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Creating a Better World



Planning for 2023 and beyond:

A strategic planning, monitoring and evaluation toolkit for NSOs

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key words (A to Z)

Change management - creating a structured approach to managing and implementing changes, while ensuring a smooth transition from the previous situation to where you want to be.

Failure Mode and Effect Analysis (FMEA) - This type of analysis looks for potential failures in an organisation's established systems and processes, to analyse them in advance and prepare for their potential positive and/or negative deviations.

Formative evaluation – an evaluation that can be done mid-way through a strategy, and can potentially raise awareness about strategic priorities that need to be reconsidered, or KPQs and KPIs that no longer reflect the measurement needs of the organisation.

Global Support Assessment Tool (GSAT) - WOSM has developed its own quality standard called the Global Support Assessment Tool (GSAT) that assesses compliance of an NSO towards international best practices in Good Governance and Quality Scouting.

Key Performance Indicators – they are measurable values that clearly show how an organisation is performing against their strategic priorities.

Key Performance Questions – these are used to help identify and capture important information regarding organisational performance against the organisations strategic priorities.

Mission – the overall purpose of an organisation, it provides the guiding principles of an organization.

Operational plan - An operational plan outlines the concrete activities and projects your NSO plans to reach its goal (vision). These can be broken down by strategic priority (however, they can also have cross-cutting projects and initiatives that tackle more than one strategic priority), and are typically of a shorter timeframe than your overall strategic plan.

Participative process - aims at encompassing a broad range of stakeholders in the strategic planning process.

Performance-driven culture - A performance-driven culture is achieved by ensuring a visionary, performance-driven leadership is present throughout the organisation, ultimately a performance-driven culture puts constant learning at its core.

PESTLE analysis - looking at the surroundings and society in which your NSO operates. Covering Political, Economic, Social, Technological, Environmental, and Legal factors.

Risk Management assessment - involves understanding, analysing and addressing risk to make sure organisations achieve their objectives

Root cause analysis - this type of analysis has a specific focus on the challenges/problems your organisation faces

Strategic plan – a strategic plan is a long term plan which highlights priorities of the organization and broad actions to take in reaching the organisational vision.

Strategic priorities - are the broad areas of focus which are based on the information you have collected through your analysis of internal and external factors affecting your organisation's work and the inputs received through your stakeholders.

Summative evaluation – an evaluation that takes place at the end of a strategic plan cycle, in preparation for building a new strategic plan.

SWOT analysis – A Strengths-Weaknesses-Opportunities-Threats (SWOT) analysis is a way to present data gathered through other internal and external analyses exercises.

Vision - the vision statement describes the desired future state of your organisation and desired state of your organisation's impact within a given time frame.



Introduction



This toolkit is designed to support National Scout Organisations (NSOs) in the World Organisation of the Scout Movement (WOSM) in developing, implementing and evaluating their national strategies.

Strategic planning has long been a topic of discussion in Scouting – and there are probably as many ways of doing it as there are NSOs. So why bother with developing a toolkit?

The answer to this is two-fold: Firstly, although there are many approaches to strategic planning among NSOs, WOSM has identified through its Global Support System that many NSOs still require support in this area. Outcomes of WOSM's Global Support Assessment Tool shows that currently less than 60% of assessed NSOs reach the WOSM average in terms of best practice criteria related to operating within their strategic framework.

Secondly, WOSM has adopted a new Strategy for Scouting ("Vision 2023") in 2014, and its success largely depends on whether NSOs will align their own strategies with it. Therefore, this toolkit focuses not only on the practical aspects of strategic planning, implementation, monitoring and evaluation, but also goes beyond and inspires NSOs to incorporate elements of the world level Strategy for Scouting into their own national ones. The toolkit contains step-by-step guidance on developing, implementing, monitoring and evaluating a strategic plan.

Disclaimer: The models for planning, monitoring and evaluating strategic plans that are presented in this toolkit are a result of research of available models applicable to a Scouting context. The ones mostly referred to come from Bernard Marr's "Managing and Delivering Performance" (A guide on how government, public sector and not-for-profit organisations can measure and manage what really matters). However, they should not be considered as the only way of doing strategic planning, implementation, monitoring and evaluation. Rather, they aim at giving a starting point, which can be further built upon based on the needs and specific national contexts of each NSO.



Why do you need a strategic plan?

> *A goal without a plan is just a wish.*
>
> *-- Antoine de Saint-Exupéry*



Developing a strategic plan is only the first part: what follows is a process of implementation, monitoring and evaluating per the goals set out in the plan. Unfortunately, even though lots of organisations develop elaborate strategic plans, they often end up collecting dust on a shelf in the office. Implementation is brought to "same old business" and monitoring happens only when donors request to see progress.

Often organisations manage to survive like this – maintaining status quo, without much effort invested in strategically progressing and growing.

On the other hand, organisations that have strategic plans strive towards achieving success in their area of work by means of constant improvement. To achieve success, you first must:

- Identify what is the actual meaning of it for you,
- How you are going to measure your progress towards achieving it,
- And finally, how you are going to continually improve yourselves to reach it.

There are several reasons why strategic planning is necessary:

- It forms the direction in which the organisation is heading,
- It brings everyone in the organisation on the same page, working towards the same vision and goals,
- It helps prioritize the organisation's work,
- It creates synergy across the organisation (cross-team collaboration),
- It helps "tell the story" – within and outside of the organisation.[1]

[1] *Based on: http://managementhelp.org/blogs/strategic-planning/2011/10/18/why-you-need-a-plan-5-good-reasons/*



Imagine the following scenario:

You are a member of the national board of a small NSO. Your NSO has had a strategy, but has not actually devoted time and effort to implementing it. You have created the document with your board (it may have been a requirement to get some funding?) and left it to collect dust on the shelf.

You kept on doing things the same way you always have. Eventually, your general assembly asks you to report back on the progress you've made towards achieving the strategy. Then, as you have not followed it, you quickly scramble to collect some data, compile a report and deliver a presentation to the assembly.

Someone in the back has read and followed it all carefully, and sees through your attempt at covering up the fact that you had a plan, but did not follow it. The person is asking all the right (or in your case, painful, questions): Have we reached our strategic objective of growing 5% in the last 5 years? Why not? Where do we stand right now? The whole assembly gets involved, more questions are pouring in, and you are stuck with admitting that the plan was not followed.

Now, let's look at a reverse scenario:

You are a member of the board of a small NSO. Two years ago, your board has worked hard on analysing your NSO's situation at the time, and developing a strategic plan which included action points for improving the areas that were weak. You've identified your indicators of success, and found the most suitable methods for measuring your progress. When the general assembly comes, you are not only able to show progress towards your goals, but you are also able to point out what further needs to be done to reach your targets. In addition, you can give clear guidance on what your plan for the next period should contain, based on a common vision of where your organisation wants to be in the foreseeable future.

Which position would you rather be in?



WOSM's Strategy for Scouting

The development of a Strategy for Scouting started in 1988, when the key challenge of helping young people to respond to the rapid changes taking place in society was identified. In response to this challenge, work was undertaken in four areas: Youth Programme, Adult Leadership, the Management of Associations and WOSM's own Financial Resources. Growth was added as an area of work in 1990 and discussions on 'Scouting for What?' and 'Scouting for Whom?', which were to lead to the development of a mission statement, were a key element of the World Scout Conference in Oslo in 1996. The mission statement, which re-affirms Scouting's role in today's world and was adopted in 1999 at the World Scout Conference in Durban, provides a common starting point for the implementation of the strategy in national associations.

Following these efforts, at the 36th World Scout Conference in Greece in 2002 a Strategy for Scouting was adopted, and it contained seven strategic priorities: 1) Youth involvement, 2) Adolescents, 3) Girls and Boys, Women and Men, 4) Reaching out, 5) Volunteers in Scouting, 6) An organisation for the 21st Century and 7) Scouting's Profile.

After a thorough review process of the previous strategy, the current Strategy for Scouting – "Vision 2023" was adopted at the 40th World Scout Conference in Slovenia in 2014. As part of the Strategy for Scouting, the Conference adopted a new vision statement:

By 2023 Scouting will be the world's leading educational youth movement, enabling 100 million young people to be active citizens creating positive change in their communities and in the world based on shared values.

In addition, the Strategy for Scouting 2023 outlined six strategic priorities:

1. Youth Engagement,
2. Educational Methods,
3. Diversity and Inclusion,
4. Social Impact,
5. Communications and External Relations, and
6. Governance.

The strategic priorities set the guidance for determining



the triennial plans for each of the three trienniums between 2014 and 2023.

The Strategy for Scouting 2023 was prepared using a participative process. This means that the process aimed at involving all key stakeholders, to ensure wide-spread agreement and ownership on the priorities listed in the strategy. This process is not unique to WOSM – as a concept it aims at encompassing a broad range of stakeholders in the strategic planning process. In WOSM, this meant involving the following stakeholders: NSO representatives, WOSM Regional representatives, World Scout Committee members, and World Scout Bureau Staff. The aim of the participative process was to ensure that the strategic planning was not done in a top-down manner. Rather, it aimed at assuring agreement and a feeling of ownership among all stakeholders, particularly the NSOs. It reflects the belief that Vision 2023 describes where most NSOs would like to see Scouting be in 2023.

Through the Strategic Planning Toolkit, we will refer to the Strategy for Scouting 2023 as an example for the participative strategy process, and more details on its development will be provided. Each NSO is encouraged to develop its own participative process, depending on their national context.

The next chapters offer you a detailed insight into the steps necessary to prepare your strategic plan, decide on how to monitor your progress in achieving the goals set out, and improve your work based on your findings.

> ***The practice of shared vision involves the skills of unearthing shared 'pictures of the future' that foster genuine commitment and enrolment rather than compliance. In mastering this discipline, leaders learn the counter productiveness of trying to dictate a vision, no matter how heartfelt.***
>
> *Peter M. Senge, The Fifth Discipline: The Art and Practice of The Learning Organization*



Step-by-step guide to strategic planning, implementation, monitoring and evaluation

The time and effort needed for developing a strategic plan will depend on the size of your NSO and the experience you have in developing strategic plans. Overall, the toolkit proposes a similar process as the one WOSM followed leading up to the 40th World Scout Conference. The steps involved in developing a strategic plan are as follows:

1. Choosing the right time to begin the process of developing a strategic plan for your organization,
2. Building the team of knowledgeable people to both develop and support the implementation of the new strategic plan,
3. Reviewing the relevance of your NSO's mission and vision for your organisation at present moment,
4. Analysing the current situation of the NSO, considering internal capacities, challenges faced, identifying stakeholders and the (future) environment in which it operates.
5. Building on these learnings and developing your NSO's strategic plan. Rolling out a wide-spread consultation process with different stakeholders to ensure ownership of the new strategy and getting feedback on your analysis from step 4. Adopting the strategic plan at your National Assembly,
6. Aligning your organisation with the new strategic plan (especially in terms of its organisational structure and human and financial resources). Creating the necessary working groups and support structures for the various strategic priorities,
7. Creating an Operational Plan to put the strategic plan into action, actively working towards the organizational vision,



8. Conducting a Risk management assessment to understand how best to carry out the operational plan,

9. Collecting the right monitoring information to prepare for the continually work of assessing performance against the strategic plan,

10. Carrying out a quality monitoring and evaluation process for following the progress your NSO makes towards achieving the goals set out in your strategic plan and to adapt direction where needed, and

11. Setup a reporting process for your National Assembly and sharing with other stakeholders.

As mentioned, the time it takes to implement these steps will vary from NSO to NSO. What is important is that you leave sufficient time before your National Assembly for a consultation process, to ensure that everyone in your NSO has had the time and been informed about the opportunity to influence the future direction of Scouting in your country. It is recommended that you begin developing your NSOs Strategic Plan at a minimum of 6-months before your National Assembly.

Tips

Did you consider exploring how other NSOs around you have shaped their strategic plans? Reach out to them, learn from their experience – it may save you a lot of time in the analysis phase!



Step 1: Choosing the right time

Choosing the right time to begin this journey is an important factor to be considered. The development of a new strategy for a National Scout Organisation can occur for a few different reasons:

1. The NSO is close to completing a current strategic plan, and is now looking towards a new one for the upcoming period,

2. The NSO has a strategic plan in place, however, it has not been implemented, and does not correspond to the (future) needs of the organisation, therefore a new one is necessary,

3. The NSO has never had a strategy, and is looking forward to creating one.

4. The leadership of the organisation has changed, and insists on creating a new strategic plan.

Note that the last reason listed is a potentially dangerous one: NSOs should work towards strategic plans that surpass the mandates of the national leadership teams. When well prepared, they should correspond to the actual needs of the NSO, and not cater towards the opinions of the national leadership.





Step 2: Building the team

Choosing the right team of people to develop your national strategy is a critical step towards ensuring the success of the process. The people involved in your team should:

- Be a small group of five to seven dedicated volunteers and professionals.
- Have at least a basic knowledge of strategic planning, implementation and/or monitoring and evaluation (which this toolkit can help with),
- Have a strong understanding of the organisational needs of your NSOs
- Have strong links with Scouting in all parts of your country (i.e. people with a good network),
- Is able to compile input from different stakeholders and negotiate priorities,
- Have a commitment to not only developing the strategy, but also following it through to implementation and monitoring the successes (and challenges) your NSO reaches throughout the implementation.
- Represent the diversity of the NSO and provide a good balance to ensure a well-rounded representation is brought to the team (regional, gender, age, or any other criteria important for your NSO).

The team can be composed of the national board members, staff support and representatives from regional/local Scout groups. The importance of buy-in during the process as well as of the end result (e.g. the strategic plan) should not be underestimated. The group of people you choose to lead the strategy development process may have a challenge to overcome in this respect. Hence the importance of involving people with a broad network and formal or informal authority within the organisation. Naturally, they should be followed and supported in these efforts by your National Board/Council as at least ambassadors of the process as well as the implementation of the strategic plan.

It may be valuable to consider engaging an external consultant for the process of developing your new strategic plan. An external view can be very beneficial in pointing out to issues that your team may not recognise at first as challenges or opportunities. However, this often carries additional cost with it, therefore it is understandable that this is not an option for all NSOs.



Step 3: Reviewing your NSO's Mission and Vision

> ***Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat.***
>
> *-- Sun Tzu*

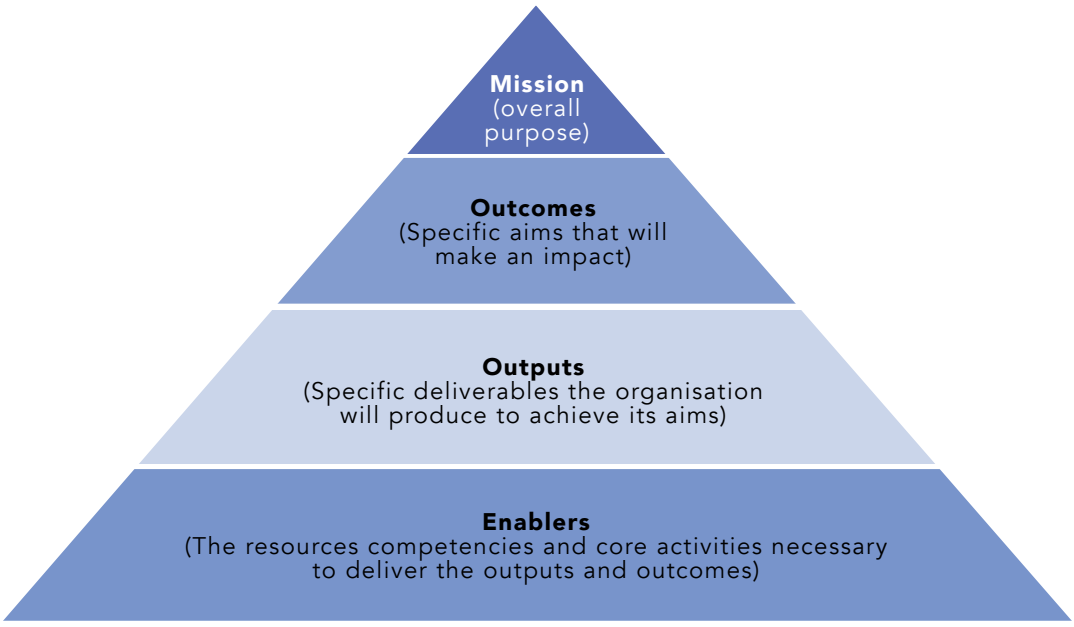
As a first step in developing a strategic plan, there needs to be consensus on the **core values** and **purpose** of each National Scout Organisation . The basis for this work are the purpose and principles of Scouting (as defined in WOSM's constitution). However, WOSM acknowledges that each NSO operates in a different national context, and therefore each NSO is encouraged to work on defining their own mission statement, while still reflecting upon WOSM's mission.

Identify and agree on the essentials

When developing a strategic plan, it is important for an organisation to first agree on the essentials – the overall purpose everyone in the organisation strives towards achieving, or the MISSION of the organisation.

The following model helps in understanding how the mission of an organisation relates to the outcomes and outputs of an organisation's activities:





Note: Model taken from Bernard Marr's "Managing and Delivering Performance".

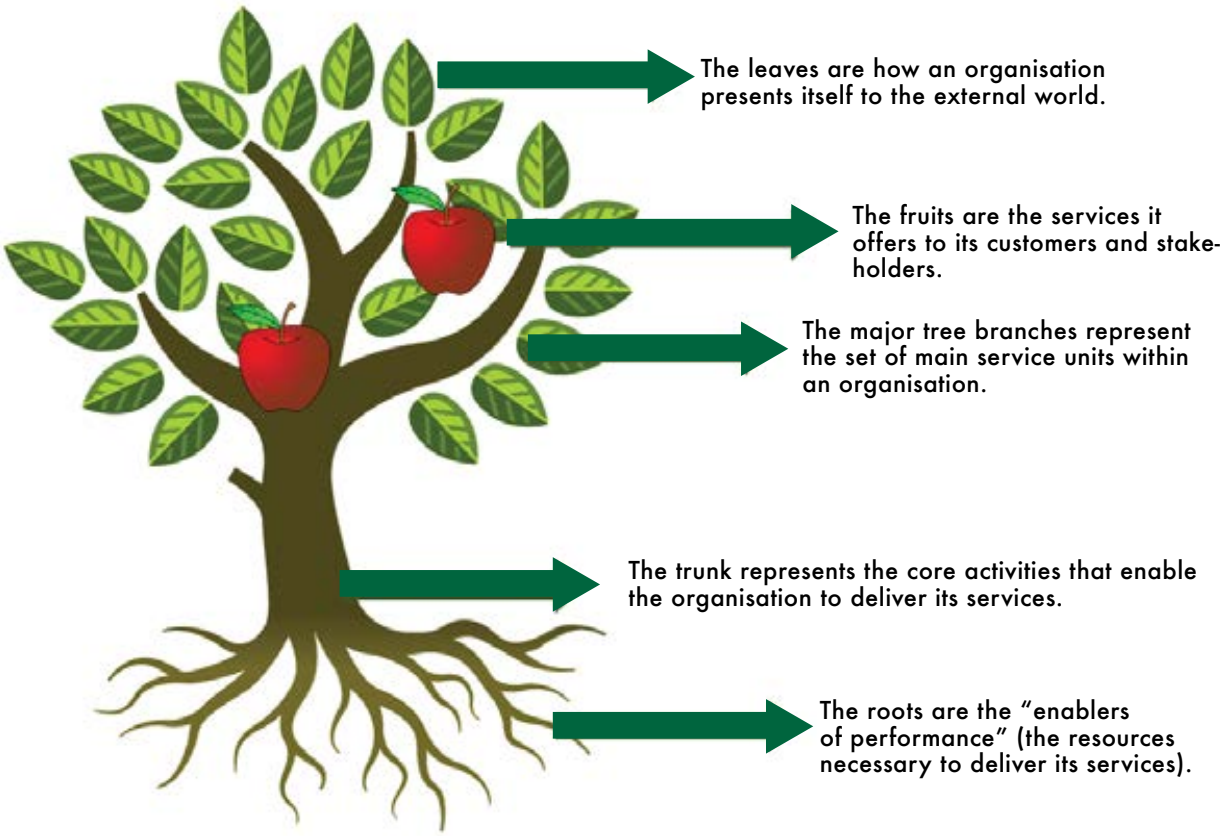
The mission is the overall purpose: all outcomes and outputs (tiers 2 and 3 of the pyramid) need to be in line with this purpose. Finally, achieving the mission is possible thanks to the resources, competences and the core activities that are organised daily.

When it comes to Scouting, the mission statement had been adopted in 1999, at the 35th World Scout Conference:

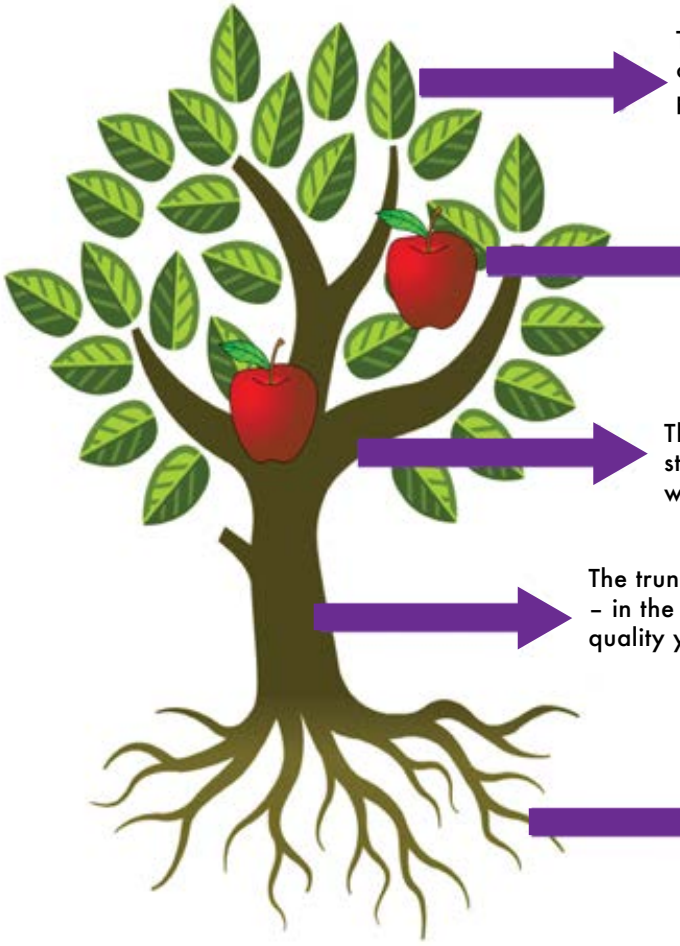
"The Mission of Scouting is to contribute to the education of young people, through a value system based on the Scout Promise and Law, to help build a better world where people are self-fulfilled as individuals and play a constructive role in society."



An interesting analogy presented in Bernard Marr's book is that of a tree, where:



In Scouting terms, for a National Scout Organisation, this would mean that:



The leaves are the Mission, which has the role of being the guiding principles (and helps NSOs present themselves to the external world),

The fruits are the activities each NSO delivers through their national youth programmes, whose core remains guided by the principles of Scouting, but which change over time to cater for the needs of young people in the country and the context in which you operate.

The major tree branches relate to the strategic priorities of the NSO – these will also change over time.

The trunk represents the core activities – in the case of Scouting: delivering a quality youth programme.

The roots are the enabling factors – including the adult volunteers that devote time to the organisation, financial resources an NSO gathers, and other tangible and intangible resources that enable the NSO to go about its work.

Reflecting on your NSO's mission

Most NSOs already have defined mission and vision statements. If this is your case, consider taking time at the beginning of your strategic planning process to do a "reality check" of your mission and vision statements and see if they still apply to your NSO's current context. Note that it is not advisable to change mission and vision statements every 3 years – these should be easily carried over several strategic plans.

When working on your NSO's mission statement, take time to see how it reflects WOSM's mission. Note that strategic plans may differ significantly across the Movement, however, the mission statement is something all NSOs share. Still, there is space to accommodate WOSM's mission statement to your national contexts.

A few questions may help with defining (or reviewing) the mission:

1. What are the core values your NSO stands for?
2. What is the core purpose?

When working on mission statements, try to keep them down to one simple sentence, which is easy to understand and with which your membership can easily identify. Remember that the mission statement is your guidance in developing your strategic and operational plans, and therefore it should stand up to a test against a couple of simple questions:

1. Is it relevant to your membership? And can you see it being relevant over a long period of time?
2. Is it realistic? Can it provide guidance for developing achievable goals?
3. Is it understandable to your membership? Do they support it through their regular activities?

Once you have developed (or reviewed) your mission statement, and have identified (or reviewed) your core values through that exercise, you will have essentially set the framework for developing your strategic plan.

But before defining your strategic priorities you also need to be knowledgeable of your surroundings – the next chapter gives you guidance on analysing your NSO from the inside, as well as identifying your stakeholders and their needs.

Once you have developed (or reviewed) your mission statement, and have identified (or reviewed) your core values through that exercise, you will have essentially set the framework for developing your strategic plan.

But before defining your strategic priorities you also need to be knowledgeable of your surroundings – the next chapter gives you guidance on analysing your NSO from the inside, as well as identifying your stakeholders and their needs.

Reflecting on your NSO's vision

While a mission statement captures your organisation's purpose and core values, the vision statement describes the desired fut0ure state of your organisation and desired state of your organisation's impact within a given time frame. Every time you prepare a new strategic plan, your vision statement should be reviewed and rewritten, whereas your mission statement does not need to change (unless the analysis showed that it requires changes).

As an example, we use here WOSM's Vision 2023:

TIMEFRAME — CLEAR AND COMPREHENSIBLE GOAL

By 2023 *Scouting will be the* ***world's leading educational youth movement****,*

MEASURABLE OUTCOME

enabling ***100 million young*** *people to be active citizens creating positive change in their communities and in the world based on shared values.*

A vision statement ideally has a time limit, and spans over several strategic plans. In the case of WOSM's Vision, this time frame is 10 years – from 2014 to 2023. In addition, a vision statement contains a clear and comprehensible goal, with a measurable outcome.

The vision statement outlines your overall goal for the next 10 years (or different, depending on the timeframe you decide for your strategic plan).





Step 4: Analysing the current situation of your NSO

Getting a comprehensive understanding of the current state of your NSO, and the context in which you operate, is crucial in terms of developing a meaningful and relevant strategic plan. There are several steps involved in this analysis looking both internally and externally, including: assessing internal capacities, challenges your NSO faces, identifying stakeholders and looking at your NSOs surroundings.

NSO internal capacities

You will need to assess your NSOs internal capacities. WOSM has developed its own quality standard called the **Global Support Assessment Tool (GSAT)** that assesses compliance of an NSO towards international best practices in Good Governance and Quality Scouting. If your NSO has not yet used GSAT, it is highly recommended that you consider using, at the very least, the self-assessment tool prior to developing your strategy. Think of GSAT as a medical check-up: it will highlight your strong and weak spots, and in addition, offer you a "remedy" for the weak ones, i.e. possibilities for improving through WOSM's Global Support system. GSAT will give you a good indication in to the areas where your NSO needs improvement to reach global standards of best practice across 10 different dimensions:

1. NSO - WOSM institutional requirements
2. Governance framework
3. Strategic framework
4. Integrity management
5. Communication, advocacy & public image
6. Adults in Scouting
7. Resource allocation & financial controls
8. Youth programme
9. Growth potential
10. Continuous improvement.

More information about GSAT and the different formats in which it can be done can be found at:

Global Assessment Tool
www.scout.org/gsat

Challenges your NSOs faces

Another useful exercise to be completed at this stage is the Root Cause Analysis. This type of analysis has a specific focus on the challenges/problems your organisation faces, with the aim of examining them in detail, and understanding why they occur. It can be done by following three simple steps:

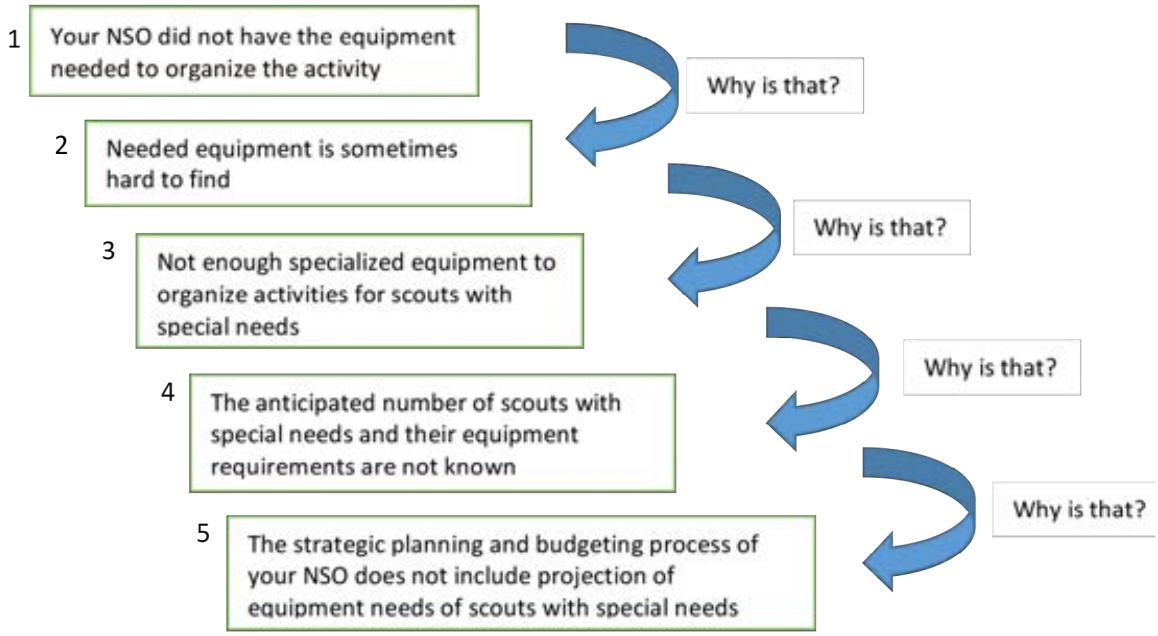
1. Identify the challenge/problem.
2. Understand why it happened.
3. Find ways to reduce the possibility of it occurring again in the future.

The benefit of using the Root Cause Analysis method is that it helps you with identifying structural issues, which are the cause of a whole host of other, maybe more visible and seemingly more urgent but actually, secondary issues. Addressing those secondary issues might solve your urgent problems, but won't address your more fundamental, structural issues.

Root Cause Analysis

Root Cause Analysis helps to identify the origin of the challenge/problem using specific steps and tools to find the primary cause.

5 WHY's technique to identify the problem. For instance,



Such questioning is continued until all the root causes are found. Remember there are three basic types of causes: Physical, Human and Organizational.

Source: https://www.cms.gov/medicare/provider-enrollment-and-certification/qapi/downloads/guidanceforrca.pdf (page 6)

Identifying stakeholders

Stakeholder analysis

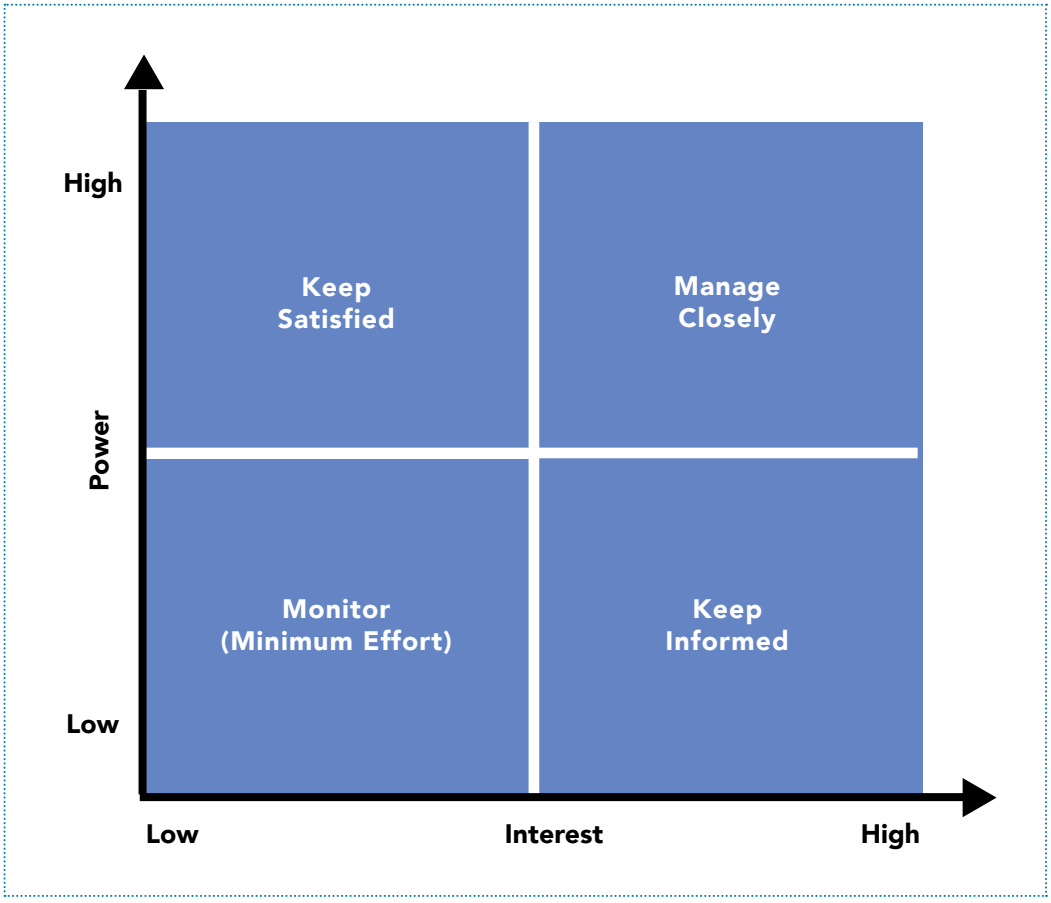
As part of this analysis process, it is important to identify your NSO's key stakeholders – groups of people, organisations, institutions who have an interest in your organisation, and who can impact the organisation.

By simple brainstorming, you may come up with a long list which would typically include:

- Scouts (youth members, including youth consultative platforms such as youth forums, etc.),
- Parents of youth members,
- Alumni scouts and their parents
- Adult volunteers,
- Local governments,
- Partner organisations,
- WOSM governance bodies and World Scout Bureau,
- And others (depending on your national context).

After coming up with a list, you should "grade" the influence and interest each of these stakeholders may have on the success of your NSO (you may want to use a numeric scale, or simply grade with "low", "medium" or "high"). If you end up with a rather long list of stakeholders, try to single out those with the most influence. You should end up with four to six key stakeholders, whose opinions and needs you will explicitly take intoconsideration when developing your strategy.

One way of classifying your stakeholders is by using the graph below:



The graph will help you understand what kind of action you should take towards each stakeholder – for example, the parents of your youth members may have a high interest (want to know what their children are learning) and high power (as they can affect the number of your members by either keeping or withdrawing their children from Scouting). The action required from you towards these stakeholders is to fully engage them and make great efforts to keep them satisfied.

Depending on the position they take in the grid, stakeholders require different types of action:

- High power, interested people: these are the people you must fully engage and make the greatest efforts to satisfy.
- High power, less interested people: put enough work in with these people to keep them satisfied, but not so much that they become bored with your message.
- Low power, interested people: keep these people adequately informed, and talk to them to ensure that no major issues are arising. These people can often be very
- helpful with the detail of your project.
- Low power, less interested people: again, monitor these people, but do not bore them with excessive communication."

Guidance for conducting interviews

1. Know your interviewees. Understand why they are an important stakeholder for the organisation, and what are their interests in your NSO, as well as how they can contribute to your future strategic plan.

2. Ask if being quoted is ok. Make sure to ask at the beginning of the conversation if the interviewee is fine with being quoted, or if they prefer to stay anonymous.

3. Ask if recording is ok. If you intend to record the interviews which you conduct (which is recommended), make sure that your interviewee is fine with it. Ask at the beginning of the interview, and explain that the recordings will only be used for the purpose of writing your notes about the interview afterwards.

4. Enable "Off-the-record" statements. If your interviewee wishes to state something that would not be recorded, but can help you in better understanding the context, you should allow this. Make sure not to take any notes about it either, as this may give the interviewee the wrong impression that you will be using the information in your report anyway. You can note it down after you finish an interview, with a note to yourself that it is confidential.

5. Structure your interview. For each of your interviewees, make sure that you have a list of key topics you would like to discuss (not more than 4-5). For each topic, aim at developing a few main questions, and 1-2 follow-up questions.

6. Start with factual questions and follow with opinions and judgement questions. For example, if you are talking with a parent of a Cub-Scout, you would ideally first ask them to describe their experience of Scouting, the impressions they have about the benefits of Scouting for their child, the amount of time they have invested in enabling their child to be part of Scouting, etc. Then you would ask them how useful the regular programme activities are for their child, what was the impact of Scouting on them as individuals, and what impact do they perceive it has on their child, etc.

7. Be careful with the wording of you questions. Make sure you use understandable words. In addition, try to avoid questions that provide only "yes/no" answers", aim for more open-ended responses.

8. Push (gently) for responses. At times interviewees will need encouragement. You can ask questions such as: "Could you please explain that a bit more?", "Can you give me some specific examples?", etc.

9. Stay neutral. Don't take sides in a story. Try to always show equal interest in all aspects of an issue, rather than drilling into one more than another.

10. Listen carefully. This not only shows respect to your interviewee, but also saves both of you precious time.

11. Don't ask questions to which you already know answers. Try to avoid asking about things you already know (e.g. as a result of previous conversations with the given stakeholder). If there are issues that need clarification, or you are uncertain about the validity of the information obtained previously, then it is fine to proceed. Otherwise, it may become a waste of time for both you and the interviewee.

12. Take notes. Even if your interviewee is fine with being recorded (which you should check prior to starting a conversation), it is recommended that you take notes, in order to make the analysis process easier. Note taking differs from person to person: while some prefer to note down lots of phrases and sentences, some keep it short, and only note the essentials. Both have down sides: in the first case, you may take much more time in reviewing your notes due to their quantity, whereas in the second case, you may end up missing out on some important pieces of information, forgotten due to the amount of information processed. Finding a balance between the two is key.

13. Summarize your thoughts at the end of each interview. Make sure that you note down your thoughts from each interview, in order to keep them all organized and prevent mixing up interviewees.

Questions

Some of the key questions you should ask when gathering their opinions are:

- What are the key benefits they receive from your organisation?
- What are their needs?
- Does your organisation currently cater for those needs?
- How can they contribute to your organisation?

Looking at your NSOs surroundings



Finally, as a last step towards analysing the current situation in your NSO, you need to look at your surroundings and the society in which you operate. This can be done through a PESTEL analysis, which looks at the following factors:

- **P**olitical – e.g. government support for volunteer organisations,
- **E**conomic – e.g. parents' income status,
- **S**ocial – e.g. demographic situation in country (number of young people, emigration rate, etc.)
- **T**echnological – e.g. prevalence of social media among young people,
- **E**nvironmental – e.g. threat of natural disasters, climate change, etc.,
- **L**egal – e.g. insurance laws, safety regulations, etc.

Identifying all the external factors that influence your NSO's work helps in understanding the context in which you operate. In addition to these, there are two things you may want to explore further:

1. The needs of young people in your country (and assess to what extent you address them through your programme). It is important here to not just focus on identifying the needs of your members, but of young people in general, as this will later help you to make your programme more relevant and more attractive to new members.

2. Your competition (what do other youth organizations offer, and what are your advantage points over them).

Consolidating the analysis



To further support your thinking process towards a strategy, we will use a SWOT analysis to present all the data we have gathered so far from the three sources mentioned above (key stakeholders' analysis, internal assessment, external assessment).

A Strengths-Weaknesses-Opportunities-Threats (SWOT) analysis can be done by using the following table:

	POSITIVE	NEGATIVE
	STRENGTHS	**WEAKNESS**
INTERNAL		
	OPPORTUNITIES	**THREATS**
EXTERNAL		

The GSAT internal analysis focuses clearly on strengths and weaknesses, whereas the Root Cause Analysis provides insights for the weaknesses. The Stakeholder Analysis will contribute to both the internal and external factors, and the PESTEL analysis focuses on the opportunities and threats.

With your findings classified through this model, you can proceed to using them to inform the development of your strategic plan.



Step 5: Developing your NSO's strategic plan

Strategic priorities are the broad areas of focus which are based on the information you have collected through your analysis of internal and external factors affecting your organisation's work and the inputs received through your stakeholders.

This step is to identify and develop the different priorities you need to devote attention to in order to reach your NSOs vision. These priorities will later be translated to your operational plans, as they will point the direction in which you need to focus your resources and energy. But for now, at this stage, it is important to think on a broad, abstract level here and to not get stuck on details.

Strategic Plan examples

WOSM's six strategic priorities (as defined in the Strategy for Scouting 2023) are:

Youth Engagement
Scouting should give young people the opportunity to develop the skills and knowledge empowering them to take an active part in the Movement and in their communities. Involvement, recognition and intergenerational exchange are key in providing a framework for our youth members.

Educational Methods
The Youth Programme should provide a non-formal learning environment strengthening the capacity of young people to face the challenges of tomorrow. Scouting should attract, train and retain quality adult volunteers to deliver the Youth Programme.

Diversity and Inclusion
Scouting should reflect the societies in which it exists and actively work to welcome all individuals without distinction. This diversity should not only be reflected in the membership, but also the methods and programmes used within the Movement.

Social Impact
Every Scout should be involved in community service, and share their experiences to inspire others. Through activities and projects, Scouts contribute to their communities and become leaders of positive change.

Communications and External Relations
Scouting's profile should accurately portray what we do and why we do it, reflecting our shared values. By using the most impactful methods of communication, and engaging in strategically relevant partnerships, Scouting should be recognized as the world's leading youth movement.

Governance
The governance of WOSM should be transparent, accountable, efficient and clearly linked to its overall strategy, focused on achieving the mission and vision of the Movement. The roles and responsibilities of the different levels in the organization should be clearly defined and understood, ensuring a customer-focused approach. In doing so we ensure high synergy across all levels of WOSM with a high "return on investment".

Consultation process

For a strategy to even stand a chance at being successful and to actually be implemented at all levels, it needs to be widely accepted in the organization. Ensuring this ownership by internal stakeholders should not be underestimated in the process. One of the key reasons why strategies fail to become reality is a lack of understanding and lack of support at the various levels of your organisation.

WOSM has been implementing a participative strategy process, which includes widespread consultation processes with various stakeholders. Having enough time to do an in-depth consultation allows for any needed adjustments to be made to the strategic plan before adoption and to ensure sufficient buy-in of your NSO's membership for a successful adoption of the new strategic plan.

These are suggested actions that can be taken to ensure a thorough consultation process with your NSO's key stakeholders:

- Open information sessions
- Surveys
- Focus groups
- Invitations for feedback
- Regular updates towards your General Assembly
- Informal discussions and networking

Adopting your NSO's strategic plan

It has now been at least 6-months since you started the development of your NSOs strategic plan. After an in-depth consultation with key stakeholders your NSO's strategic plan will need to be taken to your National Assembly for a formal adoption by your membership.

It is good practice to clearly articulate your NSO's new strategic plan to your members prior to the formal adoption through a presentation walking through the entire strategic plan. This also allows a good opportunity for members to ask any final questions before they make their final decision on adopting the strategic plan. Note that the way you communicate the plan differs according to your target audience (e.g. you will not communicate the same way to your national leaders as you would towards your youth membership).

Formally presenting the new strategic plan can also assist with member buy-in and beginning the next phase of alignment and implementation.





Step 6: Aligning your NSO with the new strategic plan

Now that you have agreed upon a new strategic plan for your NSO, and your National Assembly has officially adopted it, the actual work on implementation begins. As a starting step, your NSO now needs to align itself per the strategic plan. This means that your NSO needs to ensure that all its teams, structures, people, projects and activities are working towards achieving the goals set out in the strategy, rather than outside of it. In addition, it means aligning your human resources (volunteer and professional) as well as your budget allocation to your strategic plan.

To begin the alignment exercise, it is advised that your NSO maps out all the different activities it conducts on a regular basis, and identifies whether each of those activities actually still contribute to achieving your overall goals in one of your strategic priorities. Using the Start, Stop, Continue exercise can help with this mapping activity of your organisation. If an activity does not fall under any of your strategic priorities, you are faced with two options:

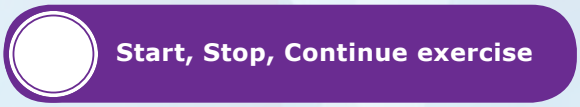
1. Either you deem this activity to be too important to be left out, and you tweak your strategic priorities to include this activity,
2. Or you stop doing this activity (as it does not contribute to your overall goal).

One example might be an annual event for your national level volunteers, aimed at networking and showing appreciation for the work they do. And while it might not actually contribute to any of the objectives of your strategic priorities, it does contribute to the overall wellbeing and satisfaction of your volunteers and thus increase the motivation and retention rate of your volunteers. Something you might actually wish to include in your strategic priorities.

Once you have mapped out your activities against your strategic plan, it is time to review their usefulness for achieving the goals set out in your new strategy. "A new strategy wouldn't be new if nothing needs changing" . This exercise will point out the gaps that need to be addressed in the list of activities you are currently conducting, to progress forward towards achieving your goals. This would also be a good time to evaluate the impact of each activity in terms of contributing to your goals, keeping in mind that a project or activity might

contribute to more than one strategic priority. It might be the case that a number of your activities might no longer be the most effective or efficient way of achieving your goals and should there be changed, adjusted or cut. Note that introducing new activities will most likely mean cut-backs on already existing activities.

Therefore, the alignment of your NSO's activities goes in hand with aligning your budget. After activities are prioritized, and new ones are introduced, you will need to deal with some potentially difficult choices in terms of adapting your NSO's spending on each activity. If an activity is no longer a priority for your organisation, you should consider cutting it, and reallocating its resources towards other activities which have more impact on achieving your strategic plan.



Aligning your NSOs structure and working groups

The same exercise needs to be repeated when it comes to governance and organisational structure (i.e. your current structures need to be reviewed considering the new strategic plan). For example, if one of your NSO's new priorities is achieving greater diversity in the organisation in general, this means that a cross-departmental cooperation is necessary – from the Youth Programme, over to Adults in Scouting and to your Communications teams. You may need to create new working groups and recruit volunteer or professional positions to cater for this new need. Once these groups or positions have been created, ensure that they are sufficiently trained for this new role and responsibility.

Change management

Critical to the success of the implementation of your strategic plan is effective "change management". This means that your organisation is investing effort into creating a strategic approach to managing and implementing changes, while ensuring a smooth transition from the previous situation to where you want to be. There is a structural dimension to change management, as explained in the points above, but also, and more importantly, a human side to change management. It is normal to experience resistance at all levels in your organisation when you start introducing changes. Changes are inherently uncomfortable; they bring us out of our comfort zones, and push us into the unknown. Therefore, it is crucial to prepare yourself and others before implementing a change:

- Know your reasons well, and substantiate them with strong arguments. This can be informed by the outcomes of your SWOT exercise and stakeholder mapping.
- Prepare a description of the change process, to be able to easily explain to different audiences how you will get from A to B and what B looks like.
- Aim at ensuring ownership among all groups affected by the change before rolling it out.
- Communicate the change well ahead of time and widely – the last thing you need is people being misinformed (or even worse, totally uninformed!).
- Be willing to listen to and actually hear the concerns of your units, volunteers, staff or other stakeholders. Show that you take the issues raised, serious and address those issues or take their ideas on board in the further implementation process.



Step 7: Creating an operational plan

As mentioned, the strategic priorities are the key items that will inform the development of your operational plan. An operational plan outlines the concrete activities and projects your NSO plans to reach its vision. These can be broken down by strategic priority (however, they can also have cross-cutting projects and initiatives that tackle more than one strategic priority), and are typically of a shorter timeframe than your overall strategic plan. For example, WOSM works on a triennial basis – i.e. a new operational plan is established every three years, based on the overall strategy and the successes and challenges of the previous plan.

The operational plan outlines:

1. The activities your NSO plans to conduct to achieve your vision,
2. The time and place where they will be conducted,
3. The person (or team) responsible for the completion of each activity,
4. The Key Performance Indicators for knowing how you are doing against your strategic plan (see Step 9).



FACULTY OF EDUCATIONAL OPERATIONAL PLAN 2008-2010

Section A Operational Plan 2008-10

Education (Bolded actions/strategies are those identified to VCG as key strategies for 2018)

Objectives	Actions/Strategies	Measures/Targets	Accountability	Timeline
1 **Curriculum that is current, rigorous, internationally oriented and locally relevant, and promotes ethical practice** *Monash Directions 2025:* - a university in the world - distinctive graduates *Excellence and Diversity:* - excellence in education	1.1 Continue cross campus planning (Peninsula/Gippsland) for renewed middle/ primary/early childhood teacher education program ensuring: – an international orientation – Indigenous perspectives – an evidence-based and research led orientation – intellectual and professional engagement	• Course and unit amendments approved and registered for 2009 • All unit development completed according to specified timeline over 2008-10	Course Director Early Childhood Course Directors Primary Manager – Academic Services & Quality	2007-10
	1.2 Invite members of the Bunurong community to work with staff and students at Peninsula on an action plan to provide for: – a visible Indigenous and Bunurong presence on campus – an Indigenous voice in planning and development – broadening student and staff world views – joint community projects	• Continued collaboration with the Monash Peninsula-Bunurong community in relation to education, culture and history	Peninsula-based Research Leader, Professor and Course Directors	2007-9
2 **Varied and productive pedagogies that challenge and extend all students intellectually while being respectful and inclusive of difference.** *Excellence and Diversity:* - excellence in education	2.1 Continue and expand professional learning program on feedback and assessment practices for both ongoing and sessional teaching staff	• 50% of staff on each campus in workshop program each year • All units with explicit criteria for assessment • Improvement on unit evaluations with 90% of units with mean above 3.5 for feedback and assessment related items in 2009	AD Teaching (with Course Directors)	2007-8
	2.2 Continue and expand professional learning program on productive pedagogies for flexible and OCL including – workshops on pedagogy and writing genre for flexible and OCL – portfolio of advice and exemplars of OCL materials – 'just in time' pedagogical advice/support for teaching for OCL	• Improvement on unit evaluations from students enrolled in OCL with 90% of units with mean above 3.5 for all items in 2009	AD Teaching (with Course Directors)	2007-8
	2.3 Review and revise as necessary Master of Counselling units to address pedagogical concerns identified in MEQ and support staff to enhance on and off campus pedagogy as needed	• Unit reviews for 2006-8 analysed and used to monitor progress • Improvement on MEQ 2006 to 2009	Course Director Psychology Deputy Course Director (M Psych)	2006-8
3 **Efficient and sustainable courses and processes that enable innovative and flexible teaching.**	3.1 **Implement the new suite of Secondary Teacher Education courses ensuring operational continuity and quality across all campuses with a high level of satisfaction by students and staff.**	• Manuscripts audited for - international orientation - indigenous perspectives - assessment regime	Course Directors Secondary Manager – Academic Services & Quality	2008-10

Activity	Responsible person	Tool / form	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Identify groups and farmers; inform about ICS	Extension officer	Meetings and group discussions, preliminary assessment													
Risk assessment	Head of extension	Risk assessment checklist													
Application of individual members to primary cooperative	Primary Coop	Farmer's application with signature													
Contracting farmers	ICS manager	Farmer agreement, internal regulations													
Training of ICS technicians	ICS manager	Training reference materials													
Training farmers on ICS and organic production	Extension officer	Farmer diary, ICS formats, list of participants													
Document profile data of farms, draw maps	Facilitator	Farmer diary, base line information questionnaire, farmer register													
Internal inspection of nursery	Internal inspector	Inspection report nursery													
Monitoring and technical advice visit to farms	Facilitator	Farmer diary, farmer register (enter visits)													
Internal inspection of farm	Internal inspector	Inspection report farm													
Internal inspection of pulping centre	Internal inspector	Inspection report pulping centre													
Supervise internal inspection activities	ICS manager	Register of re-inspected farms / pulping centres / nurseries													
Approval decisions for farms, pulping centres and nurseries	Approval committee / ICS manager	Inspection report, approved list of farmers													
Fresh cherry delivery to pulping centre	Pulper operator	Register of fresh cherry delivery with harvest estimate													
Delivery of parchment to processing centre	Marketing manager	Register of dry parchment delivery													
Hulling of dry parchment, grading/sorting	Marketing manager	Register of hulling activities													
External inspection	Certification body / ICS manager	List of approved farms / pulping centres / nurseries													
Selling of green beans	Marketing manager	Register of sales													



Step 8: Risk management assessment

Risk is part of our daily lives – Scouting is no exception. According to international standards , risk is defined as the "effect of uncertainty on objectives" , where the effect is considered as "a deviation from the expected, positive and/or negative". To be prepared for both positive and negative deviations from the expected, organisations undertake risk management assessments. Risk management "involves understanding, analysing and addressing risk to make sure organisations achieve their objectives" .

To prepare for meaningful risk management, your NSO must first identify all the potential risks it faces (internally and externally), and then prioritise them on the basis of impact and likelihood.

The easiest way of identifying potential risks is by returning to the internal and external analysis you have conducted in preparation for developing your strategic plan, and analyse those for potential risks. See below for an example.

One method of conducting a risk assessment is through a "Failure Mode and Effect Analysis" (FMEA) . This type of analysis looks for potential failures in an organisation's established systems and processes, to analyse them in advance and prepare for their potential positive and/or negative deviations.

The FMEA analysis asks a set of questions, which help you analyse better the risks that may impact your work:

- Identify the steps/places in the process where things might go wrong,
- Describe some of the potential "failures",
- Describe the impact of those "failures" on your organisation's work and achieving your strategic plan,
- What caused these "failures"?
- How much warning time do you have before these "failures" potentially occur (i.e. how much in advance is it possible to predict these "failures" happening)?
- What solutions can you come up with to mitigate or fix these "failures"?

Failure Mode and Effect Analysis

The following simplified model of a risk log frame helps you determine the risks you need to focus most on:

- Use risks identified from the FMEA exercise,
- Rank the level of their potential impact (consequences) on your NSO by using a simple scale from 1 to 4 (1 being the lowest to 4 being the highest),
- Determine the likelihood of such a risk occurring (using the same scale),
- Assigning a person/team responsible for monitoring the risk, and



- Determining the frequency of risk monitoring.

Once all your risks are listed with the grades, simply add up the numbers from the two categories (likelihood and impact) and the risks with the highest score are the ones you need focus on the most.

Below is a sample table with examples:

Risk Description	Impact	Likelihood	Total score	Accountability/ review frequency
Fall in interest among youth members for programme	4	3	7	Youth Programme team/ annually
Low retention rates with adult volunteers	4	2	6	Adults in Scouting team/ annually
Lack of financial resources for activities	3	2	5	Chief executive/ biannually
Competition offering similar activities	2	2	4	Chief exec and communi-cations team/quarterly

Note that this does not mean that you can neglect the risks that scored lower – they still need to be monitored, but will however receive less of your constant attention as compared to the top ones.

Typically, after completing a risk assessment and determining the people responsible for monitoring the different elements on a regular basis, an organisation should also develop plans for mitigating risks (where scenario planning techniques may be of assistance, especially for emergency situations), at least for the ones that could potentially have the most impact and are most likely to occur.

One way of lessening these risks is also by introducing appropriate monitoring measures – which is the topic of the next chapter.



Step 9: Collecting the right monitoring information

The need for measurement is intrinsic to human beings – they measure and assess their surroundings daily, to inform our decisions. Similarly, to progress with achieving the goals set out in the strategic plan, you need to make informed decisions about each step you take along the way. However, if you do not measure "what counts", you may end up with a mass of data that cannot provide direction. Therefore, the next chapters provide guidance on how to develop meaningful measurement tools for your NSO.

Understanding why we measure progress

Measures are "indicators of how [an organisation] is performing relative to its goals and whether the overall strategy has been accomplished" .

According to Bernard Marr, measurement happens for different reasons, which can be summed up in the following categories:

- **Ensuring conformity control**: Often, measuring is done in organisations as a method of providing the leadership data by which they may assess the progress an organisation is achieving, and control for conformity among the different bodies in the organisation. This reasoning is more visible in businesses than the NGO sector, however, it is still relevant for mentioning in this context, since NSOs may have similar motives for monitoring for implementation quality across all units.

- **Reporting to external audiences** (mainly donors): This reason is very common among NGOs, as funding from external sources may even come conditioned to measuring

> *Not everything that can be counted counts, and not everything that counts can be counted.*
>
> -- Albert Einstein

progress. In addition, NGOs often use measurement figures to draw attention of external audiences to their success in achieving certain goals.

- **Constant learning:** This should be the key reason for measuring progress. Data gathered through this process enables us to understand where we have been lacking progress, and where improvements are needed. In addition, measuring for constant improvement also empowers our membership (and especially adult leaders), as they will feel their work will not go unnoticed, and they will have a constructive environment for further development.

It is important that your NSO considers carefully the reasons why it is measuring its progress. Ideally, your focus should be on constant improvement and learning, however, it is understandable that for compliance with your funding sources you may need to conduct some measurement directed towards external audiences. It is recommended that you avoid measurement as a top-down control method, as there are better ways of inspiring your units to strive towards a common goal than having them feel as if they are "being tested".

The challenges of measuring progress are two-fold:

1. You first need to identify what it is that you NEED to measure, and then
2. HOW you are going to measure it.

Naturally, not all the things you would want to measure can be expressed in numbers (such as hours of service, amount of financial resources spent, numbers of participants, etc.). However, this does not mean that progress cannot be measured for those indicators that you still find necessary for making informed decisions, but you cannot quite express in numbers, such as social impact (for Scouting, Social impact is considered as the effect of a Scouting activity on individuals and families within a community as well as the Scouting members involved in planning and implementing this activity) .

Naturally, these measurements come with limitations: perfect metrics are very rare in the NGO world, and therefore it is also important to understand that they should rather be considered as indicators of a level of performance or progress towards achieving your goals (and not solid, completely trustworthy measurements).

The next sections provide guidance on how to develop your own indicators of progress, by focusing on what matters – even though it cannot always be counted.

Designing key performance questions

Before deciding on what your indicators of success will be, it is important to ask yourselves – what is it that you really need to know to measure your progress towards achieving your vision? This kind of attitude towards measurement is much like taking a scientific research approach to it: you first need to establish the research question, then a hypothesis, and then collect data to test the hypothesis.

An advantage of clearly defining research questions before establishing indicators of success is the amount of time and energy that will be saved in collecting data. With established key performance questions (KPQs), you are cutting down on collecting unnecessary data (that often clouds your vision).

The following are guidelines on how to design your KPQs, according to Bernard Marr:

Choose one to three KPQs per strategic priority:
The fewer KPQs you have, the better, as naturally, it is expected that each of them will trigger a KPI, and with too many of them, you risk ending up again with a sea of unwanted information.

Ensure that they are performance related:
This means that they should enable you to understand how well you are doing at any point in time towards achieving your goals. Note that KPQs should not be about strategy clarification. For example, you should not ask at this stage "How should we do this?" (this is a question you should ask during the development of the strategy) but rather "How well are we doing this?".

Engage people in the creation of the questions:
Much like you have engaged them through the building of your strategy, designing the KPQs is another important buy-in opportunity, as KPQs are supposed to communicate to everyone in an organisation what it is that matters when it comes to your overall performance.

Create short and clear questions:
KPQs need to be understandable, with no double meanings. No jargon or internal language should be used, as the KPQs need to be as comfortable as possible to use for everyone in your organisation.

KPQs should be open-ended questions:
This means that they should not be Yes-No questions, but rather focus on the How your activities are done. For example, instead of asking "Have increased our membership?" you could ask "How well have we reached out to our targeted communities for growing Scouting?". KPQs should inspire discussion, rather than provide simplified answers.

KPQs should focus on the present and future:
Instead of asking questions related to the past – such as "How well did we satisfy our members' requests for more outdoors activities?", by simply refocusing towards the future – "To what extent are we satisfying our members' request for more outdoor activities?" we are keeping the dialogue open for the future, and putting a focus of using the information gathered in future decision-making.

They should be refined and improved along the way:
KPQs are not set in stone – on the contrary, once they are put to use, you may notice that there is a need for some refinement. This is a natural process of trial and error, and one that we should not shy away from.

They should form the basis of developing your Key Performance Indicators (KPIs):
Your KPIs are essentially your hypotheses – answers to your research questions. In this sense, they provide your estimated (assumed) answer to your KPQs.

Use KPQs to report and communicate progress:
If you present the question you are answering through your KPI, it makes things a lot more understandable to your external audiences, rather than only including the KPI. The KPQs give a more thorough background understanding, as they link your measurement method and targets to the specific objectives of your strategic plan.

To help you with developing your own KPQs, below is a list with potential KPQs you could consider:

- How well are we delivering our new Youth Programme?
- How likely are our members to recommend Scouting to their friends?
- How do our local communities see Scouting?
- How well are we performing in developing partnerships with other NGOs?
- How effective is our new communications strategy?
- To what extent are we reaching out to marginalised communities in our country?
- To what extent have we improved our decision-making processes on national level?
- To what extent are we collaborating between units?
- To what extent are we impacting the lives of others in the local communities where Scouting exists?

Designing key performance indicators

The role of Key Performance Indicators (KPIs) is to collect information that will ultimately help us in:

1. Learning about the status of progress we're making towards achieving our strategy, and based on this knowledge
2. Making well-informed decisions that will lead towards improvement and better performance in our organisation.

Note that KPIs need to be relevant and meaningful for your organisation, and do not necessarily have to be quantifiable with a number. They can be answered with descriptions – qualitative data as well.

As a "check-list" for testing each of your indicators, we recommend that you ask the following questions:

- Do we have a KPQ to answer with this indicator?
- Are there decisions this indicator would support?
- Can we collect meaningful data for this indicator?
- Does this indicator help us to answer our KPQ?
- Does this indicator help us to make better decisions?
- Are the assessment costs and efforts justified?

If the answer to these questions is YES, you are on the right path for developing a meaningful and relevant indicator. An indicator is relevant if it can be clearly linked to a strategic objective, and it is meaningful if it helps in answering one of your previously identified Key Performance Questions .

If the answer to any of the questions above is NO, you should carefully reconsider the need for such an indicator or try to see whether it can be adapted to better respond to your need for meaningful and relevant KPIs.

To make your measurement process aligned with your strategic plan and streamlined, it is recommended that you use a simple template for all your KPIs, in order to ensure that you are clear from the start on the elements of each. The table below gives an example of the factors you need to keep in mind when preparing your KPIs, and a couple of hypothetical examples of how this can be done:

KPI	Strategic priority it corresponds to	KPQ it helps answer	Data collection method/frequency of collection	Person/team responsible for collection
By 2023, our NSO will have increased membership in marginalised communities	Membership Growth	How well are we reaching out to marginalised communities?	Census data from our local units/ annual basis.	Membership Growth
By 2023, 90% of our units will be implementing our new Youth Programme, that has a strong focus on catering for diverse needs of our members.	Membership Diversity	To what extend are we delivering a programme that caters for the diverse needs of our membership?	Annual survey with local unit leaders/ biannual basis.	Youth Programme Team

Deciding on an appropriate data collection method may not always be obvious. Below are a few examples of how you may want to collect data in an efficient and cost-effective manner:

Annual or biannual **membership surveys**:
Membership surveys can provide a good "pulse-check" of how you are performing on implementing your youth programme in all its different aspects. These can be either sent to the full membership online, or to a selected representative sample of membership. To select a representative sample,
you would need to pay attention to have it reflect:

- Your geographic spread (e.g. if most your membership comes from the south of the country, your sample should also have more members from that part, rather than being equally distributed throughout the country),
- Your age balance (e.g. if most your membership is in the Scout section, your sample should also be skewed in favour of the Scout section, rather than equally distributed across all age groups),
- Your gender balance (e.g. if 70% of your NSO's membership are boys, then 70% of your sample should also be boys).

- **Surveys of adults in Scouting:** These can be an excellent way of cross-checking the data you receive from membership surveys, as they give you two different perspectives. In addition, such surveys can help you understand how well you perform in terms of organisational management, trust levels, and internal communication.
- **Census/membership data:** This data is normally collected on an annual basis in each NSO, and it gives the most accurate answer to membership growth indicators, but it can also be expanded further to help collect data for indicators related to membership diversity and inclusion.
- **Interviews and focus groups:**
These methods require more skill and knowledge (and can be more time-consuming than surveys) but can provide much more reliable and in-depth data, especially if your KPIs are qualitative (i.e. require a descriptive measurement). These methods can be especially useful in cases when you need to reach out to external audiences (e.g. local community representatives) to collect their input on how they see Scouting in your country.

KPIs should be constantly reviewed. If an indicator has become irrelevant to your NSO, and no longer informs your decision-making, you should reconsider the need for measuring it further. Note that you do not need to develop "perfect" indicators – they should be used to improve our learning and aiding our decision-making, and should not become the sole focus of our strategic planning work.



Step 10: Monitoring and evaluation

> *There is nothing noble in being superior to your fellow man; true nobility is being superior to your former self.*
>
> -- Ernest Hemingway

Measuring progress and achievements is only one part of the puzzle. The real purpose of measuring is to learn about yourselves as an organisation, your challenges and successes, to improve and develop even further. If this last step is not done, efforts invested in measurement are largely futile.

The following subchapters provide guidance on how to ensure that what you have measured actually has impact on your NSO's work.

To understand the difference between monitoring and evaluation, we refer to the simple table below:

	Monitoring	**Evaluation**
Timeline	Continual collection of information, throughout programme/project	periodic review at a significant point in the project. End of project, Mid-term and Change of Phase
Focus	Measures activity (Outputs),	Evaluates success, (Outcomes)
Purpose	Progress tracker Asks whether the project is being implemented as planned – are we on the right track	Reflection and correction – Asks whether the activities (outputs) have resulted in achieving the objectives (outcomes) and contributed to the goal Whether the project is successful
Stakeholders	Often uses people inside the project	Uses a mix of people from inside and outside the project
Results	May result in minor action to correct the situation	May result in major strategy change

- In terms of **timeline** – monitoring happens throughout a programme/project, while an

- evaluation is usually reserved for mid-term and final stages (formative and summative evaluation).

- In terms of **focus** – monitoring focuses on immediate outputs (e.g. how many participants at an activity, how many activities organized). Evaluation focuses more on the outcomes (although it includes the outputs) (e.g. because of activity X, how many new Scouts joined the movement?).

- **Purpose** – monitoring is there for tracking the progress made on a regular basis, and flagging any concerning issues. Evaluation reflects on the "how" and "why" things were done as they were, and whether there is a possibility for improvement in the future.

In conclusion, while monitoring is more interested in ensuring progress is made and challenges are spotted early enough in the implementation of a strategy, an evaluation focuses on the reasons behind the occurrence of those challenges, or the reasons for the achieved success.

Monitoring your performance on a regular basis

Monitoring, along with evaluation, supports your NSO in tracking the achievements you make towards your strategic plan, and helps you in making decisions related to implementing the plan.

Monitoring can be defined as "a continuing function that aims primarily to provide the management and main stakeholders of an ongoing intervention with early indications of progress, or lack thereof, in the achievement of results." (Note that here "an ongoing intervention" may refer to an activity, project or programme that falls under the scope of your strategic plan).

Deciding on the timing for monitoring your performance will largely depend on the goals you have set out in your strategic plan, the timeframe of your plan, as well as the timeframe for measuring each of your KPIs. However, it is important that you establish a first measurement for all indicators once your strategy is adopted, in order to set up a baseline.

Afterwards, you may want to conduct a measurement on an annual (or even biannual basis) for all indicators. For some, you may decide to measure even more frequently (especially if they relate to communications, for example reaching out to your membership through social media).

What is important in this process is that you establish a framework and plan for measurement, and clearly define the timeline for measurement. This way your whole organisation can be informed of when to expect updates on progress achieved. This will in turn help all bodies in your organisation better plan their decision-making processes around the given timeline, as the data collected will have an impact on the decisions they take.

If at a certain measurement point you see that there are areas with "red flags", where progress is stalling, or you are having challenges with collecting data, it is a good time to think about the following questions:

1. Did you perform well on aligning your activities?
2. Is the lack of progress on this KPI a result of miscommunication?
3. Are you facing challenges in collecting the data you intended to collect?
4. Are those responsible for monitoring the KPI doing their job?
5. Are you interpreting the data correctly?
6. Is the objective corresponding to this KPI still
7. relevant and/or realistic in your NSO?

These questions are intended to start dialogue about the aspect of your work this KPI is monitoring. Each of them raises some potential challenges you may be facing – and the purpose of them is to inspire constructive discussions among your strategy team, but also the team responsible for the area of work in question, and the national board.

Here is an example of a potentially challenging KPI and how it can be addressed:

- **KPI:** By 2017, our NSO will open 10 new Scout Groups in the northern district.

- **Current situation (2016):** There has been only one group open, and the leaders in the district are facing great difficulties in starting new groups, due to a lack of interest among local children and youth for Scouting. They have tried going to schools and promoting Scouting there, but had little success.

- **Potential solution:** Firstly, the board should consider if the KPI and goal of opening 10 new groups is still relevant and/or realistic for this district. In this hypothetical case, the board considers it is still relevant, and that the KPI is still achievable. The board reaches out to the west district for support in developing more attractive methods for recruiting membership. They invest in a meeting between leaders of the west and north districts, to enable them to exchange ideas and best practices. As follow up, the board decides also to monitor more closely the progress, and notes that closer communication and support to the north district is necessary. They decide that they will hold several national gatherings in the north district to raise the popularity

and visibility of Scouting there and hopefully gather more members.

Another example refers more to the nature of the KPI and how it had been communicated to the team in charge:

- **KPI:** By 2018, our NSO will measure its social impact in local communities.

- **Current situation (2016):** The NSO's social impact volunteer team has reached a standstill. Even after numerous consultations with experts, they are still undecided as to how to approach measuring Scouting's social impact. They reach out to the national board for guidance.

- **Potential solution:** The national board reviews the work done so far by the social impact volunteer team, and notices that the reason for their confusion was the actual wording of the KPI and a miscommunication of expectations: the volunteer team saw "social impact in local communities" as purely a result of community service, whereas the methodologies suggested by experts referred strongly on the personal progression element of social impact (which also largely impacts local communities). After the board explained that both elements should be examined (personal impact and community service), it became easier for the volunteer team to choose an appropriate methodology and proceed with rolling out a measurement process.

Evaluating your NSOs performance

An evaluation should be done at least mid-way through a strategy, this is a so-called **"formative" evaluation** . This type of evaluation can raise awareness about strategic priorities that potentially need to be reconsidered, or KPQs and KPIs that no longer reflect the measurement needs of the NSO.

If your NSO decides to conduct a formative evaluation, it should focus on the following tasks:

1. Reviewing the full strategy considering data collected through monitoring up to the selected point in time (for conducting the evaluation).

2. Discuss the relevance of the strategic priorities with stakeholders, both internal and external (are they still answering their needs?).

3. Discuss the relevance of the activities in your operational plans with staff and volunteers (are the activities you are providing still yielding the expected results?).

4. Discuss the relevance of your KPQs and KPIs for measuring your progress (is the data collected still relevant and useful for making informed decisions?).

A formative evaluation is conducted to prevent an organisation from going down a wrong direction, by reflecting on the progress achieved from a distance, and realising the need for changes if the outcomes and impact are not in line with your strategic objectives . At times, your activities should be adjusted, and at times, you will realise that the plan did not correspond to the actual needs of your membership. Both scenarios are possible, and an organisation should not stick blindly to a plan if it is obvious that it is not resulting in improvements.

A "summative" evaluation is one that takes place at the end of a strategic plan cycle, in preparation for building a new strategic plan. This kind of evaluation reflects on the following questions:

1. Are you satisfied with the process we followed in developing and implementing this strategy? If not, what would you like to change?
2. Did the outcomes and/or impact of the strategy meet your needs and expectations? If not, how did the mismatch occur?
3. Did you conduct an adequate analysis of your internal and external situation? If not, where were the gaps? What knowledge did you not gather, and which will be useful for building the next strategic plan?

4. What was left unachieved in this strategic plan, and you still consider it important enough to incorporate in the next plan?

The summative evaluation may expand further into more detail, depending on what information you consider important for your future planning process. The way in which you collect data during evaluations will vary on the extent to which you would like to involve your stakeholders in providing feedback.

You may want to conduct in-depth interviews or focus groups with certain groups of stakeholders (for example, your youth members, adult leaders, national board, parents, other civil society actors or separate volunteer/professional teams in your organisation). It is important to note that this type of evaluation can already form the basis of your stakeholder analysis for the next strategy cycle.



Step 11: Reporting on your NSOs performance

Reporting on your performance and the progress you are making towards achieving your goals to your stakeholders is very important. By periodically sharing your progress, you ensure transparency and accountability and strengthen the trust and relationship with your stakeholders. In addition, it enables you to benefit from the pool of knowledge and resources that your stakeholders have, which may help you reach your plan's objectives.

The reporting framework and plan should be established at the development phase of a strategic plan: you should inform your stakeholders in advance about the time periods in which they will be receiving reporting from you.

The reports should contain an accurate assessment of your progress towards achieving the objectives of your strategic plan – you may choose to present your monitoring findings in detail (including details of the measurement methods description), or simply share the conclusion of your measurement, with an explanation of how you intend to move forward on each objective. Typically, your report should show not just your successes but also any challenges you may have faced with implementing the objectives.



conclusion: Why is it important to foster a "performance-driven culture?"

> ***Culture eats strategy for breakfast.***
>
> -- Peter Drucker

An organisational culture influences everything that happens in the organisation – from how we reward people and recognize success, to how we measure progress and address your challenges.

As such, organisational culture also influences our approach to strategy and strategic planning, monitoring and evaluation. If we do not have a culture of constantly seeking improvement and learning from our mistakes, implementing a strategy will be a challenging task.

Therefore, it is important to stress the crucial role a "performance-driven culture" plays in an organisation. It is based on four pillars:

- A sense of common purpose,
- Clearly established accountability for results,
- Honesty in reporting about progress achieved, and
- A clear understanding of what a performance-driven culture means for each body within the organisation.

A performance-driven culture is achieved by:

1. Ensuring a visionary, forward looking leadership is present throughout the organisation,
2. Establishing a reward and recognition scheme that celebrates success,
3. A strong reporting system developed for communicating performance information, and
4. Adequate review processes that enable all stakeholders to participate in providing feedback on organisational performance.

Ultimately, a performance-driven culture puts constant learning at its core – which goes hand-in-hand with Scouting's guiding principle of "Learning by doing". With this toolkit, we have aimed to put this principle to work in the tasks of strategic planning, implementation, monitoring and evaluation. We hope you find it useful in your endeavours.

Strategy Monitoring Group of the World Scout Committee (2014-2017)

"Look wide, beyond your immediate surroundings and limits, and you see things in their right proportion. Look above the level of things around you and see a higher aim and possibility to your work."

-- Lord Robert Baden Powell



Endnotes

Based on: http://managementhelp.org/blogs/strategic-planning/2011/10/18/why-you-need-a-plan-5-good-reasons/

For more information, please consult the Essential Characteristics of Scouting at: https://www.scout.org/sites/default/files/library_files/EssChar_E.pdf

For more information visit: https://www.mindtools.com/pages/article/newTMC_80.htm

Based on: https://www.mindtools.com/pages/article/newPPM_07.htm

Marr, Bernard (2009): Managing and delivering performance. Elsevier, LTD. P 108.

For more information, consult: http://www.iso.org/iso/home/standards/iso31000.htm

ISO 31000 Risk Management practical guide for SMEs. More information at: http://www.iso.org/iso/iso_31000_for_smes.pdf

More information on risk management at: https://www.theirm.org/about/risk-management/

More information on FMEA at: http://asq.org/learn-about-quality/process-analysis-tools/overview/fmea.html

Penna, M. Robert (2011): The nonprofit outcomes toolbox. A complete guide to program effectiveness, performance measurement and results. John Wiley & Sons, Inc. Hoboken, New Jersey. P. 308.

Olsen, Erica (2012): Strategic Planning Kit for Dummies, 2nd edition. John Wiley & Sons, Inc. Hoboken, New Jersey. P. 238.

For more information on Scouting's definition of Social Impact, see: https://www.dropbox.com/s/w3iw2a68mhf8k6k/SI%20concept%20paper_final_Oct2015.pdf?dl=0

Based on Bernard Marr's Performance Indicator Decision Framework. Marr, Bernard (2009): Managing and delivering performance. Elsevier, LTD. P 179.

Marr, Bernard (2014): 25 need to know key performance indicators. Pearson education limited. UK. P. 20.

Social Development Department - The World Bank. More information at: http://siteresources.worldbank.org/INTBELARUS/Resources/M&E.pdf

Note that formative evaluations also take place at the beginning of a project/programme/strategy cycle, to establish a baseline and have a greater understanding of the needs of an organisation.

Ibid. P 213.