TRANSFORMING
AGENCY, ACCESS, AND POWER

A TOOLKIT AND GUIDE FOR INCLUSIVE DEVELOPMENT

SPRING 2018

WELCOME ➔

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WELCOME TO THE

TAAP TOOLKIT AND GUIDE FOR INCLUSIVE DEVELOPMENT

The TAAP Toolkit partners – IREX, Leonard Cheshire, Help Age International, Mobility International USA, Women's Refugee Commission and World Learning Europe – provided invaluable expertise in the development of the TAAP Toolkit and Guide for Inclusive Development.

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TAAP

FULL INCLUSION IS JUST A CLICK AWAY. **START HERE.** ➔

TAAP

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n. A resource for development practitioners and civil society activists to integrate social inclusion into program design, implementation, and learning.

n. An approach to inclusive development that identities who is left behind, explores reasons why and how it impacts agency, access and power, and provides an analytical framework and practical tools to take action against the exclusion and towards positive social change.

……

v. To draw out, from, or upon; to tap new sources of voices, skills and lived experiences.

WELCOME

Message

> "As we embark on this collective journey, we pledge that no one will be left behind."
>
> – PREAMBLE TO TRANSFORMING OUR WORLD:
> THE 2030 AGENDA FOR SUSTAINABLE DEVELOPMENT

We joined together as international development organizations to co-create this *TAAP Toolkit and Guide for Inclusive Development* because we believe that social change must be inclusive in order to be transformative — to create societies that are more peaceful and more just.

We take a universal approach to inclusion, recognizing it as a process of improving the ability, access, dignity, and opportunity of people disadvantaged on the basis of their social identity to take part in social, economic, cultural, and political life. This means amplifying the voices of all people, especially those who have traditionally been marginalized or excluded from agency, access, and power, so that we can all join together as champions of inclusion and transform current systems and norms.

The *TAAP Toolkit and Guide for Inclusive Development* is the product of extensive international collaboration, consultations, and pilots in seven countries, and has been developed as open source, so that as many development practitioners as possible can share what they've learned from applying the Transforming Agency, Access, and Power (TAAP) approach. TAAP's systematic methodology offers concrete support to development practitioners seeking to go beyond diversity, to full engagement of included, marginalized, and excluded people working together toward positive social transformation.

On behalf of our respective organizations, we invite you to join our growing global community of practice in this important work toward changing the international development landscape to ensure that truly, no one is left behind. Please join us by fostering inclusion as you can, where you are, with what you have—and with an unwavering commitment.

Sincerely,

CAROL JENKINS, CEO, WORLD LEARNING
KRISTIN LORD, PRESIDENT AND CEO, IREX
JUSTIN DERBYSHIRE, CEO, HELP AGE INTERNATIONAL
SUSAN SYGALL, CEO, MIUSA
SARAH COSTA, EXECUTIVE DIRECTOR, WOMEN'S REFUGEE COMMISSION
TIZIANA OLIVA, EXECUTIVE DIRECTOR, LEONARD CHESHIRE INTERNATIONAL

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A BRIEF OVERVIEW OF **TAAP**

What does inclusion mean?

Inclusion is the process of improving the ability, access, dignity, and opportunity of people, disadvantaged on the basis of social identity, to take part in society. Inclusion means drawing on the voices, skills, and experiences of all people traditionally marginalized and excluded from agency, access, and power on the basis of one or more dimensions of social identity, including: age (particularly youth or older persons); disability; displaced status; race, ethnicity, indigenous identity; religious identity; sex (particularly women and girls); and sexual orientation or gender identity (LGBTI).

Why is inclusion important for sustainable development?

Achieving the inclusive world envisioned in the United Nation's 2030 Agenda for Sustainable Development requires radically changing the agency, access and power of those people and groups who control resources and power, and those who are marginalized or excluded entirely. To ensure that all members of society have a voice and the power to determine their own destiny is a matter of social justice. Access to resources and participation in the political, social and economic dimensions of sustainable development matters in a world of growing inequality. We believe that lasting, transformative social change is only possible through inclusion.

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What does inclusion require?

Genuine inclusion goes beyond inviting previously marginalized or excluded persons to take part in development projects. It means ensuring that such persons have the opportunity to act as agents of change. This process requires changing systems and challenging norms.

What is TAAP?

TAAP, which stands for *Transforming Agency, Access, and Power,* is an integrated and holistic approach to sustainable development. The TAAP approach supplies development and humanitarian practitioners and civil society activists with a set of guiding principles, an analytical framework, and a series of practical steps and activities aimed at integrating inclusion throughout a project cycle. Whether you are seeking to integrate inclusion into an existing project of any sector (e.g., agriculture, health, education) or to design a new project with inclusion as its own goal, the *TAAP Toolkit and Guide for Inclusive Development* is a valuable resource.

KEY POINT

TAAP'S
FIVE PRINCIPLES

The TAAP principles are the core of the TAAP approach. The activities in each step of the TAAP process provide for continuous, rigorous review to ensure that projects that apply the TAAP approach stay grounded in the following five organizing principles.

* See next page for details on TAAP's Five Principles.

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TAAP'S *FIVE PRINCIPLES*

All TAAP practitioners and interested stakeholders are encouraged to review and internalize the five principles before beginning a project that applies the TAAP approach, and to refer back to them regularly.

PARTICIPATORY **APPROACHES**

CONTEXT **SENSITIVITY**

EMPHASIS ON **DIGNITY AND AGENCY**

ADDRESS **POWER IMBALANCES**

THINK BIG **THINK THE IMPOSSIBLE**

What TAAP Brings

- Amplifies the voices, dreams, and dignity of people historically left out of international development projects.
- Creates opportunities for reflection and learning as we seek to "leave no one behind."
- Provides evidence-based approaches for working with marginalized and excluded people.
- Helps practitioners better design and implement inclusive strategies, participatory processes, and transformational activities
- Takes international values, including commitments to sustainable development and to universal human rights, and translates them into actionable steps.

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THE TAAP *APPROACH*

The TAAP Initiative

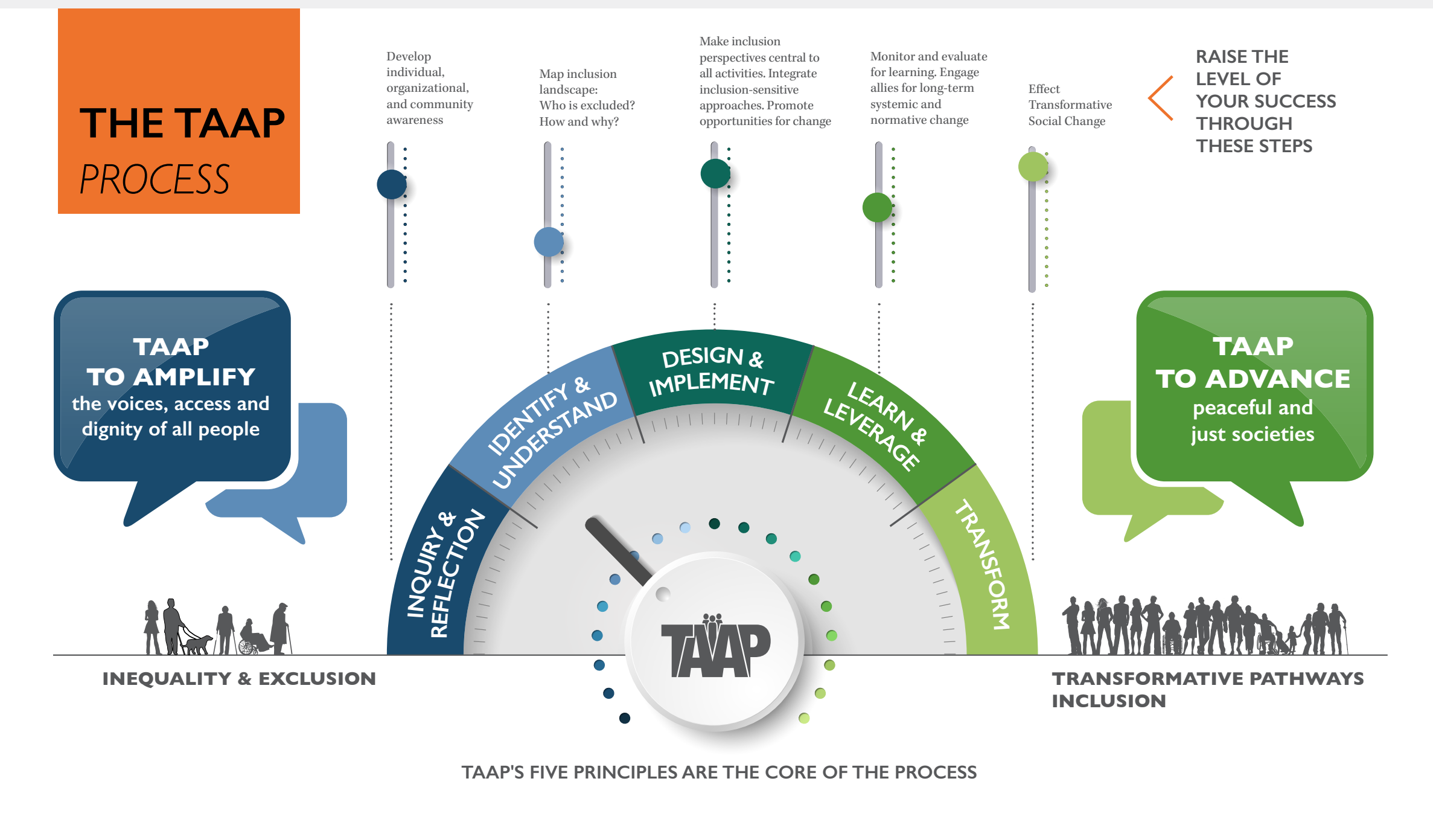
The TAAP Initiative engages development practitioners and policymakers to amplify the voices, access and dignity of all people. The TAAP initiative includes the TAAP approach, TAAP Toolkit and Guide for Inclusive Development, TAAP Tuesdays newsletter, partnerships, thought leadership, and learning agenda.

The TAAP Approach

The TAAP Approach is an analytical framework and a set of principles for integrating universal and transformative strategies and practices throughout a project cycle. The analytical framework applies six domains of analysis and an intersectional lens to assess the situation of inclusion in a context, and inform program design.

The TAAP Process

The TAAP Process guides development, humanitarian and civil society practitioners and activists through a series of actions and steps: INQUIRY AND REFLECTION; IDENTIFY who is marginalized and excluded and UNDERSTAND how and why; Inclusion-sensitive DESIGN and IMPLEMENTATION; Monitor and evaluate for LEARNING; and LEVERAGE the system for transformative social change.



CLICK TO ENLARGE

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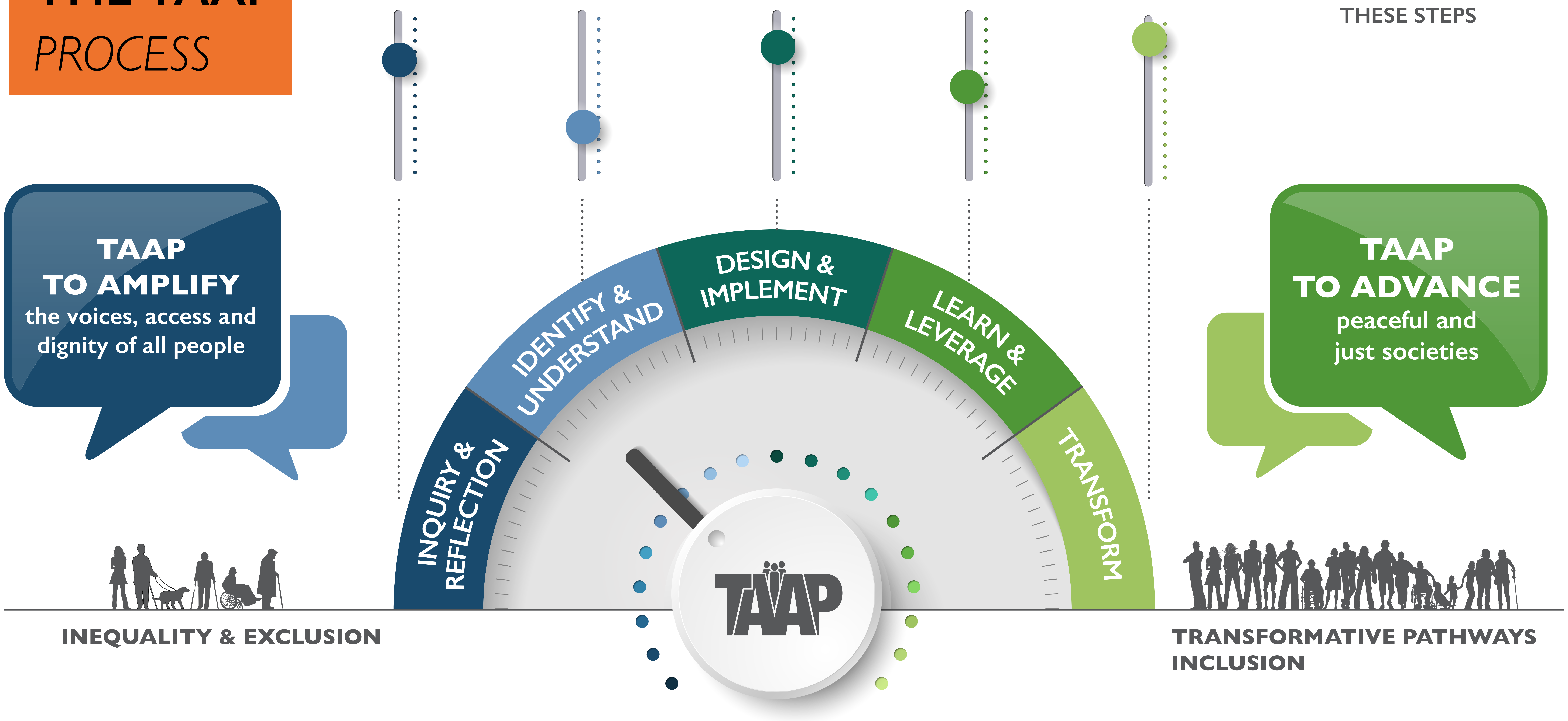
THE TAAP *PROCESS*



Develop individual, organizational, and community awareness

Map inclusion landscape: Who is excluded? How and why?

Make inclusion perspectives central to all activities. Integrate inclusion-sensitive approaches. Promote opportunities for change

Monitor and evaluate for learning. Engage allies for long-term systemic and normative change

Effect Transformative Social Change

RAISE THE LEVEL OF YOUR SUCCESS THROUGH THESE STEPS

TAAP TO AMPLIFY the voices, access and dignity of all people

TAAP TO ADVANCE peaceful and just societies

INEQUALITY & EXCLUSION

TRANSFORMATIVE PATHWAYS INCLUSION

TAAP'S FIVE PRINCIPLES ARE THE CORE OF THE PROCESS

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THE TAAP *ROADMAP*

The toolkit ensures that social inclusion and inclusion-sensitivity are integrated into every phase of a project life cycle. The TAAP activities are thus organized into four sequential phases, with two cross-cutting sections.

You can start with any of the phases and can carry out all the activities or select those most relevant to your project or to where you are in your inclusion journey.

The figure to the right illustrates the sections of the TAAP Toolkit and Guide, organized following the steps of a project management cycle.

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THE TAAP TOOLKIT AND GUIDE
PROJECT MANAGEMENT CYCLE

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THE PHASES OF THE TOOLKIT

PHASE I

In Phase I, you will explore your own identity and the organization's identity.

PHASE II

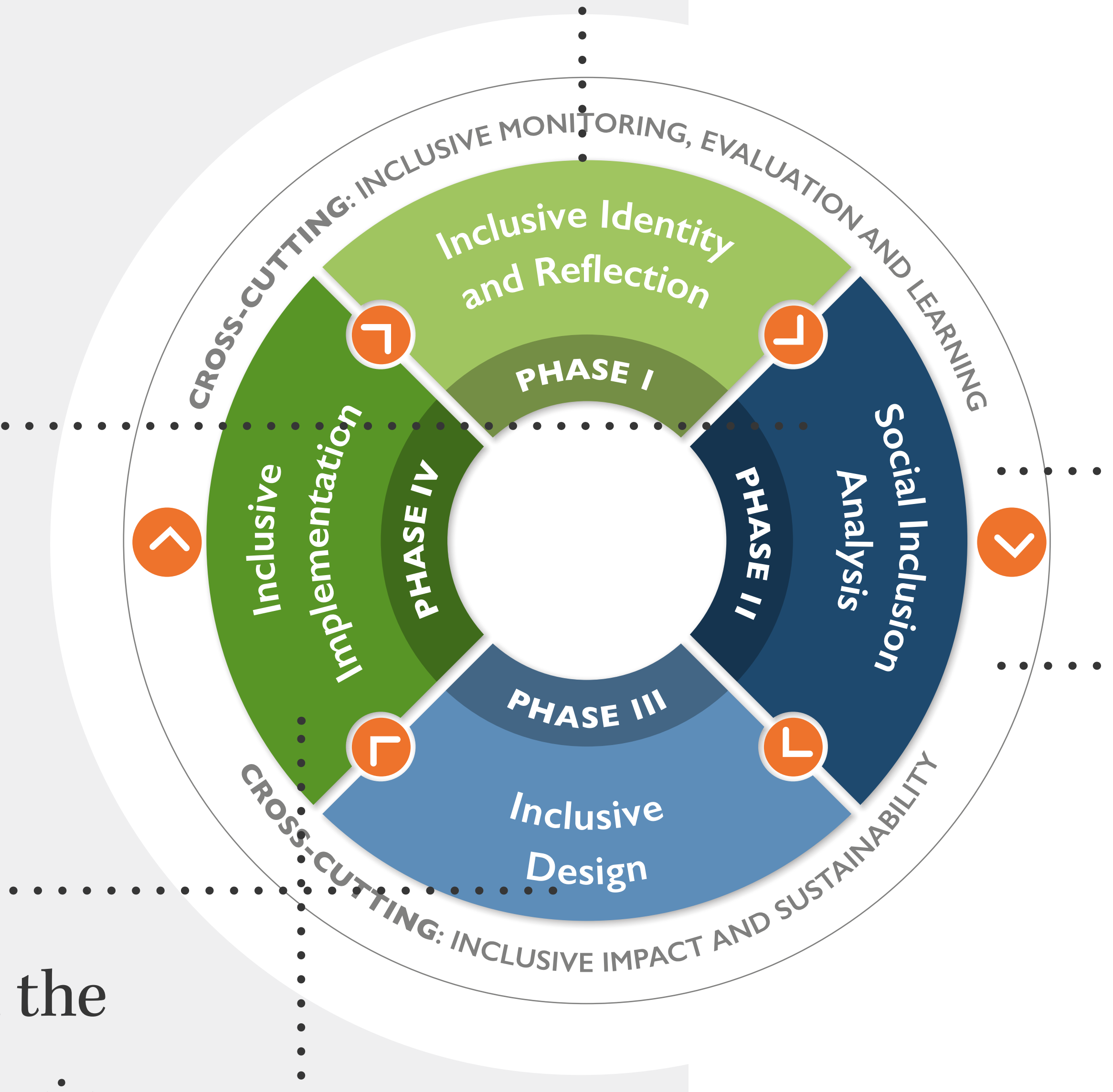
In Phase II, you'll conduct a rigorous context analysis (your stakeholders, your operating environment, and the state of inclusion in that context) and propose a set of recommendations about inclusion-focused project goals and activities.

PHASE III

In Phase III, you'll design project activities based on the recommendations from that Phase II inclusion analysis.

PHASE IV

In Phase IV, you will integrate inclusion into essential project implementation functions, and monitor for inclusion opportunities and barriers.



CROSS CUTTING PHASES

It's important to remember that with TAAP projects, as with all projects, monitoring and evaluation and ensuring a sustainable impact are not afterthoughts: that work is ongoing throughout the entire project lifecycle. The activities in Cross-Cutting Section on Inclusive Monitoring Evaluating and Learning (MEL) guide you through the development of monitoring and evaluation frameworks and indicators, with special attention to ethical data collection. Cross-Cutting Section Inclusive Impact and Sustainability (IIS) captures your ambitious thinking: the plan is to maximize the likelihood that the inclusion work embedded in your project(s) will be truly transformative and sustainable.

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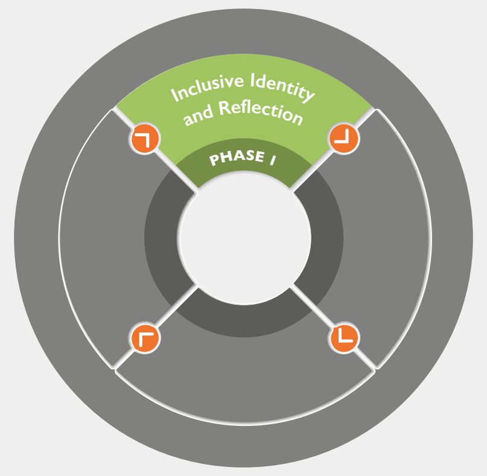

PHASE I

INCLUSIVE INQUIRY AND REFLECTION

CONTINUE >

Before beginning any project, it is wise to ensure that you and your organization pause and reflect on the extent to which your house is in order. The activities in Phase I explore individual and organizational identity, including the uncovering of any biases that may affect the TAAP inclusion work to come. Please note that often, the same people come together as different project teams. It is not necessary to repeat Phase I for each new project if this is the case. That said, if significant project elements change (e.g. new context), then it is advisable to revisit Phase I. If your organization regularly undertakes staff retreats, these may also provide a good opportunity to complete Phase I.

STEP A

Individual Inclusive Inquiry and Reflection

Project team individuals map their own identities, plot their inclusion sensitivity along a spectrum, and write personal mission statements.

STEP B

Organizational Inclusive Inquiry and Reflection

Project team members evaluate the organization's policies and practices with regard to inclusion and document possible strategies to improve those policies and procedures.

STEP C

Recognizing Everyday Inclusion

Project team members fan out in the community, riding buses, reading billboards, observing social interactions, and otherwise gathering data through a new social-inclusion-sensitive lens.

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PHASE II

SOCIAL INCLUSION ANALYSIS

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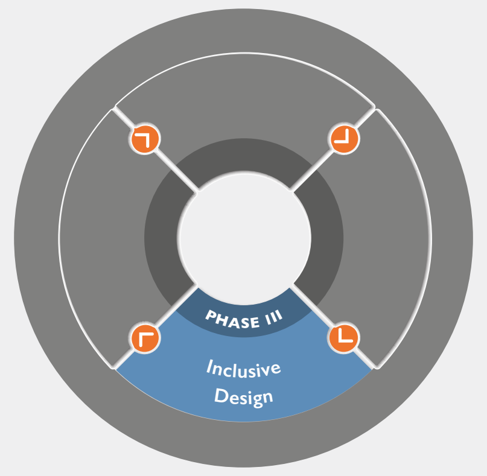
Before you can think about or plan meaningfully for the desired future state of social inclusion, you have to understand the current state. The activities in Phase II end with a Social Inclusion Analysis Report documenting key stakeholders, situation analysis, possible high-impact interventions, and a description of how these align with the **TAAP PRINCIPLES**.

STEP A	STEP B	STEP C	STEP D
Determine the Study Design Sets the terms of reference (TOR) for the report.	**Apply TAAP Social Inclusion Analysis Framework** Aligns the work with the five core principles as well TAAP's version of the industry-standard six analytical domains of social life, including laws; access to and control over resources; knowledge, beliefs and perceptions; power and decision-making; roles and responsibilities; and human dignity, safety, and wellness.	**Data Collection and Analysis** Is where you carry out the primary and/or secondary research, map your data and findings, explore root causes, and define the transformative interventions, as determined from your study ToR from Step A.	**Write the Social Inclusion Analysis Report** Produces the actual written document.



PHASE III

INCLUSIVE DESIGN

CONTINUE ›

In this Phase, you take what you learned in the Inclusion Analysis and translate it into concrete choices for your project's design to maximize inclusion.

STEP A	STEP B	STEP C
Appreciate the Social Inclusion Analysis In this step, the project design team reviews the report findings, generates a snapshot of the key barriers and boosters to inclusion, and verifies the stakeholders.	**Prioritize the Social Inclusion Recommendations** This step ensures that the team thoughtfully considers the recommendations and the extent to which they can be adopted.	**Planning the Pathway to Inclusion** This step prepares the project team for implementation, ensuring that the proposed project aligns with TAAP principles, has a budget, and stays focused on the desired change.

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PHASE IV

INCLUSIVE IMPLEMENTATION

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In this Phase, the team puts everything that has been learned into actual practice. Whatever findings the research uncovered, and whatever recommendations the project design incorporated, Phase IV is where it gets translated into reality.

STEP A

Reflect on the Inclusive Design Results

Ensures that all team members understand and share the project's commitment to its identified goals around social inclusion. The project team gains a collective understanding of the key results of Phase III, inventorying the project's potential barriers and boosters, and ensuring clarity about the key stakeholders, priority recommendations, and how project activities and outcomes align with the theory of change.

STEP B

Ensuring Inclusion Sensitivity in Essential Project Functions

Helps you integrate inclusion-sensitivity into work plans, hiring practices, procurement, operations, risk management, and project-close out.

STEP C

Monitoring for Inclusion Opportunities and Barriers

Guides the team through exercises designed to help them take advantage of opportunities to boost inclusion and understand and overcome the barriers.

STEP D

Write the Social Inclusion Plan

Codifies the commitments to the project's plans for inclusion-sensitivity and responsiveness at a cross-cutting level as well as for stand-alone inclusion activities.

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CROSS-CUTTING

INCLUSIVE MONITORING, EVALUATION AND LEARNING

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“What matters gets measured. What’s measured gets done.” In the inclusive monitoring, evaluation, and learning, or MEL, phase, you develop indicators, gather data, and evaluate results to continually strengthen inclusion. This work cuts across all phases of the project cycle. In fact, it often predates the project cycle because the indicators proposed for tracking are often included in project funding proposals.

STEP A

Develop Inclusive MEL System

This step helps ensure that your MEL framework reflects the relevant identity groups and that the project results are more inclusive.

STEP B

Implement Inclusive MEL

This step is more technical. Its activities focus on data collection tools, who collects the data, and the questions they ask to make data collection more inclusive and participatory while maintaining technical strength.

STEP C

Learn, Pause and Reflect

This step aims to give participants a chance to debrief. By participating in a data management process, many marginalized or excluded groups may feel empowered and enthusiastic—but also may encounter issues for which they were not prepared and need to process.

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CROSS-CUTTING

INCLUSIVE IMPACT AND SUSTAINABILITY (IIS)

CONTINUE ›

The TAAP approach asks us to dream big. Here in Cross-Cutting Section IIS: Inclusive Impact and Sustainability are the tools to guide that thinking without getting lost in the detail.

STEP A

Reflect on Desired Change and Identify Entry Points

In this step, you will create a systems map that shows your project's place within the grand scheme of actors and factors that can boost or put up barriers to systemic change. (Note that systems thinking also takes place throughout Phases I-IV.) This systems map is intended to be a living document, regularly updated as those actors and factors in that grand scheme, and the alliances among them, shift over time or are overtaken by external events.

STEP B

Envisioning Sustained Impact

In this step, you will revise the systems map to show what it would look like if the problem that your project exists to address was resolved by actors in the community themselves.

You finish Step B when you make an Impact and Sustainability Action Plan with specific high-impact actions, each with a deadline, responsible person, and resource allocation, to keep your TAAP momentum going and growing.

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GLOSSARY *OF TERMINOLOGY*

The authors recognize that there are different perspectives on many of the terms described. The definitions below indicate how the terms are being used in the context of this toolkit. They were developed through extensive literature review and consultation with TAAP stakeholders. Where a definition has been taken verbatim from another source, we have provided the relevant citation.

Access	A person's ability or right to take full and equal advantage of opportunities that come from economic, social, and political development.
Accountability	The process of using power responsibly, taking account of, and being held accountable by, different stakeholders, primarily by those affected by the exercise of such power.
Agency	Self-determination, autonomy, power, and ability to make decisions freely; to exercise power within society, household, and over one's own body; to participate in society.
Appreciative Inquiry	A meeting-facilitation and project-leadership technique that seeks to engage stakeholders in self-determined change. Rather than focus on "problem solving" or addressing challenges, appreciative inquiry focuses on envisioning, articulating, and planning for a desired future state that reflects stakeholders' desires and thus does not depend on coercion, persuasion, or incentives.[1] FIND IT ONLINE
Barriers	Hindrances to a person's or identity group's growth, well-being, safety, development, etc. as an individual and/or as part of society at large.
Boosters	Already-favorable factors or conditions upon which inclusion work can build.
Dignity	The state or quality of being honored and respected; the ability of members of marginalized and excluded identity groups to live free from stigma and discrimination.
Discrimination	Unjust or prejudicial treatment of different categories of people, especially on the basis of an identity (e.g., age, race, ethnicity, sex).

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[1] Cooperrider, David and Suresh Srivastva.(1987). Appreciative inquiry in organizational life. Greenwich, CT: JAI Press, Inc. https://www.centerforappreciativeinquiry.net/wp-content/uploads/2012/05/APPRECIATIVE_INQUIRY_IN_Orgnizational_life.pdf

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Displaced persons	People forced to flee their homes due to persecution, conflict, violence, or human rights violations. This category includes internally displaced people (seeking safety in other parts of their own country) as well as asylum seekers and refugees (people seeking safety and international protection in other countries).
Exclusion	Multi-dimensional processes driven by unequal power relationships across four dimensions (economic, political, social, and cultural) and at different levels including: individual, household, group, community, country, and global, resulting in deprivation of agency, access, and power.
Gender	Socially defined differences between women and men, girls and boys, including economic, social, and political roles, responsibilities, rights, entitlements, characteristics, obligations, and power dynamics associated with sex and sexuality. The social definitions of what it means to be female or male vary among cultures and change over time.
Identity-based Violence	Failure to recognize human rights or violations of human rights perpetrated against individuals or groups due to identity. Such violation undermines physical and mental health, well-being, dignity, security, and autonomy; it may include explicit threats of such consequences. IBV prevents affected individuals and groups from fully participating in and contributing to society.
Inclusion/Social inclusion	The process of improving the ability, access, dignity, and opportunity of people, disadvantaged on the basis of social identity, to take part in society. This process requires changing systems and challenging norms.[2]
Inclusion Responsiveness	A step beyond inclusion sensitivity, inclusion responsiveness describes the step by which an individual's or team's awareness of marginalization spurs pro-active program design to address marginalization and to engage marginalized identities as agents of change.
Inclusion Sensitivity	Awareness on the part of an individual or organization of the disparities in marginalized and excluded groups' agency, access, and power to contribute their voices and experience.
Inclusive design	The process by which project teams apply the results of inclusion analysis and translate them into project choices aimed at maximizing inclusion, taking into consideration any organizational limitations or constraints.
Intersectionality	How our individual identities (race, gender, disability status, and age) interact in ways that can intensify the inclusion or exclusion we experience. INTERSECTIONALITY

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[2] This definition is adapted from the World Bank definition (i.e., "The process of improving the ability, opportunity, and dignity of people, disadvantaged on the basis of their identity, to take part in society.") and the UN definition (i.e., "the process of improving the terms of participation in society, particularly for people who are disadvantaged, through enhancing opportunities, access to resources, voice and respect for rights.") The adapted definition is the result of extensive TAAP consultations with thought leaders and social inclusion practitioners.

CONTINUE >

LGBTI Persons	People who identify as lesbian, gay, bisexual, transgender, or intersex; sexual or gender minorities. This is a broad inclusive term for populations whose perceived or real sexual orientation, gender identity and expression, or sexual characteristics do not conform to commonly accepted norms.
Marginalization	Dynamic processes resulting in a group or class of people becoming less important or relegated to a secondary position due to a) underdevelopment, lack of resources, distance; b) oppression; or c) lack of cultural integration, lack of adaption to norms.
Marginalized Populations	Groups of people who, based on their identity, are relegated to less important, secondary roles of power or participation in the political, social, and economic lives of their societies.
Minority	"National or ethnic, religious and linguistic minorities," pursuant to the United Nations Minorities Declaration. (United Nations Office of the High Commissioner. 1992. Declaration on the Rights of Persons Belonging to National or Ethnic, Religious and Linguistic Minorities. Adopted 18 December. [http://www.ohchr.org/EN/ProfessionalInterest/Pages/Minorities.aspx])
Normative change	A shift in how individuals, groups, or societies define accepted standards of behavior, activities, or culture.
Older Persons	People aged 60 or older.
Persons with disabilities	People who have long-term physical, mental, intellectual, or sensory impairments and may be hindered by society from achieving full, equal, and effective participation in society.
Positional Awareness	Recognition of where one fits in a society in relation to others, and of who has and does not have agency, access, and power.
Power	The degree of control, whether at the individual or social level, over material, human, intellectual, financial, or other resources. Power is dynamic and relational, exercised in social, economic, and political relations.
Sex	The classification of people as male or female.

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Racial, Ethnic, and Indigenous Identities	Those who identify as a member of a group that may share some of the following elements: culture, race, language, or place of origin. Although we believe that cultural identities should be defined as ethnicities or ethnic groups, we have chosen to retain the term *racial* alongside *ethnic and indigenous identities* because in some countries the term race is still used to refer to cultural diversity. There is no biological evidence to support the existence of distinct races, but the use of the term race acknowledges that practices of racism and racial discrimination nevertheless persist and need to be combated.
Religious Identities	Those who identify with a set of beliefs that relate humanity to the spiritual world. Religious identities may or may not be part of an organized system and participate in religious activities. Often such identities intersect with political and ethnic identities, and may be hard to distinguish from them. It is important to create space for diversity within religious identities. Some may be strict adherents to the core tenets of a religion, others may be less strict and identify loosely. In some contexts, particularly those with one dominant religion, a person who does not identify with any religion should be considered a minority with inclusion needs.
Resilience	The ability of a system, community, or society exposed to a hazard to resist, absorb, accommodate to, and recover from the effects of that hazard in a timely and efficient manner, including through the preservation and restoration of its essential basic structures and functions.[3]
Transformation	The process by which discrimination, inequality, and egregious power imbalances are changed into inclusive societal outcomes. This process recognizes that addressing marginalization and exclusion requires an active change in the systems and social norms of everyday life.
Vulnerability	The diminished capacity of an individual or group to anticipate, cope with, resist, and recover from the impact of a natural or human-made hazard. Vulnerability is most often associated with poverty, but also arises when people are isolated, insecure, and defenseless in the face of risk, shock, or stress.
Youth	Young people between the ages of 15-29.

Congratulations, you have now familiarized yourself with the terms needed to navigate the toolkit.

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[3] United Nations Office for Disaster Risk Reduction, UNISDR Terminology and Disaster Risk Reduction (Geneva: 2009). http://www.unisdr.org/files/7817_UNISDRTerminologyEnglish.pdf

FAQs *ABOUT THIS TOOLKIT*

Who is it for?

The primary audiences for this resource are people responsible for designing, implementing, monitoring, and sustaining impact of development and humanitarian projects. You do not need prior experience with social inclusion. However, some phases require expertise in specific technical areas; these are clarified at the beginning of each phase.

How is it structured and used?

The core of the toolkit are the activities designed to apply TAAP inclusion principles across the project life cycle. As noted elsewhere, the activities are grouped into four sequential phases and two cross-cutting sections.

Do all the activities require a facilitator?

Many but not all. Each activity includes an introduction which indicates whether a facilitator is recommended (along with how much time should be budgeted, whether the activity assumes completion of any prerequisite activities, any materials or supplies that might be required, and other basic information).

What qualifications should a facilitator have?

With the exception of those in Phase II, the TAAP toolkit activities can be facilitated by non-specialists provided they have certain basic skills and characteristics.

* See next FAQ for specific facilitator qualifications.

CONTINUE ›

What specific qualifications should a facilitator have?

#1: The facilitator need not be an external professional, although it is recommended in Phase II: Social Inclusion Analysis.

#2: The facilitator should be respected and confident in his or her ability to carry out the tasks.

#3: The facilitator should have good organizational skills. The process is straightforward, and facilitators should have a high ability to organize and access needed tools, processes, and materials.

#4: The facilitator should demonstrate high levels of respect for all participants, and commit to ensuring that all stakeholder needs are discussed and addressed throughout the process.

#5: The facilitator should be able to keep others on task, and maintain reasonable time frames.

#6: The facilitator should allow equal "air time" for all participants, ensuring that all voices are heard in the group. (This may require encouraging the reluctant to speak, the talkative to yield, or both.)

#7: Organizations should proactively engage facilitators who bring the skills and characteristics discussed above and who bring the lived experiences of marginalized and excluded people.

CONTEXT **SENSITIVITY**

Where is specialized support required?

We strongly recommend that organizations consider engaging specialized expertise for Phase II. Phase II involves primary research (key informant interviews, focus group discussions), secondary research (desk review of existing relevant literature and studies) and a final deliverable of a written report. Phase II activities will likely require a team, which should have: subject matter expertise in development work generally and inclusive programming specifically; experience in carrying out primary and secondary research; data analysis and the ability to write clearly and compellingly for general audiences. If your organization needs help identifying expertise, please contact taap@worldlearning.org.

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Can an implementer use only part of the Toolkit?

"Stand alone" options are identified at the beginning of each phase through the "prerequisite activities" notation and by this icon.

We encourage full use of all phases when possible. If you just want to find which tool to use for a particular task, see ANNEX 3, "I JUST WANT TO…".

How can we balance the imperative of transforming agency, access, and power while working in environments that are not yet ready to undertake normative and systemic change across all identity groups?

Every society is at a different point on the pathway to social inclusion. The Sustainable Development Goals' Leave No One Behind 2030 Agenda recognizes that the dignity of the individual is fundamental and that SDG "targets should be met for all nations and people and for all segments of society."[4] The TAAP approach emphasizes the importance of identifying who is left behind, the barriers to universal agency, access and power, and the boosters (i.e., the already favorable factors or conditions upon which inclusion can be built) that can be leveraged. The World Bank's *Inclusion Matters* report asserts that: "The process of fostering inclusion is incremental. It requires time and unwavering commitment." You are encouraged to foster inclusion as you can, with what you've got, based on where you are—but with unwavering commitment.[5]

What other resources are available?

The TAAP Inclusion website (www.taapinclusion.org) includes a wealth of additional information such as:

- Global snapshots (the global situation in brief for each identity group: displaced persons; LGBTI persons; older persons; persons with disabilities; racial, ethnic and indigenous identities; religious identities; women and girls; youth) with selected boosters and barriers.
- Real-world scenarios that illustrate TAAP principles and approach in action.
- An expanded discussion of the Theory of Change and how TAAP activities promote change at different levels of the Social Ecological Model.
- Additional inclusion indicators.

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[4] United Nations Statistics Division, 2016, The Sustainable Development Goals, Retrieve from https://unstats.un.org/sdgs/report/2016/leaving-no-one-behind

[5] World Bank. 2013. Inclusion Matters: The Foundation for Shared Prosperity (Advance Edition). Washington, DC: World Bank, xvii.

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How can we exercise care in our work?

The TAAP approach seeks to advance marginalized and excluded communities, many of whom have differing needs. TAAP users should be constantly aware of opportunities to safely include and engage people of all identities, ages, and persons with mobility disability, hearing impairment, visual impairment, cognitive impairment, or other accessibility issues. Users should reflect on and plan to provide reasonable accommodations linked to universal design (i.e., the design and composition of an environment so that it can be accessed, understood and used to the greatest extent possible by all people). Efforts to change attitudes and systems require persistent sensitivity and responsiveness to the specific needs, skills, and lived experiences of different identities.

CONTEXT SENSITIVITY: LEGAL AWARENESS AND COMPLIANCE

There may be instances where the law or local norms requires or forbids certain actions on your part. For example, some countries mandate that all reported or suspected instances of domestic violence be shared with law enforcement. In other countries, certain sexual practices, even between consenting adults, are considered crimes. All staff should have an understanding of potential harms that can happen during an inclusion effort. It is also essential that your organization understand the laws governing your project's host country and have a compliance strategy. This may require hiring local law firms to advise you on your proposed inclusion programming.

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Please note that many of the exercises involve participants sharing personal information about their identities and lives which may reveal painful experiences of exclusion, violence, or abuse. Discussions of power and discrimination may also inadvertently expose some marginalized or excluded groups to added risk of violence or abuse. The authors of this toolkit request that all users conduct risk analysis and develop appropriate risk mitigation strategies before undertaking activities.[6]

Protecting marginalized and excluded people must always remain of paramount importance: being "outed" as LGBTI, for example, can put individuals at risk of familial exclusion, loss of income, violence, as well as arrest in some countries. The high rate of trauma among marginalized and excluded populations requires a skilled approach to ensure their safety and comfort. Be aware of the possible effects of the kinds of research you're conducting and follow standard ethical protocols.

(See also Cross-Cutting Section: Inclusive Monitoring, Evaluation, and Learning.)

CROSS-CUT TO MEL

It is important to ensure all participants' confidentiality and informed consent before doing any of the TAAP activities. Understanding the risks participants face if confidentiality is violated can, in fact, be a first step in understanding the realities of marginalization and exclusion. Most organizations have their own data-collection procedures and specific templates to ensure confidentiality and consent of respondents. (Human resources, M&E, marketing, or other departments may have such forms; if none are available, please see the TAAP Inclusion website at www.taapinclusion.org.

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[6] We assume that most organizations committed to pursuing a serious effort at inclusion have already reached a stage of institutional development where risk analysis and risk mitigation strategies are produced as part of standard operating procedure. There are resources available online for general risk management guidance. See for example USAID's Developing a Risk Management Plan (https://www.usaid.gov/sites/default/files/documents/1864/Developing-a-Risk-Management-Plan.pdf)

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How can we support survivors of violence and discrimination? ⚠ EXERCISE CARE

Before implementing any of the TAAP activities or data collection process, we suggest you document the procedures you will follow when abuse, neglect, violence, or ongoing acts of discrimination may be revealed. Work with your organization's relevant staff and other actors as necessary to identify a standard operating procedure that should be followed in such situations. Be aware of any inter-agency mechanisms that may exist to confidentially respond to reports of sexual abuse and exploitation. For example, in some contexts, reports of violations perpetrated by development actors or service providers may be reported to multilateral agencies or to industry-association groups.

Plan to offer survivors up-to-date information about available services and how to access them. Identify organizations that provide specialized case management for survivors of violence, and understand whom they serve (e.g. women and girls; children; male survivors). Consult with local LBGTI, youth, disability-focused, and other relevant organizations to identify the services that are trusted by their respective constituencies. Meet with social workers, health specialists, and other actors within existing formal and informal referral systems to share information about the TAAP activities, and collect information (e.g. services available, any costs or fees, contact names, phone numbers, hotlines, etc.) that can be shared with survivors seeking support.

EMPHASIS ON **DIGNITY AND AGENCY**

The wishes of the survivor about whether, where, or from whom to seek help must always be respected to the extent allowable by law; the survivor should not be pressured into a course of action.

You should always obtain survivors' informed consent prior to contacting any organization on their behalf, and explain what the procedures might be. Clarify how the survivor would like to be contacted by the specialized service provider, and only share the minimum information necessary for the referral (e.g. first name, contact number to be reached, best time to call). If the survivor does not request or consent to your contacting a service provider, then you should provide them with information on where and how they can access services themselves should they so choose.

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How can we better engage civil society?

Local civil society organizations representing marginalized or excluded groups can play a critical role.

CONSULT WITH PARTNERS

They can provide context-specific guidance on how to safely engage marginalized or excluded individuals; locations that are safe for these individuals to meet; and services that are appropriate for those who may request additional support. They can also provide advice on local legal obligations and implications,[7] such as mandatory reporting processes and how to reduce the risk of further harm relating to these processes.

Congratulations, you have now finished the Introduction.

Continue to the Overview of the TAAP Initiative

CONTINUE ›

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[7] The input of local civil society organizations is not a substitute for advice of legal counsel. All TAAP practitioners are strongly advised to engage qualified legal representation if necessary to ensure compliance with laws in their countries of operation.

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OVERVIEW
OF THE TAAP INITIATIVE

THE TRANSFORMING AGENCY, ACCESS, AND POWER (TAAP) INITIATIVE:[8]

THE IMPERATIVE OF INCLUSIVE DEVELOPMENT

Development projects have many different goals. They might involve improving health, ensuring housing, providing access to education, or sustaining the environment. Some projects are broad based (e.g. nationwide vaccination campaigns) while others are highly specialized (e.g., smartphone apps to expand vital and affordable financial services). There are short- and long-term projects, some seeking to drive change from the bottom up, others from the top down. But in all, there tends to be one common goal: *to effect transformative social change.*

To effect truly transformative social change, every humanitarian and development project must be grounded in evidence, must include all stakeholders, and must take human rights into account. The World Bank's seminal publication INCLUSION MATTERS[9] provides evidence that inclusion is critical to humanitarian and development projects' success, and that inclusion can be planned for and achieved. Inclusive development describes the obligation of all humanitarian and development actors to respect, protect, and pursue the fulfillment of basic human rights.

> *"All human beings are born free and equal in dignity and rights. Human rights are inherent and inalienable in human beings, simply by the fact of their being human."*
>
> – ARTICLE I OF THE UNIVERSAL DECLARATION OF HUMAN RIGHTS

CONTINUE ›

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[8] The TAAP Initiative refers to the strategic imperative of investing in inclusive project design. The TAAP Initiative includes the approach (framework, principles, and project cycle integration), toolkit, newsletter, partnerships, thought leadership, learning agenda.

[9] World Bank. 2013. *Inclusion Matters: The Foundation for Shared Prosperity*. Washington, DC: World Bank. (http://siteresources.worldbank.org/EXTSOCIALDEVELOPMENT/Resources/244362-1265299949041/6766328-1329943729735/8460924-1381272444276/InclusionMatters_AdvanceEdition.pdf)

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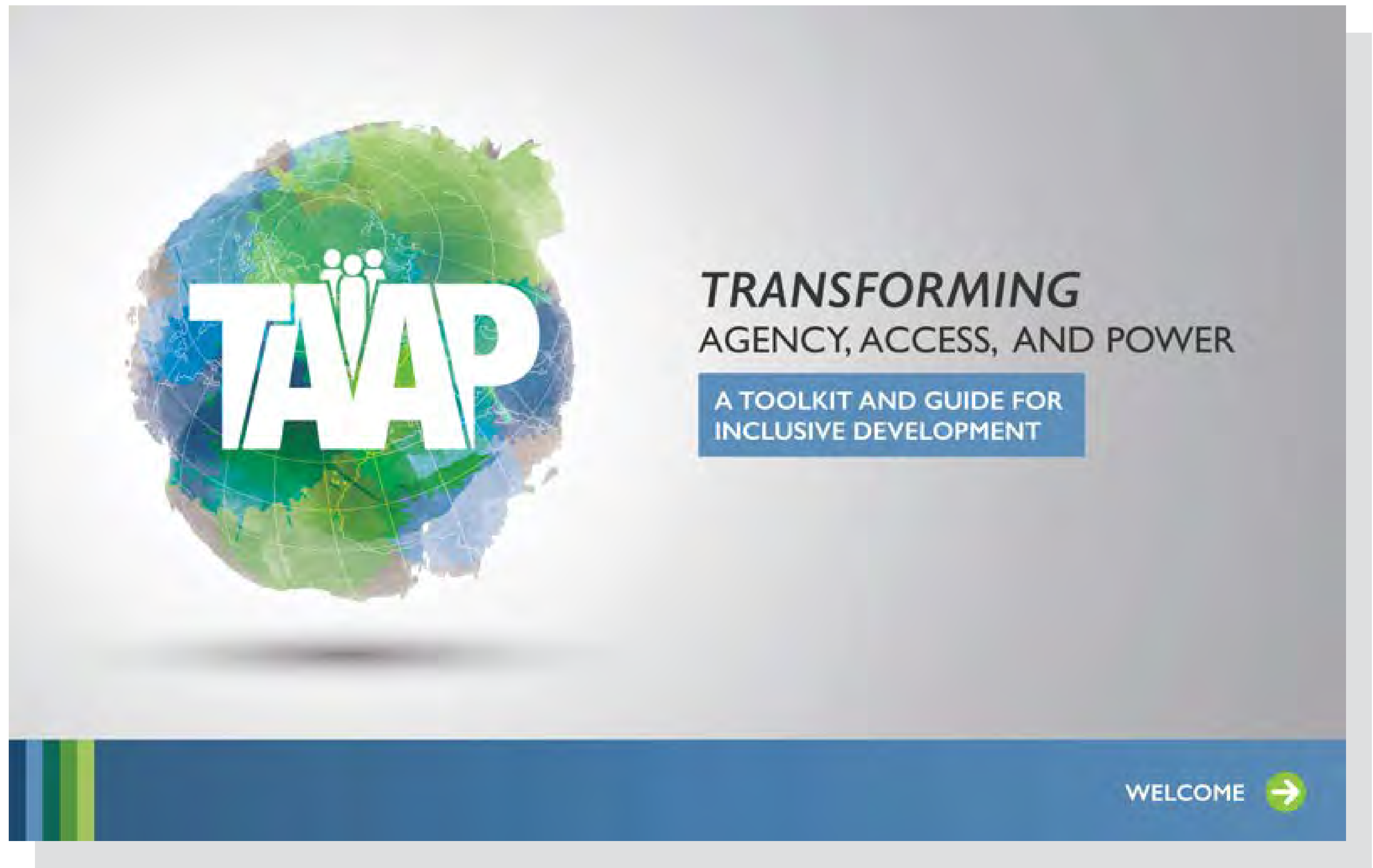
Those rights are set forth in many formal frameworks, including the Universal Declaration of Human Rights and the Sustainable Development Goals (SDG)s. The quote "If you have come here to help me, you are wasting your time but if you have come here because your liberation is bound up with mine, then let us work together" speaks to this obligation and recognizes that the rights and dignity of all people are interdependent. The TAAP approach reflects the belief that sustainable development is only possible if no one is left behind.



TRANSFORMING
AGENCY, ACCESS, AND POWER
A TOOLKIT AND GUIDE FOR INCLUSIVE DEVELOPMENT

WELCOME

The commitment to ensure that everyone is included is the focus of the TAAP Toolkit and Guide for Inclusive Development.

TAAP is a unique approach to ensuring inclusion. It is universal, intersectional, and transformational.

INTERSECTIONALITY

It works across identities, and recognizes that compounded layers of identity (also known as intersectionality)[10] bring both advantages and disadvantages to individuals and identity groups. The approach consists of the analytical framework, the five TAAP core principles, and the process of integrating inclusion throughout the project cycle which is the subject of this toolkit.

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[10] Intersectionality is discussed throughout this toolkit, most notably in Annex 2.

TAAP's transformational approach challenges development actors to engage not only those who lack agency, access, and power, but also those who have it, to support all actors to work together to create meaningful social change.

TAAP brings together the *humanitarian* (i.e., work aimed at reducing suffering and building resilience) and the *development* (i.e., work that responds to ongoing structural issues) perspectives. Development efforts must be inclusive of populations affected by crisis and conflict, with humanitarian efforts also complementing longer-term development in these contexts.

TAAP provides an analytical framework and practical tools so all practitioners, whether focused on humanitarian relief or development, can:

- Reflect on the biases, sources of power, and barriers to inclusion in communities.
- Analyze data on global, country, project, and identity-based levels to identify barriers to, and opportunities for, inclusion.
- Design, implement, monitor, and evaluate projects that intentionally work with diverse populations.
- Pursue responsive and transformative solutions to expand inclusion.
- Advance more peaceful and just societies.
- Build awareness of your project, partners, and team as inclusion champions.

TAAP also provides a practical resource to put your commitment to inclusion into action—in your own organizational culture and throughout every project lifecycle. By applying the practical exercises in this toolkit, we can fully integrate the principles of inclusion into all our work, increasing the **agency, access and power**[11] of marginalized or excluded people—and thereby advancing more peaceful, just societies.

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[11] See definitions in GLOSSARY

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TAAP BACKGROUND

When working to address barriers to inclusion, it is important to recognize that every society has its own specific power structures. There are people and groups who control resources and make decisions. There are also marginalized populations who are relegated to secondary positions and excluded populations who are shut out of power entirely. Marginalized and excluded populations are not necessarily the minority. For example, far more people are poor or working-class than are rich, but all over the world, a small number of very wealthy people wield much more power.

Women make up more than half the world's population but are routinely excluded from decision-making and the exercise of power. Marginalized groups may include: racial,[12] ethnic, religious, or indigenous identities; people with physical or other disabilities; youth; older persons; people with different gender identities or expressions; and displaced persons. Although each such group may be itself a minority, collectively they might represent a sizeable majority, particularly if we take into account *intersectionality*.

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[12] The authors recognize that "racial" categories are societal and cultural constructs rather than objective scientific realities. But given the persistence of those constructs, and the major role they play in marginalization and exclusion, it is important to the TAAP approach to address the notion of "race."

Intersectionality is the understanding that a person may enjoy advantages, or suffer disadvantages, on the basis of multiple identities rather than just one.

INTERSECTIONALITY

For example, a woman may be poor, elderly, and have a disability. An adolescent or young adult may be gender non-conforming and an ethnic minority. To understand the barriers that face excluded communities it is important also to understand the compounding factors that make those barriers even more difficult to overcome. This requires an in-depth analysis of the stakeholders in the project's context, and a structured and intentional effort to ensure inclusion for all. The TAAP Toolkit and Guide for Inclusive Development can help accomplish this. ANNEX I contains an extensive discussion of intersectionality.

About the Identity Groups.

We recognize that there are many people, disadvantaged on the basis of their identity, who are excluded from taking part in society. TAAP focuses on eight identity groups that are significant to the power dynamics of all societies:

- *Displaced people*
- *LGBTI persons*
- *Older persons*
- *Persons with disabilities*
- *Racial, ethnic, and indigenous identities*
- *Religious identities*
- *Women and girls*
- *Youth*

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We recognize that men and boys also suffer from forms of gender-based discrimination and rigid gender norms. Statistically, however, women and girls are far more likely to be traditionally marginalized and excluded from agency, access, and power.

As you conduct the SOCIAL INCLUSION ANALYSIS (IN PHASE II), 🔍 you will learn more about the included, marginalized and excluded identities in your specific context.

TAAP's definitions **(SEE** GLOSSARY**)** 🔍 are grounded in the principle of self-identification noted in international standards, including the UN Committee on the Elimination of Racial Discrimination (CERD). Those standards affirm that unless there is justification to the contrary, identification of persons as members of a racial or ethnic group will be based on "self-identification by the individual concerned."

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TAAP OVERVIEW

Before you get started, read this brief overview of the Transforming Agency, Access and Power (TAAP) principles and processes. You'll also be reminded of them as you work through the tools.

TAAP'S *Five Principles*

PARTICIPATORY **APPROACHES**

CONTEXT **SENSITIVITY**

EMPHASIS ON **DIGNITY AND AGENCY**

ADDRESS **POWER IMBALANCES**

THINK BIG **THINK THE IMPOSSIBLE**

CONTINUE >

PARTICIPATORY
APPROACHES

The participatory approach begins with analyzing a project's objectives and approach, then identifying all of the population segments who stand to be affected and should thus have ultimate ownership and control.

KEY CONSIDERATIONS INCLUDE:

- Understanding how to balance representation of marginalized and disadvantaged groups.
- Providing mechanisms for safe participation.
- Effective listening.
- Implementing feedback and complaints procedures.
- Ensuring appropriate use of data that comes from participation.
- Reporting back to those who participated.
- Establishing accountability at all levels.

Applying this principle means that all stakeholders who are affected by your work are not just listened to but have an active role in decision-making throughout the project's implementation.

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CONTEXT **SENSITIVITY**

Context sensitivity is about applying what you learn for maximum impact. Although an understanding of global or regional trends may provide guidance, it is vitally important to understand local norms and to weave that understanding throughout all projects.

Doing so helps ensure that you identify the local power dynamics (and marginalization dynamics) so that your project can remove barriers to inclusion, mitigate unintended consequences, and provide pathways to inclusion. Context sensitivity is a fundamental principle of good development and is vitally important for the safety, dignity, and well-being of marginalized and excluded people. This principle allows you to:

- Understand the inter- and intra-group dynamics of the local context, including trends relating to crisis and conflict which may affect stakeholders and target groups.
- Understand interactions between a project's interventions and the context and group relations.
- Act upon insights from local voices and prior experience to avoid the negative and maximize positive effects.

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EMPHASIS ON DIGNITY AND AGENCY

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Dignity

Dignity is the state of being honored and respected. In the TAAP framework, dignity refers to the ability of marginalized and excluded peoples to live free from stigma or discrimination.

Agency

Agency is the power and ability to decide how you participate in your society. It refers to a person's capacity to make decisions freely, and to exercise power over his or her own body and within the household, community, and wider society.

By practicing this principle, organizations working for social change can avoid contributing to oppressive structures or reinforcing norms that constrain individuals' capacity to determine and pursue their own priorities and to serve as agents of change in their society.

CONTINUE ›

ADDRESS **POWER IMBALANCES**

……

This addresses your responsibility to promote policies and initiatives that treat all stakeholders with equality. Equity does not mean that everyone gets the same thing. Equity means that everyone gets what they need. It recognizes that every society has historical power structures that work to the maximum benefit of some while marginalizing or excluding others.

Practicing this principle depends on practicing Principle 1: Participatory Approaches so that you deeply understand the populations your work will impact, the nature and conditions of their marginalization or exclusion, and what they need to exercise agency and empowerment.

Practicing this principle also means understanding that "one size does not fit all." TAAP seeks to understand the many layers of identity-based power distribution and to find inclusive ways to address power imbalances—in part by fostering direct connections between historically marginalized and excluded populations and those in power—connections that would be unlikely to happen otherwise.

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THINK BIG
THINK THE IMPOSSIBLE

A problem-solving orientation can be a virtue. However, it can be a burden if it becomes a consuming worldview, if all you see are problems. We live in a world where things that were considered impossible less than a century ago—votes for women, universal public education, wheelchair access in public spaces—are completely unremarkable today in some countries.

It was the work of those who believed in a more inclusive society and their determined efforts that brought previously marginalized and excluded people to places of greater agency, access, and power. Practicing this principle means continually looking beyond our daily routine work, and creating space where we can dream big and orient our work toward that vision.

It requires focusing on the best use of resources so that we give priority to interventions with truly transformative potential.

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TAAP *THEORY OF CHANGE*

What Success Means and What It Requires

The TAAP Theory of Change (ToC) posits that expanding the agency, access, and power of historically marginalized and excluded people will require tackling entrenched norms, institutions, and power structures. The TAAP ToC rests on two core assumptions. First, it posits that transformations in attitudes, behaviors, and social norms depend upon a strong starting awareness on the part of the practitioner about the power dynamics among various groups. Second, the TAAP ToC assumes that the intervention must seek to effect change at different levels.

TAAP adapts Urie Bronfenbrenner's social ecological model[13] 🌐 as a framework for illustrating the overlapping spheres of influence and interaction through which the TAAP inclusion approach operates. The activities in this volume work in a similar dynamic interdependence, promoting and strengthening change at different levels.

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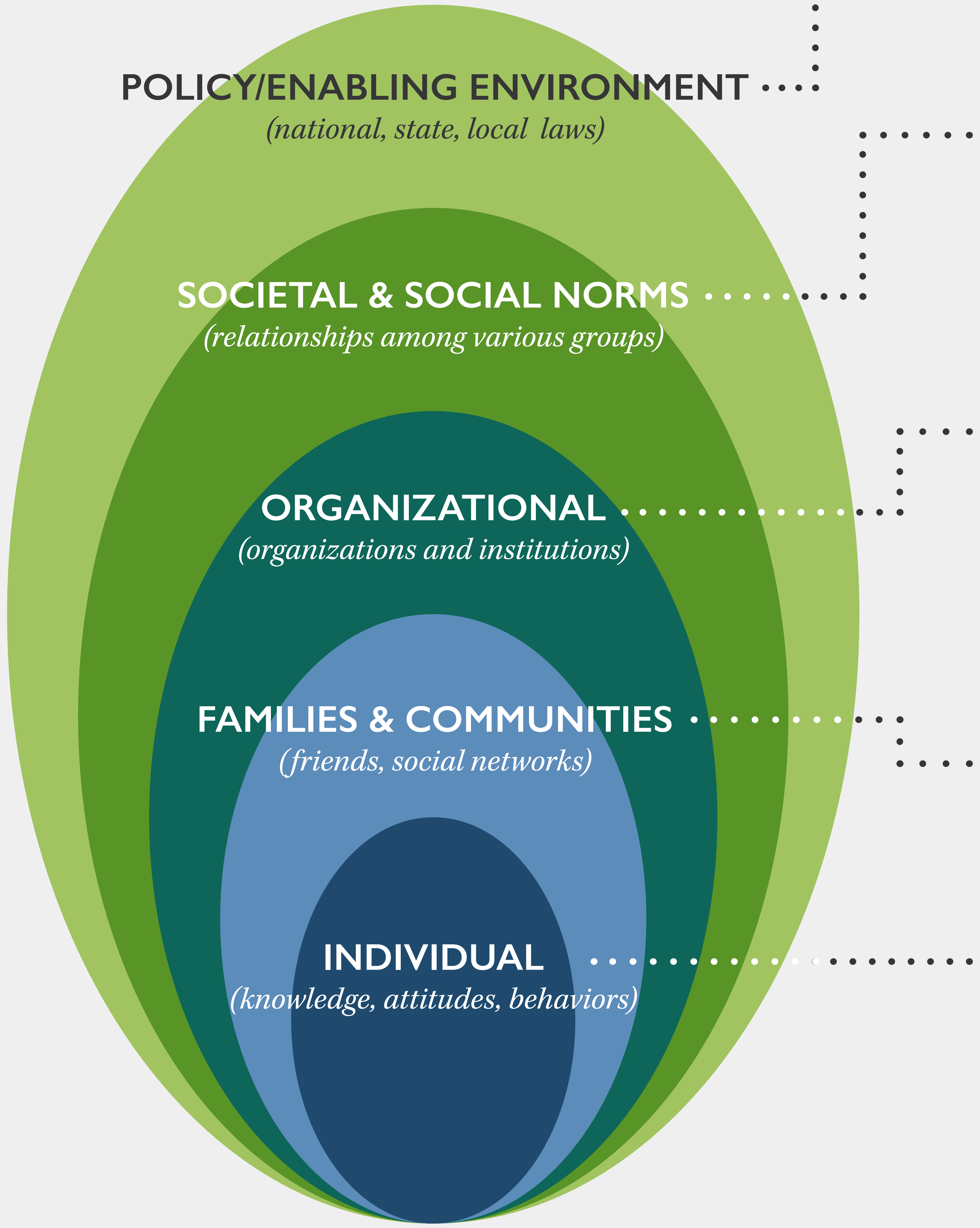
Levels of Change within ToC



POLICY/ENABLING ENVIRONMENT

Laws, policies and institutional practices that address, protect and promote agency, access and power for included, marginalized and excluded identity groups.

SOCIETAL & SOCIAL NORMS

Relationships among various social groups and networks, based on rules, norms, and behaviors that are accepted and followed.

ORGANIZATIONAL

Organized bodies of people with a specific purpose or interest (public, private, social) that influence the agency, access and power of social identity groups.

FAMILIES & COMMUNITIES

Formal (and informal) social networks and social support systems that can influence individual behaviors.

INDIVIDUAL

Characteristics of an individual that influence behavior change (knowledge; attitudes; behavior; self-efficacy; developmental history; sex; age; religious identity; racial/ethnic identity; gender identity; economic status; financial resources; values; goals; expectations; literacy; stigma etc.).

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[13] The TAAP Theory of Change was inspired by the work of Urie Bronfenbrenner (1917-2005), most notably Bronfenbrenner, Urie. 1979. *The Ecology of Human Development: Experiments by Nature and Design*. Cambridge, MA: Harvard University Press (https://khoerulanwarbk.files.wordpress.com/2015/08/urie_bronfenbrenner_the_ecology_of_human_developbokos-z1.pdf)

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PROJECT CYCLE:

How the TAAP Approach Works

TAAP activities are organized into four sequential phases, with two cross-cutting sections. The figure below illustrates the TAAP approach.

THE TAAP TOOLKIT AND GUIDE

PROJECT MANAGEMENT CYCLE

PHASE I

Inclusive Inquiry and Reflection- Team members explore their own personal identities and the organization’s identity as those identities relate to social inclusion.

PHASE II

Social Inclusion Analysis- Team members conduct a rigorous assessment of the landscape: stakeholders, operating environment, and the state of inclusion in that environment. This analysis will determine the project’s goals and its activities.

PHASE III

Inclusive Design- Design a project with inclusion-sensitive activities and budget.

PHASE IV

Inclusive Implementation- Implement the project, guided by an inclusion action plan.

CROSS-CUTTING SECTION MEL

Inclusive Monitoring Evaluating and Learning- Strengthens inclusion in programmatic M&E activities, with special attention to considerations around ethical data collection and usage.

CROSS-CUTTING SECTION IIS

Inclusive Impact and Sustainability (IIS)- Helps capture ambitious thinking: the plan to maximize the likelihood that the inclusion work embedded in project(s) will be truly transformative and sustainable.

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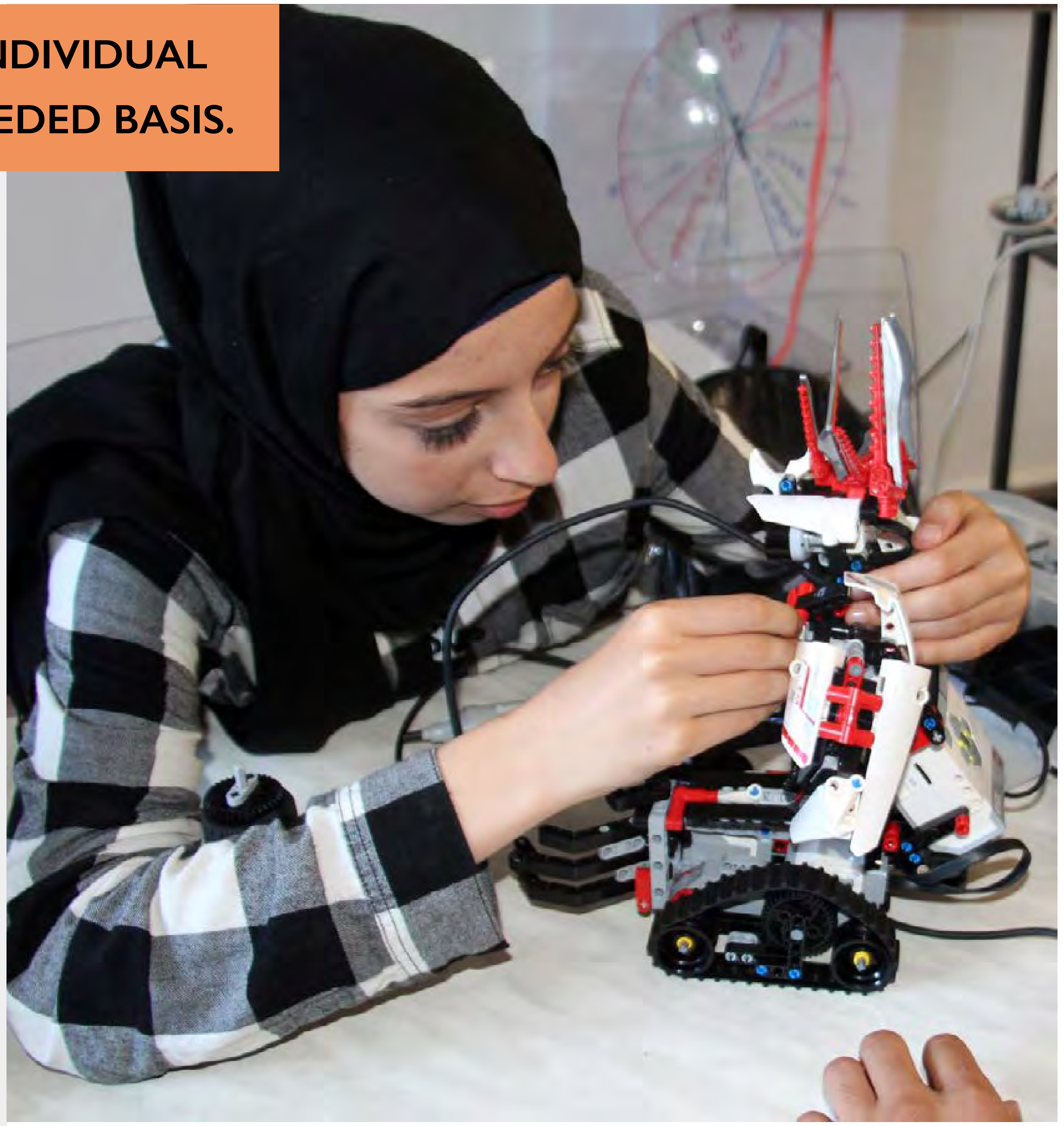
THE TOOLKIT ENTRY POINTS

THE TOOLKIT'S FORMAT ALLOWS YOU TO SELECT INDIVIDUAL PHASES, STEPS, OR SINGLE ACTIVITIES ON AN AS-NEEDED BASIS.

Note, however, that many activities assume completion of prerequisite activities; those prerequisites are noted in the activity introduction. We recommend doing the TAAP Approach in its entirety, integrating the cross-cutting sections throughout. The TAAP vision of fully inclusive societies is deliberately expansive and ambitious.

It requires a systematic and sustained commitment rather than a process fix. Regardless of which activity(ies) you undertake, we highly recommend that all users complete Phase I: Individual Inquiry and Reflection. Note that in some contexts it may be advisable to start Phase I with the organization rather than the individual-focused activities. This will allow team members and partners to first consider questions of organizational identity, which may feel more comfortable, before exploring their own.



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- **PHASE I**
  Inclusive Inquiry and Reflection
- **PHASE II**
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  Inclusive Design
- **PHASE IV**
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PHASE I
INCLUSIVE INQUIRY AND REFLECTION

By the time you finish this phase, you will have:

- Personal statements for each member of the project team which will inform and inspire their work.
- A statement about your organization's identity, guided by structured reflection and informed by multiple points of view.
- Indicators about inclusion in the community or context where your project operates.

THE BASICS

Phase I lays the foundation for all the work that follows. If the same team members tend to work together across multiple projects, you don't need to repeat Phase I each time unless important elements change, (e.g., country, marginalized or excluded groups). Although the TAAP authors encourage team members to develop individual and organizational awareness by completing all the activities, individuals may choose to prioritize Activity A.2, the Individual Inclusion-Sensitivity Rating Scale and Personal Statement.

For the Everyday Inclusion activity, the project team may work with local stakeholders and choose to go out into public spaces in the community or, if circumstances do not allow, the activity can be scaled back to an in-house reflection session with staff and key stakeholders. Either way, the intent is to develop a heightened and shared awareness of inclusion and exclusion.

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PHASE I

INCLUSIVE INQUIRY AND REFLECTION

WHAT	Inclusive Inquiry and Reflection (IIR) is a process to better understand two aspects of the practitioner—the individual and the organization—to see how both aspects interact with other individuals and groups.
WHO	Phase I focuses on individual staff, the organization, and at times a middle tier such as a project team, working group, or coalition.
WHEN	IIR lays the foundation for all the TAAP phases, steps, and activities that follow. It is iterative, continually revisited and updated as the project moves forward.
HOW	We recommend following steps and activities in order, starting with considerations of the individual in his or her own context and moving outward to consider external contexts.
WHY	To avoid perpetuating marginalization, it is vital to develop individual and organizational POSITIONAL AWARENESS: where we fit within society in relation to others, and about who has (does not have) agency, access, and power.

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PHASE I

INCLUSIVE INQUIRY AND REFLECTION

Phase I of the Toolkit has specific steps and associated activities. While the steps and activities suggest a linear sequence of events, in actual implementation there is often a more dynamic flow to the work. Some steps or activities may be occurring simultaneously and the work often circles back to revisit earlier steps.

STEP A Individual Inquiry and Reflection	Activity 1: Mapping Your Identity Activity 2: Individual Inclusion-Sensitivity Rating Scale and Personal Statement
STEP B Organizational Inquiry and Reflection	Activity 1: Mapping Your Organization's Identity Activity 2: Organizational Questionnaire
STEP C Recognizing Everyday Inclusion	Activity 1: Everyday Inclusion Indicators

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PHASE I
STEP A

INDIVIDUAL INQUIRY AND REFLECTION

Participants reflect on their own identity from a personal perspective.

This is necessary for individual practitioners to understand how their life experiences influence inclusiveness within the project, the organization for which they are working, and the external context in which the project or organization is aiming to make change.

WORKSHEET AVAILABLE
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ACTIVITY 1
MAPPING YOUR IDENTITY

Description	Questionnaire, mapping, reflection	
Overview	This exercise allows exploration of the many facets of our identities, and illustrates how identities can be a basis for "powering us up" or for "powering us down," serving as drivers of inclusion or exclusion.	
Objectives	• To inquire and reflect on which aspects of your identity have been marginalized or excluded and have less power than others as well as aspects where you have more power and privilege than others • To develop or increase awareness about your own positionality and acknowledge that it can change with context	
Why do this activity?	Identity is often complex. Different layers of our identity help us connect with others on many levels as we have an opportunity to share what we discover about ourselves. The exercise encourages reflection on which parts of our individual or collective selves can benefit from advantage and privilege (or conversely, can disadvantage us), thus giving us more or less power than others in different contexts. To prevent harm when working in diverse and dynamic teams and across cultures and power disparities, it's vital that programs and projects begin with increased awareness and sensitivity about how power and identity interact.	
Facilitator needed?	Optional	Internal
Time	2 hours	
Materials	GUIDING QUESTIONS FOR INITIAL REFLECTION A BLANK IDENTITY WHEEL FOR EACH PARTICIPANT GUIDING QUESTIONS FOR BUILDING SOCIAL IDENTITY AWARENESS	
Participants	Individuals, Project design and implementation team members, Partners or Participants	

REFLECT

CONTINUE ›

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PHASE I BASICS
STEP A Individual Inquiry and Reflection
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STEP B Organizational Inquiry and Reflection
STEP C Recognizing Everyday Inclusion

NOTE TO FACILITATOR

⚠ EXERCISE CARE

Before beginning Activity A.1 "Mapping Your Identity," decide whether this is an individual activity, project-team based, or with partners or participants. We advise you to set some ground rules that will be the foundation for encouraging open discussion while maintaining dignity, safety, and confidentiality for all. The exercise as introduced here is for project team members to pause and reflect as they undertake a new project. The exercise can also be used as part of a team retreat. If the exercise is used in a training session, the facilitator should assess participants' individual and collective readiness to undertake the exercise, lay a foundation about identity-based inclusion and exclusion concepts, and establish an atmosphere of trust and comfort with sharing personal information.

PART I GUIDING QUESTIONS FOR INITIAL REFLECTION

Questions should be tailored to reflect the social and cultural norms of the local context. The facilitator should emphasize that participants are not required to share personal information. Emphasize that topics discussed in this session may touch on topics that are traumatic, such as sexual or ethnic violence, and encourage participants to determine how they will engage. If participants have questions about different identities, suggest they review the **GLOSSARY**.

See next page for Guiding Questions.

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PART I GUIDING QUESTIONS FOR INITIAL REFLECTION

WORKSHEET

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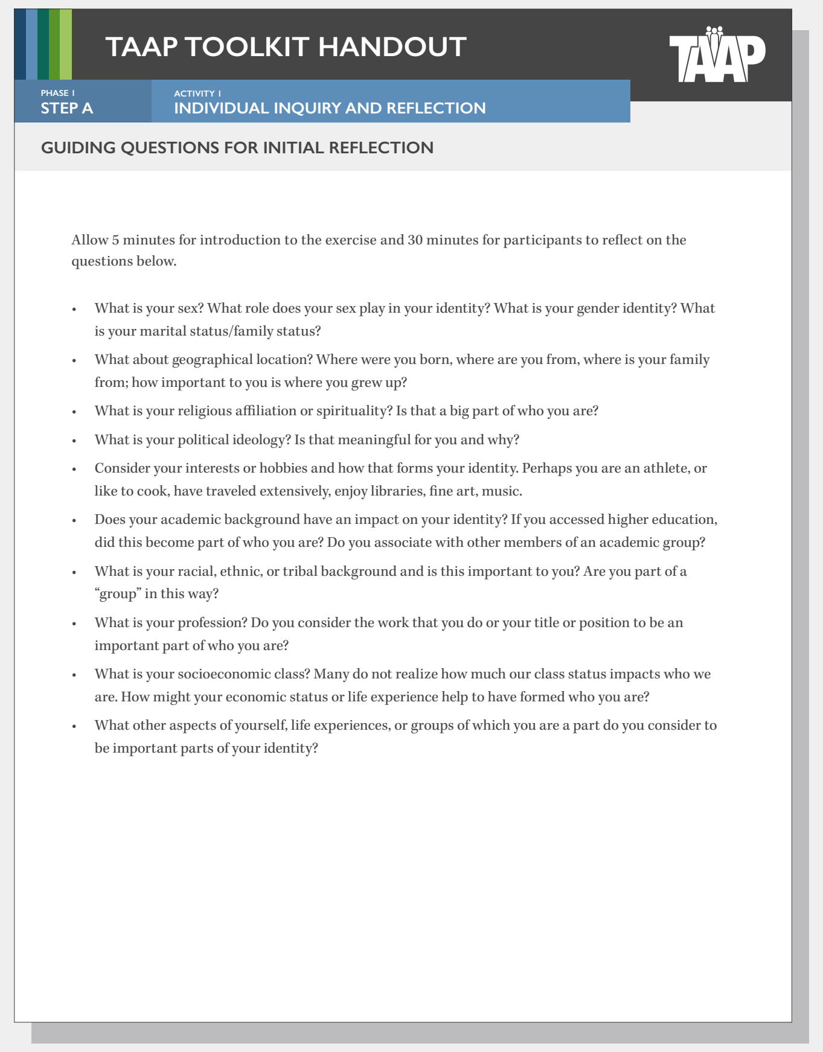
TOOLSHOP *Also available in the One-Stop Toolshop*



Allow 5 minutes for introduction to the exercise and 30 minutes for participants to reflect on the questions below.

- What is your sex? What role does your sex play in your identity? What is your gender identity? What is your marital status/family status?
- What about geographical location? Where were you born, where are you from, where is your family from, how important to you is where you grew up?
- What is your religious affiliation or spirituality? Is that a big part of who you are?
- What is your political ideology? Is that meaningful for you and why?
- Consider your interests or hobbies and how that forms your identity. Perhaps you are an athlete, or like to cook, have traveled extensively, enjoy libraries, fine art, music.
- Does your academic background have an impact on your identity? If you accessed higher education, did this become part of who you are? Do you associate with other members of an academic group?
- What is your racial, ethnic, or tribal background and is this important to you? Are you part of a "group" in this way?
- What is your profession? Do you consider the work that you do or your title or position to be an important part of who you are?
- What is your socioeconomic class? Many do not realize how much our class status impacts who we are. How might your economic status or life experience help to have formed who you are?
- What other aspects of yourself, life experiences, or groups of which you are a part do you consider to be important parts of your identity?

REFLECT

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PART 2 SOCIAL IDENTITY WHEEL

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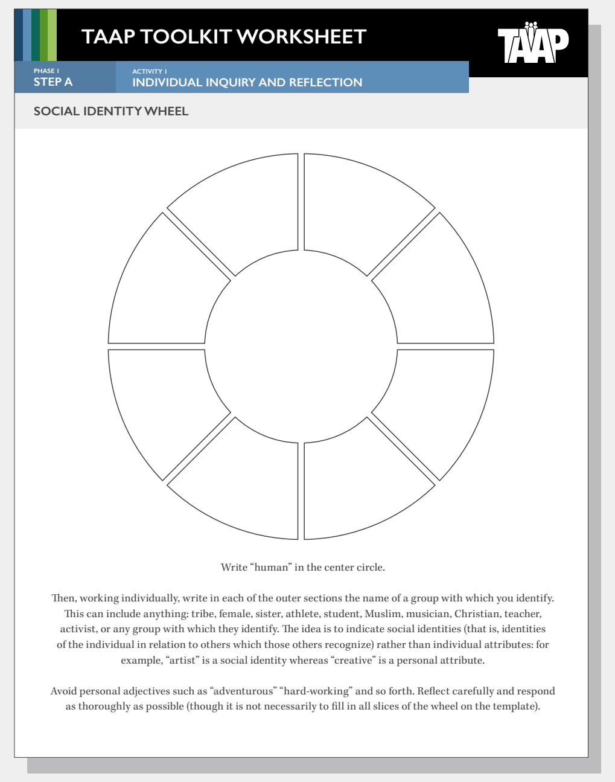
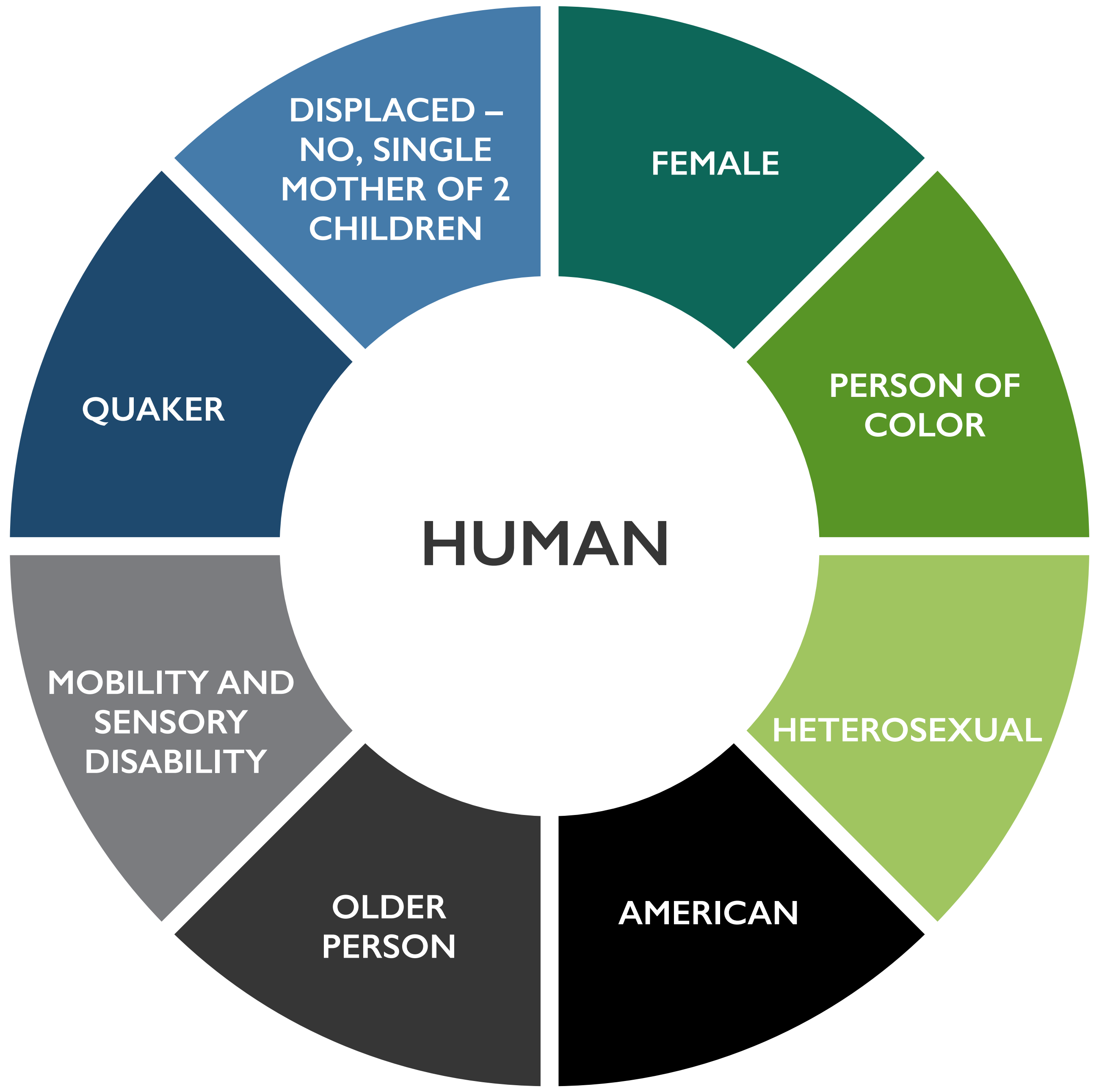


I 15 MINUTES

Give each participant a blank social identity wheel and ask each person to write “human” in the center circle. Then, working individually, ask them to write in each of the outer sections the name of a group with which they identify. This can include anything: tribe, female, sister, athlete, student, Muslim, musician, Christian, teacher, activist, or any group with which they identify. The idea is to indicate social identities (that is, identities of the individual in relation to others which those others recognize) rather than individual attributes: for example, “artist” is a social identity whereas “creative” is a personal attribute.

Ask participants to avoid personal adjectives such as “adventurous” “hard-working” and so forth. They should reflect carefully and respond as thoroughly as possible (though it is not necessary to fill in all slices of the wheel on the template).

IDENTITY WHEEL **SAMPLE**



PRE-FILLED
IDENTITY WHEEL

CONTINUE ›

PART 2 SOCIAL IDENTITY WHEEL

2 10 MINUTES

Once they have completed the identity wheel, ask them to reflect on which identities bring them advantage and power, and which, if any, of their identities have been marginalized or excluded.

REFLECT

3 10 MINUTES

Then ask participants to insert a blue UP arrow in any part of their identity wheel where they feel this aspect of identity creates unity or connection with other groups—where belonging to this identity might "power you up", providing advantages and privilege.

4 10 MINUTES

Then ask them to insert a red DOWN arrow in any part of their identity wheel where they feel or have experienced marginalization or exclusion as a member of that group; if they feel that this identity "powers you down," creating disadvantage. There is a possibility that participants can feel both powered up and powered down by a specific identity, depending on the context. If this is the case, they can put both arrows and write the context in which the arrows apply.

EXERCISE CARE

Once the identity wheel is complete, ask participants to answer the Guiding Questions for Building Social Identity Awareness on the next page to build a personal identity profile. Remind participants that sharing their personal identity profile is optional, and that they may disclose only information they are comfortable sharing.

CONTINUE >

WORKSHEET

PART 2 GUIDING QUESTIONS FOR BUILDING SOCIAL IDENTITY AWARENESS

- Which of your identities are most important to you? Which parts of yourself define you the most?
- Which of your identities is a birthright (ethnicity, nationality)?
- Which ones did you choose (teacher, singer, artist)?
- Which of your identities were assigned or expected (mother, father, wife, provider, leader, breadwinner, stay-at-home spouse)?
- Which aspects of your identity did you mark with a red DOWN arrow? Consider reflecting on or discussing how it feels/felt to be a member of a marginalized or excluded group.
- Which aspects of your identity did you mark with a blue UP arrow? Consider reflecting on or discussing how it feels/felt to be a member of a privileged or included group.
- What are some common stereotypes about your identities?
- How will your identities impact the work that you are doing in your own or another context?
- How can your learning and reflections from this exercise inform your work as a development practitioner, including in the design of programs?
- If you are currently or will be an outsider in a context in which you plan to work, and you know that context, how will any of your identities impact your work there?
- What, if anything, did you learn from this exercise about yourself and your positionality?
- Can you think of ways to increase your self-awareness about your positionality, especially in relation to the context in which you will implement programming?

WORKSHEET

PDF
Version

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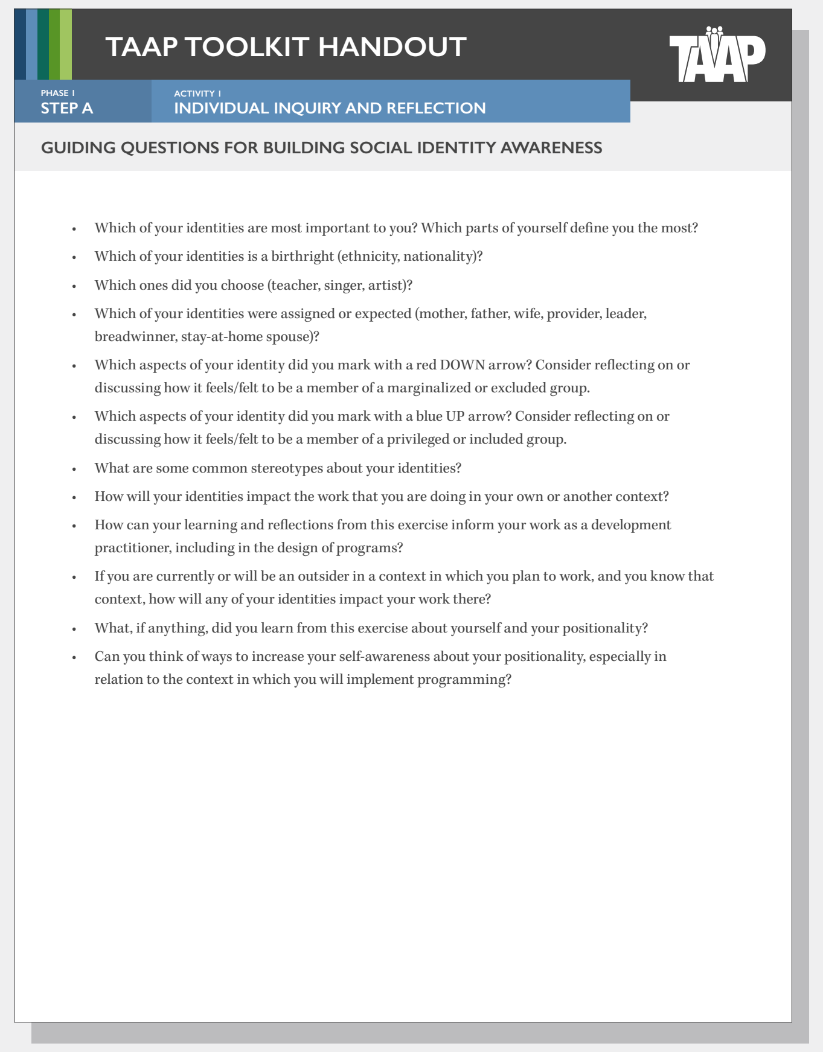

TAAP TOOLKIT HANDOUT

STEP A INDIVIDUAL INQUIRY AND REFLECTION

GUIDING QUESTIONS FOR BUILDING SOCIAL IDENTITY AWARENESS

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PART 2 SOCIAL IDENTITY WHEEL

5 40 MINUTES

Group participants into pairs or, depending on the number of people, into a small group. Ask them to read their peers' responses and to observe the differences they present in comparison to their own responses. Ask them to note something that intrigued or surprised them or that they would like to know more about. Ask them also to share what they may want others to know about their own identities.

Now that you have built awareness of your social identities, it is important to reflect on how those identities impact your work as a development practitioner, and how you can be more inclusion-sensitive.

CONTINUE >

PHASE I
STEP A

ACTIVITY 2

INDIVIDUAL INCLUSION-SENSITIVITY RATING SCALE AND PERSONAL STATEMENT

Description	Questionnaire, written statement	
Overview	This activity uses a rating scale to reflect on your own competence when it comes to doing inclusion work. It encourages you to take a deeper dive from the previous activity to reflect on how inclusion-sensitive you might be. It encourages you to consider what practices you already follow to develop awareness of positionality and additional practices you might consider to increase your commitment to inclusion.	
Objectives	• To review current as well as needed practices to increase inclusion-sensitivity • To increase your understanding of your biases and how they shape your behavior • To build your ability to do more effective, inclusive, anti-bias work	
Why do this activity?	How do we know whether we are inclusion-minded? Our intentions might be good, yet without awareness of attitudes, perceptions, and biases, our efforts can do harm to those we intend to help. A bias is a prejudice in favor of or against a thing, person, or group, usually in a way considered to be unfair. We all have biases, no matter our identity and background. Ultimately our intention is to dismantle structures and behaviors that perpetuate marginalization or exclusion of groups, and it is vital that we begin our work by addressing our own biases.	
Prerequisite activity?	Yes	Mapping Your Identity (Phase I, Step A, Activity 1)
Facilitator needed?	Yes	Internal
Time	1-2 hours	
Materials	RATINGS WORKSHEET HANDOUT	
Participants	Individuals, Project design and implementation team members, Partners or Participants	

WORKSHEET AVAILABLE
Download in the One-Stop Toolshop

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PART I INDIVIDUAL INCLUSION-SENSITIVITY RATING SCALE

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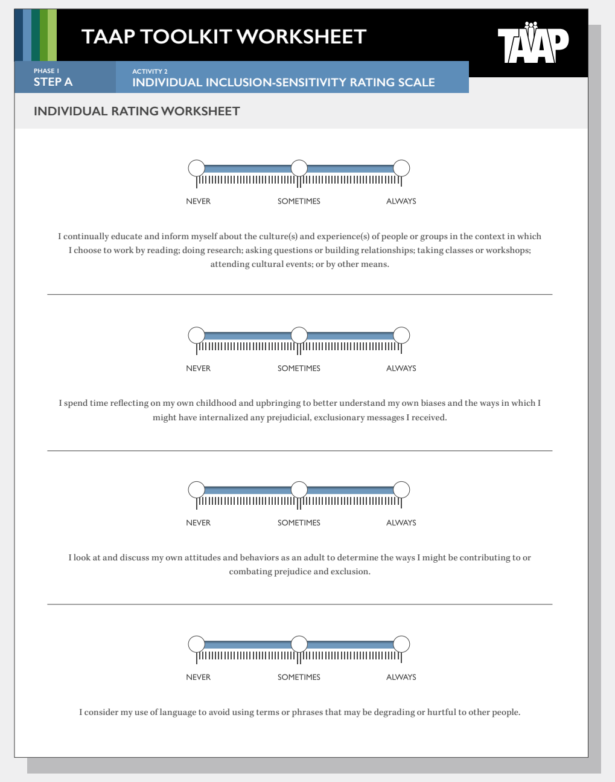

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INDIVIDUAL RATING WORKSHEET

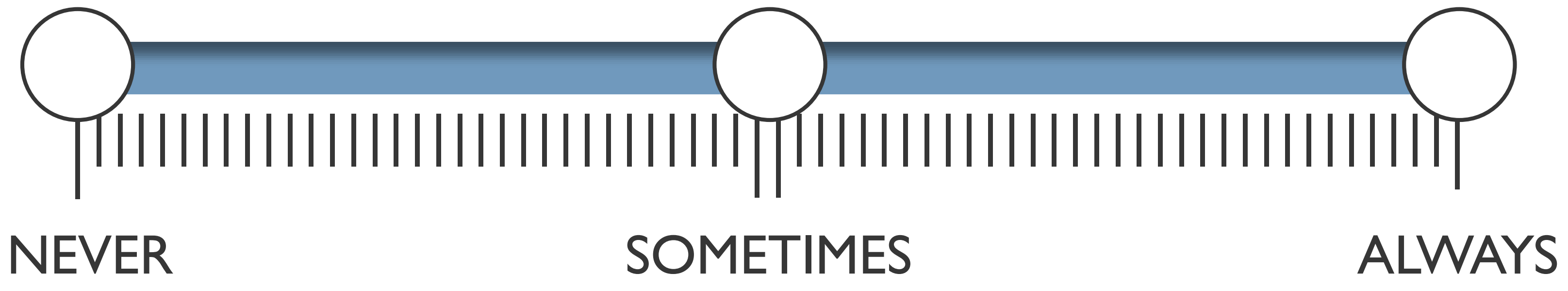
Instructions:

How do you rate your current level of inclusion-sensitivity in terms of personal reflection and practice?

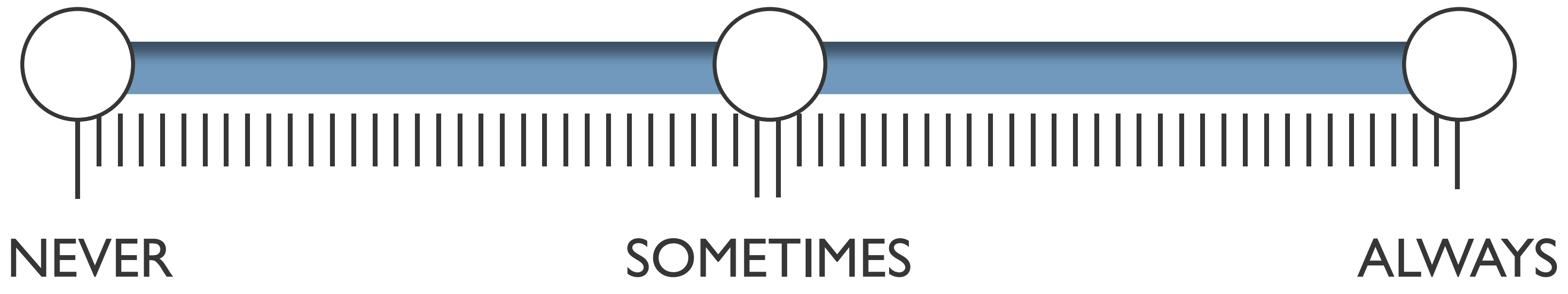
Download the Ratings Worksheet on the top right and indicate the rating on the Never-Sometimes-Always sliding scale.

Now that you have used the rating scales to reflect, question by question, on your capacity and commitment to inclusion, you will write a personal statement in Part 2 on the following page.

INTERSECTIONALITY



I continually educate and inform myself about the culture(s) and experience(s) of people or groups in the context in which I choose to work by reading; doing research; asking questions or building relationships; taking classes or workshops; attending cultural events; or by other means.



I spend time reflecting on my own childhood and upbringing to better understand my own biases and the ways in which I might have internalized any prejudicial, exclusionary messages I received.

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PART 2 PERSONAL STATEMENT

NOTE TO FACILITATOR

REFLECT

Ask the participants to write their own personal statement. Along with reflecting their responses to the prompting questions (below), their personal statement should reflect all that they have explored and learned through the last three exercises.

PROMPTING QUESTIONS

- Why are you doing this work or project? What are your motives?
- Was there a specific experience that drove you to do this work?
- Why do you care about the issue you are working on?
- What is your positionality related to this work? In what ways are you an insider? In what ways are you an outsider?
- What do you stand to gain or lose if the program is successfully implemented?
- How might your commitment be a product of your own values, upbringing, or life experiences?
- Beyond having the right skills, are you the right person for this work?
- How will you and your various identities be received by the community?
- How is your being in this role empowering to others in the community?

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CONTEXT **SENSITIVITY**

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PART 2 PERSONAL STATEMENT

OBJECTIVES

- Emphasize the most important parts of your identity as they relate to your work.
- Describe your motives and intentions in doing this work.
- Describe your own positionality.

CONTINUE >

STATEMENT EXAMPLE 1

"I'm a middle-class white American female with a background in international development. I grew up in rural America to a blue-collar, hard-working family. The men in my family were openly racist and sexist. I chose to work in women's rights internationally because I want to help reverse patterns of violence against women and against people of color. I am aware that, due to my race and class I have a significant amount of access and privilege. I'm committed to continually listening and learning about how I can best partner with others and support efforts to increase the agency, access, and well-being of marginalized or excluded people. I am also grateful to have the opportunity to live and work in countries I never thought I would see, when I was growing up on my family's farm, and to broaden my own cultural horizons."

PART 2 PERSONAL STATEMENT

STATEMENT EXAMPLE 2

"I'm a Muslim Pakistani male who grew up in a privileged home. My father was a member of government and a religious leader and my mother dutifully raised our family of six children. I am the oldest. I am saddened by the condition of my country and the persecution of certain religious groups. I was taught to be tolerant and open-minded by my father and mother, and our religious beliefs. I am committed to increasing tolerance of and access for religious minorities in my country and will use my class and gender privilege to do so. Good jobs are hard to find in my country—a huge percentage of younger workers especially are unemployed or underemployed—so I appreciate the income and benefits. I am especially grateful for the chance to work with a multinational organization. It gives me the chance to develop international-standard project management and professional skills, and in my country, working for a multinational, even a nonprofit, confers prestige. I hope that I will have a chance for advancement, maybe working abroad in the head office someday.

……

Now that each member of the team has reflected on his or her *individual* biases and how those shape behavior, move on to the *organizational* inclusive inquiry and reflection step.

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PHASE I
STEP B

ORGANIZATIONAL INCLUSIVE INQUIRY AND REFLECTION

Organizations typically define who they are through mission and vision statements.

They also have stories of origin and norms that create and define their culture.

In planning inclusive development programs, it's important to consider who your organization is and how your organization might relate to, impact, and be perceived by the people in the context where you plan to work. It is here that applying TAAP Principle 2 and bringing a context-sensitive approach to inclusion work becomes most relevant. Being context-sensitive means your organization can develop understanding about the context in which you operate, can deepen awareness about the interaction between your intervention and the context, and can act upon this awareness to avoid negative impacts and maximize positive ones.

Strong organizational support is essential to integrate inclusive development into project design. But even in organizations that do not yet have inclusion-sensitive and –responsive policies and processes in place that reflect the TAAP principles, individuals and project design teams can still serve as inclusion champions. They can be creative and proactive in contributing to inclusive programming and in advancing a culture of inclusion in their organization.

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STEP B

ORGANIZATIONAL INCLUSIVE INQUIRY AND REFLECTION

NOTE TO FACILITATOR

REFLECT

INTERNAL TEAM DISCUSSION

I | 10 MINUTES

Ask participants to reflect on the questions below. Explain that they should complete this activity individually and that they are not required to write their answers down, unless they would like to share them later. Recognize that project teams may not have information about the questions asked, nor the ability to effect major changes in organizational culture or direction. However, it is important that the team be aware of organizational positionality and opportunities for improved inclusion sensitivity.

ACTIVITY I
MAPPING YOUR ORGANIZATION'S IDENTITY

Description	Questionnaire, mapping	
Overview	As with the individual identity wheel activity, the project team will complete an organizational identity wheel.	
Objectives	• To reflect on aspects of your organization's identity that "power up" and "power down" • To reflect on aspects of your organization's identity that marginalize or exclude • To develop awareness of your organization's positionality – where it has more vs. less power and agency.	
Why do this activity?	The project team will have an increased awareness of their organization's mission, culture, and biases, and how these shape organizational behavior and effectiveness.	
Prerequisite activity?	Yes	Individual Inquiry and Reflection (Phase I, Step A [all activities])
Facilitator needed?	Yes	Internal
Time	45 minutes	
Materials	Organizational question template for initial reflection A blank organizational identity wheel for each participant Organizational reflection questions	
Participants	Design and implementation team members	

WORKSHEET AVAILABLE
Download in the One-Stop Toolshop

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GUIDING QUESTIONS FOR INITIAL ORGANIZATIONAL REFLECTION

WORKSHEET

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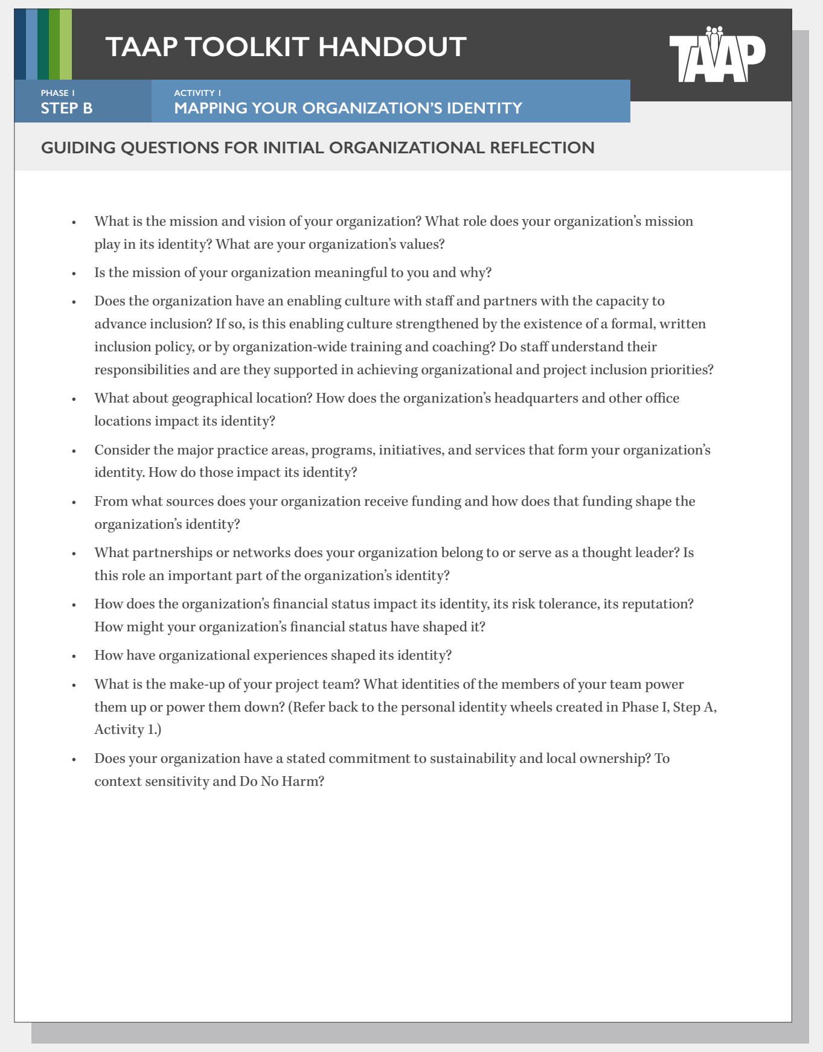
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STEP B
MAPPING YOUR ORGANIZATION'S IDENTITY
GUIDING QUESTIONS FOR INITIAL ORGANIZATIONAL REFLECTION

- What is the mission and vision of your organization? What role does your organization's mission play in its identity? What are your organization's values?
- Is the mission of your organization meaningful to you and why?
- Does the organization have an enabling culture with staff and partners with the capacity to advance inclusion? If so, is this enabling culture strengthened by the existence of a formal, written inclusion policy, or by organization-wide training and coaching? Do staff understand their responsibilities and are they supported in achieving organizational and project inclusion priorities?
- What about geographical location? How does the organization's headquarters and other office locations impact its identity?
- Consider the major practice areas, programs, initiatives, and services that form your organization's identity. How do those impact its identity?
- From what sources does your organization receive funding and how does that funding shape the organization's identity?
- What partnerships or networks does your organization belong to or serve as a thought leader? Is this role an important part of the organization's identity?
- How does the organization's financial status impact its identity, its risk tolerance, its reputation? How might your organization's financial status have shaped it?
- How have organizational experiences shaped its identity?
- What is the make-up of your project team? What identities of the members of your team power them up or power them down?
  Refer back to the personal identity wheels created in **PHASE I, STEP A, ACTIVITY 1**
- Does your organization have a stated commitment to sustainability and local ownership? ⚠

CONTEXT **SENSITIVITY** ⚠ EXERCISE CARE

CONTINUE ›

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ORGANIZATIONAL IDENTITY WHEEL

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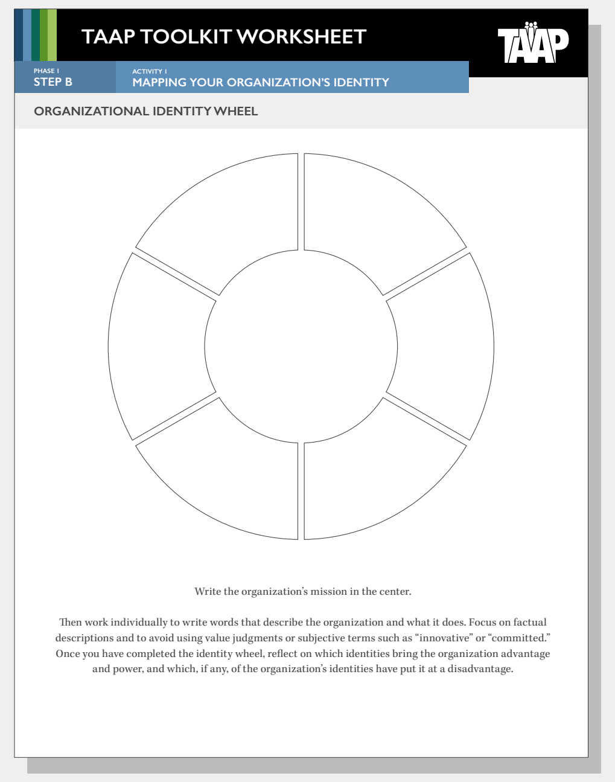
WORKSHEET



TAAP TOOLKIT WORKSHEET

PHASE I
STEP B

ACTIVITY I
MAPPING YOUR ORGANIZATION'S IDENTITY

ORGANIZATIONAL IDENTITY WHEEL

Write the organization's mission in the center.

Then work individually to write words that describe the organization and what it does. Focus on factual descriptions and to avoid using value judgments or subjective terms such as "innovative" or "committed." Once you have completed the identity wheel, reflect on which identities bring the organization advantage and power, and which, if any, of the organization's identities have put it at a disadvantage.

Next, give each participant a blank organizational identity wheel and ask each person to write the organization's mission in the center.

SAMPLE
ORGANIZATIONAL
IDENTITY WHEEL

PRE-FILLED
ORGANIZATIONAL
DENTITY WHEEL

Then ask them to work individually to write words that describe the organization and what it does. Ask them to focus on factual descriptions and to avoid using value judgments or subjective terms such as "innovative" or "committed." Once they have completed the identity wheel ask them to reflect on which identities bring the organization advantage and power, and which, if any, of the organization's identities have put it at a disadvantage.

REFLECT

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Then ask them to insert a blue UP arrow in any part of the wheel where they feel this aspect of identity creates unity or connection with other groups—in other words, where belonging to this identity might "power up" the organization, providing advantages and privilege. Next, ask them to insert a red DOWN arrow in any part of the wheel where the organization has experienced marginalization; if they feel this identity "powers down" the organization, serving to disadvantage the organization and its partners.

……

Once participants have completed the organizational identity wheel, ask them to share it with a partner or in small group. Ask them to reflect on and answer the guiding questions for building social identity awareness.

REFLECT

WORKSHEET

WORKSHEET

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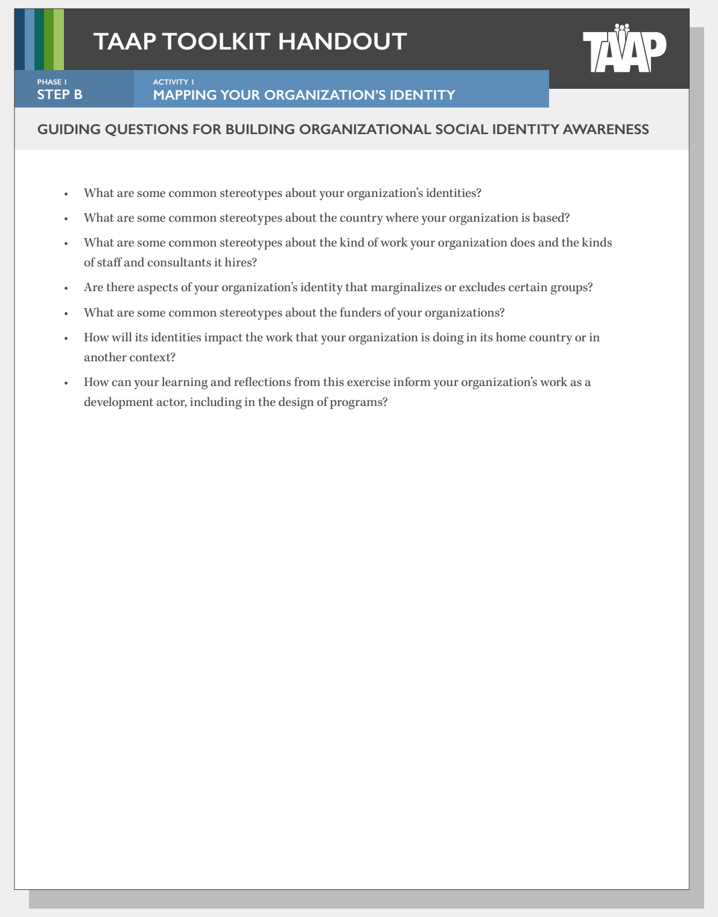
GUIDING QUESTIONS FOR BUILDING ORGANIZATIONAL SOCIAL IDENTITY AWARENESS

- What are some common stereotypes about your organization's identities?
- What are some common stereotypes about the country where your organization is based?
- What are some common stereotypes about the kind of work your organization does and the kinds of staff and consultants it hires?
- Are there aspects of your organization's identity that marginalizes or excludes certain groups?
- What are some common stereotypes about the funders of your organizations?
- How will its identities impact the work that your organization is doing in its home country or in another context?
- How can your learning and reflections from this exercise inform your organization's work as a development actor, including in the design of programs?



CONTINUE ›

PHASE I

STEP B

ACTIVITY 2

ORGANIZATIONAL QUESTIONNAIRE

Description	Questionnaire	
Overview	Inquiry and reflection are best when iterative. These questions will also be more deeply informed by the knowledge to be gathered later in the Social Inclusion Analysis phase (Phase II) and beyond. TAAP recommends routinely returning to your answers to see how they, and you, have changed and how this evolution might result in course correction or programmatic adjustments.	
Objectives	• To generate shared organizational knowledge about the level of inclusion-sensitivity • To increase awareness as an organization or team about positionality and the possible impacts of your work • To determine course(s) of organizational action to increase inclusion-sensitivity	
Why do this Activity?	Organizations can play a powerful role in counteracting the cycle of oppression through which marginalized and excluded people are denied access to resources that could empower them to reach their potential and contribute to their community. This questionnaire is a starting point for noting progress made on organizational inclusion-sensitivity, and to define and act on areas of needed growth.	
Prerequisite activity?	Yes	Mapping your Organization's Identity (Phase I, Step B, Activity 1)
Facilitator needed?	Yes	Internal
Time	2 hours	
Materials	ORGANIZATIONAL QUESTIONNAIRE TEMPLATE	
Participants	Individuals / Project design team members / Implementation team members	

WORKSHEET AVAILABLE
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CONTINUE >

WORKSHEET

ORGANIZATIONAL QUESTIONNAIRE

ORGANIZATIONAL QUESTIONNAIRE

PDF *Version*

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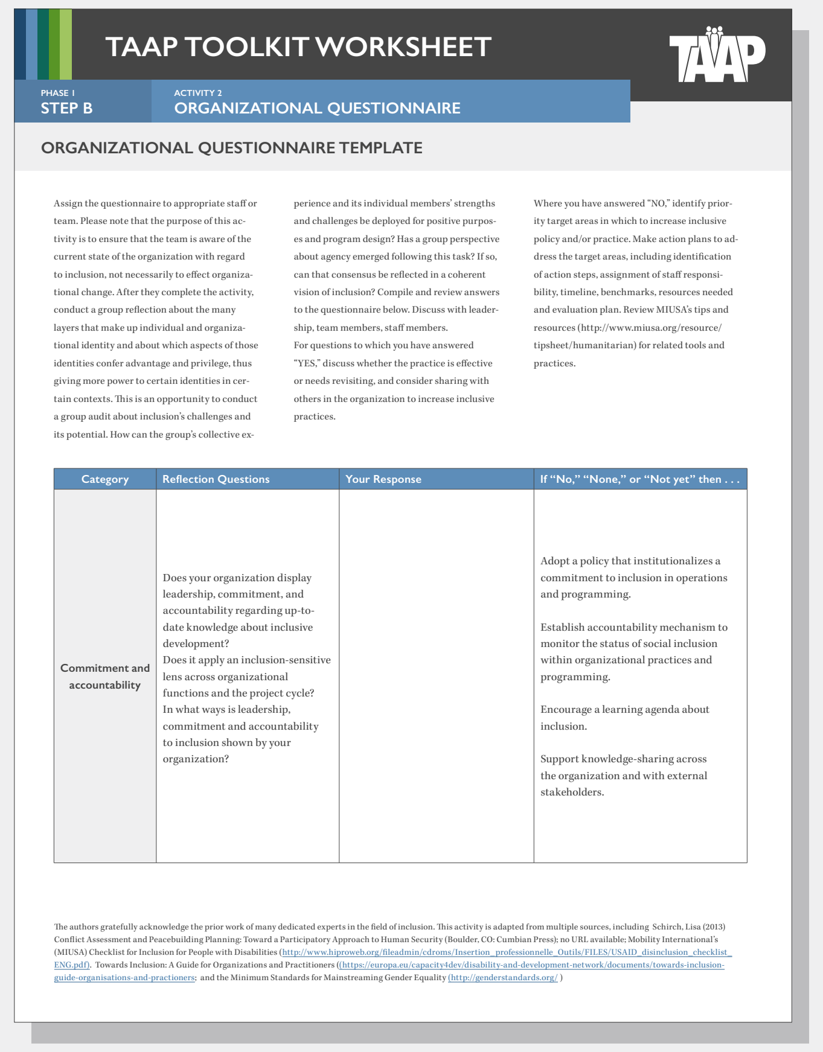
Is your organization ready for inclusion? TAAP's Organizational Questionnaire helps you assess how ready your organization is to undertake a rigorous approach to inclusion at all levels. The questionnaire provides 21 reflection questions across 8 categories. The questionnaire also provides illustrative steps for an organization or project team to consider undertaking.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ORGANIZATIONAL QUESTIONNAIRE
ORGANIZATIONAL QUESTIONNAIRE TEMPLATE

Category	Reflection Questions	Your Response	If "No," "None," or "Not yet" then….
Commitment and accountability			
Strategy			
Equitable access			
Curricula, teaching and learning			
Talent management			
Community capacity and engagement			
Monitoring and evaluation			
Contributions to long-term, positive social change			

The authors gratefully acknowledge the prior work of many dedicated experts in the field of inclusion. This activity is adapted from multiple sources, including Schirch, Lisa (2013) Conflict Assessment and Peacebuilding Planning: Toward a Participatory Approach to Human Security (Boulder, CO: Cumbian Press); no URL available; Mobility International's (MIUSA) Checklist for Inclusion for People with Disabilities (http://www.hiproweb.org/fileadmin/cdroms/Insertion_professionnelle_Outils/FILES/USAID_disinclusion_checklist_ENG.pdf). Towards Inclusion: A Guide for Organizations and Practitioners (https://europa.eu/capacity4dev/disability-and-development-network/documents/towards-inclusion-guide-organisations-and-practioners; and the Minimum Standards for Mainstreaming Gender Equality http://genderstandards.org/)

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ORGANIZATIONAL QUESTIONNAIRE

How the Activity Is Done

Please note that the purpose of this activity is to ensure that the team is aware of the current state of the organization with regard to inclusion, not necessarily to effect organizational change.

After they complete the activity, conduct a group reflection about the many layers that make up individual and organizational identity and about which aspects of those identities confer advantage and privilege, thus giving more power to certain identities in certain contexts. This is an opportunity to conduct a group audit about inclusion's challenges and its potential. How can the group's collective experience and its individual members' strengths and challenges be deployed for positive purposes and program design? Has a group perspective about agency emerged following this task? If so, can that consensus be reflected in a coherent vision of inclusion? Compile and review answers to the questionnaire below. Discuss with leadership, team members, staff members. For questions to which you have answered "YES," discuss whether the practice is effective or needs revisiting, and consider sharing with others in the organization to increase inclusive practices.

Where you have answered "NO," identify priority target areas in which to increase inclusive policy and/or practice. Make action plans to address the target areas, including identification of action steps, assignment of staff responsibility, timeline, benchmarks, resources needed and evaluation plan.

Review MIUSA's tips and resources (http://www.miusa.org/resource/tipsheet/humanitarian) for related tools and practices.

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PHASE I
STEP C

RECOGNIZING EVERYDAY INCLUSION

The Everyday Inclusion Indicators[14] exercise builds awareness of what inclusion, marginalization, and exclusion look like in the community.

To design effective programs that advance an inclusive society, it is important to have a picture of what inclusion, marginalization, and exclusion look like from the top-down level and the bottom-up.

ACTIVITY 1
EVERYDAY INCLUSION INDICATORS

Description	Observation, reflection
Overview	The activity takes place in a community setting (e.g., marketplaces, clinics, schools, etc.) The team moves through a community setting to observe and collect local indicators that show inclusion and exclusion. The activity prepares them to look for inclusion indicators in "every day" situations where issues of inclusion and exclusion may not be immediately clear. In some circumstances, security concerns may make it inadvisable to conduct this activity in public spaces in the community. If so, the facilitator can guide participants through a workshop-style exploration, on the organization's own premises, about what participants typically observe when they are in public spaces. CROSS REFERENCE TO MEL
Objectives	• To identify local-level measures of inclusion • To observe bottom-up indicators of inclusion and exclusion • To reflect on how bottom-up information can be usefully integrated into programs • To reflect on how the project context is shaped by local measures of inclusion
Why do this activity?	Provides the project team, partners, and participants with a picture of what inclusion, marginalization, and exclusion look like from the top-down level and the bottom-up. This activity, similar to the Everyday Peace Indicators, is based on the premise that local communities are best placed to identify changes in their own circumstances, rather than relying on external 'experts' to identify indicators.

CONTINUE ›

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[14] This framework and exercise are based on the Everyday Peace Indicators project, which offers an inductive, participatory approach to the generation of indicators in order to measure difficult-to-measure concepts such as peace. Taking its cue from studies in sustainable development, the project asks community members to identify their own measures of peace. It is based on the premise that local communities are best placed to identify changes in their own circumstances, rather than relying on external 'experts' to identify indicators for them. (https://everydaypeaceindicators.org)

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PHASE I
STEP C

RECOGNIZING EVERYDAY INCLUSION

ACTIVITY I

EVERYDAY INCLUSION INDICATORS

Prerequisite activity?	Yes	Individual Inquiry and Reflection (Phase I, Step A, all activities) Organizational Inclusive Inquiry and Reflection (Phase I, Step B, all activities)
Facilitator needed?	Yes	Internal
Time	1-4 hours	
Materials	Recognizing everyday inclusion	
Participants	Any interested individual, design team member, training participant. The activity will be more meaningful if carried out by participants who themselves represent diverse identities. The activity should also be carried out in a way that can accommodate anyone with a disability .	

CONTINUE >

WORKSHEET AVAILABLE
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EMPHASIS ON
DIGNITY AND AGENCY

HOW THE ACTIVITY IS DONE

CONSULT WITH PARTNERS

Explain to participants that they will work individually or in teams to develop a profile of inclusion, marginalization, and exclusion at a local level.

Give participants the Recognizing Everyday Inclusion instructions. Ask them to go to two different public locations (based on those locations relevant to your project conditions).

Ask participants to take notes while they are observing signs of inclusion, marginalization, and exclusion in public spaces. Conduct a debrief with participants, encouraging participants to reflect on their experience and think about identities that cannot be seen (sexual orientation, religion, intellectual disability, etc.) as well as those that can. Participants should notice who's missing: taking note of identities that are not present in the area they are observing as well as those that are. If possible, do this activity with members of marginalized or excluded groups who might be more aware of specific circumstances. Engage participants in a discussion of the change that they want to see.

What is the desired change at the level of everyday social interactions? At the individual level? Family or community level? Organizational level? Societal levels? Normative level? Policy level? Who are the key actors driving the inclusion, marginalization and exclusion, and what motivations would they have for changing the status quo? When is inclusion likely to be open to further expansion and when is marginalization or exclusion likely to be open to change for better or worse?

(Applying TAAP's adaptation of the SOCIAL ECOLOGICAL MODEL may be useful for this exercise.)

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HOW THE ACTIVITY IS DONE

CLICK TO START THE

EVERYDAY INCLUSION STORY START >

The following story illustrates how project teams and local community stakeholders can improve their own awareness of inclusion, marginalization and exclusion in a local setting. Participants visit public locations to observe indicators of barrers and boosters to inclusion.

STEP I

Explain to participants that they will work individually or in teams to develop a profile of inclusion, marginalization, and exclusion at a local level.

CONTINUE >

STEP 2

Participants observe a marketplace.

Is there a feeling that all people are welcome? What are the signs or indicators of welcome or exclusion? Who seems to have power? Is the market accessible for people with disabilties? What identity groups are not present in the market and what does that indicate about their agency, access and power? What would positive social change look like?

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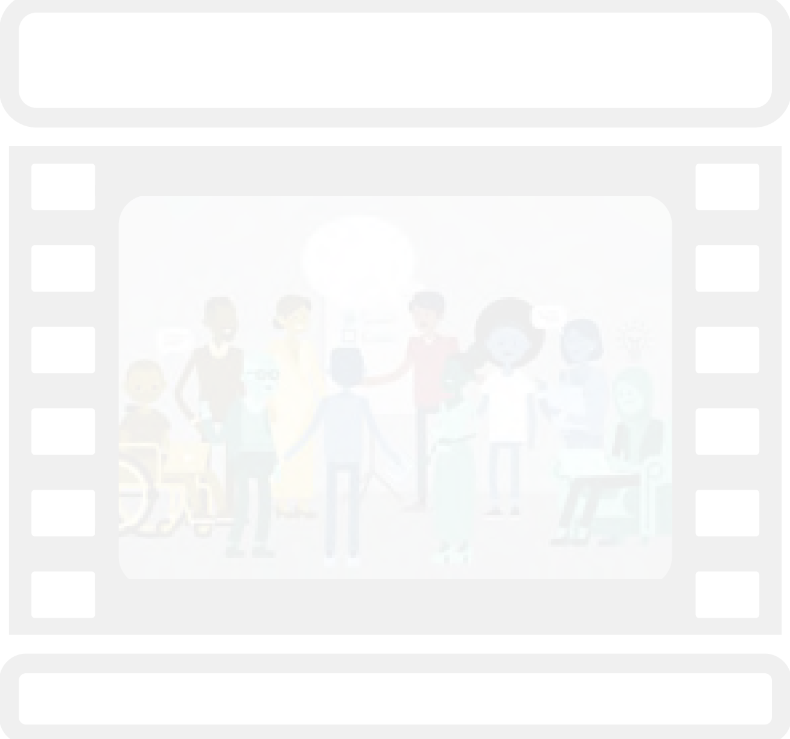

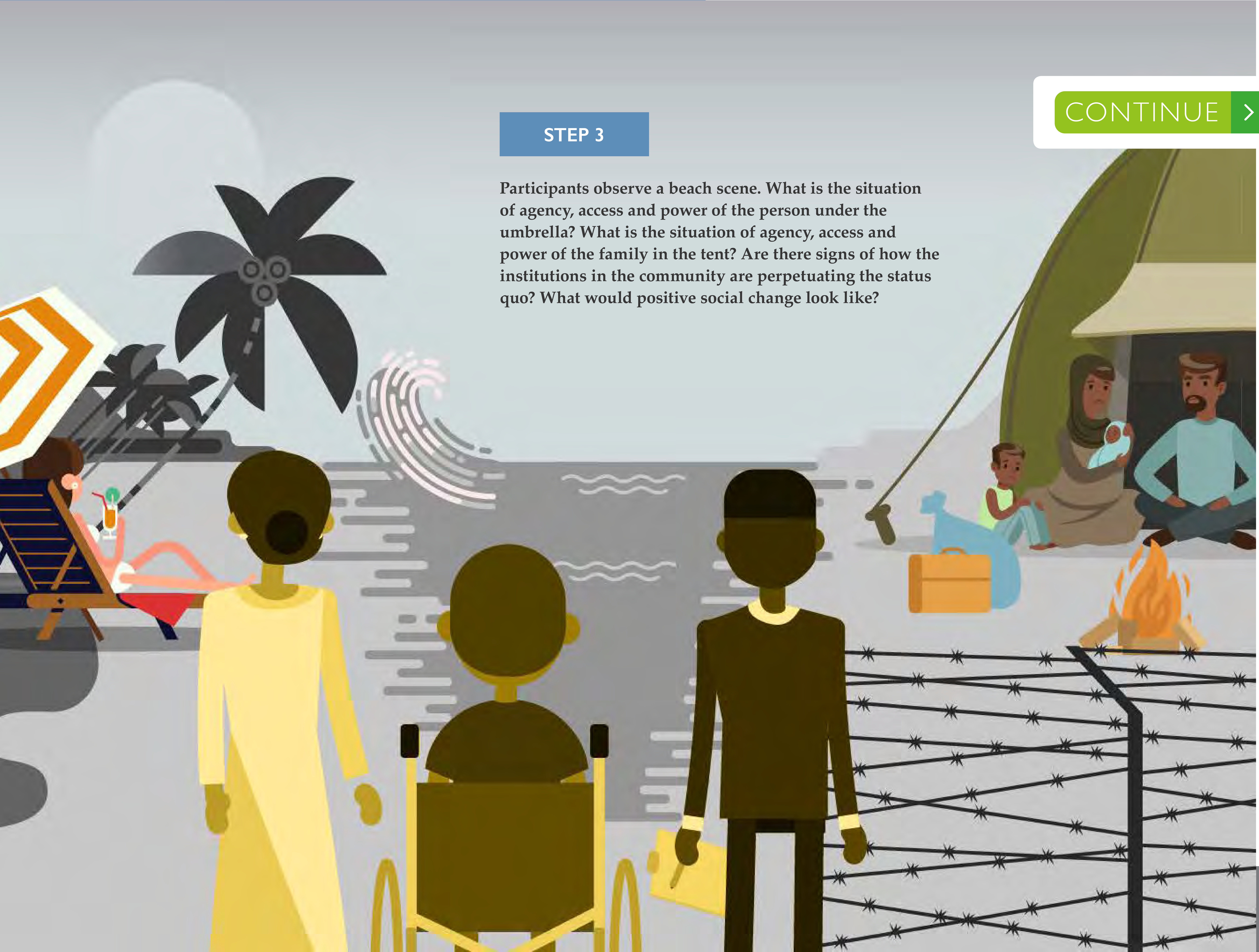

STEP 3

Participants observe a beach scene. What is the situation of agency, access and power of the person under the umbrella? What is the situation of agency, access and power of the family in the tent? Are there signs of how the institutions in the community are perpetuating the status quo? What would positive social change look like?

CONTINUE >

STEP 4

Participants conduct observation at a school. What are the signs of inclusion, marginalization and exclusion? What is the situation of agency, access and power of the various students? What would positive social change look like?

CONTINUE >

CONTINUE >

STEP 5

Participants debrief the observation experience.

This activity can also be done effectively in a virtual way.

Have groups spend time looking at newspapers, listening to radio, observing Facebook pages, watching TV or a movie. Who is included? Who seems to have agency, access and power and who doesn't? Why are marginalized and excluded identity groups not represented? What would positive social change look like?"

WORKSHEET

RECOGNIZING EVERYDAY INCLUSION: PARTICIPANT WORKSHEET

Using your worksheet, develop 6-9 indicators of inclusion you saw in your observations. Be prepared to share with the whole group.

Efforts to recognize signs of inclusion, marginalization, and exclusion at community levels can provide a baseline for measuring change and data that can be meaningfully integrated into project design and implementation. During the debrief, discuss what positive social change would look like and how you can integrate these insights throughout the design, implementation, and learning for your own project.

CONTEXT **SENSITIVITY**

WORKSHEET

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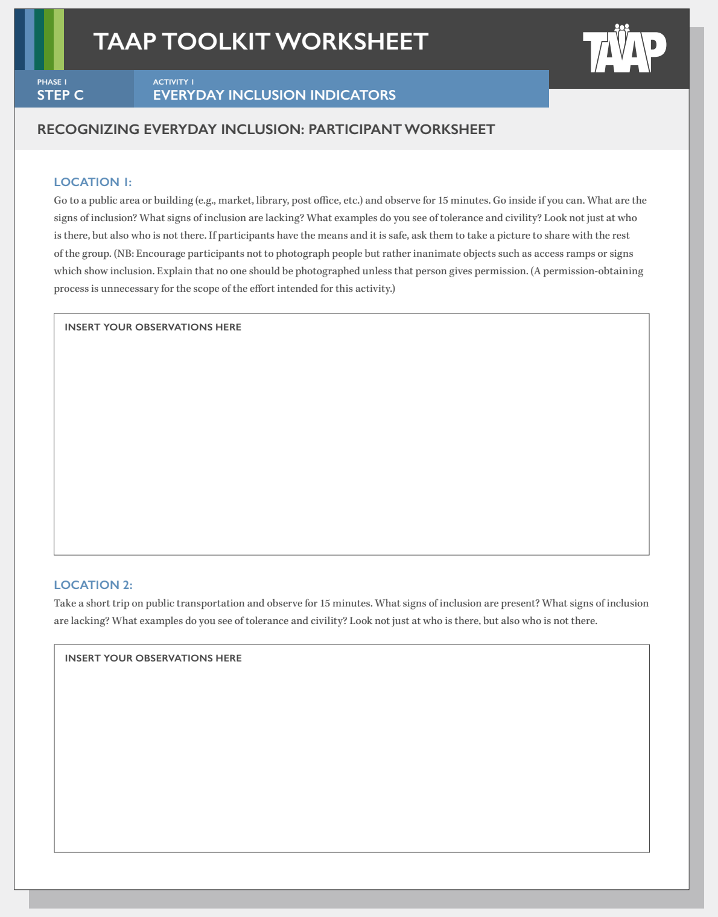

TAAP TOOLKIT WORKSHEET

PHASE I
STEP C

ACTIVITY I
EVERYDAY INCLUSION INDICATORS

RECOGNIZING EVERYDAY INCLUSION: PARTICIPANT WORKSHEET

LOCATION 1:
Go to a public area or building (e.g., market, library, post office, etc.) and observe for 15 minutes. Go inside if you can. What are the signs of inclusion? What signs of inclusion are lacking? What examples do you see of tolerance and civility? Look not just at who is there, but also who is not there. If participants have the means and it is safe, ask them to take a picture to share with the rest of the group. (NB: Encourage participants not to photograph people but rather inanimate objects such as access ramps or signs which show inclusion. Explain that no one should be photographed unless that person gives permission. (A permission-obtaining process is unnecessary for the scope of the effort intended for this activity.)

INSERT YOUR OBSERVATIONS HERE

LOCATION 2:
Take a short trip on public transportation and observe for 15 minutes. What signs of inclusion are present? What signs of inclusion are lacking? What examples do you see of tolerance and civility? Look not just at who is there, but also who is not there.

INSERT YOUR OBSERVATIONS HERE

END OF PHASE I

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PHASE II

SOCIAL INCLUSION ANALYSIS

THE BASICS

For a project to succeed, it must be grounded in the context where it's being implemented and must be informed by accurate, ethical and quality data.

Here in Phase II is where that good data gets generated to inform the ways the project can be strengthened to promote social inclusion. The activities in this phase are designed so that they can be implemented either individually or in small working groups. The end product is a substantive report which the Social Inclusion Analysis team (sector specialist, inclusion specialist, and M&E specialist) must write. The team may have the requisite skills and experience in-house to conduct the analysis, or they may seek technical expertise from external consultants (or, if the organization is relatively large, from a different country or sector office, or from headquarters). Consulting with the key stakeholders and encouraging their participation throughout the process is important for the success of Phase II and is highly encouraged where and as possible.

CONTINUE >

PHASE II
SOCIAL INCLUSION ANALYSIS

THE BASICS

By the time you finish this phase, you will have recommendations for a project design, grounded in TAAP principles, that includes:

- A clear set of Terms of Reference for a Social Inclusion Analysis
- A Social Inclusion Analysis report with the following content:

1. A clear analysis of the state of social inclusion, marginalization and exclusion in your context and content area, including root causes of social marginalization and exclusion as well as boosters for, and barriers to, positive social change.
2. A clear understanding of *intersectionality* and how that affects the social inclusion, marginalization, and exclusion of various individuals and identity groups.
3. A set of clear recommended actions and methods that can help you transform agency, access, and power.

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PHASE II
SOCIAL INCLUSION ANALYSIS

WHAT	A Social Inclusion Analysis examines a project's operating environment as it relates to issues of social inclusion, marginalization and exclusion, identify solutions we can implement through our programmatic activities at various stages of the project management cycle, to achieve transformative positive change.
WHO	More than the other TAAP phases, Phase II requires specialized expertise. That means personnel who: (a) have experience in designing studies, carrying out primary and secondary data collection and analysis; (b) have a degree of subject-matter expertise in the project's thematic focus area, c) experience in working with identity-based inclusion; and (d) can write about technical issues to make them compelling for general audiences. If your organization does not have that expertise in house, please contact www.taapinclusion.org.
WHEN	Because the purpose of this work is to ground the design (or re-design) of projects in solid data, the Social Inclusion Analysis should take place prior to any design or re-design phase. If your project operates in emergency or fragile contexts, you may need to consider the interagency quality humanitarian standards for required rapid analyses and other data needs, which are further explained in the Core Humanitarian Standard, SPHERE, or Inter-Agency Network for Education in Emergencies (INEE), and others.
HOW	Social Inclusion Analysis within this phase follows a specific framework. All activities should be conducted in the order presented.
WHY	Phase II activities help you understand the context in which your project will operate along with the opportunities and challenges to promote social inclusion. This phase provides the intellectual foundation on which you will build as you work to make your project more inclusive.

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PHASE II

SOCIAL INCLUSION ANALYSIS

Phase II of the Toolkit has specific steps and associated activities. While the steps and activities suggest a linear sequence of events, in actual implementation there is often a more dynamic flow to the work. Some steps or activities may be occurring simultaneously and the work often circles back to revisit earlier steps.

STEP A Determine Study Design	Activity 1: Define the Scope of the Social Inclusion Analysis Activity 2: Stakeholder Analysis and Mapping Activity 3: Define the Purpose Activity 4: Define Social Inclusion Analysis Questions
STEP B Apply the TAAP Social Inclusion Analysis Framework	Activity 1: Develop Social Inclusion Analysis Methodology
STEP C Conduct Data Collection and Analysis	Activity 1: Map Your Data and Findings Activity 2: Explore Root Causes Activity 3: Identify Impact Intervention Areas with Potential for Transformative Change
STEP D Social Inclusion Analysis Report	Write the Report

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PHASE II
SOCIAL INCLUSION ANALYSIS

Additional Background Information:

A Social Inclusion Analysis has the following key elements:

- Overall analysis of various identities.
- An analysis of the social norms, root causes, and power dynamics that shape interactions among people with various identities and that influence access (or lack thereof) to vital services and resources.
- An understanding of how intersectionality of various identities is affected by social inclusion, marginalization, or exclusion.
- Identification of major issues that need attention, and boosters or conditions upon which the project can build.
- An analysis of key stakeholders (individuals, groups, institutions, etc.) with the desire, right, power, mandate or interest to transform areas of social exclusion, and the ability to expand inclusion.

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PHASE II
SOCIAL INCLUSION ANALYSIS

As noted elsewhere, the power of a TAAP Social Inclusion Analysis is the emphasis on INTERSECTIONALITY.

Intersectionality refers to the ways the multiple facets of one's identity can interact to either compound or mitigate experiences of inclusion, marginalization, or exclusion. Please see Annex 1 for an extensive discussion of intersectionality. For example, failure to understand intersectionality may lead to rural women with disabilities being referred only to health and rehabilitation, but not to women economic empowerment programs. Staff, community leaders, and even family members may assume that such a woman identifies as a person with disabilities, that this is her most urgent and important need, but fail to recognize her other needs based on sex (being a female), gender (woman) and age (her age), with all the experiences that special stage of life involves for all people with or without disabilities.

INTERSECTIONALITY

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PHASE II
SOCIAL INCLUSION ANALYSIS

The Social Inclusion Analysis framework covers six important domains:

1. Laws, Policies, Regulations, and Institutional Practices
2. Access to and Control over Assets and Resources
3. Knowledge, Beliefs and Perceptions, Cultural Norms
4. Power and Decision-making
5. Roles, Responsibilities, Participation and Time Use
6. Human Dignity, Safety and Wellness[15]

PARTICIPATION

Participation: It is essential that you conduct the Social Inclusion Analysis with full participation of your key stakeholders. The activities in the Cross-Cutting Section: Inclusive Monitoring, Evaluation and Learning can help you determine the levels of participation you can promote here in Phase II.

The activities in Phase II examine these domains through the TAAP lens, considering each domain as its current state affects the ability of marginalized or excluded groups to transform their agency, access, and power. In the process of analyzing the six domains, you will identify boosters and barriers that support or inhibit inclusion. The identification of barriers involves exploring the underlying causes of inequality which may be rooted in a variety of the domains noted above, including regressive laws and regulations, deeply patriarchal cultural values, inadequate public policies, lack of political will for social change, or other systems or institutions with incentives or other factors designed to maintain the status quo.

PARTICIPATORY APPROACHES

CONTINUE

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[15] See Phase II, Step B, Activity 1: Develop the Inclusion Analysis Methodology for full definitions and greater detail.

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PHASE II

SOCIAL INCLUSION ANALYSIS

The Social Inclusion Analysis framework concludes with additional analysis of ways to bring various groups together to sustain inclusion beyond the life of the project. (The systems mapping activity CROSS REFERENCE TO IIS in **CROSS-CUTTING INCLUSIVE IMPACT AND SUSTAINABILITY** will help you see how various groups come together.)

Most social inclusion analyses follow either a *qualitative or mixed method* design, with data from secondary and primary sources. There might be a desk review of existing data and literature (also known as *secondary sources*) as just one part of the methodology, or a systematic desk review without additional data collection.[16] Other social inclusion analyses might also have primary-source data collection, including interviews, focus group discussions, or surveys to provide greater depth. We do not prescribe a one-size-fits-all study design for social inclusion analyses because they are context- and issue-specific. We do, however, encourage all users of this volume to be sure they are making best use of available data before undertaking the effort and expense of additional data collection. The scope of your study will depend on its goals and your organization's available resources.

THINK BIG
THINK THE IMPOSSIBLE

CONTINUE ›

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[16] Illustrative data sources for a desk review might include: UNDP Human Development Reports (http://hdr.undp.org/en/content/human-development-index-hdi), Inequality-adjusted Human Development Index (IHDI) (http://www.np.undp.org/content/dam/turkey/docs/Publications/hdr/HDR2014%20FAQ%20IHDI%20EN.pdf), Sustainable Development Goals Progress Reports (https://unstats.un.org/sdgs), government reports (US State Department Human Rights reports), civil society reports (Freedom in the World), shadow reports, etc.

PHASE II
STEP A

DETERMINING SOCIAL INCLUSION ANALYSIS STUDY DESIGN

The first step to undertaking a social inclusion analysis is to define its design, creating a Terms of Reference with clearly articulated goals, steps, actors, and outcomes for your study.

Please use the template provided in **ANNEX 2** as you work through these steps.

ACTIVITY 1

DEFINE THE SCOPE OF THE SOCIAL INCLUSION ANALYSIS

Description	Brainstorming, technical advice	
Overview	Studying issues of social inclusion, marginalization, and exclusion can be challenging, given that almost everyone in any society experiences some sort of social exclusion. This activity is designed to: • Determine the parameters of your Social Inclusion Analysis • Conduct stakeholder analysis and mapping • Clarify the purpose of the Social Inclusion Analysis • Define the Social Inclusion Analysis study questions	
Objective	To determine the scope of the Social Inclusion Analysis.	
Why do this activity?	The more clearly and narrowly defined the focus, the more practical the Social Inclusion Analysis will be to implement.	
Prerequisite activity?	No	N/A
Facilitator needed?	Yes	See “The Basics” for important information about the facilitation needs for this phase.
Time	4 hours	
Materials	Computers, whiteboard, and markers	
Participants	Social Inclusion Analysis Team. Some activities in this phase require extensive stakeholder engagement, which might affect the time requirements.	

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DEFINE THE SCOPE OF THE SOCIAL INCLUSION ANALYSIS

NOTE TO FACILITATOR

Given the broad range of elements that could be studied in a social inclusion analysis, we recommend you focus your inquiry as specifically as possible from the outset. This activity will help you define the entry point for your study.

This activity can be conducted as a small group exercise or as individual work. Wherever appropriate, invite your stakeholders to participate. **(SEE THE CROSS-CUTTING SECTION INCLUSIVE MONITORING, EVALUATION AND LEARNING FOR TOOLS.)**

How the Activity Is Done

The worksheet on the following pages provides guidance on how to determine the purpose and parameters of your Social Inclusion Analysis. First, respond to the 6 questions in the following table. Then, use your responses to complete statements about what the focus of your analysis is, and is not.

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WORKSHEET

DEFINE THE SCOPE OF THE SOCIAL INCLUSION ANALYSIS*

Below are questions from the worksheet. Download it on the right.

Focus Area	Questions
Thematic/ Sub-thematic/ Cross-cutting issue focus	Do you intend to focus your Social Inclusion Analysis on a particular theme (e.g. education), subtheme (e.g. early childhood education), or a cross-thematic issue (e.g. the impact of identity-based violence on education outcomes)? IF YOU HAVE ANSWERED YES, WRITE YOUR DECISIONS ON THE WORKSHEET.
Identity-focused	Do you intend to study (a) particular identity group(s) (e.g., LGBTI persons, migrant minorities, rural residents, religious or ethnic minorities, etc.) across various themes? If you answer yes, write your decisions here. IF YOU HAVE ANSWERED YES, WRITE YOUR DECISIONS ON THE WORKSHEET.
Identity(ies) within a Theme(s) focus	Do you intend to study a particular identity or identities, group(s) within a theme? Or a set of themes (e.g. migrant children in education, women from rural areas in health)? Or a set of identities across various themes (in case the theme(s) of your study has (have) not been determined yet). IF YOU HAVE ANSWERED YES, WRITE YOUR DECISIONS ON THE WORKSHEET.
Geography	Do you intend to study a particular location with a focus on particular themes or identities? IF YOU HAVE ANSWERED YES, WRITE YOUR DECISIONS ON THE WORKSHEET.

WORKSHEET

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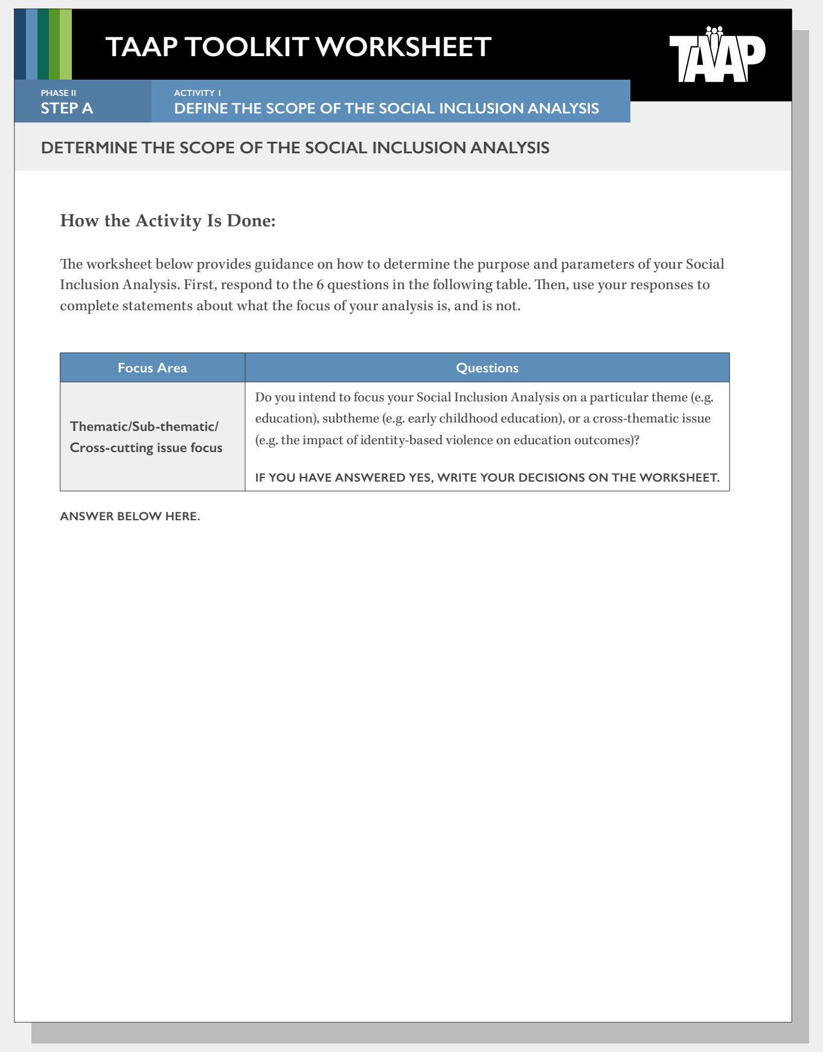

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PHASE II
STEP A

ACTIVITY 1
DEFINE THE SCOPE OF THE SOCIAL INCLUSION ANALYSIS

DETERMINE THE SCOPE OF THE SOCIAL INCLUSION ANALYSIS

How the Activity Is Done:

The worksheet below provides guidance on how to determine the purpose and parameters of your Social Inclusion Analysis. First, respond to the 6 questions in the following table. Then, use your responses to complete statements about what the focus of your analysis is, and is not.

Focus Area	Questions
Thematic/Sub-thematic/ Cross-cutting issue focus	Do you intend to focus your Social Inclusion Analysis on a particular theme (e.g. education), subtheme (e.g. early childhood education), or a cross-thematic issue (e.g. the impact of identity-based violence on education outcomes)? IF YOU HAVE ANSWERED YES, WRITE YOUR DECISIONS ON THE WORKSHEET.

ANSWER BELOW HERE.

* *Activity Questions continue on the following page.*

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DEFINE THE SCOPE OF THE SOCIAL INCLUSION ANALYSIS

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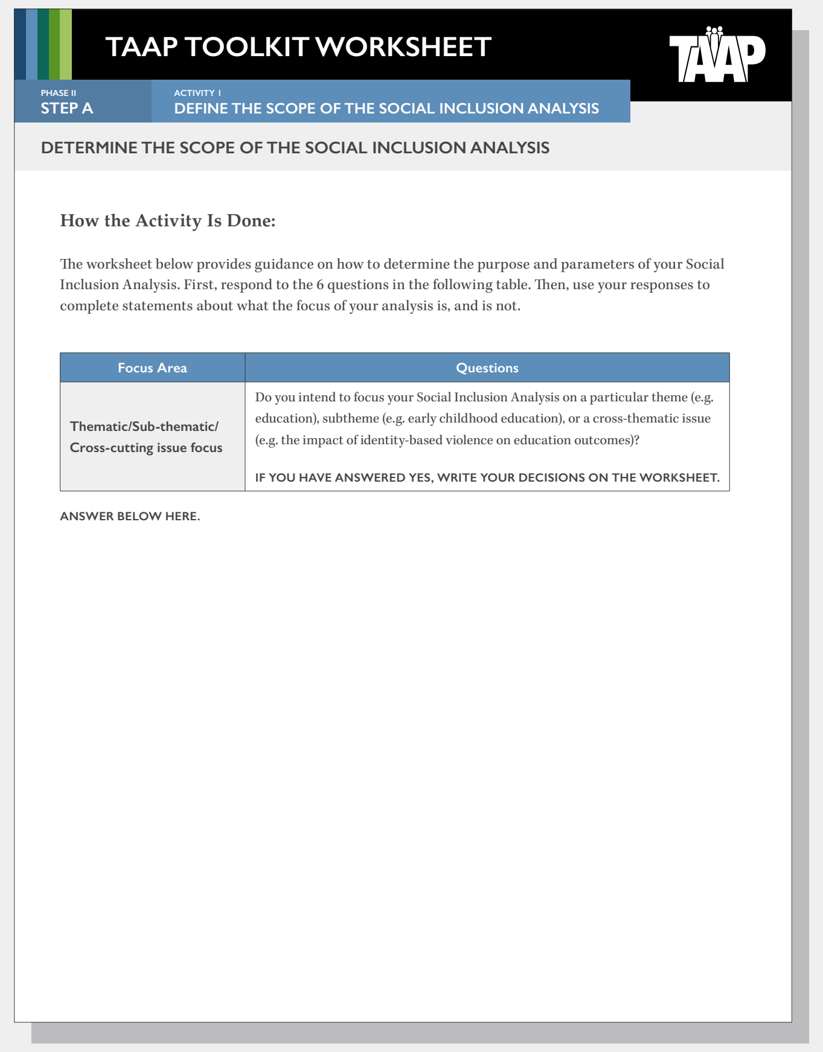
Below are questions from the worksheet. Download it on the right.

Focus Area	Questions
Undecided	Do you not yet know the focus of your study? IF NOT, WRITE THE LIST OF REASONS ON THE WORKSHEET. (Discuss and refer to the options above for guidance. It is important that the focus of your study be decided upon before you move to next steps)
Other	IF YOU WANT TO STUDY INCLUSION COMPONENTS IN ANOTHER FORM, WRITE YOUR DECISION ON THE WORKSHEET.



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ACTIVITY 1
DEFINE THE SCOPE OF THE SOCIAL INCLUSION ANALYSIS

DETERMINE THE SCOPE OF THE SOCIAL INCLUSION ANALYSIS

How the Activity Is Done:

The worksheet below provides guidance on how to determine the purpose and parameters of your Social Inclusion Analysis. First, respond to the 6 questions in the following table. Then, use your responses to complete statements about what the focus of your analysis is, and is not.

Focus Area	Questions
Thematic/Sub-thematic/ Cross-cutting issue focus	Do you intend to focus your Social Inclusion Analysis on a particular theme (e.g. education), subtheme (e.g. early childhood education), or a cross-thematic issue (e.g. the impact of identity-based violence on education outcomes)? IF YOU HAVE ANSWERED YES, WRITE YOUR DECISIONS ON THE WORKSHEET.

ANSWER BELOW HERE.

Examine your selected focus and consider whether any biases might have influenced your selection and unintentionally omitted relevant questions or groups from your study focus. Once the step above is complete, start writing the scope of your Social Inclusion Analysis by completing the following statements (and complete this section of your ToR in the Annex 2 template):

The focus of this Social Inclusion Analysis IS ....

The focus of this Social Inclusion Analysis is NOT....

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ACTIVITY 2

STAKEHOLDER ANALYSIS AND MAPPING

As you sharpen the focus of your study, it is important to understand who its various stakeholders are and what roles they should play.

Many organizations have developed stakeholder analysis and mapping tools and made them available for others to use. Please see TAAP website for references. WWW.TAAPINCLUSION.ORG

Whichever tool you select, it should:

1. Identify the key stakeholders who may be interested (positively or negatively) in your analysis;
2. Assess the influence of, importance of, and level of impact of your analysis effort upon each stakeholder; and
3. Identify how best to engage stakeholders.

This will help you see who needs to be part of which process throughout the Social Inclusion Analysis, and how best to engage them.

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STEP A

ACTIVITY 2
STAKEHOLDER ANALYSIS AND MAPPING

Description	Brainstorming, mapping, technical advice	
Overview	It is important to understand who its various stakeholders are and what roles the should play. This activity is designed to help you: • To identify the key stakeholders who may be interested in your analysis • To assess the influence of, importance of, and level of impact of your analysis efforts upon each stakeholder • To identity how best to engage stakeholders	
Objective	To determine the various stakeholders of the Social Inclusion Analysis study.	
Why do this activity?	Identifying various Social Inclusion Analysis stakeholders helps to determine how to engage them in strategy development.	
Prerequisite activity?	No	N/A
Facilitator needed?	Yes	See “The Basics” for important information about the facilitation needs for this phase.
Time	4 hours	
Materials	WORKSHEET: STAKEHOLDER ANALYSIS MATRIX WORKSHEET: STAKEHOLDER ENGAGEMENT	
Participants	Social Inclusion Analysis Team. Some activities in this phase require extensive stakeholder engagement, which might affect the time requirements.	

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STAKEHOLDER ANALYSIS AND MAPPING

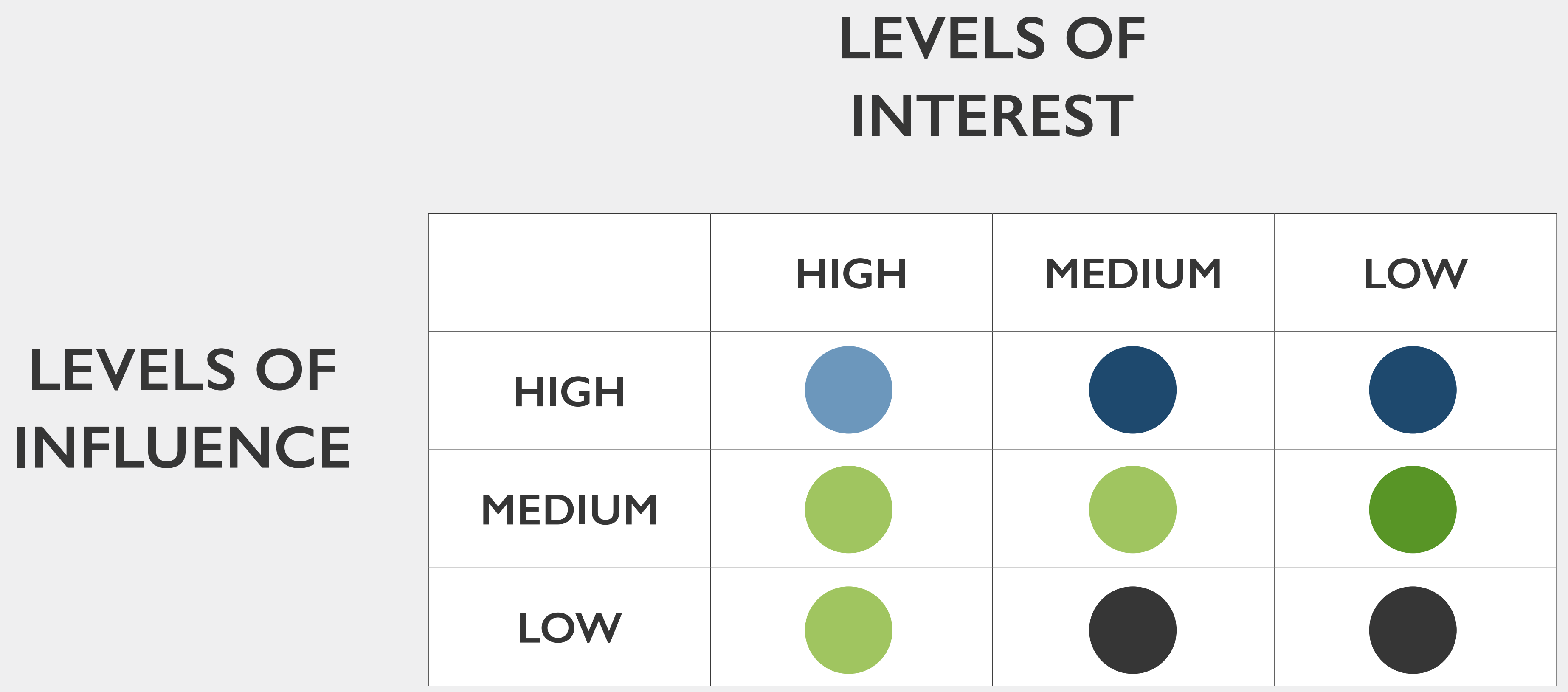
How the Activity Is Done

This activity can be done individually or in a group.

- Start by creating a list of stakeholders who may be interested in your study.
- Then create a list of stakeholders who may influence your study.

The stakeholder analysis matrix maps your stakeholders to help you decide how to engage them based on their level of influence and interest in your study. You may also note where in the matrix you anticipate the stakeholder to be positioned on a range from ally to opponent for the theme or sub-theme. It may also be helpful to rank their level of commitment to positive social change.

STAKEHOLDER ANALYSIS MATRIX



LEVELS OF INTEREST

LEVELS OF INFLUENCE

	HIGH	MEDIUM	LOW
HIGH	●	●	●
MEDIUM	●	●	●
LOW	●	●	●

LEVELS OF ENGAGEMENT

Partner ●

Involve/Engage ●

Consult ●

Monitor ●

Inform ●

EXAMPLES

HIGH LEVEL OF INFLUENCE
\+ HIGH LEVEL OF INTEREST
= PARTNER ●

LOW LEVEL OF INFLUENCE
\+ HIGH LEVEL OF INTEREST
= CONSULT ●

LOW LEVEL OF INFLUENCE
\+ MEDIUM LEVEL OF INTEREST
= INFORM ●

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STAKEHOLDER ANALYSIS AND MAPPING

Plotting Your Stakeholders-Illustrative Example

A representative of the national government who has a low level of influence in the study and a low level of interest in the study. Therefore, you would plot this stakeholder in the box that intersects at low level of influence and low level of interest and determine that you would keep that stakeholder informed. An example of informed engagement is provided: send updates, invite to data review workshop.

On the following page, download the blank Analysis Matrix.

CONTINUE >

STAKEHOLDER ANALYSIS MATRIX

LEVELS OF INTEREST

LEVELS OF INFLUENCE

	HIGH	MEDIUM	LOW
HIGH			
MEDIUM			
LOW			●

LEVELS OF ENGAGEMENT

Partner	●
Involve/Engage	●
Consult	●
Monitor	●
Inform	●

ILLUSTRATIVE EXAMPLE

The Illustrative Example intersects at low level of influence and low level of interest. This determination means that you would keep that stakeholder informed.

An example of informed engagement is provided: send updates, invite to data review workshop.

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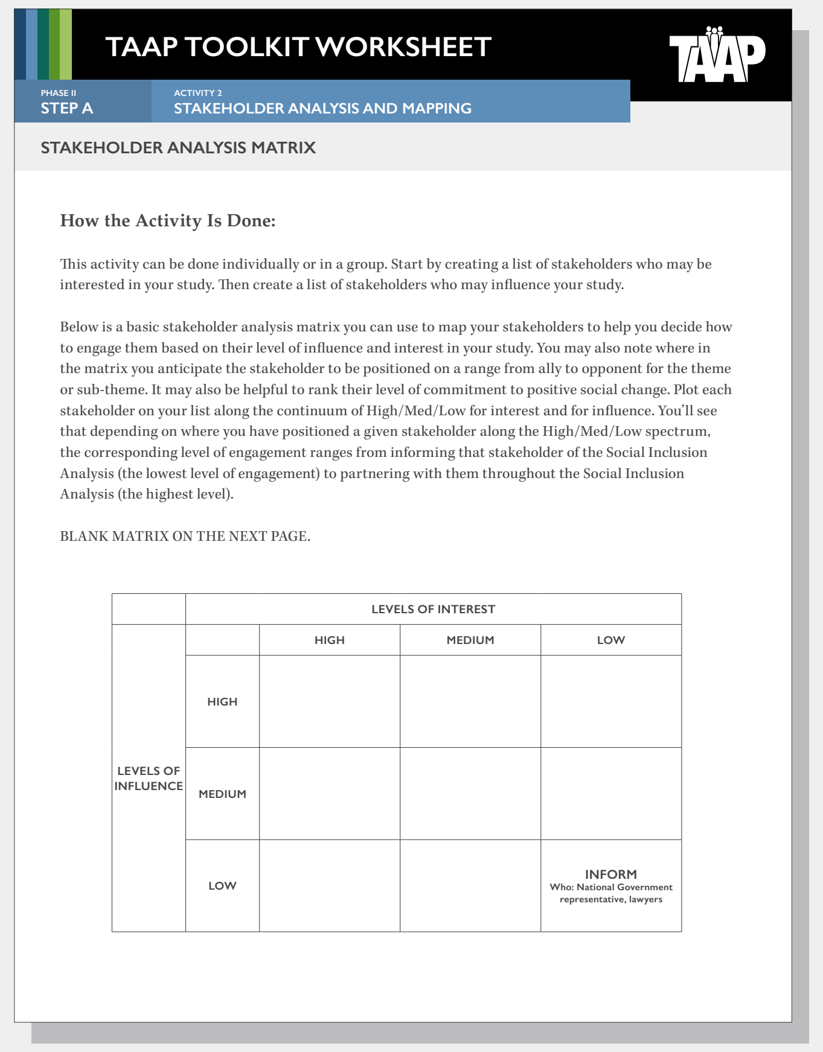
Stakeholder Analysis Matrix

On the worksheet to the right, plot each stakeholder on your list along the continuum of High/Med/Low for interest and for influence.

You'll see that depending on where you have positioned a given stakeholder along the High/Med/Low spectrum, the corresponding level of engagement ranges from informing that stakeholder of the Social Inclusion Analysis (the lowest level of engagement) to partnering with them throughout the Social Inclusion Analysis (the highest level).

After you have determined the level of engagement, you will need to determine the specific ways you want to engage the stakeholders.

Continue to the next worksheet.



TAAP TOOLKIT WORKSHEET

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ACTIVITY 2
STAKEHOLDER ANALYSIS AND MAPPING

STAKEHOLDER ANALYSIS MATRIX

How the Activity Is Done:

This activity can be done individually or in a group. Start by creating a list of stakeholders who may be interested in your study. Then create a list of stakeholders who may influence your study.

Below is a basic stakeholder analysis matrix you can use to map your stakeholders to help you decide how to engage them based on their level of influence and interest in your study. You may also note where in the matrix you anticipate the stakeholder to be positioned on a range from ally to opponent for the theme or sub-theme. It may also be helpful to rank their level of commitment to positive social change. Plot each stakeholder on your list along the continuum of High/Med/Low for interest and for influence. You'll see that depending on where you have positioned a given stakeholder along the High/Med/Low spectrum, the corresponding level of engagement ranges from informing that stakeholder of the Social Inclusion Analysis (the lowest level of engagement) to partnering with them throughout the Social Inclusion Analysis (the highest level).

BLANK MATRIX ON THE NEXT PAGE.

		LEVELS OF INTEREST		
		HIGH	MEDIUM	LOW
LEVELS OF INFLUENCE	HIGH			
	MEDIUM			
	LOW			INFORM Who: National Government representative, lawyers

CONTINUE

WORKSHEET

STAKEHOLDER ANALYSIS AND MAPPING

Stakeholder Engagement Worksheet

Provide detail in each box about the strategy for partnering, monitoring, consulting or informing your stakeholders about the Social Inclusion Analysis.

Once you have determined the specific strategies for engaging various stakeholders, fill out the boxes with the types of stakeholders. In our example, under "inform" for low-influence and low-interest we note that the team will provide details for informing national government representatives and lawyers about the Social Inclusion Analysis. You can further disaggregate by internal vs. external stakeholders, or allies vs. opponents, or other distinctions, if those would be helpful.

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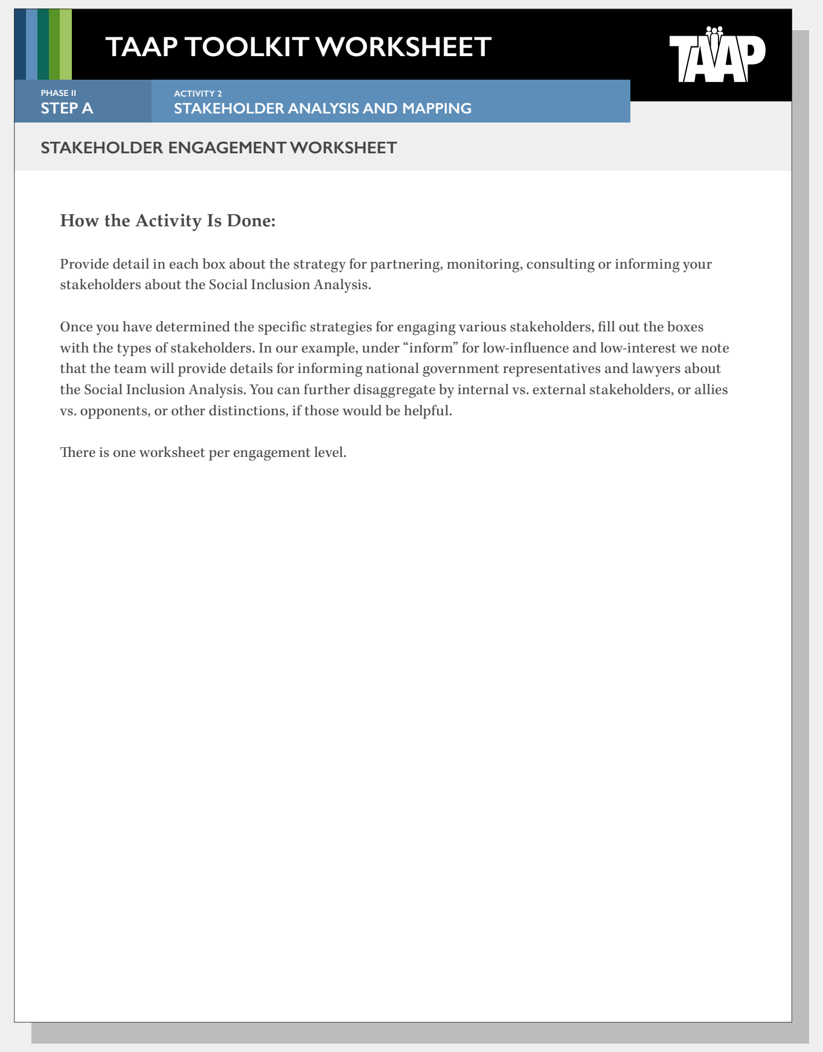
EXAMPLES

- If you determine that the individual or organization will be a partner, define the activities of the partnership. Example: Defining the scope of the study or identifying informants together.
- If you determine that the organization will be consulted, provide details about the consultation activities. Example: Sending the organization regular updates on the progress, inviting them to the Social Inclusion Analysis data review workshops, sending meeting minutes.
- If you determine that the individual ororganization will be monitored, provide details about the monitoring activities. Example: Follow up on their most recent studies, understand their research interests, and review their publications and press releases to identify how they are crafting their messages about inclusion.



TAAP TOOLKIT WORKSHEET

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ACTIVITY 2
STAKEHOLDER ANALYSIS AND MAPPING

STAKEHOLDER ENGAGEMENT WORKSHEET

How the Activity Is Done:

Provide detail in each box about the strategy for partnering, monitoring, consulting or informing your stakeholders about the Social Inclusion Analysis.

Once you have determined the specific strategies for engaging various stakeholders, fill out the boxes with the types of stakeholders. In our example, under "inform" for low-influence and low-interest we note that the team will provide details for informing national government representatives and lawyers about the Social Inclusion Analysis. You can further disaggregate by internal vs. external stakeholders, or allies vs. opponents, or other distinctions, if those would be helpful.

There is one worksheet per engagement level.

At the end of this activity, integrate the various strategies for each stakeholder into the project workplan.

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PHASE II BASICS
STEP A Determine Study Design
ACTIVITY 1 2 3 4
STEP B Apply the TAAP Inclusion Analysis Framework
STEP C Conduct Data Collection, Analysis and Reporting
STEP D Write Inclusion Analysis Report

PHASE II
STEP A

ACTIVITY 3

DEFINE THE PURPOSE OF YOUR SOCIAL INCLUSION ANALYSIS

It is essential to define your purpose clearly right from the outset.

By its nature, data collection and analysis can go on indefinitely, along limitless possible paths of inquiry. A clearly defined purpose ensures that the analysis stays on track and focuses on collecting only the information needed. That defined purpose will determine the methodology, sources of data, and informant selection, all of which will of course determine the ultimate outcome of your Social Inclusion Analysis report.

Description	Brainstorming, prioritizing	
Overview	Data collection and analysis can go on indefinitely. This activity is designed to help you prioritize and select up to three purpose(s) of the Social Inclusion Analysis.	
Objective	To determine the purpose of the Social Inclusion Analysis.	
Why do this activity?	A clearly defined purpose ensures that the analysis stays on track, focusing on only the information needed.	
Prerequisite activity?	No	N/A
Facilitator needed?	Yes	N/A
Time	1 hour	
Materials	Computers, whiteboard, and markers	
Participants	Social Inclusion Analysis Team, stakeholders (as appropriate)	

NOTE TO FACILITATOR

Where appropriate, stakeholders may be invited to participate in this activity. Guide the group (whether team members only, or team plus stakeholders) to discuss the purpose statements mentioned below. Consistently ask about timeframe, resources, and capacities required versus those actually available. The group should choose the purpose statements that are most appropriate, or else modify, creating new statements of purpose for the study.

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DEFINE THE PURPOSE OF YOUR SOCIAL INCLUSION ANALYSIS

How the Activity Is Done

Select no more than three purpose statements from the list below, or write your own. Although in some contexts all may be relevant, it is important to focus your efforts, staying mindful of the resources available for your Social Inclusion Analysis. This activity helps you articulate **WHY** you want to conduct the Social Inclusion Analysis. As you develop or select your purpose statements, consider how they might focus on transforming agency, access, and power.

Once you have identified your purpose statement/s, complete the following sentences. You can also include this in your Social Inclusion Analysis ToR template from Annex 2:

The purpose of this Social Inclusion Analysis is to…

This Social Inclusion Analysis does not intend to…

The list of possible "why" statements includes:

- To increase knowledge and awareness about who is most often underrepresented, marginalized or excluded from rights, services, or opportunities (political, social, or economic).
- To recommend areas of inclusion focus for projects, policy and advocacy work.
- To maximize opportunities for your project to support marginalized and excluded groups.
- To determine effective ways to engage those who already have agency, access, and power to use their influence for positive social change.
- To identify ways your project can promote change in how social groups include, marginalize, or exclude each other.
- Other (to be developed by group).

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STEP A

ACTIVITY 4

DEFINE SOCIAL INCLUSION ANALYSIS QUESTIONS

To keep the Social Inclusion Analysis focused, it is important to determine the specific questions to frame your study.

It might be helpful at this point to refer to the **6 DOMAINS** as guidance, but please note that at this stage you are not yet developing the data collection tools and questionnaires: think of this activity as the creation of your learning agenda, your research questions. As you do this activity, keep in mind the uniqueness of the TAAP approach and its focus on transforming agency, access, and power. Guide the group to define their questions, and then cluster those questions within the categories below. We recommended having no more than 5 questions (fewer if possible). Ideally there will be one question for each of the **TAAP CORE PRINCIPLES.** Where there are questions that belong to two or more concepts, put them in cross-cutting areas with explanation.

Description	Brainstorming, prioritizing, technical advice	
Overview	This activity is designed to define the Social Inclusion Analysis study questions.	
Objective	To determine no more than 5 questions of the Social Inclusion Analysis, including one question for each of the TAAP core elements – agency, access and power.	
Why do this activity?	Narrowing the focus of the Social Inclusion Analysis questions ensures that the follow-on activities such as data collection can be organized and implemented effectively.	
Prerequisite activity?	No	N/A
Facilitator needed?	Yes	N/A
Time	2 hours	
Materials	Computers, whiteboard, and markers	
Participants	Social Inclusion Analysis Team, key stakeholders	

CONTINUE

DEFINE SOCIAL INCLUSION ANALYSIS QUESTIONS

How the Activity Is Done

We have provided examples of Social Inclusion Analysis questions from which you can choose, or you can develop your own. Ensure that the Social Inclusion Analysis team (a team which, as a reminder, includes subject matter expertise in development work generally and inclusive programming specifically; experience in carrying out primary and secondary research and conducting meaningful analysis into research findings; and the ability to write clearly and compellingly for general audiences) fully processes and supports the questions. By having the team voice their own impressions upfront, you can reveal any preconceived ideas that team members may be bringing to the process.

The purpose of the Social Inclusion Analysis is to answer these questions with methodological rigor, so if, going in, there are already preconceived ideas, it is important to raise and address them in advance.

See questions on the following page.

CONTINUE ›

DEFINE SOCIAL INCLUSION ANALYSIS QUESTIONS

- To what extent are the basic rights and needs of people in the context met or not?
- How does that happen? Government-led services and protections? Entrenched customs and mores? Market-based solutions? A combination?
- To what extent does a person experience threats to their safety, wellness, or dignity because of their identity?
- What gaps exist between included, marginalized, and excluded identities at the household level? The community level? The societal level?
- How do those gaps impact the way that identity groups experience agency and access to development interventions?
- What are the existing gender and social identity norms?
- What are the existing barriers, opportunities, boosters, and enablers?
- What might be some of the causes responsible for the existence (and perpetuation) of those barriers, opportunities, and enablers?
- How do marginalized and excluded groups interact with other groups? Which groups do they not interact with at all?
- Why do interactions (or lack of interactions) happen the way they do?
- Who holds power to influence inclusion/marginalization/exclusion patterns?
- What are the most pressing needs of various identity groups?
- Which identity groups already appear to have traction in their advocacy? Why?
- Who are the key duty-bearers, public servants, influencers, people with power, role models?
- Who pushes back against certain inclusion efforts or identity groups? Who are the decision makers who simply don't act? What is their motivation or rationale for non-action?
- How can you position your project participants to become champions of inclusion?
- Other (to be developed by the group).

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DEFINE SOCIAL INCLUSION ANALYSIS QUESTIONS

Once you have selected (or developed) your questions, cluster those within each of the four TAAP areas (agency, access, power, and transformation). We recommend at least one question to address transformation. This will help you understand whether there are any ways to make positive links between various identity groups based on power dynamics, and to identify who, among those who have power, might be most willing to engage excluded groups. If you have questions that cross several TAAP areas, make note of this. (You will be checking back on these notes later as you develop your data collection tool in **PHASE II, STEP B, ACTIVITY 1: DEVELOP SOCIAL INCLUSION ANALYSIS METHODOLOGY.**)

Using the table below as a guide, insert your Social Inclusion Analysis questions in the downloadable worksheet on the right.

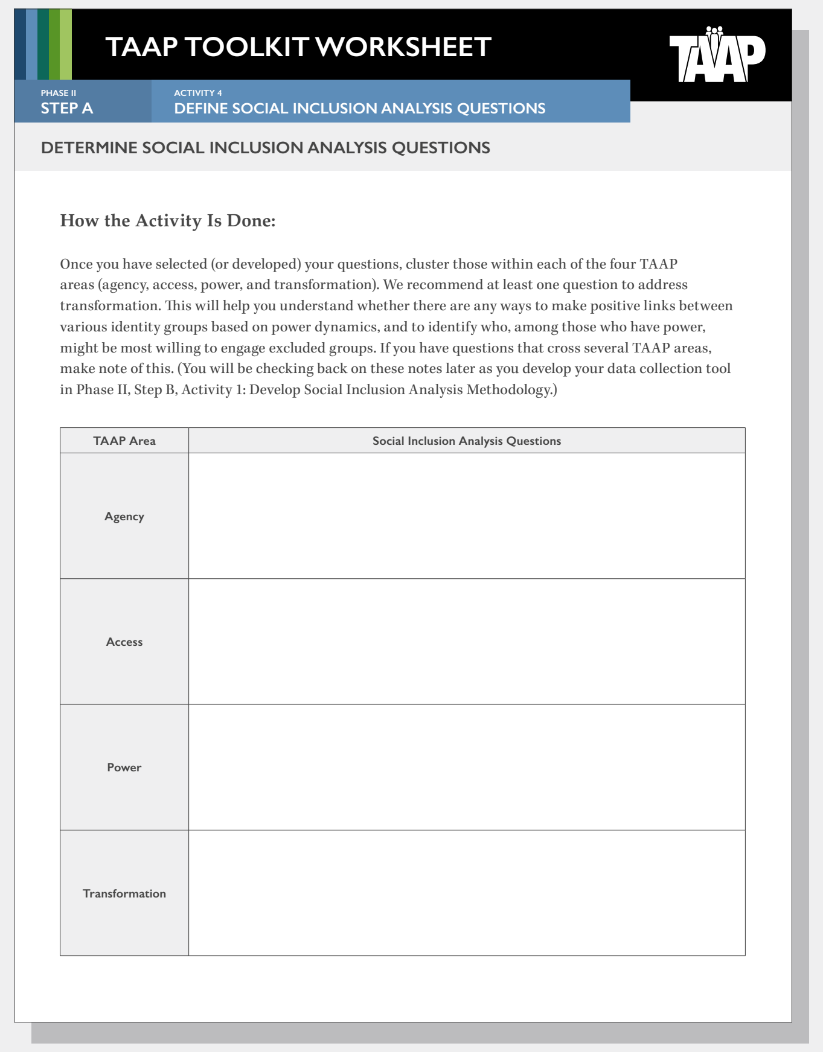
TAAP Area	Social Inclusion Analysis Questions
Agency	
Access	
Power	
Transformation	

ADDRESS
POWER IMBALANCES

WORKSHEET

PDF
Version

TOOLSHOP
Also available in the One-Stop Toolshop



TAAP TOOLKIT WORKSHEET

PHASE II
STEP A

ACTIVITY 4
DEFINE SOCIAL INCLUSION ANALYSIS QUESTIONS

DETERMINE SOCIAL INCLUSION ANALYSIS QUESTIONS

How the Activity Is Done:

Once you have selected (or developed) your questions, cluster those within each of the four TAAP areas (agency, access, power, and transformation). We recommend at least one question to address transformation. This will help you understand whether there are any ways to make positive links between various identity groups based on power dynamics, and to identify who, among those who have power, might be most willing to engage excluded groups. If you have questions that cross several TAAP areas, make note of this. (You will be checking back on these notes later as you develop your data collection tool in Phase II, Step B, Activity 1: Develop Social Inclusion Analysis Methodology.)

TAAP Area	Social Inclusion Analysis Questions
Agency	
Access	
Power	
Transformation	

Conclude this step by consolidating your work so far onto one sheet. Remember that the Annex 2 template is available for your use, and you can use the results of this step to populate your ToR.

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PHASE II
STEP B

APPLY TAAP SOCIAL INCLUSION ANALYSIS FRAMEWORK

Please continue following the Annex 2 template as you work through this step.

In this step you will understand and rank Domains of Analysis by level of importance; determine where you get data for relevant domains and identity groups; and confirm the social inclusion analysis questions specific to relevant domains.

ACTIVITY 1
DEVELOP THE SOCIAL INCLUSION ANALYSIS METHODOLOGY

Description	Questionnaire; mapping; prioritization exercise; brainstorming; technical advice	
Overview	This activity develops the data collection and analysis methodology, and defines data collection tools and processes you will use for the Social Inclusion Analysis. Before you define methodology, data collection tools, or respondents for your Social Inclusion Analysis, it is important to understand the Social Inclusion Analysis framework. That framework takes the four TAAP areas (agency, access, power, and transformation), and studies each through the lens of 6 classic domains of analysis originally developed at Harvard in the 1980s. The 6 domains, elaborated later in this activity, play an important role in shaping your Social Inclusion Analysis, and the design and implementation work that will flow from that analysis. This activity is composed of three parts: • Selecting the key study domains • Identifying key respondents and data collection methods • Designing questions	
Objective	To define the Social Inclusion Analysis Framework.	
Why do this activity?	To be successful, your Social Inclusion Analysis must be one that you have the resources to implement. Appropriate methodology ensures practical applicability as well as rigor.	
Prerequisite activity?	Yes	Determine Study Design (Phase II, Step A)
Facilitator needed?	Yes	See "The Basics" for information about the facilitation needs for the activities in this Phase.
Time	5-8 hours (depending on the complexity of your study and the composition of your team)	
Materials	Computers, whiteboard, and markers	
Participants	Social Inclusion Analysis Team	

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APPLY TAAP SOCIAL INCLUSION ANALYSIS FRAMEWORK

The six Social Inclusion Analysis Domains are categories used to frame the data you will be collecting and analyzing in your Social Inclusion Analysis. The Six Domains Analytical Framework was developed by the Harvard Institute for International Development in the mid-1980s to collect and analyze information from communities and households. It described who performed various household and community functions, who had access and control of resources, and the influence of gender roles. The domains have since evolved to include other forms of power relationships and decision-making processes.

KEY NOTE

A Social Inclusion Analysis employs systematic data organization to identify, understand, and describe gaps in the general status of included, marginalized, and excluded identity groups according to the domains, and to understand the relevance of inclusion, marginalization and exclusion in a specific context.

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PART I SELECTING THE KEY DOMAINS OF THE STUDY

NOTE TO THE FACILITATOR

The worksheet on the following page, *Rank Domains by Level of Importance*, includes the six domains of analysis with brief descriptions. Depending on the type, purpose, and focus of your Social Inclusion Analysis, all or only some of the domains may be relevant. Facilitate the discussion to narrow down the domains that will be thoroughly examined.

How the Activity Is Done

Review the six domains used in a TAAP Social Inclusion Analysis. Review the results of Step A, looking at the scope, focus, purpose, and the questions of the Social Inclusion Analysis.

Rate the level of importance of each domain for your Social Inclusion Analysis, using the following ratings:

H = HIGH
(if all aspects of the domain are very important to the purpose of your study)

M = MEDIUM
(if some, but not all, aspects of the domain are important to your study)

L = LOW
(if the domain is not crucial for your study).

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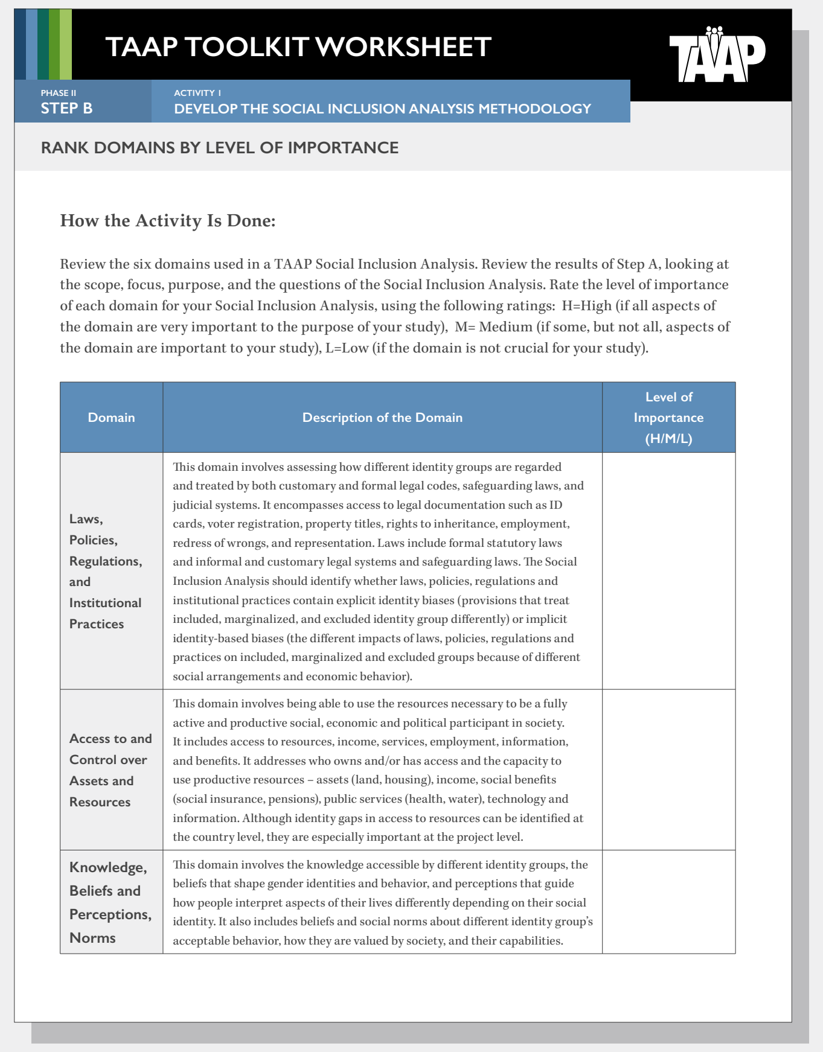
PART I RANK DOMAINS BY LEVEL OF IMPORTANCE

WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*



TAAP TOOLKIT WORKSHEET

RANK DOMAINS BY LEVEL OF IMPORTANCE

How the Activity Is Done:

Below are samples from the worksheet. Download it on the right.

Domain	Description of the Domain	Level of Importance (H/M/L)
Laws, Policies, Regulations, and Institutional Practices	This domain involves assessing how different identity groups are regarded and treated by both customary and formal legal codes, safeguarding laws, and judicial systems. It encompasses access to legal documentation such as ID cards, voter registration, property titles, rights to inheritance, employment, redress of wrongs, and representation. Laws include formal statutory laws and informal and customary legal systems and safeguarding laws. The Social Inclusion Analysis should identify whether laws, policies, regulations and institutional practices contain explicit identity biases (provisions that treat included, marginalized, and excluded identity group differently) or implicit identity-based biases (the different impacts of laws, policies, regulations and practices on included, marginalized and excluded groups because of different social arrangements and economic behavior).	
Access to and Control over Assets and Resources	This domain involves being able to use the resources necessary to be a fully active and productive social, economic and political participant in society. It includes access to resources, income, services, employment, information, and benefits. It addresses who owns and/or has access and the capacity to use productive resources – assets (land, housing), income, social benefits (social insurance, pensions), public services (health, water), technology and information. Although identity gaps in access to resources can be identified at the country level, they are especially important at the project level.	

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PART 2 IDENTIFY YOUR RESPONDENTS AND DATA COLLECTION TOOLS

NOTE TO THE FACILITATOR

This part of the activity can be done in a small or a large group. Through this activity you will become more familiar with the analysis framework for this study, and will be able to develop your specific data collection processes and tools accordingly. When the data is collected you will use that framework to map findings within the relevant TAAP core concepts (agency, access, power and transformation). You will then analyze the boosters and barriers, map out the affected identities within each of the selected domains, and create a focused and intentional list of respondents, referring to the stakeholder mapping you conducted in Phase II, Step A, Activity 1.

How the Activity Is Done

Team members map respondents and data sources within each of the domains identified for the Social Inclusion Analysis. Using the template provided below start by creating a list of respondents, putting an X next to the domain where you expect that group to provide data. Then, replace the X with the appropriate data collection tool to use with that particular group (see LGBTI respondent group as example).

This will help you develop tools that are aligned and coordinated across various respondents and that reflect the questions you want to ask.

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PART 2 IDENTIFY YOUR RESPONDENTS AND DATA COLLECTION TOOLS

How the Activity Is Done (Continued)

Examine your selected data sources, and choose those that will provide you with the most relevant information. You should not limit your data collection to those with the most boxes checked; instead, try to ensure that you have diversity of data sources. For example, although government representatives might be able to reflect in a general way on most of the dimensions, they might not be able to give the in-depth perspective you might get from a person directly impacted by marginalization or exclusion.

You may also notice that because government representatives might be able to reflect on a number of dimensions, you will have many questions for them, so you may want to employ your data collection tools selectively and focus on the most strategic dimensions. Bear in mind throughout this activity that communities affected by identity-based discrimination know best what inclusion means to them. They should be a primary source of information on the effectiveness of inclusive development efforts.

On the following page, continue to the Worksheet: Identify Your Respondents and Data Collection Tools.

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PART 2 IDENTIFY YOUR RESPONDENTS AND DATA COLLECTION TOOLS

Below are samples from a pre-filled worksheet. Download a blank one on the right.

Respondents / Other Data Sources	Laws, Policies, Regulations, and Inst'l Practices	Access to and Control over Assets and Resources	Knowledge, Beliefs and Percept-ions, Cultural Norms	Power and Decision-making	Roles, Resps, Participation and Time Use	Human dignity, safety, and wellness
Documents, reports and secondary data sources		UN Human Development Indicators and Reports	USAID Gender Analysis			Human Rights Watch Reports
Government policymakers	X	X	X	X	X	
Religious/faith-based identity groups	X					X
Gender-focused organizations			X		X	

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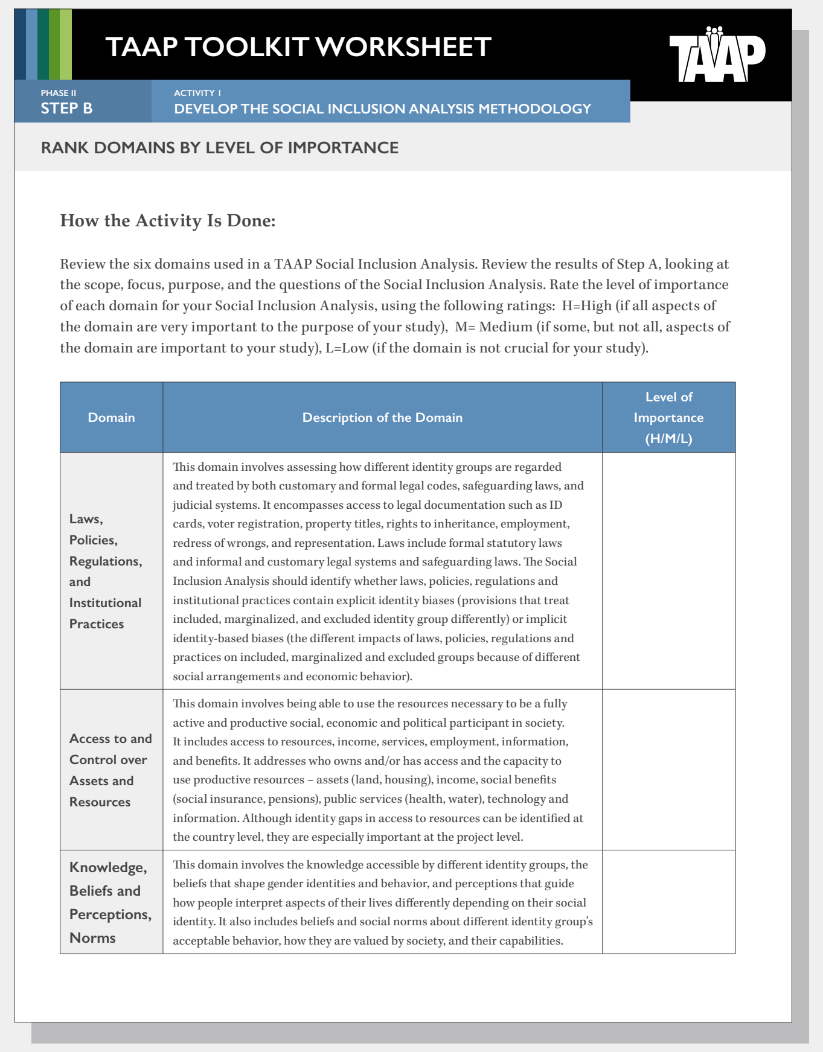

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PHASE II
STEP B

ACTIVITY I
DEVELOP THE SOCIAL INCLUSION ANALYSIS METHODOLOGY

RANK DOMAINS BY LEVEL OF IMPORTANCE

How the Activity Is Done:

Review the six domains used in a TAAP Social Inclusion Analysis. Review the results of Step A, looking at the scope, focus, purpose, and the questions of the Social Inclusion Analysis. Rate the level of importance of each domain for your Social Inclusion Analysis, using the following ratings: H=High (if all aspects of the domain are very important to the purpose of your study), M= Medium (if some, but not all, aspects of the domain are important to your study), L=Low (if the domain is not crucial for your study).

Domain	Description of the Domain	Level of Importance (H/M/L)
Laws, Policies, Regulations, and Institutional Practices	This domain involves assessing how different identity groups are regarded and treated by both customary and formal legal codes, safeguarding laws, and judicial systems. It encompasses access to legal documentation such as ID cards, voter registration, property titles, rights to inheritance, employment, redress of wrongs, and representation. Laws include formal statutory laws and informal and customary legal systems and safeguarding laws. The Social Inclusion Analysis should identify whether laws, policies, regulations and institutional practices contain explicit identity biases (provisions that treat included, marginalized, and excluded identity group differently) or implicit identity-based biases (the different impacts of laws, policies, regulations and practices on included, marginalized and excluded groups because of different social arrangements and economic behavior).	
Access to and Control over Assets and Resources	This domain involves being able to use the resources necessary to be a fully active and productive social, economic and political participant in society. It includes access to resources, income, services, employment, information, and benefits. It addresses who owns and/or has access and the capacity to use productive resources – assets (land, housing), income, social benefits (social insurance, pensions), public services (health, water), technology and information. Although identity gaps in access to resources can be identified at the country level, they are especially important at the project level.	
Knowledge, Beliefs and Perceptions, Norms	This domain involves the knowledge accessible by different identity groups, the beliefs that shape gender identities and behavior, and perceptions that guide how people interpret aspects of their lives differently depending on their social identity. It also includes beliefs and social norms about different identity group's acceptable behavior, how they are valued by society, and their capabilities.	

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PART 3 HOW TO ASK QUESTIONS

NOTE TO THE FACILITATOR

This exercise is best conducted with a group divided into working pairs. Assign each pair one domain to populate. Ask them to consistently look back to the scope of the study from **PHASE II STEP A, DETERMINE STUDY DESIGN.**

Once data sources are identified, define your tools, timeframe, and data collection workplan. (Note: It is not possible for the authors of this volume to recommend tools or methods, because those are context-specific.) The general questions in the next table may help you to think of more specific questions for each domain area and to re-assess and refine your data collection tools. Modify the questions in the next table as needed.

How the Activity Is Done

We recommend expanding the chart provided on the following pages, with separate lines for Agency, Access, Power and Transformation, to ensure that you are examining each individually.

(For example, for the paired group working on the "What are the laws" question, provide lines for "What are the laws impacting Agency," "What are the laws impacting Access," and "What are the laws impacting Power.")

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PART 3 HOW TO ASK QUESTIONS

Provide the following directions to pairs:

First decide which data collection tool(s) is appropriate for your specific domain. Discuss together why that tool is appropriate. Once you have agreed on the tool(s), develop detailed, domain-specific questions that you can ask using the data collection tool(s) you have selected. Include questions that will help to identify domain-specific barriers to agency, access, and power for included, marginalized, and excluded identity groups, as well as questions that pertain to domain-specific boosters (what favorable conditions already exist that can be built upon) for agency, access, and power.

DOMAIN-RELATED GENERAL QUESTIONS		What are the Laws, Policies, Regulations, and Institutional Practices that influence the context in which included, marginalized and excluded identity groups act and make decisions?	Who has access to and control over assets and resources?	What are the knowledge, beliefs, cultural norms and perceptions of and about included, marginalized and excluded groups?	Who has control over the power to make decisions?	What are the roles, responsibilities, participation and time use of different identity groups?	What is the status of human dignity, wellness, and safety among different identity groups?
AGENCY, ACCESS	BOOSTER						
	BARRIER						

CONTINUE >

PART 3 HOW TO ASK QUESTIONS

NOTE TO THE FACILITATOR

After you have designed the questions, you may need to go back to the results of the Part (2) of this activity and re-assess whether the data collection tool you identified is the best for your purposes. Additionally, you might also decide to go back and further narrow your Social Inclusion Analysis. Revisiting processes can help you ensure that you are consistently improving the design of your study as its various components are developed. Please refer to the Washington Group Questions on Disability for disability questions. (http://www.washingtongroup-disability.com) Use other accepted best practice for interviewing various groups in your area of study. For guidance on interviewing people regarding sexual orientation and gender identity issues, refer to the Williams Institute's "Best Practices for Asking Questions about Sexual Orientation on Surveys."[17] As noted elsewhere in this toolkit, TAAP implementers should remain mindful of the heightened risks that LGBTI persons face in many countries, even compared to other marginalized or excluded groups, and proceed according to Do No Harm principles.

Use this template on the following page to complete the processes described in this part.

You will find illustrative questions for specific thematic projects in the TAAP scenarios which will be located on the www.taapinclusion.org website.

CONTINUE ›

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[17] Available at: https://williamsinstitute.law.ucla.edu/research/census-lgbt-demographics-studies/best-practices-for-asking-questions-about-sexual-orientation-on-surveys/

WORKSHEET

PART 3 HOW TO ASK QUESTIONS

WORKSHEET

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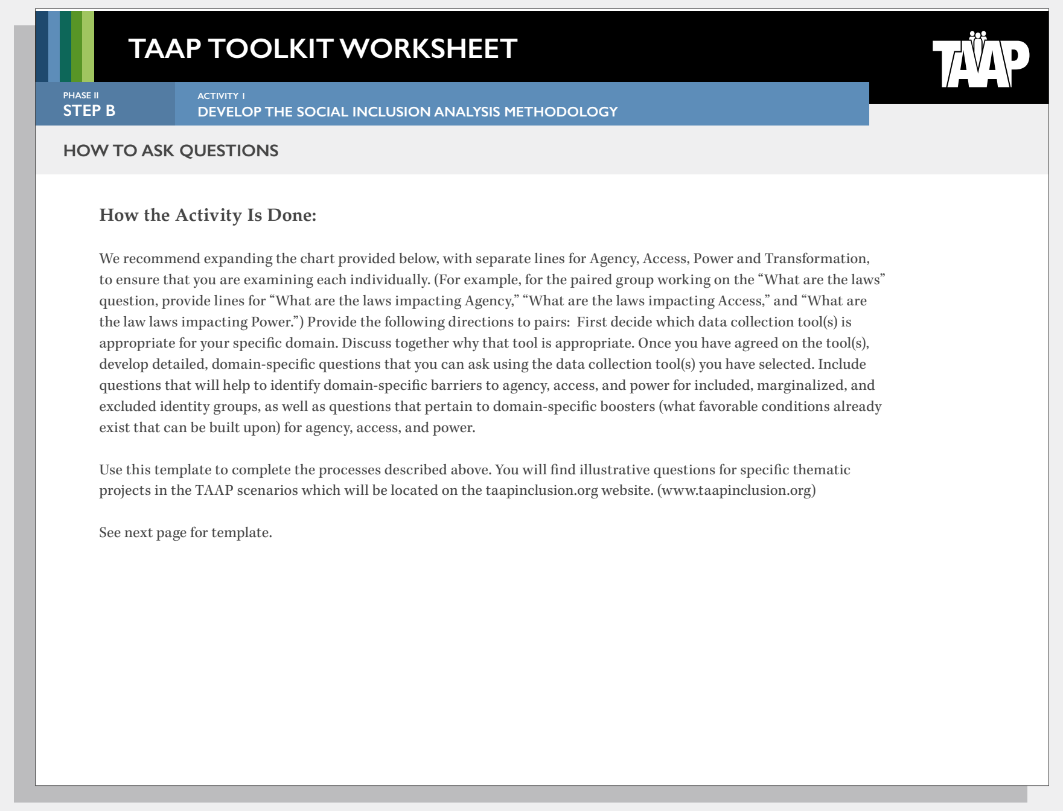
Download a full worksheet on the right.

AGENCY DOMAIN-RELATED GENERAL QUESTIONS		Who has access to and control over assets and resources?	What are the knowledge, beliefs, cultural norms and perceptions of and about included, marginalized and excluded groups?	Who has control over the power to make decisions?	What are the roles, responsibilities, participation and time use of different identity groups?	What is the status of human dignity, wellness, and safety among different identity groups?
BOOSTERS						
BARRIERS						



TAAP TOOLKIT WORKSHEET

PHASE II
STEP B

ACTIVITY 1
DEVELOP THE SOCIAL INCLUSION ANALYSIS METHODOLOGY

HOW TO ASK QUESTIONS

How the Activity Is Done:

We recommend expanding the chart provided below, with separate lines for Agency, Access, Power and Transformation, to ensure that you are examining each individually. (For example, for the paired group working on the "What are the laws" question, provide lines for "What are the laws impacting Agency," "What are the laws impacting Access," and "What are the law laws impacting Power.") Provide the following directions to pairs: First decide which data collection tool(s) is appropriate for your specific domain. Discuss together why that tool is appropriate. Once you have agreed on the tool(s), develop detailed, domain-specific questions that you can ask using the data collection tool(s) you have selected. Include questions that will help to identify domain-specific barriers to agency, access, and power for included, marginalized, and excluded identity groups, as well as questions that pertain to domain-specific boosters (what favorable conditions already exist that can be built upon) for agency, access, and power.

Use this template to complete the processes described above. You will find illustrative questions for specific thematic projects in the TAAP scenarios which will be located on the taapinclusion.org website. (www.taapinclusion.org)

See next page for template.

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PHASE II
STEP C

CONDUCT DATA COLLECTION, ANALYSIS, AND REPORTING

Once you have finalized your data collection methods and tools in Phase II, Step B, it is time here in Step C to start actually collecting data.

Adherence to best practices is of paramount importance during this step, particularly for primary-source data collection (interviewing people one-on-one or leading focus group discussions).

Many organizations, especially larger ones, set forth data collection best practices in their own monitoring and evaluation standard guidelines. This toolkit's **CROSS-CUTTING SECTION: MONITORING, EVALUATION, AND LEARNING** 🔍 also contains technical advice and a set of activities to ensure that data collection and analysis is inclusion-sensitive. Please review that section before completing this activity. Project teams must properly inform all interview and survey subjects about the purpose of the Social Inclusion Analysis and its intended use. Teams must also obtain participants' informed consent to be interviewed. The high rate of trauma among marginalized and excluded populations requires a skilled approach to ensure their safety, dignity, and comfort. Protecting their identities and opinions is one of the most important responsibilities in the TAAP approach. Refer also to the activities in the Cross-Cutting Section: Monitoring, Evaluation, and Learning section to consider: whether you want to conduct a participatory Social Inclusion Analysis; who will conduct the data collection; and whether there are any associated risks. If you decide that you do want to lead a participatory data collection process, be sure to include enough time in your data collection workplan to train data collectors—again, with special emphasis on ethical-data collection practices.

* *The activities in this step will help you organize and analyze your data, draw findings, and make recommendations.*

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PHASE II
STEP C

CONDUCT DATA COLLECTION, ANALYSIS, AND REPORTING

ACTIVITY 1

MAP YOUR DATA AND FINDINGS

Description	Mapping; prioritization exercise; brainstorming; technical advice	
Overview	This activity will help you map data in a way that makes visible the intersectionality of identities. This not only will decrease the volume of data, but also meaningfully organize it so that you can more easily analyze and use it.	
Objective	To analyze and document the findings and recommendations.	
Why do this activity?	This activity produces a clear set of findings and recommendations, and provides useful documentation for Phase III.	
Prerequisite activity?	Yes	Determine Study Design (Phase II, Step A, all activities) Apply the TAAP Inclusion Framework (Phase II, Step B, all activities)
Facilitator needed?	Yes	See "The Basics" for information about facilitation needs for activities in this phase.
Time	Time spent on this activity can vary depending on how much data was collected and how data analysis is conducted.	
Materials	Computers, whiteboard, and markers.	
Participants	Your organization's staff; partners; program participants	

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MAP YOUR DATA AND FINDINGS

NOTE TO FACILITATOR

This activity is done *after* the data is collected, stored, and filed. (As noted above, the most important thing to keep in mind during actual data collection is the safety and dignity of all respondents, especially those from marginalized or excluded identity groups, who may take part in your primary-source research. Note that this volume contains no discrete "activity" for data collection because that process is essentially the actual execution—the reading of reports, the conducting of focus groups, the interviewing of key informants—of the strategy you devised in Step B of this phase.)

This activity requires basic data analysis skills, and is best done individually or in groups of pairs. Start the analysis by culling the findings and mapping them against Worksheet II.C.1 Mapping Data and Findings with TAAP Domains and TAAP Components (downloadable copy available in the One Stop Tool Shop). Assign each of the participants/pairs one domain, and direct them to cull, input, analyze, and report their findings. Once the data mapping is done, check to make sure that all concepts have been studied and that sufficient data exists to explain how those are affected.

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MAP YOUR DATA AND FINDINGS

How the Activity Is Done

When you conducted your data collection, you likely noticed that certain identities were mentioned in response to your questions related to inclusion, marginalization, and exclusion. For example, if you were studying access to education, your respondents may have told you that boys tend to have easier access to education than girls, and that among children in general, children in the cities have easier access to education than those in the rural areas.

When you analyze the different identity groups for this activity, here are types of identities (from the example) from which you may draw:

- Age (use categories relevant to your area of study, may include 0-5; <18, >18, or other categories).
- Gender (use the contextualized definitions and include intersecting identities).
- Geography (rural, urban, semi-urban, etc.)
- Disability (based on the Washington Group questions)
  http://www.washingtongroup-disability.com/washington-group-question-sets/short-set-of-disability-questions/
- Racial, ethnic, indigenous, religious identity.
- Others relevant to your study and context.

INTERSECTIONALITY

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MAP YOUR DATA AND FINDINGS

How the Activity Is Done (Continued)

As you go issue by issue, place the identity groups on the grid, mapping the finding against Agency, Access, Power or Transformation and briefly describe how each identity is affected, including relevant barriers and boosters.

For example, in a context where women are prohibited from inheriting land, insert in the box at the crossroad of Access and Domain 1 the following barrier: *"Identity 1/ Women: Prohibited from inheriting land."*

You may find that TAAP Domains and TAAP Components (agency, access, power and transformation) intersect in the grid on the following page. The nexus of the X and Y axes reveals barriers and boosters for both the development gap/domain and for agency or access or power. These intersections amplify the data to ensure that you are not missing opportunities to identify boosters and barriers that support or inhibit inclusion of a particular identity group. The data collected through the domain "Access to and Control over Assets and Resources" shows that female-headed households in rural areas are less likely to have larger landholdings than their male counterparts. The nexus with the Access component of TAAP signals a significant constraint to agency, access and power. In cases when it is hard to follow these guidelines, use your expertise of the context and of the issue to determine the box where your data belongs.

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MAPPING DATA AND FINDINGS WITH TAAP DOMAINS AND TAAP COMPONENTS

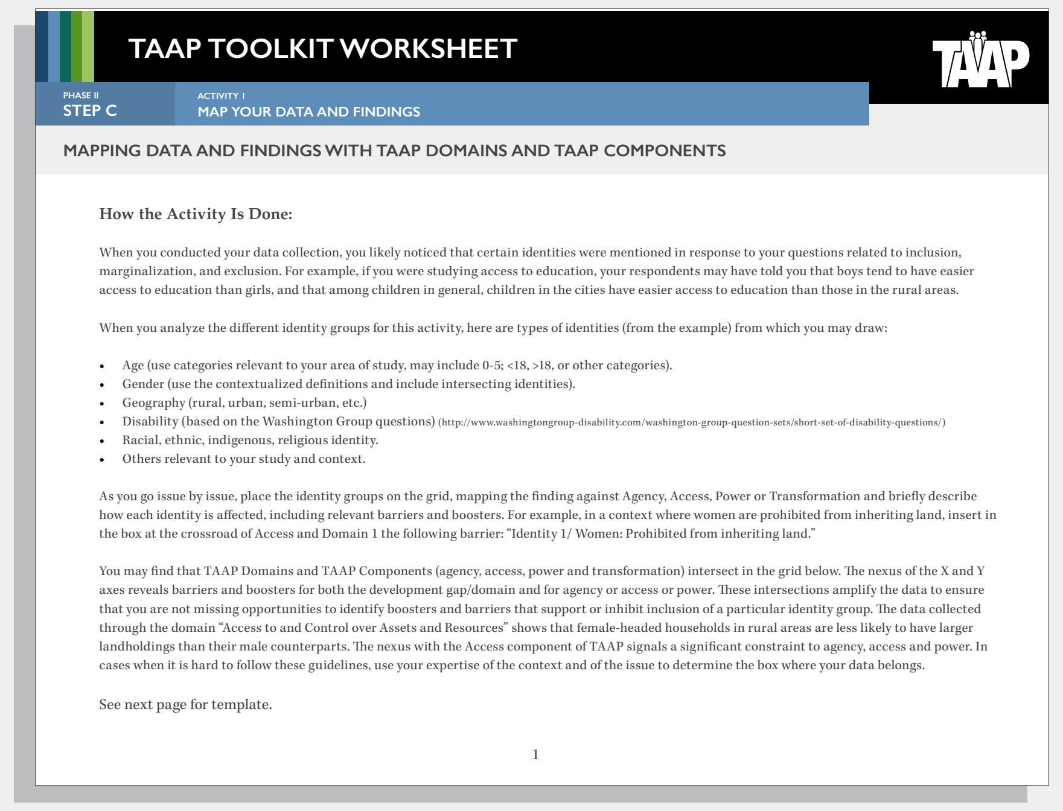
WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*

Below are samples from a pre-filled worksheet. Download a blank one on the right.

TAAP Domains / TAAP Components		Laws, Policies, Regulations, and Institutional Practices	Access to/Control over Assets and Resources	Knowledge, Beliefs/ Perceptions, Cultural Norms	Power, Decision-making	Roles, Responsibilities, Participation and Time Use	Human Dignity, Safety and Wellness
ACCESS	BOOSTER	Example: Identity: Women, Children and other disadvantaged groups: Boosters (International law promotes equal rights to land) Identity 2: Boosters	Example: Identity: Women: Boosters New Micro-loan program provides women-only loans for seeds and farm equipment Identity: Women, Children and other disadvantaged groups: 1998 Land Act affords some protection for women, children and other disadvantaged groups				
	BARRIER	Example: Rural, women: (Identity legally prohibited from inheriting land) Identity 2: Barriers	Example: Rural: In rural areas, male-headed households are generally likely to have larger landholdings than their female-headed household counterparts Identity 2: Barriers			Example: Identity: Women: Women are disadvantaged by the limited time they have (time poverty) that does not allow them to go out to advocate. Identity 2: Barriers	



TAAP TOOLKIT WORKSHEET

PHASE II
STEP C

ACTIVITY 1
MAP YOUR DATA AND FINDINGS

MAPPING DATA AND FINDINGS WITH TAAP DOMAINS AND TAAP COMPONENTS

How the Activity Is Done:

When you conducted your data collection, you likely noticed that certain identities were mentioned in response to your questions related to inclusion, marginalization, and exclusion. For example, if you were studying access to education, your respondents may have told you that boys tend to have easier access to education than girls, and that among children in general, children in the cities have easier access to education than those in the rural areas.

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- Others relevant to your study and context.

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See next page for template.

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MAP YOUR DATA AND FINDINGS

How the Activity Is Done (Continued)

As you have entered and organized your data in Worksheet: Mapping Data and Findings with TAAP Domains and TAAP Components, consider:

- Who are the key actors driving the inclusion, marginalization or exclusion?
- Why are the key actors motivated to drive the inclusion, marginalization or exclusion?
- What strategies are key actors using to drive the inclusion, marginalization or exclusion?
- When is inclusion likely to be open to further expand and when is marginalization or exclusion likely to be open to change for better or worse?

Consider tracking ideas that emerge about what can be done to affect these factors of inclusion, marginalization or exclusion. Be sure to integrate these considerations into the Social Inclusion Analysis report.

CONTINUE ›

PHASE II
STEP C

ACTIVITY 2
EXPLORE ROOT CAUSES

Description	Brainstorming, discussion, analysis	
Overview	This activity results in the creation of a "problem tree" that depicts the identified consequences, drivers, causal factors, and root causes related to inclusion, marginalization, and exclusion of the problem the project seeks to address.	
Objective	To identify and understand the consequences, drivers, causal factors, and root causes of inclusion, marginalization, and exclusion in the project.	
Why do this activity?	Effective inclusion efforts must focus on designing programs that tackle root causes rather than symptoms, and must also actively identify and mitigate unintended consequences. The activity is based on a technique called the "Five Whys"[18] (the principle that uncovering the ultimate reason a problem exists requires asking the question why five times). The goal of this activity is to understand the ultimate reason why the problem that your project hopes to address exists in the first place, and how your project's inclusive design contributes to addressing the root cause.	
Prerequisite activity?	No	N/A
Facilitator needed?	Yes	Internal/External
Time	2 hours	
Materials	Flip chart with outline of tree, three different colored sticky notes, markers/pens	
Participants	Required: Design team. Recommended: Partners, participants, stakeholders	

CONTINUE >

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[18] Harvard Business Review. "The 5 Whys." 7 February 2012. Accessed 5 Aug 2017 (https://hbr.org/2012/02/the-5-whys.html).

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EXPLORE ROOT CAUSES

NOTE TO FACILITATOR

Instruct the team to consider the problem your project hopes to address, and encourage them to dig deep into why the problem exists. We often consider the first few "whys," but root causes require deeper analysis. The team may become frustrated that their project design does not address a root cause. Note that not all projects need to (or can) address the root cause of a problem and it is fine to address causal factor(s). It is still important for the team to understand what contributes to the causal factors in the system that perpetuates marginalization or exclusion, to explore what can be done to affect these factors (i.e., how does meaningful change come about), and to define what short- and long-term results the project intends to support the local community achieve with respect to inclusion.

How the Activity Is Done

Craft a Problem Statement. A problem statement is a clear description of the need for your project. This is an opportunity to step back from the specific inclusion issues in your operating environment and to articulate the problem you are trying to address. Introduce the definitions of consequences, causal factors, and root causes:

- **CONSEQUENCE:** The result/effect of the problem.
- **CAUSAL FACTOR:** Something that contributes to creating a problem such as a circumstance or influence/drivers.
- **ROOT CAUSE:** The ultimate reason why the problem exists.

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THE PROBLEM TREE

How the Activity Is Done

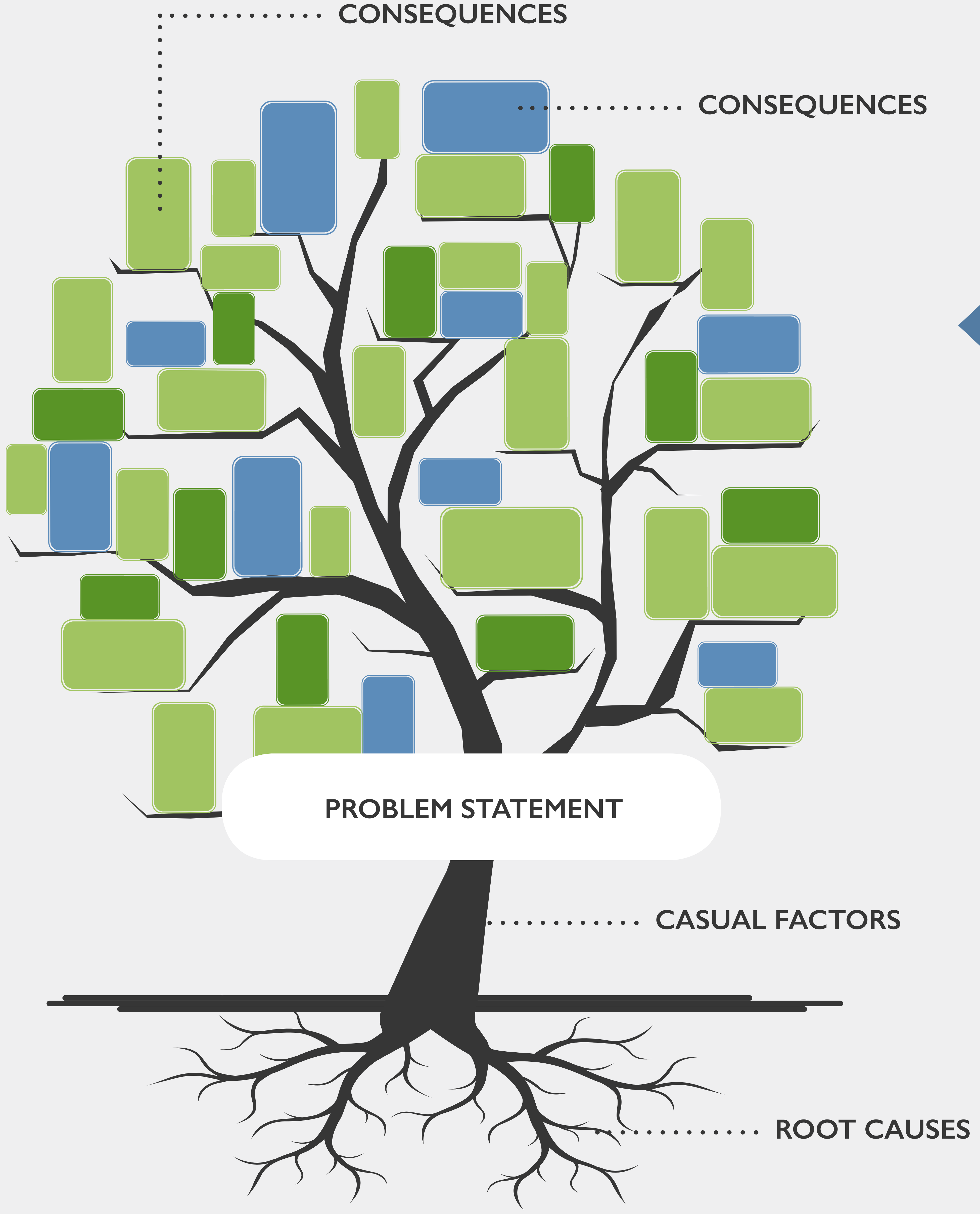
Next, introduce the Problem Tree and explain how it is used to illustrate consequences, causal factors, and root causes.

ON A FLIPCHART, WHITEBOARD, OR PIECE OF PAPER, DRAW A SIMPLE TREE WITH BRANCHES AND ROOTS.

Write the problem statement horizontally in the middle of the tree – right where the branches first start rising out of the trunk. Consequences are the leaves, causal factors should go along the trunk, root causes are the roots below the surface.

See the following page for a worksheet with further instructions.

CONTINUE ›



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WORKSHEET

THE PROBLEM TREE

WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*

How the Activity Is Done

The team should work as a group to identify the problem(s) and resultant consequences and add those to the problem tree. Make sure to be inclusive by probing the various identities that may be affected by the problem(s). Consider tracking ideas that emerge about what can be done to affect these factors of inclusion, marginalization or exclusion. Be sure to integrate these considerations into the Social Inclusion Analysis report.

CONTINUE >

TAAP TOOLKIT WORKSHEET

PHASE II
STEP C

ACTIVITY 2
EXPLORE ROOT CAUSES

THE PROBLEM TREE

How the Activity Is Done:

Introduce the Problem Tree and explain how it is used to illustrate consequences, causal factors, and root causes.

On a flipchart, whiteboard, or piece of paper, draw a simple tree with branches and roots.

Write the problem statement horizontally in the middle of the tree – right where the branches first start rising out of the trunk. Consequences are the leaves, causal factors should go along the trunk, root causes are the roots below the surface.

The team should work as a group to identify the problem(s) and resultant consequences and add those to the problem tree. Make sure to be inclusive by probing the various identities that may be affected by the problem(s). Consider tracking ideas that emerge about what can be done to affect these factors of inclusion, marginalization or exclusion. Be sure to integrate these considerations into the Social Inclusion Analysis report.

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EXPLORE ROOT CAUSES

Once you have identified the problem(s) and consequences, begin to ask "why." Be thoughtful. Strive to identify how the consequences may be a result of similar or varying causal factors and root causes for different identity groups. As you identify causal factors and root causes, add those to the problem tree.

Once you have a complete problem tree, discuss how these causes fall under the 6 different domains of analysis listed below (and defined and described more fully in Phase II, Step B, Activity 1: Develop the Social Inclusion Analysis Methodology):

- Laws and policies.
- Knowledge, beliefs, norms, and perceptions.
- Roles, responsibilities, time use.
- Power to make decisions.
- Access to/control over assets and resources.
- Status of human dignity, safety and wellness.

With the root causes now identified by domain, look again to see whether any of the root causes cut across multiple domains. How do the root causes interact with one another? The point of these considerations is to provide rich material that can be used later in the Social Inclusion Analysis report (Step D of this phase 🔍) about the root causes: the dynamic interplay between them, and what can be done to affect these factors so that meaningful change can happen.

Write up your findings and present to the person who will be responsible for writing the Social Inclusion Analysis report.

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PHASE II
STEP C

ACTIVITY 3
IDENTIFY INTERVENTION AREAS WITH POTENTIAL FOR TRANSFORMATIVE CHANGE

Description	Analysis	
Overview	This activity helps to identify the intersection of identities and develop a set of findings and recommendations. It will help to consistently identify groups of stakeholders and participants who are at a higher risk of being excluded. The activity consists of three parts: • Map intersectionality of identities against an inclusion scale • Define the key causes of inclusion, marginalization, and exclusion • Define the interventions with the highest likelihood of transformative social change	
Objective	To identify the high-impact intervention areas.	
Why do this activity?	Understanding intersectionality and the way it affects individuals and groups of people will help to identify impactful interventions.	
Prerequisite activity?	Yes	Determine Study Design (Phase II, Step A) Apply the TAAP Framework (Phase II, Step B) Map Your Data and Findings (Phase II, Step C, Activity 1)
Facilitator needed?	Yes	Please see "The Basics" for important information about the facilitation needs for the activities in this phase.
Time	4-8 hours	
Materials	Computers, whiteboard, sticky notes, and markers	
Participants	Social Inclusion Analysis Team	

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PART I MAP INTERSECTIONALITY OF IDENTITIES AGAINST AN INCLUSION SCALE

NOTE TO THE FACILITATOR

This activity helps identify the groups that are most excluded and the intersectionality for exclusion. This requires familiarity with data analysis methods that decrease the data volume and identify trends through examination of patterns. The facilitator needs to examine the completed Worksheet II.C.1 to identify intersectionalities and then describe the identities that are most excluded across most or all of the domains.

The facilitator should do this before sharing and discussing information with the team. Using the data mapping framework provided, you will analyze and understand intersectionality in the field of your social inclusion analysis, and will be able to integrate those in your project design. This activity can be done individually, or in pairs.

How the Activity Is Done

Review Phase II, Step C, Activity 1 Worksheet: **MAPPING DATA AND FINDINGS WITH TAAP DOMAINS AND TAAP COMPONENTS.**

On a whiteboard, draw the three categories – included, marginalized and excluded.

Start analyzing the trends of the identity groups, using sticky notes to place the identities under the relevant category. You may refer to the trends in identity groups on the following page. Ask each working team member/pair to place the identities from their analysis on that continuum.

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PART I MAP INTERSECTIONALITY OF IDENTITIES AGAINST AN INCLUSION SCALE

Trends in Identity Groups

INCLUDED

Persons with the capacity, opportunity, and dignity, to benefit from and fully participate in the social, political, and economic development of the society.

MARGINALIZED

Persons whose limited capacity, opportunity, and dignity disadvantages them from benefiting from and fully participating in development. Their link to the society is weakened.

EXCLUDED

Persons whose lack of capacity, opportunity, and dignity bars them from benefiting from and participating in social, economic and political development. Their agency, access and dignity are ignored, denied, or actively infringed upon.

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PART I MAP INTERSECTIONALITY OF IDENTITIES AGAINST AN INCLUSION SCALE

NOTE TO THE FACILITATOR

Once the individuals/pairs have placed identities against the categories, discuss whether there are any unusual results. For example, the same identity might appear both in the included and excluded groups depending on the domain. Confirm this with the group as a whole, and assure them that it is not unusual. To finish, look at the identities noted on the analysis sheet mapped against the categories, define the groups of people who may be described by those identities, clarify what intersectionality looks like in this context, and how it is understood and responded to. Discuss how the intersectionality may affect the findings and recommendations of this phase, and therefore affect the design of your project.

On the right are a few sample questions to help.

- What forms of identity are considered important/less important in the community we studied? Why? How can that affect the design and implementation of our project?
- Who are most affected by exclusion and why? How are they affected? What makes them excluded? What should be avoided in our project? What can our project build on?
- Which social, civil society development, economic, educational (narrow down to the area of your study) programs are available to different groups in the community? How do they reach the most excluded groups? How/why do they not reach the most excluded groups?

CONTINUE >

PART I MAP INTERSECTIONALITY OF IDENTITIES AGAINST AN INCLUSION SCALE

- Are there any gaps in laws, policies, social and cultural norms that limit an individual's or group's access to services to meet their needs and their opportunities to thrive? How can these be addressed?
- Are there any activities, recommendations, or ideas emerging from the data or your observations that can contribute towards the inclusion of different groups?
- Given the data that you have collected, which marginalized or excluded identities are within the scope of the project? If, for example, data collected for a primary education program revealed that learners with disabilities are discriminated against in the community studied, interventions to address that discrimination may fall within the scope of the project. You might also find out that your activities benefiting students with disabilities also affect adults with disabilities in that project location, and therefore you need to expand the scope of your inclusion work.

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PART 2 DEFINE THE KEY CAUSES OF INCLUSION, MARGINALIZATION, AND EXCLUSION

Develop your findings, discussions, and draw conclusions and track them to use them when shaping your recommendations.

Examine boosters and barriers of inclusion, marginalization, and exclusion, and summarize what makes these groups occupy their respective categories.

- INCLUDED
  - What *makes* them included?
  - What *could make* them excluded?
- MARGINALIZED
  - What *makes* them marginalized?
  - What *could make* them included?
- EXCLUDED
  - What *makes* them excluded?
  - What *could make* them included?

CONTINUE ›

PART 2 DEFINE THE TRANSFORMATIVE INTERVENTIONS

Work with your group to determine, from your data, what may be considered high-impact transformative interventions as reported by your respondents for the context you studied. The group should also consider activities (or adjustments to activities) to respond to the situation. Are there opportunities to "Think Big" (TAAP Principle 5), perhaps by identifying existing positive examples that could be scaled up or otherwise leveraged? This part of the activity will help you identify high-impact things you can do within your project to support the inclusion of marginalized or excluded groups. Defining high-impact interventions will require discussions and consultations with relevant stakeholders; the following questions can help guide those conversations.

CONTINUE ›

HIGH IMPACT INTERVENTIONS

1. *What high-impact interventions did you collect from your respondents that could involve all the groups? Why are they considered high-impact interventions? What would they look like when implemented successfully? Who should be involved in their implementation? Do they address the causes of marginalization and exclusion described in this activity?*
2. *What are the things that included groups can do within the scope of the project to meaningfully engage those who are marginalized or excluded? How should those things be implemented? When? Where? Do these potential activities address the causes of exclusion? How will meaningful change happen?*
3. *What activities could the project implement that would sustain collaboration among those groups after project close-out?*
4. *What are potential different impacts of the project, including unintended or negative consequences, on included, marginalized and excluded populations?*

THINK BIG
THINK THE IMPOSSIBLE

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PART 2 DEFINE THE TRANSFORMATIVE INTERVENTIONS

Developing effective recommendations is one of the most important components of this phase.

Please refer to the TAAP website for more resources on how to develop effective recommendations. Take time to check your analysis with stakeholders if you haven't done so through the process. (Refer to **PHASE III, STEP B. ACTIVITY 2 VALIDATE PRIORITIZATION** with Key Stakeholders, and modify for this process.)

CONTINUE >

KEY NOTE

These recommendations will be further contextualized within a project, as you start designing your project in Phase III. If you are using the Social Inclusion Analysis framework to review an existing project, go to phase 3 and implement **STEP A, ACTIVITY 2: MAKE A LOCAL SNAPSHOT**, considering the specific statistics, boosters and barriers within your project's immediate context.

Develop Recommendations:

What are the recommendations coming out of the data and discussion that can help transform agency, access and power? Where possible, tailor these to specific audiences. Explain why these recommendations are important and what change can be seen upon implementing. Explain why these recommendations are feasible and how they align with the "Think Big" principle and with the inclusive impact and sustainability imperative.

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PART 2 DEFINE THE TRANSFORMATIVE INTERVENTIONS

Many social inclusion analysis teams develop a set of recommended inclusion-sensitive indicators for the report. For more on this, go to the **CROSS-CUTTING SECTION INCLUSIVE MONITORING, EVALUATION AND LEARNING STEP A, ACTIVITY 1: ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS.**

Another good resource is USAID's Gender Sensitive Indicators for Europe and Eurasia, 2016. (https://usaidlearninglab.org/library/gender-sensitive-indicators-europe-and-eurasia)

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PHASE II
STEP D

WRITE THE SOCIAL INCLUSION ANALYSIS REPORT

After the data analysis, it is time to start writing the Social Inclusion Analysis Report. Go back to the TERMS OF REFERENCE IN ANNEX 2 to confirm the outline of the report and whether you need to produce internal and external versions.

On the following page is a best practice outline for a 30-page report, including the most essential information. You may also download this practice outline.

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WRITE THE SOCIAL INCLUSION ANALYSIS REPORT

WORKSHEET

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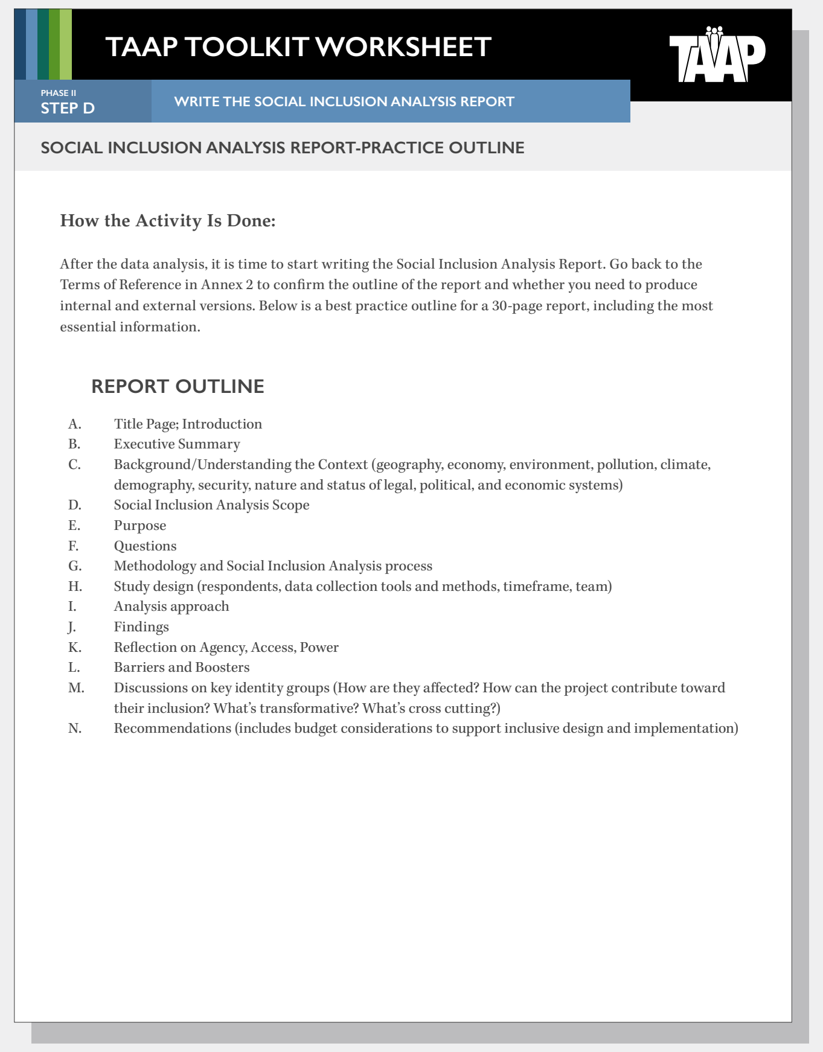
REPORT OUTLINE

Title Page

- **A.** Introduction
- **B.** Executive Summary
- **C.** Background/Understanding the Context (geography, economy, environment, pollution, climate, demography, security, nature and status of legal, political, and economic systems)
- **D.** Social Inclusion Analysis Scope
- **E.** Purpose
- **F.** Questions
- **G.** Methodology and Social Inclusion Analysis process
- **H.** Study design (respondents, data collection tools and methods, timeframe, team)
- **I.** Analysis approach
- **J.** Findings
- **K.** Reflection on Agency, Access, Power
- **L.** Barriers and Boosters
- **M.** Discussions on key identity groups (How are they affected? How can the project contribute toward their inclusion? What's transformative? What's cross cutting?)
- **N.** Recommendations (includes budget considerations to support inclusive design and implementation)



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PHASE II
STEP D

WRITE THE SOCIAL INCLUSION ANALYSIS REPORT

SOCIAL INCLUSION ANALYSIS REPORT-PRACTICE OUTLINE

How the Activity Is Done:

After the data analysis, it is time to start writing the Social Inclusion Analysis Report. Go back to the Terms of Reference in Annex 2 to confirm the outline of the report and whether you need to produce internal and external versions. Below is a best practice outline for a 30-page report, including the most essential information.

REPORT OUTLINE

- A. Title Page; Introduction
- B. Executive Summary
- C. Background/Understanding the Context (geography, economy, environment, pollution, climate, demography, security, nature and status of legal, political, and economic systems)
- D. Social Inclusion Analysis Scope
- E. Purpose
- F. Questions
- G. Methodology and Social Inclusion Analysis process
- H. Study design (respondents, data collection tools and methods, timeframe, team)
- I. Analysis approach
- J. Findings
- K. Reflection on Agency, Access, Power
- L. Barriers and Boosters
- M. Discussions on key identity groups (How are they affected? How can the project contribute toward their inclusion? What's transformative? What's cross cutting?)
- N. Recommendations (includes budget considerations to support inclusive design and implementation)

END OF PHASE II

CONTINUE ›

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PHASE III
INCLUSIVE DESIGN

By the time you finish this phase, you will have a project design, grounded in TAAP principles, that includes:

- An updated understanding of your proposed project's stakeholders.
- A set of recommended project activities, validated by the same stakeholders.
- A project budget.
- An articulated vision of the change your project aims to create.

The design work here in Phase III may reveal a need to collect more data or to re-validate data generated in Phase II. This is normal: *the TAAP approach is iterative.*

THE BASICS

Starting TAAP now at Phase III? Haven't done a social inclusion analysis? We recommend the following in this phase:

ACTIVITY A.2 - CREATE A LOCAL SNAPSHOT
ACTIVITY A.3 - WHO ARE THE STAKEHOLDERS NOW?
ACTIVITY C.1 - MAKE YOUR PROJECT A TAAP SCENARIO
ACTIVITY C.2 - BUDGETING FOR INCLUSION
ACTIVITY C.3 - WHAT CHANGE IS POSSIBLE?

To complete these activities, you can use your own knowledge of the context, meet with key informants and representatives of local identity groups, and conduct desk research to understand the local inclusion context. This will give you a great starting point before you move to Phase IV: Inclusive Implementation.

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PHASE III

INCLUSIVE DESIGN

WHAT	Inclusive design is the process by which you apply the results of your inclusion analysis and translate those results into choices for your project: maximizing inclusion by balancing important factors from the analysis against what is possible for your organization to undertake.
WHO	The project design team will work with each other and in consultation with key stakeholders.
WHEN	After completion of Phase II, Inclusion Analysis.
HOW	The design team will build understanding of the findings from the social inclusion analysis. From that they will create initial design recommendations and validate those recommendations with key stakeholders.multiple stakeholders.
WHY	Understanding the inclusion context will help you design interventions with a greater chance of achieving transformative social change.

CONTINUE ›

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PHASE III
INCLUSIVE DESIGN

Phase III of the Toolkit has specific steps and associated activities. While the steps and activities suggest a linear sequence of events, in actual implementation there is often a more dynamic flow to the work. Some steps or activities may be occurring simultaneously and the work often circles back to revisit earlier steps.

STEP A Appreciate the Inclusion Analysis	Activity 1: Debrief the Inclusion Analysis Activity 2: Create a Local Snapshot Activity 3: Who Are the Stakeholders Now?
STEP B Prioritize Inclusion Analysis Recommendations	Activity 1: Draft Your Prioritized Recommendations Activity 2: Validate Prioritization with Key Stakeholders
STEP C Plan the Pathway to Inclusion	Activity 1: Make Your Project a TAAP Scenario Activity 2: Budgeting for Inclusion Activity 3: What Change is Possible?

CONTINUE

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PHASE III
STEP A

APPRECIATE THE INCLUSION ANALYSIS

We know that too often reports and analyses remain underutilized.

This step ensures that the team sets aside time in the design (or redesign) process to reflect on the report's findings so that its recommendations will actually be used.

ACTIVITY 1
DEBRIEF THE SOCIAL INCLUSION ANALYSIS

Description	Questionnaire/worksheet, brainstorming, discussion, reflection
Overview	Team members reflect on their first impressions of the Phase II Social Inclusion Analysis report. They brainstorm key terms and concepts, and complete a worksheet to answer important questions about it. Then they review first impressions and terms to see how impressions may have changed during the activity.
Objective	To ensure that the team understands the analysis and its relation to project design.
Why do this activity?	It is important to ensure that the team comprehends the analysis and understands how the analysis can feed into project design.
Facilitator needed?	Optional Phase II: Social Inclusion Analysis Report (final output of Phase II; version intended for internal use).
Time	2 hours
Materials	Copies of Social Inclusion Analysis report (internal use version), flip charts, notecards, For each member, handouts of WORKSHEET III.A.1 "DEBRIEFING THE INCLUSION ANALYSIS"
Participants	Required: Design team. Recommended: Partners, participants, other stakeholders.

REFLECT

WORKSHEET AVAILABLE
Download in the One-Stop Toolshop

CONSULT WITH PARTNERS

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DEBRIEF THE SOCIAL INCLUSION ANALYSIS

NOTE TO FACILITATOR

When considering the composition of the team, there may be members who belong to identity groups highlighted by the report. It is important to set ground rules to create a safe space to share personal experiences around this. ⚠

There may also be team members who disagree with the analysis or with other team members about the experiences of included, marginalized, or excluded groups. Reassure participants that good-faith disagreements are expected. If the disagreements appear to be driven by bias, the facilitator should refer to the work the participants did earlier in *Phase I: Inclusive Inquiry and Reflection*, encouraging them to remain aware of their own biases.

⚠ EXERCISE CARE

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DEBRIEF THE SOCIAL INCLUSION ANALYSIS

How the Activity Is Done

The team members should come to this activity having already read the Social Inclusion Analysis report. (Such a report is usually about 30 pages in length, so it would be an inefficient use of time to read it together for the first time as part of this activity.) Circulate copies of the report for reference, give them a few minutes to review, and then ask the team to write their first impressions on note cards and to save them for the end of the activity. As a group activity, ask the following, "Share the first words that come to mind after reading the Social Inclusion Analysis." Write the words on a flip chart so everyone can see them. Check words that come up more than once. Group the words together to start organizing the main ideas. Save this "main idea" flip chart for later. Depending on how large the group is, ask members to form groups of up to 3 people.

Ask them to complete **WORKSHEET III.A.1 DEBRIEF THE SOCIAL INCLUSION ANALYSIS**– (45 minutes).

After they complete the worksheet, review each question and discuss, marking where groups have different opinions. (45 minutes). After groups complete the worksheet, go back to the "main ideas" flip chart. Ask if they notice differences between the flip chart, worksheet, and discussion. Repeat with the notecards from the beginning of the activity.

The first impressions, words and phrases, and the completed worksheets should all be kept to ensure the ultimate design reflects what team members identify as key takeaways.

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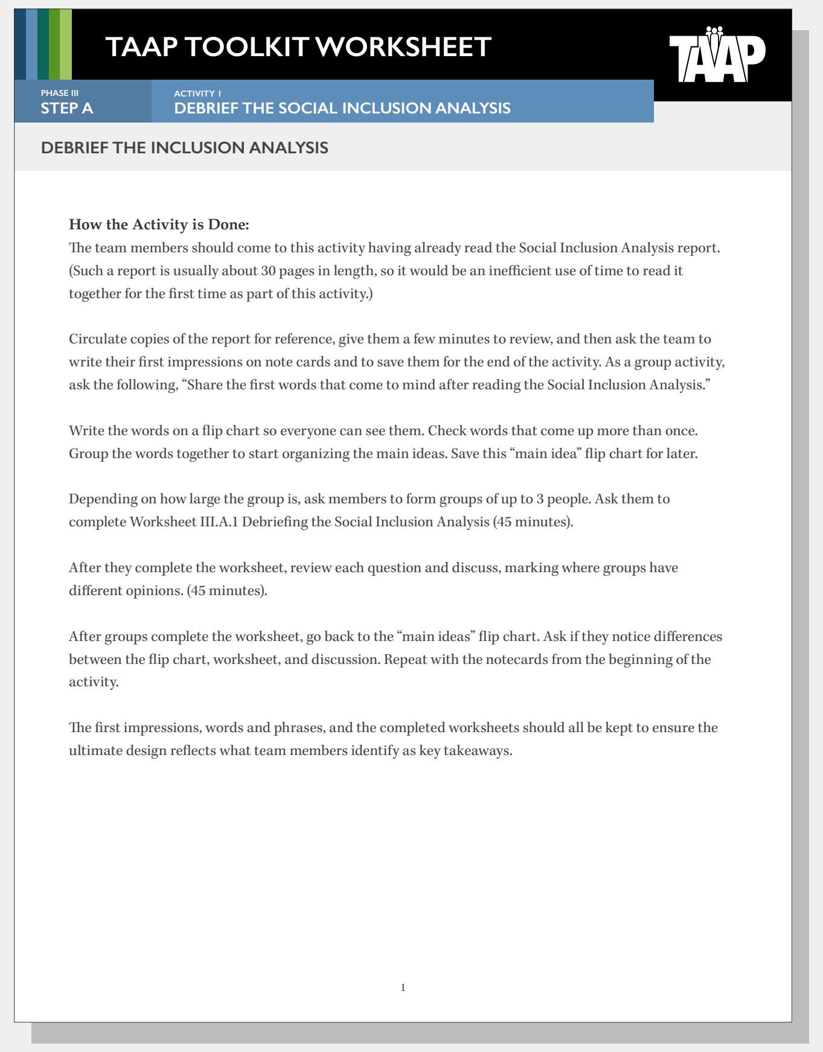
WORKSHEET

DEBRIEF THE SOCIAL INCLUSION ANALYSIS[19]

WORKSHEET

PDF
Version

TOOLSHOP
Also available in the One-Stop Toolshop



TAAP TOOLKIT WORKSHEET

PHASE III
STEP A

ACTIVITY 1
DEBRIEF THE SOCIAL INCLUSION ANALYSIS

DEBRIEF THE INCLUSION ANALYSIS

How the Activity is Done:
The team members should come to this activity having already read the Social Inclusion Analysis report. (Such a report is usually about 30 pages in length, so it would be an inefficient use of time to read it together for the first time as part of this activity.)

Circulate copies of the report for reference, give them a few minutes to review, and then ask the team to write their first impressions on note cards and to save them for the end of the activity. As a group activity, ask the following, "Share the first words that come to mind after reading the Social Inclusion Analysis."

Write the words on a flip chart so everyone can see them. Check words that come up more than once. Group the words together to start organizing the main ideas. Save this "main idea" flip chart for later.

Depending on how large the group is, ask members to form groups of up to 3 people. Ask them to complete Worksheet III.A.1 Debriefing the Social Inclusion Analysis (45 minutes).

After they complete the worksheet, review each question and discuss, marking where groups have different opinions. (45 minutes).

After groups complete the worksheet, go back to the "main ideas" flip chart. Ask if they notice differences between the flip chart, worksheet, and discussion. Repeat with the notecards from the beginning of the activity.

The first impressions, words and phrases, and the completed worksheets should all be kept to ensure the ultimate design reflects what team members identify as key takeaways.

1

Below are sample questions from the worksheet. Download it on the right.

Reflection Questions	Response
In what context is inclusion, marginalization, or exclusion taking place?	
Which identity groups are included, marginalized, or excluded?	
How are identity groups included, marginalized or excluded?	
What are the factors driving inclusion, marginalization or exclusion, and what can be done to affect these factors?	
Who are the key actors driving the inclusion, marginalization or exclusion?	
Why are the key actors motivated to drive the inclusion, marginalization or exclusion?	
What strategies are key actors using to drive the inclusion, marginalization or exclusion?	
When could inclusion be further expanded and when is marginalization or exclusion likely to change for better or worse?	

REFLECT

CONTINUE

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[19] Adapted from Lisa Schirch (2013) Conflict Assessment & Peacebuilding Planning.

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PHASE III
STEP A

ACTIVITY 2
CREATE A LOCAL SNAPSHOT

Description	Understand and apply a process for identifying and presenting relevant findings from the Phase II: Social Inclusion Analysis Report in the "Local Snapshots" format.	
Overview	This activity produces a Local Snapshot summarizing relevant and noteworthy boosters of, barriers to, and opportunities for inclusion, usually for a specific identity group. It highlights what is happening in your context regarding inclusion, marginalization, or exclusion of a given group in society or a given sector. (A "snapshot" gives you a brief idea of what a situation is like.)	
Objective	To understand and apply a process for identifying and presenting relevant findings from the Phase II: Social Inclusion Analysis Report in the "Local Snapshots" format.	
Why do this activity?	The Local Snapshot is a useful reference for project planning (Phase IV), monitoring, evaluation, learning (XC-MEL), and sustainability planning (XC-IIS). When the team updates the Local Snapshot periodically, it chronicles the progress of inclusion-sensitivity in your context.	
Prerequisite activity?	Yes	Debriefing the Inclusion Analysis (Phase III, Step A, Activity 1)
Facilitator needed?	Yes	Internal or External
Time	3 hours	
Materials	Copies of Global Snapshots (available from the TAAP website at www.taapinclusion.org) and Worksheet III.A.2 Create a Local Snapshot (downloadable copy available in the One Stop Tool Shop); flip chart; stickers; sticky notes	
Participants	Design team, implementation team, participants, other stakeholders	

CONTEXT **SENSITIVITY** STAND ALONE CONSULT WITH PARTNERS

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CREATE A LOCAL SNAPSHOT

NOTE TO FACILITATOR

- Read through and understand the overall structure and content of the Global Snapshots before you do this work; these are available on the TAAP website at www.taapinclusion.org. TAAP's Global Snaphots are a set of briefs about the global situation for the identity groups that are significant to the power dynamics of all societies: LGBTI persons; Older Persons; Persons with Disabilities; Racial, Ethnic and Indigenous Identities; Religious Identities; Women and Girls; Youth). Each snapshot provides information in 3 categories: 1 - the global situation of the identity group, 2 - selected boosters (already-favorable factors of conditions upon which inclusion work can build), and 3 - selected barriers (hindrances to a person or identity group's growth and development, dignity, safety, well-being) from the global landscape.
- Have copies of the Global Snapshots ready for this activity. Explain the Global Snapshots before beginning the activity and remind participants that the Global Snapshots reflect the domains of analysis.[20]

By this point in the TAAP approach, the design team should have a clear understanding of the high-impact intervention recommendations from the Social Inclusion Analysis report and a sense of the identity groups with which the project will work. The structure and formatting of the Global Snapshots can help the design team create their Local Snapshots. The content may also be useful, although the team should remember that their objective is to create a highly localized snapshot, specific to the project's context.

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[20] These are (1) Laws and Policies; (2) Knowledge, beliefs, norms and perceptions; (3) Roles, responsibilities and time use; (4) Power to make decisions; (5) Access to/control over assets and resources; (6) Status of human dignity, safety and wellness.

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CREATE A LOCAL SNAPSHOT

How the Activity Is Done

Hand out copies of the TAAP Global Snapshots, explaining their structure, providing definitions of a booster and a barrier, and looking through them together. Emphasize that the content is factual—that there are no opinions or unsubstantiated content. To confirm that the group understands the six domains of analysis, ask the group to identify which domains of analysis are mentioned in the Global Snapshots and then ask someone to share a few examples of how these might be relevant to the local context. Write down responses on the flip chart and then explain that the team will be developing its own Local Snapshot for its project's own identity group(s) using the findings from the Inclusion Analysis. If the design team is larger than 3 or 4 people, form small groups.

Using a blank snapshot template, ask one small group to spend one hour identifying a list of the most notable and impactful boosters from the analysis report; another group will focus on barriers. Discuss how the boosters and barriers impact diverse and multi-dimensional (i.e., intersectional) identity groups in unique ways.

Each group presents their snapshot and the reasons why they populated it the way they did as those reasons relate to the six domains. Then the full group decides together on the final content for the final Local Snapshot. If there is disagreement, ask team members to explain and work together as a group to come to consensus. Ask a team member to finalize the content for the Local Snapshot in the worksheet. Distribute the completed Local Snapshot draft to the team and reference it for later activities.

INTERSECTIONALITY PARTICIPATORY APPROACHES

CONTINUE ›

WORKSHEET

CREATE A LOCAL SNAPSHOT

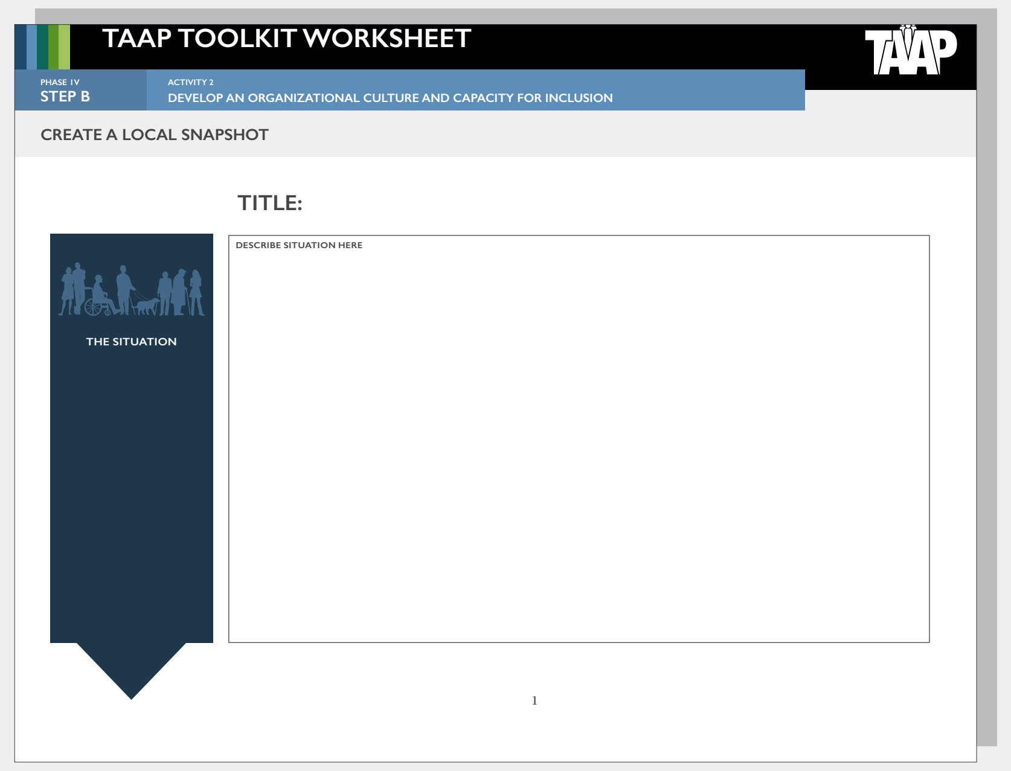
WORKSHEET

PDF
Version

TOOLSHOP
Also available in the One-Stop Toolshop

Below is a sample from the worksheet. Download it on the right.

THE SITUATION	
BARRIERS	(TO PARTICIPATION IN ECONOMIC, POLITICAL, OR SOCIAL LIFE)
BOOSTERS	(WHAT'S ALREADY GOING WELL THAT CAN BE BUILT UPON)



TAAP TOOLKIT WORKSHEET

PHASE IV
STEP B

ACTIVITY 2
DEVELOP AN ORGANIZATIONAL CULTURE AND CAPACITY FOR INCLUSION

CREATE A LOCAL SNAPSHOT

TITLE:

THE SITUATION

DESCRIBE SITUATION HERE

1

* Review the Guiding Questions to Support Local Snapshot Development on the following page.

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WORKSHEET

GUIDING QUESTIONS TO SUPPORT LOCAL SNAPSHOT DEVELOPMENT

Below is a sample from the worksheet. Download it on the right.

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PHASE III
STEP A

ACTIVITY 2
CREATE A LOCAL SNAPSHOT

GUIDING QUESTIONS TO SUPPORT LOCAL SNAPSHOT DEVELOPMENT

What are the laws and policies that create barriers and boosters?

How do the practices of those laws and policies differ from the written law?

What are the perceptions and attitudes?

What are the different roles and responsibilities?

Who has the power to make decisions?

WORKSHEET

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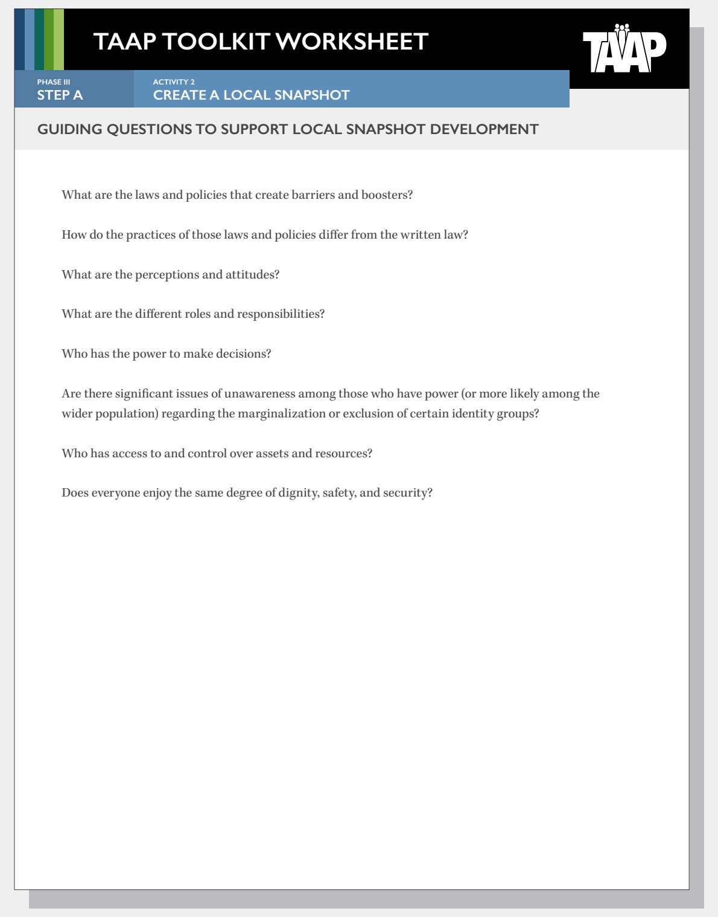
Also available in the One-Stop Toolshop



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ACTIVITY 3
WHO ARE THE STAKEHOLDERS NOW?

NOTE TO FACILITATOR

This exercise engages the project team in creating personas of key stakeholders.

It encourages the participants to be sensitive to the motivations, perspectives, and values of stakeholders while avoiding stereotypes.

Description	Discussion, analysis	
Overview	This activity compares the project stakeholders originally mapped against those who appear to be the stakeholders now. The project team will create personas of key stakeholders to explore those stakeholders' motivations, perspectives, and values, and to devise key messages for each group to build trust and gain support.	
Objectives	• To identify project stakeholders based on the Inclusion Analysis • To articulate the motivations, power, and influence each stakeholder group may have to shape the project	
Why do this activity?	The Inclusion Analysis reveals the extent to which inclusion, marginalization, and exclusion occur in the context of the project. It also identifies mechanisms of inclusion, marginalization, and exclusion, including the key actors that are boosters of, barriers to, and agents of inclusion. Understanding the stakeholders and key actors will help the team realign the project design to include key stakeholders, understand their motivations and power, and monitor participation and ultimately, design a more effective project.	
Prerequisite activity?	Yes	Debrief the Analysis (Phase III, Step A, Activity 1)
Facilitator needed?	Yes	Internal or External
Time	2-3 hours depending on number of stakeholder groups	
Materials	Flip charts, markers	
Participants	Required: Design team. Recommended: Partners , participants (direct and indirect), stakeholders specific to the project	

CONSULT WITH PARTNERS

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WHO ARE THE STAKEHOLDERS NOW?

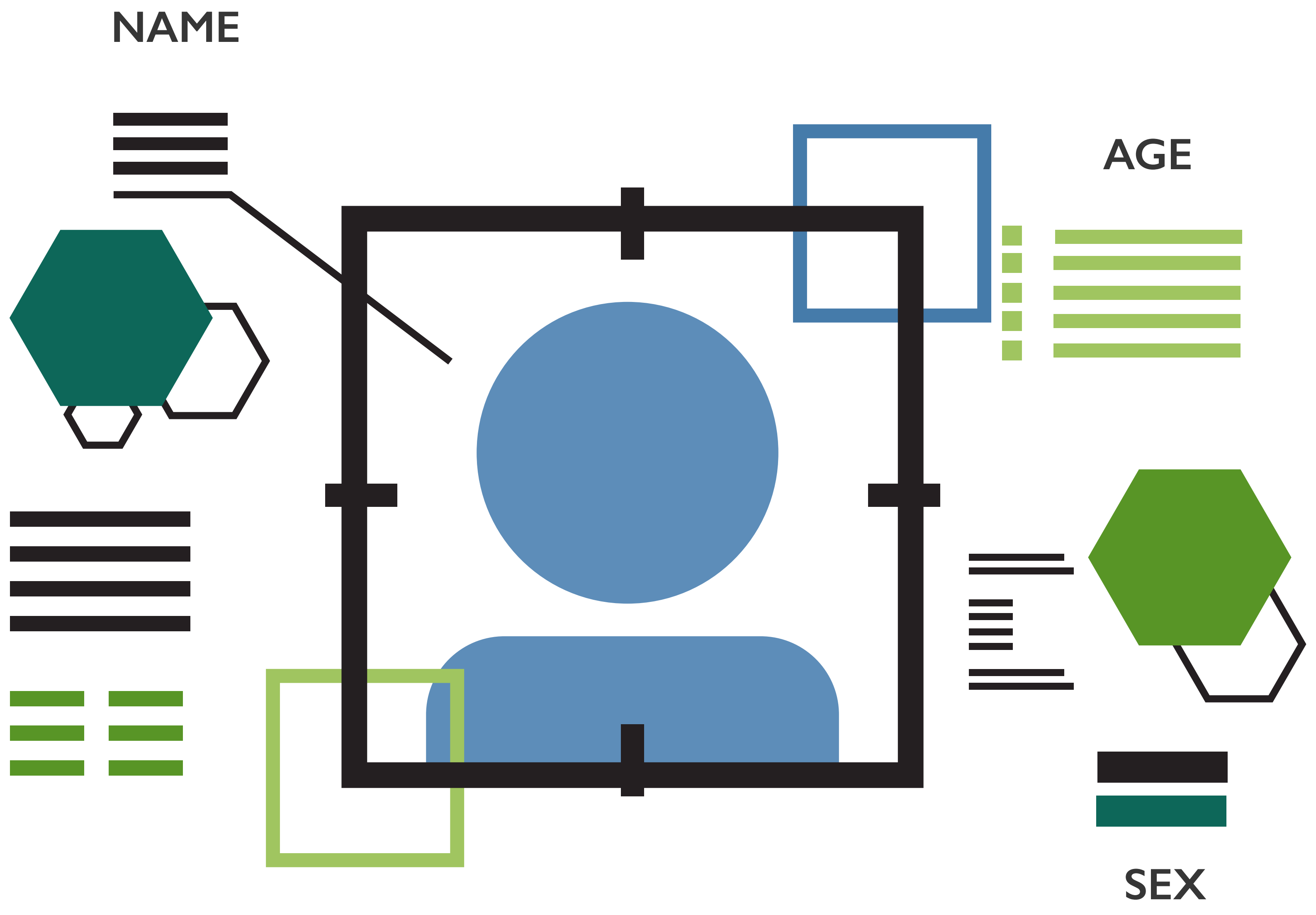
How the Activity Is Done

Assign one member of the project team to be the scribe. If the project team is more than 5 people, break the group into small groups.

Assign each group a key stakeholder from among those identified earlier, asking the team to imagine a person who might represent this stakeholder group.

The facilitator asks the group to come up with this person's name, sex, gender identity, age, and other characteristics.

Ask them to draw a picture of this person on the top left-hand corner of flipchart paper with his or her name, age, and other identifying information under the drawing.



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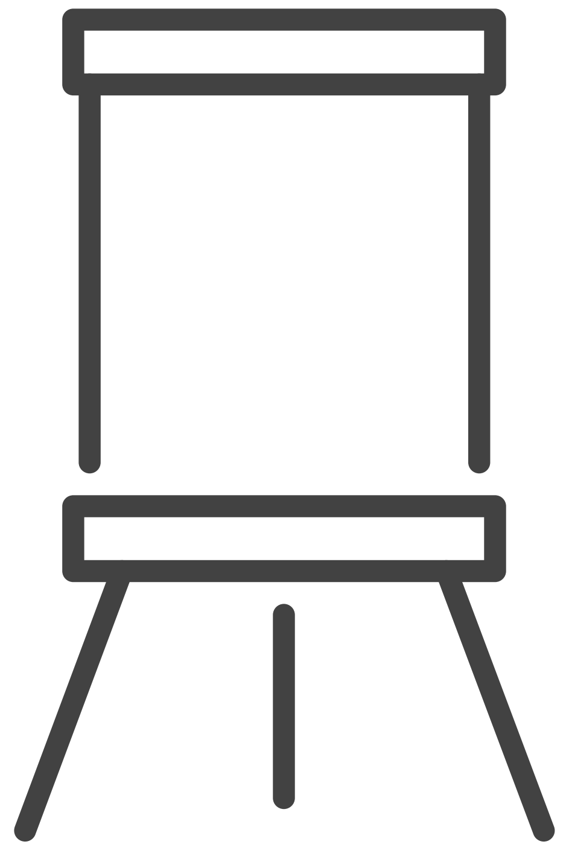
WHO ARE THE STAKEHOLDERS NOW?



Next, ask the group the following questions and record their responses on the flipchart paper. Encourage the group members to support each other to think beyond stereotypes. Remind them of the considerable work that has already been done (in prior phases and activities) to build true understanding of identity groups and stakeholders, consistent with the TAAP principles.

If the activity is done as a small group activity, ask each group to share. Keep the personas for future activities in the design phase and to monitor whether the personas' motivations/influences/interests change during the project.

Explore:

- What motivates this person? What are his/her aspirations?
- Who influences this person? Whom does s/he trust?
- Success for this person is...
- What does s/he struggle with?
- What are his/her core values that relate to diversity and inclusion?
- What are the multiple dimensions (i.e., intersectionality) of his/her identities and how does the interaction of those identities impact their agency, access and power?
- Does s/he have the power to influence positive change? If so, how?
- Does s/he have the power to resist change? If so, how?
- Keeping in mind his/her interests and values, how would we convince, leverage, and/or encourage this person to support inclusion?

EMPHASIS ON
DIGNITY AND AGENCY

INTERSECTIONALITY

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STEP B

PRIORITIZE INCLUSION ANALYSIS RECOMMENDATIONS

The Inclusion Analysis report may have included recommendations that seem costly or otherwise difficult to implement.

This step ensures that the team considers the recommendations and the extent to which they can be incorporated into project design. This step has two activities: *Draft Prioritized Recommendations* and *Validate Prioritization with Key Stakeholders.*

ACTIVITY 1
DRAFT YOUR PRIORITIZED RECOMMENDATIONS

Description	Prioritization exercise	
Overview	Using **WORKSHEET III.B.1 DRAFT YOUR PRIORITIZED ANALYSIS RECOMMENDATIONS** the team considers the recommendations contained in the Social Inclusion Analysis report and determines the priority, timing, cost, and place of each of those recommendations on the social inclusion continuum. The team then ranks those recommendations, prioritizing which to integrate into the project design.	
Objective	To choose the recommendations that will become part of your project design.	
Why do this activity?	The Inclusion Analysis report will include a variety of recommendations some of which may not possible, at least not in the near term. This activity helps you prioritize which recommendations can be integrated into the project design, and to rethink and revise the recommendations as needed.	
Prerequisite activity?	Yes	Inclusion Analysis report (output of Phase II)
Facilitator needed?	No	N/A
Time	2 hours	
Materials	Copies of **WORKSHEET III.B.1 PRIORITIZED INCLUSION ANALYSIS RECOMMENDATIONS**	
Participants	Required: Design team. Recommended: Stakeholders	

WORKSHEET AVAILABLE
Download in the One-Stop Toolshop

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DRAFT YOUR PRIORITIZED RECOMMENDATIONS

> *"The state has the preeminent role in promoting change toward inclusion, but other actors play important roles too. In fact, it is the interplay of state and non-state actions that leads to inclusion. Catalysts and champions of change toward social inclusion, for instance, often come from the elite."*
>
> \- World Bank, Inclusion Matters, pg. 25

How the Activity Is Done

From the Phase II Inclusion Analysis report, write the recommendations in *Worksheet III.B.1 Prioritized Inclusion Analysis Recommendations*, under "Inclusion Analysis Recommendation." Add more lines if needed. Review each of the factors and their definitions.

- **PRIORITY:** Importance of the recommendation. Does the recommendation align with the project's theory of change, results framework, or logical framework? Will implementing the recommendation address the intersecting identities, inequalities and root causes unearthed in the Social Inclusion Analysis? Does the recommendation lead to a design that will engage included identity groups (e.g., men and boys for a gender-focused program; economic elites in a small business enterprise program; ethnic majorities in a social cohesion program)? Does the scope of the project allow engagement of included identities not just at the individual level but at the community level?
- **TIME:** How critical is the recommendation to your project's success? Does it need to be implemented now? What are the consequences of implementing it later?
- **COST:** What resources will be needed to implement the recommendation?
- **SOCIAL INCLUSION CONTINUUM:** Where does the recommendation fall on the social inclusion continuum? Will it be *accommodating or transformative*?

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DRAFT YOUR PRIORITIZED RECOMMENDATIONS

GENDER AND SOCIAL INCLUSION INTEGRATION CONTINUUM

Adapted from the Interagency Gender Working Group training materials, the Social Inclusion Continuum is a tool to measure the degree to which an Inclusion Analysis recommendation is aware of social inclusion (and can be used for project activities).

"Gender Integration Continuum." Interagency Gender Working Group. https://www.igwg.org/wp-content/uploads/2017/05/FG_GendrIntegrContinuum.pdf

GENDER/SOCIAL INCLUSION BLIND	Does not take any gender or social inclusion considerations into account
GENDER/SOCIAL INCLUSION AWARE	Examines and addresses gender and social inclusion considerations in some way
EXPLOITATIVE	Reinforces or takes advantage of inequitable gender and/or social inclusion norms
SENSITIVE/ACCOMMODATING	Acknowledges and works with or around gender and/or social inclusion norms
TRANSFORMATIVE	Critically addresses and works to positively change gender and social inclusion relations

GOAL:
GENDER AND SOCIAL INCLUSION EQUALITY AND BETTER DEVELOPMENT OUTCOMES

For a better understanding of the Continuum, see the illustrated Case Story on the following pages.

CONTINUE ›

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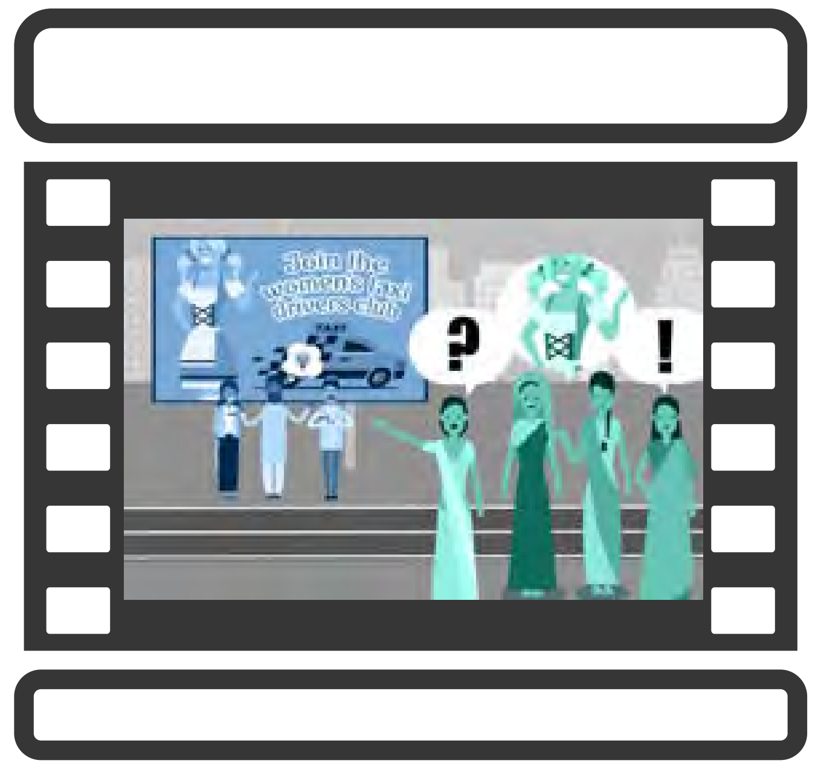
GENDER AND SOCIAL INCLUSION INTEGRATION CONTINUUM

CLICK TO START THE
ILLUSTRATED CASE STORY

START >

The illustrated case story provides you with a real-world scenario of four different project design approaches, based on Social Inclusion Analysis recommendations, across the gender and social inclusion continuum. The poverty alleviation project seeks to improve the lives of urban unemployed and under-employed people through offering low cost leasing programs for taxi cabs and training for prospective taxi drivers. The story panels begin by showing a gender and social inclusion blind project design and end by showing a transformative version of the project.

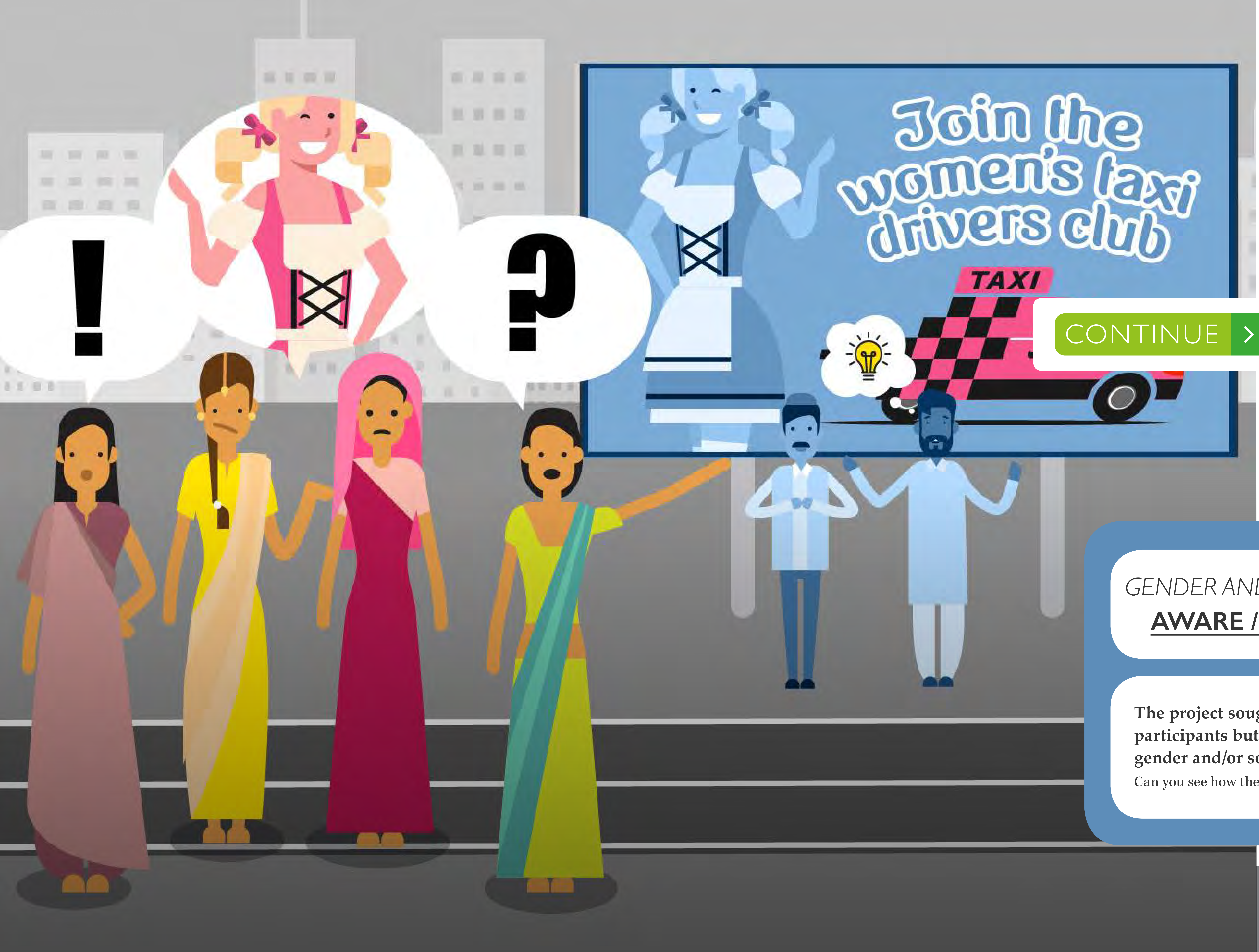
CONTINUE >



GENDER AND SOCIAL INCLUSION **BLIND**

The project design did not take any gender or social inclusion considerations in to account. Barriers to women's participation included:

To qualify to participate in driving lessons or to obtain a loan to lease or purchase a taxi, a trainee/borrower must have a driver's license and meet the bank's general conditions for obtaining a loan. The project also required participants to enroll in a two-week evening training workshop. The project did not consider social norms at the individual, household and societal level and did not consider women's time poverty.



GENDER AND SOCIAL INCLUSION

AWARE / EXPLOITATIVE

The project sought to recruit women participants but reinforced inequitable gender and/or social inclusion norms.

Can you see how the pink cab campaign is exploitative?

CONTINUE

GENDER AND SOCIAL INCLUSION

AWARE / ACCOMODATING

The project design acknowledges and works with and around gender and social inclusion norms.

The project supported women participants to obtain required documentation, provided driving lessons and babysitting support during training sessions, and built map reading and car repair skills . The project worked with the taxi company to offer "women drivers for women-only passengers" so that female taxi drivers did not have to be concerned about being harassed by male passengers.

GENDER AND SOCIAL INCLUSION AWARE/ TRANSFORMATIVE

The project critically addressed and worked proactively to change gender and social inclusion relations.

The project team visited households to share information on the income-generating benefits of the project. The project team offered gender equality courses for men and women in the community and celebrated the role of all people in promoting gender and social inclusion.

CONTINUE >

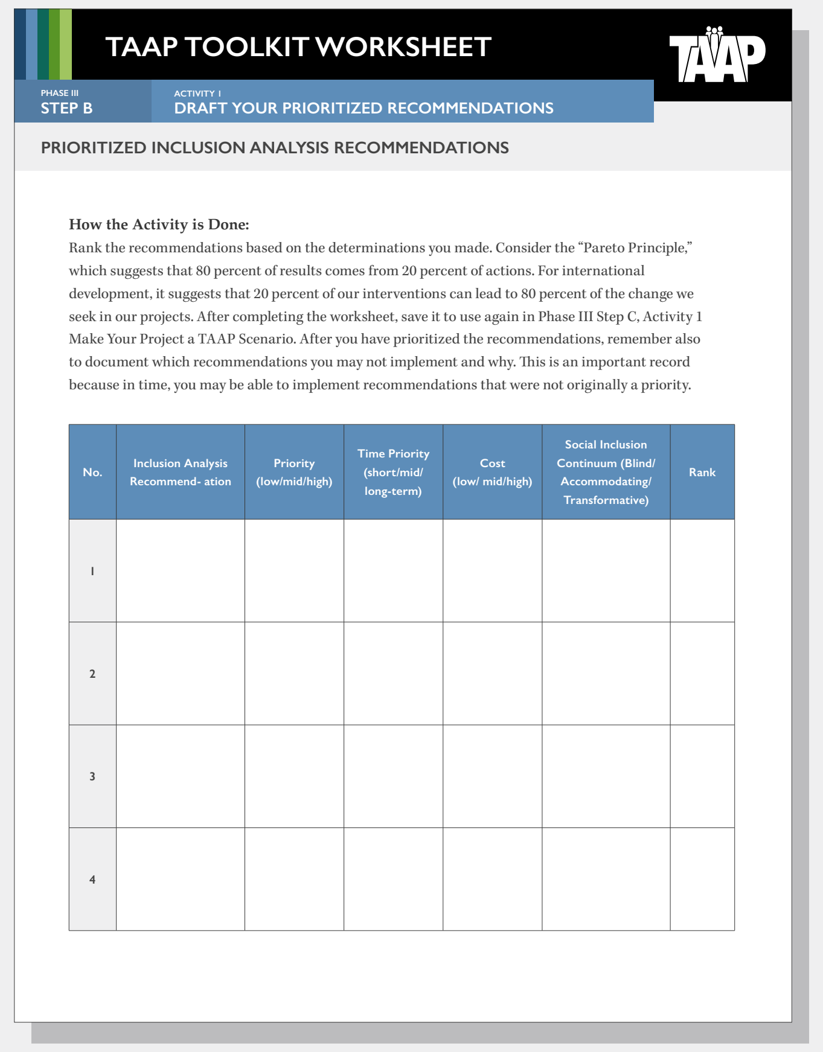
WORKSHEET

PRIORITIZED INCLUSION ANALYSIS RECOMMENDATIONS

WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*



Now that you have reflected on priority, time, cost and where the recommendations fall on the Inclusion Continuum, you are ready to rank the recommendations.

Below is a sample of the worksheet. Download it on the right.

No.	Inclusion Analysis Recommend- ation	Priority (low/mid/high)	Time Priority (short/mid/ long-term)	Cost (low/ mid/high)	Social Inclusion Continuum (Blind/Accommodating/ Transformative)	Rank
1						
2						
3						

Rank the recommendations based on the determinations you made. Consider the "Pareto Principle,"[21] which suggests that 80 percent of results comes from 20 percent of actions. For international development, it suggests that 20 percent of our interventions can lead to 80 percent of the change we seek in our projects.

After completing the worksheet, save it to use again in Phase III Step C, Activity 1 Make Your Project a TAAP Scenario. After you have prioritized the recommendations, remember also to document which recommendations you may not implement and why. This is an important record because in time, you may be able to implement recommendations that were not originally a priority.

CONTINUE ›

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[21] Kruse, Kevin. Forbes. "The 80/20 Rule…" 7 Mar 2016. Accessed 5 Aug 2017. <https://www.forbes.com/sites/kevinkruse/2016/03/07/80-20-rule/>.

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STEP B

ACTIVITY 2
VALIDATE PRIORITIZATION WITH KEY STAKEHOLDERS

Description	Interview, focus group discussion, prioritization	
Overview	It is important to listen to stakeholders and incorporate their feedback into your design. This increases your project's credibility and the community goodwill on which success can depend. This activity embodies TAAP Principle 1: Participatory Approaches	
Objective	To ensure that the Social Inclusion Analysis report's priorities align with those of key stakeholders.	
Why do this activity?	Your project's success will ultimately depend on buy-in from key stakeholders. This activity helps build that buy-in.	
Prerequisite activity?	Yes	Prioritized Inclusion Analysis Recommendations (Phase III, Step B, Activity 1)
Facilitator needed?	Yes	Internal
Time	1 hour per stakeholder interview/focus group discussion	
Materials	List of prioritized recommendations (the output from the activity immediately prior)	
Participants	Required: Design team, stakeholders	

Unable to engage directly with stakeholders for this activity?

Consider using the personas created in Activity A.3. and adapting the questions in this current activity for a group discussion instead. Try to put yourself and the team in the personas' positions, and to the best of your ability try to answer the questions below as you think they would do.

PARTICIPATORY
APPROACHES

CONTINUE >

VALIDATE PRIORITIZATION WITH KEY STAKEHOLDERS

NOTE TO FACILITATOR

This activity can be approached two ways:

1) Key Informant Interviews, or
2) Focus Group Discussions with stakeholders.

As part of the activity, please refer to **CROSS-CUTTING SECTION MEL: INCLUSIVE MONITORING, EVALUATION AND LEARNING** to review ethical data collection methods. You should also obtain participant consent. If your organization has a standard participant consent form, it is probably kept with a department such as legal, risk management, or monitoring & evaluation. If your organization has no such standard form, an example can be found on the TAAP website at www.taapinclusion.org. When facilitating this activity, remember that even people within the same identity group may disagree on priorities. It is important to make sure everyone feels their concerns are heard and to acknowledge that the project will have to make choices from a number of options. Constructively decline suggestions that fall outside the realistic scope.

CROSS REFERENCE TO MEL

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WORKSHEET

QUESTIONS TO VALIDATE YOUR PRIORITIZATION

WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*

Below are questions on the worksheet. Download them on the right.

How the Activity Is Done

If you are meeting with key stakeholders in person, prepare a list of the prioritized recommendations to share during the key informant interview and/or focus group discussion. Use or adapt the questions below depending on the audience. You should decide in advance whether it is appropriate to share the factors the team weighed when they ranked the recommendations.

Questions to Validate Your Prioritization:

These questions are meant to be iterative and adaptable depending on the context and the stakeholder group.

- Based on the initial prioritization, would you change the ranking? If yes, why?
- Of all the recommendations, which do you believe would have the most impact for transformative social change? The least? Why?
- Which recommendation seems most realistic? The least? Why?
- Of all our stakeholders, who can act as a booster for a recommendation(s)? Why?
- Do the recommendations that we've prioritized do everything we can address through this project? Are we missing anything?
- Of all our stakeholders, who may be resistant to a recommendation(s)? Why?
- Which strategies could the project put in place to gain the resistant stakeholder's support?
- Based on your discussions with stakeholders, adjust your prioritization as needed.

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STEP C

PLANNING THE PATHWAY TO INCLUSION

The final step in Phase III: Inclusive Design is planning the pathway to inclusion.

The activities in this step will prepare you to implement your inclusive project. This step includes three activities: Make Your Project a TAAP Scenario, Budgeting for Inclusion, and What Inclusion, and What Change is Possible?

ACTIVITY 1

MAKE YOUR PROJECT A TAAP SCENARIO

Description	Questionnaire (and worksheets)	
Overview	This activity helps develop actions to integrate inclusion in your project: as you determine concrete steps to take, you will also determine corresponding indicators to measure how effective those steps are at expanding inclusion. You can also begin planning which activities will be sustainable beyond the life cycle of the project. Depending on funder requirements, this activity may also help with annual workplans.	
Objectives	• To incorporate inclusion sensitivity and the TAAP principles into your project design • To create the TAAP Scenario, a tool to envision, monitor, and track how your project is intentionally integrating inclusion through the project cycle	
Why do this activity?	By making your project a TAAP Scenario, you will design actions grounded in the Phase II Social Inclusion Analysis report and on previous Phase III Inclusive Design activities. This scenario will serve as a guide through your implementation.	
Prerequisite activity?	Optional	Social Inclusion Analysis report Prioritize Inclusion Analysis Recommendations (Phase III, Step B, both activities)
Facilitator needed?	No	N/A
Time	4-8 hours	
Materials	Copies of WORKSHEET III.C.1: MAKE YOUR PROJECT A TAAP SCENARIO	
Participants	Design team, stakeholders	

WORKSHEET AVAILABLE
Download in the One-Stop Toolshop

STAND ALONE

CONSULT WITH PARTNERS

CONTINUE >

MAKE YOUR PROJECT A TAAP SCENARIO

How the Activity Is Done

To guide you in creating a TAAP Scenario, see the examples of a TAAP Project Scenario on the TAAP website at www.taapinclusion.org.

Review the definitions of inclusion sensitivity and inclusion responsiveness to think through how those concepts are (or could be) reflected in the project. You may be designing a new project or modifying an existing one here in Phase III: Inclusive Design. Either way you can use this activity to thoughtfully integrate inclusion into the project. If you are designing a new project, you can use this activity to create actions that integrate inclusion right from your project's onset, basing those actions on findings from the inclusion analysis and on the work you've completed earlier in this phase. Alternatively, if you are modifying an existing project, you can use this activity to pause, reflect, and thoughtfully integrate inclusion into your current processes or create new ones.

Review the TAAP Principles:

- PARTICIPATORY **APPROACHES**
- CONTEXT **SENSITIVITY**
- EMPHASIS ON **DIGNITY AND AGENCY**
- ADDRESS **POWER MBALANCES**
- THINK BIG **THINK THE IMPOSSIBLE**

CONTINUE ›

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MAKE YOUR PROJECT A TAAP SCENARIO

In this activity you will:

(1) **REFLECT** on the project's highest-level goals,

(2) **EXPLORE** a series of where, what, who, how, why, when questions,

(3) **DEVELOP** guiding questions across the project cycle, and

(4) **DEVELOP** inclusion-sensitive strategies and actions your project can incorporate that reflect inclusion sensitivity generally and the 5 TAAP Principles specifically.

The project life cycle is not linear. As noted elsewhere, the two cross-cutting sections in particular (Inclusive Monitoring, Evaluation and Learning and Inclusive Impact and Sustainability) should both occur throughout the entire project. Similarly, the work carried out in Phase I: Inclusive Inquiry and Reflection is often revisited throughout the project lifecycle as the individuals involved and the organization are themselves affected by the project activities.

Bearing in mind the iterative nature of the TAAP approach generally, thoughtfully explore the four sets of questions below. Then use your responses to those questions to populate Worksheet: Inclusion-Sensitive Strategies Across the Project Life Cycle.

REFLECT

CONTINUE ›

PART I DESCRIBE PROJECT BACKGROUND AND EXPLORE OVERALL STRATEGY FOR INTEGRATING INCLUSION

Work in groups to do the following:

1	10 MINUTES	Develop a 3-5 sentence description of the project.
2	5 MINUTES	Include the highest-level objective or goal.
3	60 MINUTES	How can the project be guided by the 5 TAAP Principles? (*30 minutes to brainstorm / 30 minutes to report and synthesize)*
4	60 MINUTES	How can the project take a universal/cross-identities approach? *(30 minutes to brainstorm / 30 minutes to report and synthesize)*
5	60 MINUTES	How can the project take an **INTERSECTIONAL** approach? *(30 minutes to brainstorm / 30 minutes to report and synthesize)*
6	60 MINUTES	How can the project take a transformative approach? *(30 minutes to brainstorm / 30 minutes to report and synthesize)*

The data from this activity will carry over to Part 2.

CONTINUE

INTERSECTIONALITY

PART 2 INQUIRY AND ANALYSIS

This part of the activity may take 1 hour.

Work in groups to answer these questions:

- WHERE is the inclusion, marginalization or exclusion taking place, in what context?
- WHAT are the driving factors behind the inclusion, marginalization and/or exclusion, and what can be done to affect these factors?
- WHO is driving the inclusion, marginalization and/or exclusion?
- HOW are key actors using power to drive the inclusion, marginalization and/or exclusion?
- WHY are the key actors motivated to drive the inclusion, marginalization and/or exclusion?
- WHEN might the inclusion most likely be open to further expansion and when might the marginalization or exclusion most likely be open to change, for better or worse?

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PART 3 GUIDING QUESTIONS TO ASK ACROSS THE PROJECT LIFE CYCLE

This part of the activity helps practitioners identity inclusion-sensitive questions for each phase of the project life cycle with regard to the project team, partners, participants, and other stakeholders.

Additional sample questions are found in the scenarios on the TAAP website at taapinclusion.org.

The SAMPLE QUESTIONS relate to the four phases and the two cross-cutting sections:

- Inclusive Inquiry and Reflection
  Sample question: "What knowledge, attitudes, and experiences do the project staff have about the context?"
- Inclusion Analysis
  Sample question:"Which identity groups faced the most evident marginalization and exclusion, particularly pertaining to agency, access and power?"
- Inclusive Design
  Sample question: "Will disadvantaged identity groups feel sufficiently safe and empowered to participate in the project?"
- Inclusive Implementation*
  Sample question: "Have we created ample opportunities for persons from disadvantaged groups to take part in the project as staff, participants, trainers, mentors, agents of change?"
- Inclusive MEL
  Sample question: "Does our baseline survey capture whether our participants understand inclusion concepts?"
- Inclusive Impact and Sustainability
  Sample question: "As participants demonstrate commitment to inclusive practices in their activities, are they linking that commitment to long-term positive social change?"

* See PHASE IV WORKSHEET: ILLUSTRATIVE ABBREVIATED WORKPLAN for real-world questions that inform a workplan.

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PART 4 INCLUSION SENSITIVE STRATEGIES AND ACTIONS

Groups will review the prioritized recommended actions from Phase III Step B to develop strategies and actions for each phase of the project life cycle.

The SAMPLE ACTIONS relate to the four phases and the two cross-cutting sections:

- **Inclusive Inquiry and Reflection**
  Sample action: Planning a project team retreat to do the Phase I activities to demonstrate that staff are eager and ready to take part in TAAP.
- **Inclusion Analysis**
  Sample action: Planning or conducting participatory consultation with a wide variety of stakeholders including leaders and change agents from civil society and government institutions.
- **Inclusive Design**
  Sample action: Planning to validate prioritized recommendations with stakeholders.
- **Inclusive Implementation**
  Sample action: Planning to validate the inclusion-sensitive risk management plan with selected partners and other stakeholders.
- **Inclusive MEL**
  Sample action: Developing an inclusive plan to conduct data collection.
- **Inclusive Impact and Sustainability**
  Sample action: Planning to make an inclusive impact and sustainability plan; announcing that intention at early stages (e.g., at the team retreat to do the Phase I activities, if such a retreat can be organized) to signal from the outset the project's long-term time horizon and its seriousness of intent.

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WORKSHEET

MAKE YOUR PROJECT A TAAP SCENARIO

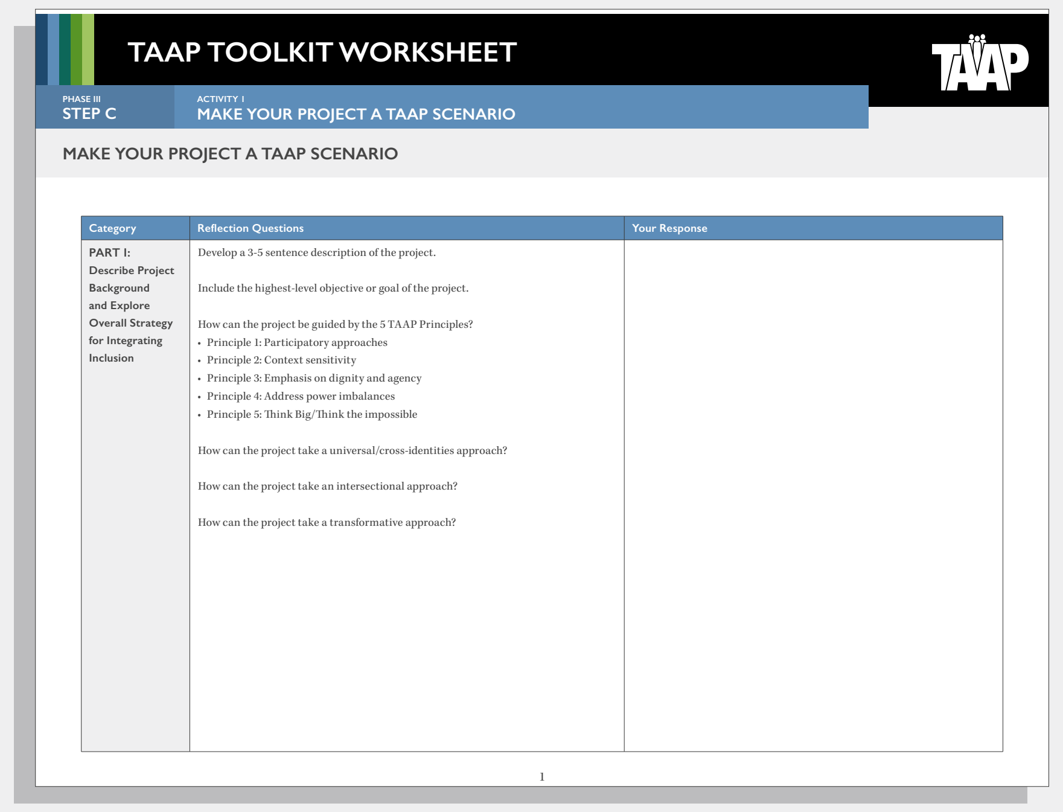
WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*

Below are sample questions from the worksheet. Download it on the right.

Category	Reflection Questions	Your Response
PART I: Describe Project Background and Explore Overall Strategy for Integrating Inclusion	Develop a 3-5 sentence description of the project. Include the highest-level objective or goal of the project. How can the project be guided by the 5 TAAP Principles? • Principle 1: Participatory approaches • Principle 2: Context sensitivity • Principle 3: Emphasis on dignity and agency • Principle 4: Address power imbalances • Principle 5: Think Big/Think the impossible How can the project take a universal/cross-identities approach? How can the project take an intersectional approach? How can the project take a transformative approach?	
PART 2: Inquiry and Analyis	Where is the inclusion, marginalization or exclusion taking place, in what context? What are the driving factors behind the inclusion, marginalization and/or exclusion, and what can be done to affect these factors? Who is driving the inclusion, marginalization and/or exclusion?	



TAAP TOOLKIT WORKSHEET

MAKE YOUR PROJECT A TAAP SCENARIO

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PHASE III
STEP C

ACTIVITY 2
BUDGETING FOR INCLUSION

Description	Worksheet, checklist	
Overview	The activity reviews, aligns, and updates the draft budget according to the project design. Worksheet III.C.2 can be used by the project finance staff to adjust costs accordingly and make sure inclusion is budgeted.	
Objectives	• To determine which costs are relevant for the project in consultation with key partners and stakeholders • To ensure that all relevant and intended costs are accounted for	
Why do this activity?	Budgeting for the proposed activities is essential for any project. Budgeting for inclusion is even more important to ensure all stakeholder groups can participate in the project equitably. The Phase II Inclusion Analysis report should have included budgeting recommendations. This activity is an opportunity to cross-check and update those recommendations.	
Prerequisite activity?	Yes	Make Your Project a TAAP Scenario (Phase III, Step C, Activity 1)
Facilitator needed?	No	N/A
Time	2 hours	
Materials	Worksheet: PHASE 3, STEP C, ACTIVITY 2: INCLUSIVE BUDGET, Project Budget	
Participants	Design and implementation team, support teams, stakeholders	

WORKSHEET AVAILABLE
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BUDGETING FOR INCLUSION

How the Activity Is Done

Review Worksheet III.C.2 Inclusive Budget and adjust as necessary to reflect your project's major and detailed budget line items. Discuss the following questions and complete the worksheet. For each instance, consider the unit, cost per unit, and description. Note that these examples are illustrative and some may not be applicable.

Consider what is an absolute minimum for an inclusive budget versus the "gold star" standard. The minimum standard describes what you must do to implement your project and be inclusive. An example might be providing budget for sign language interpreters for hearing-impaired participants. The gold star standard is an opportunity to budget for all costs related to inclusion, unburdened by resource constraints. Identify strategies for project implementation to ensure the budget remains inclusive. Update your project budget as necessary.

EXAMPLES

- **PERSONNEL** Is budget allocated for inclusion advisors, short-term technical experts and consultants, staff from marginalized or excluded groups?
- **FRINGE** Are professional development opportunities related to inclusion considered for staff to be a fringe benefit?
- **CONTRACTUAL** Are service providers budgeted to provide reasonable accommodations such as sign language interpreters, assistance, etc. for participants and staff?
- **TRAVEL AND TRANSPORTATION** Are costs required to address safety and cultural sensitivities for staff and consultant travel?
- **OTHER DIRECT COSTS** Is the office space accessible? Is the hardware and software purchased for the project accessible? What about inclusion stipends for unseen costs?
- **PROGRAM ACTIVITIES** Are there specific activities integrated into project plans that address constraints identified in the Phase II Inclusion Analysis report (or other background research) that need to be budgeted for? Are inclusion analyses, assessments, and audits included?
- **SUB-GRANTS** Do sub-grants budget for inclusion?

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BUDGETING FOR INCLUSION

WORKSHEET

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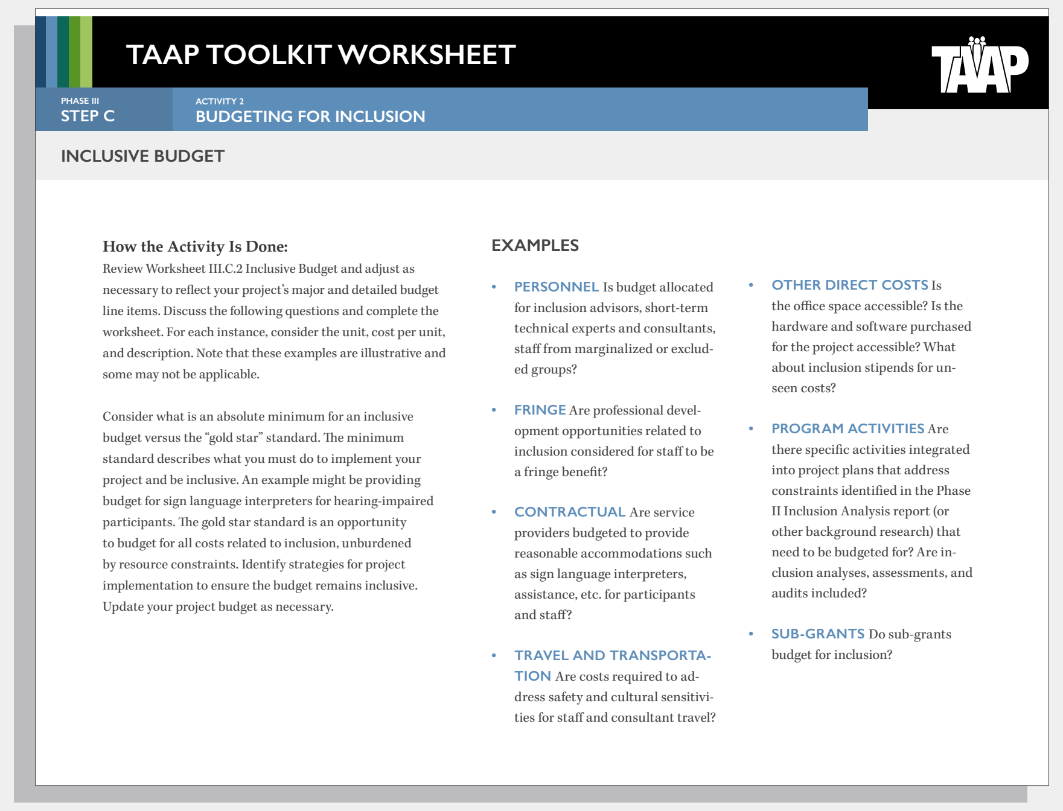
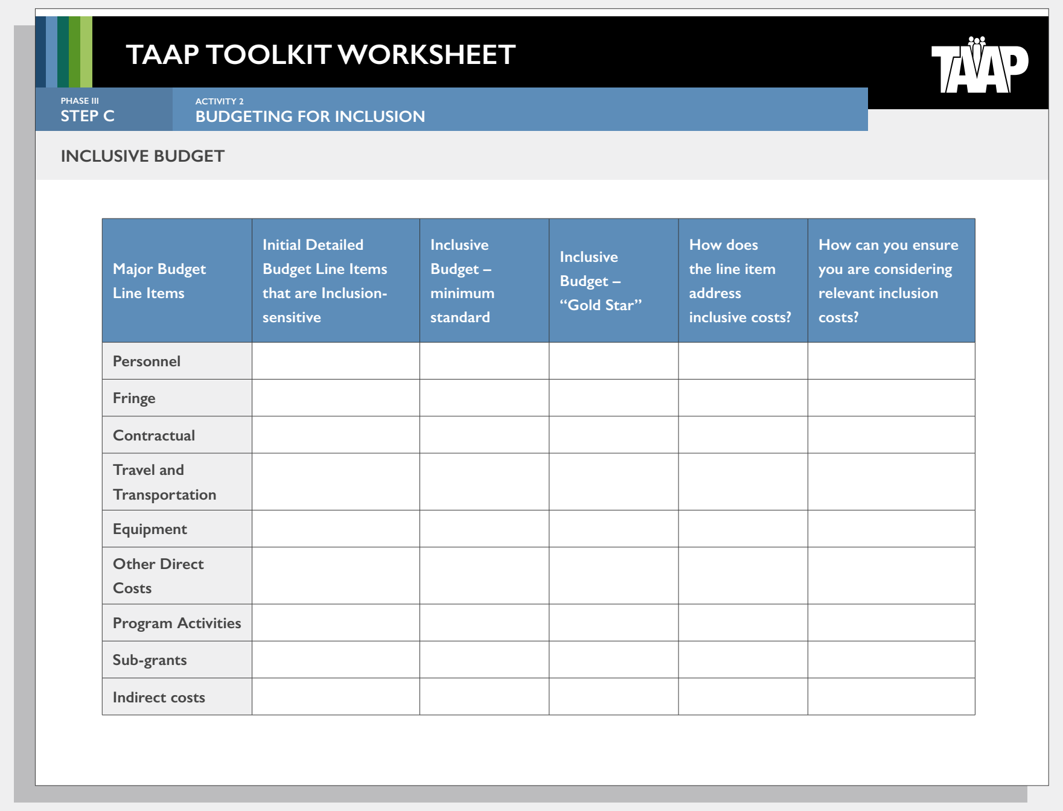
TOOLSHOP
Also available in the One-Stop Toolshop

Below is a sample of the worksheet. Download it on the right.

Major Budget Line Items	Initial Detailed Budget Line Items that are Inclusion-sensitive	Inclusive Budget – minimum standard	Inclusive Budget – "Gold Star"	How does the line item address inclusive costs?	How can you ensure you are considering relevant inclusion costs?
Personnel					
Fringe					
Contractual					
Travel and Transportation					
Equipment					
Other Direct Costs					
Program Activities					
Sub-grants					
Indirect costs					





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PHASE III
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ACTIVITY 3
WHAT CHANGE IS POSSIBLE?

NOTE TO FACILITATOR

In reviewing the TAAP Theory of Change (see next page), draw attention to the dimensions of political, social, and economic development that the Theory of Change identifies as TAAP outcomes.

Remind the team to consider all the TAAP Principles—specifically Principle 5: Think Big/ Think the Impossible.

Description	Worksheet, mapping, discussion	
Overview	Map the TAAP Scenario against the TAAP Theory of Change which was introduced in the TAAP Overview. This activity has two parts. First, decide at which levels of change your project is targeted. Second, identify outcomes from the TAAP Theory of Change that apply to your work.	
Objective	To identify the TAAP Theory of Change outcomes to which your project will contribute.	
Why do this activity?	This activity helps shift the team from vision to actual plan by focusing on the factors that will advance (or hinder) that vision and the time horizon for its achievement.	
Prerequisite activity?	Yes	Make Your Project a TAAP Scenario (Phase III, Step C, Activity 1)
Facilitator needed?	Yes	Internal
Time	2 hours	
Materials	Levels of change graphic, sticky notes, flip-chart paper, TAAP Theory of Change	
Participants	Required: Design team. Recommended: Partners, participants, stakeholders	

THINK BIG
THINK THE IMPOSSIBLE

CONTINUE ›

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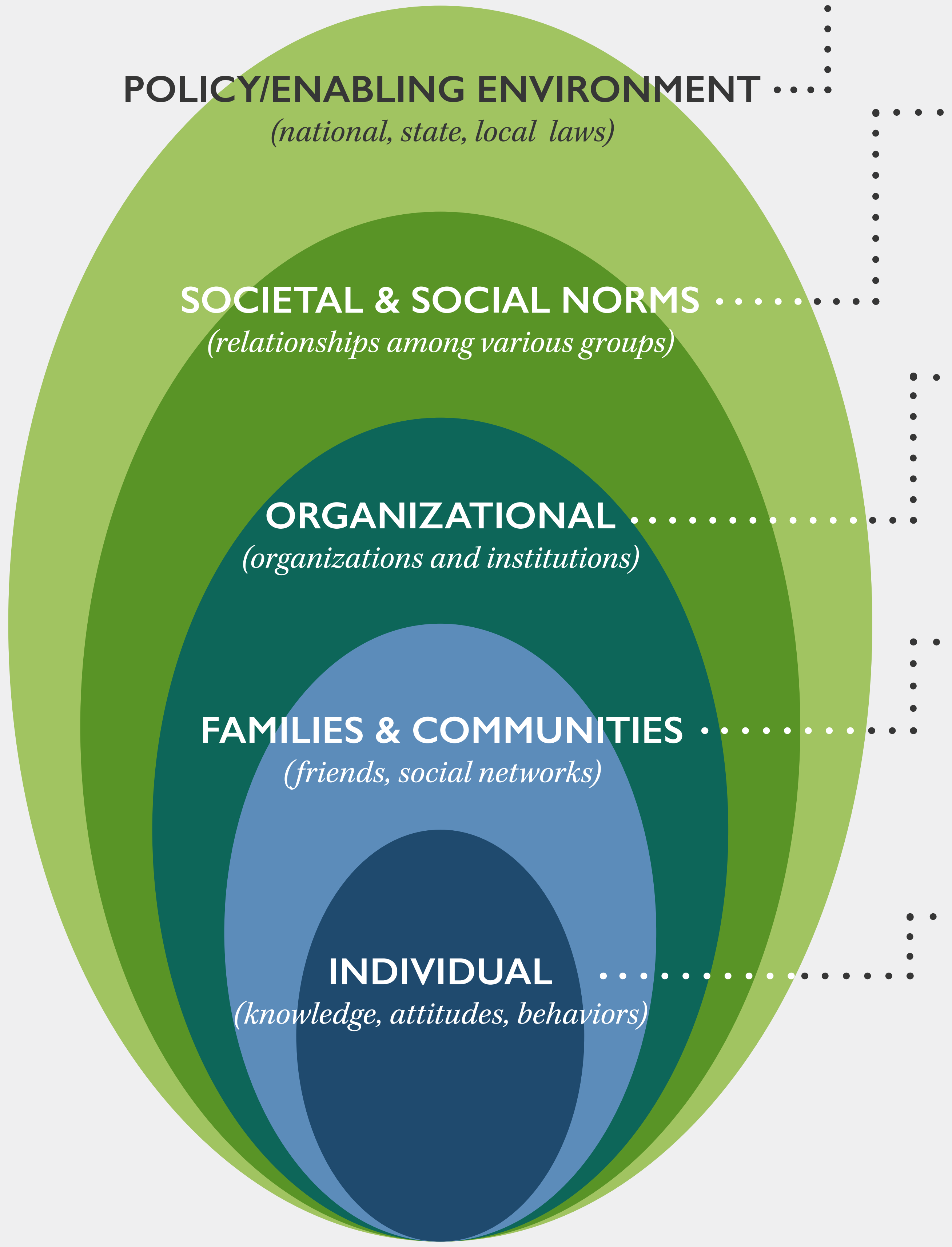
PART I WHAT CHANGE IS POSSIBLE?

How the Activity Is Done

Review the TAAP Theory of Change (ToC), which posits that expanding the agency, access and power of marginalized and excluded people will require tackling entrenched norms, institutions, and power structures. The TAAP ToC rests on two core assumptions: first, that positive transformations in attitudes, behaviors, and social norms depend upon a strong starting awareness on the part of the practitioners about the power dynamics among various groups; and second, that the intervention must seek to effect change at different levels. Decide at which levels of change (e.g., individual, family/community, societal and institutional) your project is working. Provide a printed copy of the levels of change.

CONTINUE >

Levels of Change within ToC



POLICY/ENABLING ENVIRONMENT

Laws, policies and institutional practices that address, protect and promote agency, access and power for included, marginalized and excluded identity groups.

SOCIETAL & SOCIAL NORMS

Relationships among various social groups and networks, based on rules, norms, and behaviors that are accepted and followed .

ORGANIZATIONAL

Organized bodies of people with a specific purpose or interest (public, private, social) that influence the agency, access and power of social identity groups .

FAMILIES & COMMUNITIES

Formal (and informal) social networks and social support systems that can influence individual behaviors

INDIVIDUAL

Characteristics of an individual that influence behavior change (knowledge; attitudes; behavior; self-efficacy; developmental history; sex; age; religious identity; racial/ethnic identity; gender identity; economic status; financial resources; values; goals; expectations; literacy; stigma etc.).

While discussing which levels of change you are addressing in your project, consider:

- Who/what are your primary program participants/beneficiaries?
- How are you working within formal and/or informal institutions? Directly? Indirectly? Both?

PART 2 WHAT CHANGE IS POSSIBLE?

How the Activity Is Done

Decide which outcomes from the Theory of Change apply to your project, connecting those outcomes to the actions you designed as part of the TAAP Scenario (in Phase III, Step C, Activity 1). Write them on sticky notes and place on your Level of Change drawing.

Work as a group to discuss and complete Worksheet: What Change is Possible?

- When do we expect to see the outcome? Immediate, short-term, or long-term (beyond)?
- Which boosters and barriers will support or hinder the outcome?

> *"Moving from exclusion to inclusion does not happen overnight; it is important to have a long-term view. Social inclusion requires overcoming negative beliefs and stereotypes about excluded groups, which cannot be undone in a few years of "inclusive policy." Timing is therefore of the essence; the impacts of some changes may be felt years into the future or may well be the unintended consequences of policy or other developments. Similarly, the impact of change on groups can vary, and what is considered costly for some groups today may have positive outcomes in the future or vice versa."*
>
> – World Bank, Inclusion Matters, pg. 27

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WORKSHEET

WHAT CHANGE IS POSSIBLE?

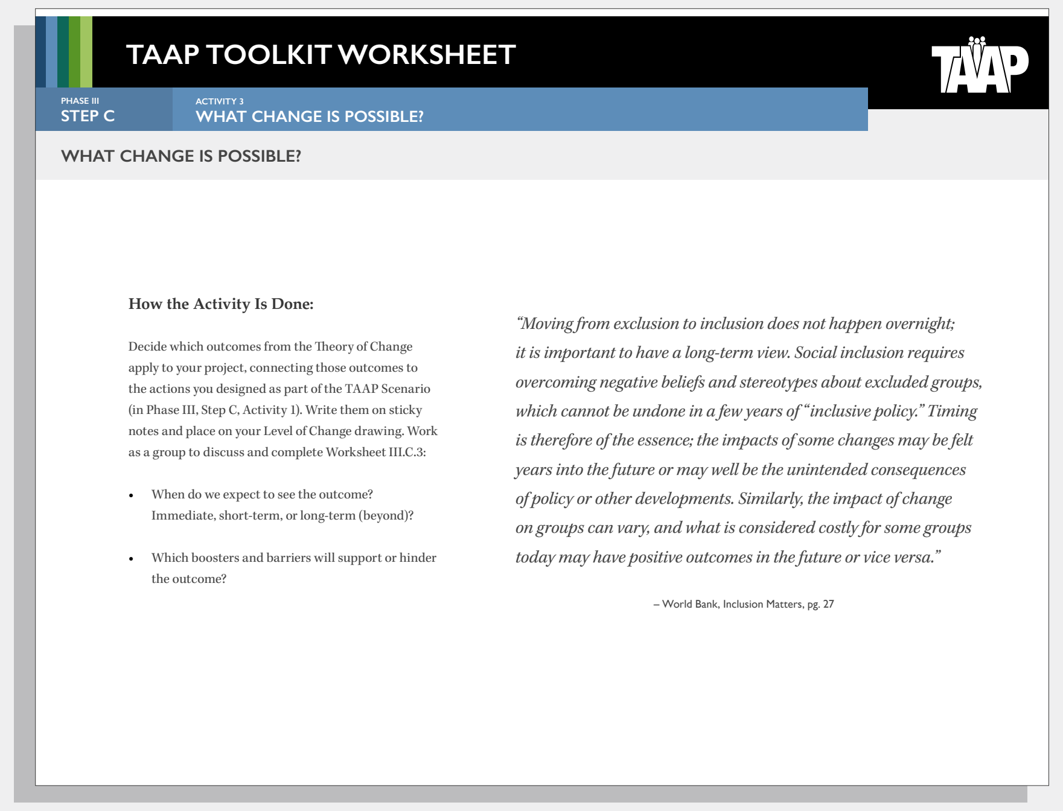
WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*

Below is a sample of the worksheet. Download it on the right.

TAAP Outcomes	Scenario Actions(s)	Level of Change	Timeframe (immediate, short-, long-term)	Boosters	Barriers	Interactions and intersectionality of barriers and boosters



TAAP TOOLKIT WORKSHEET

PHASE III
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ACTIVITY 3
WHAT CHANGE IS POSSIBLE?

WHAT CHANGE IS POSSIBLE?

How the Activity Is Done:

Decide which outcomes from the Theory of Change apply to your project, connecting those outcomes to the actions you designed as part of the TAAP Scenario (in Phase III, Step C, Activity 1). Write them on sticky notes and place on your Level of Change drawing. Work as a group to discuss and complete Worksheet III.C.3:

- When do we expect to see the outcome? Immediate, short-term, or long-term (beyond)?
- Which boosters and barriers will support or hinder the outcome?

> *"Moving from exclusion to inclusion does not happen overnight; it is important to have a long-term view. Social inclusion requires overcoming negative beliefs and stereotypes about excluded groups, which cannot be undone in a few years of "inclusive policy." Timing is therefore of the essence; the impacts of some changes may be felt years into the future or may well be the unintended consequences of policy or other developments. Similarly, the impact of change on groups can vary, and what is considered costly for some groups today may have positive outcomes in the future or vice versa."*
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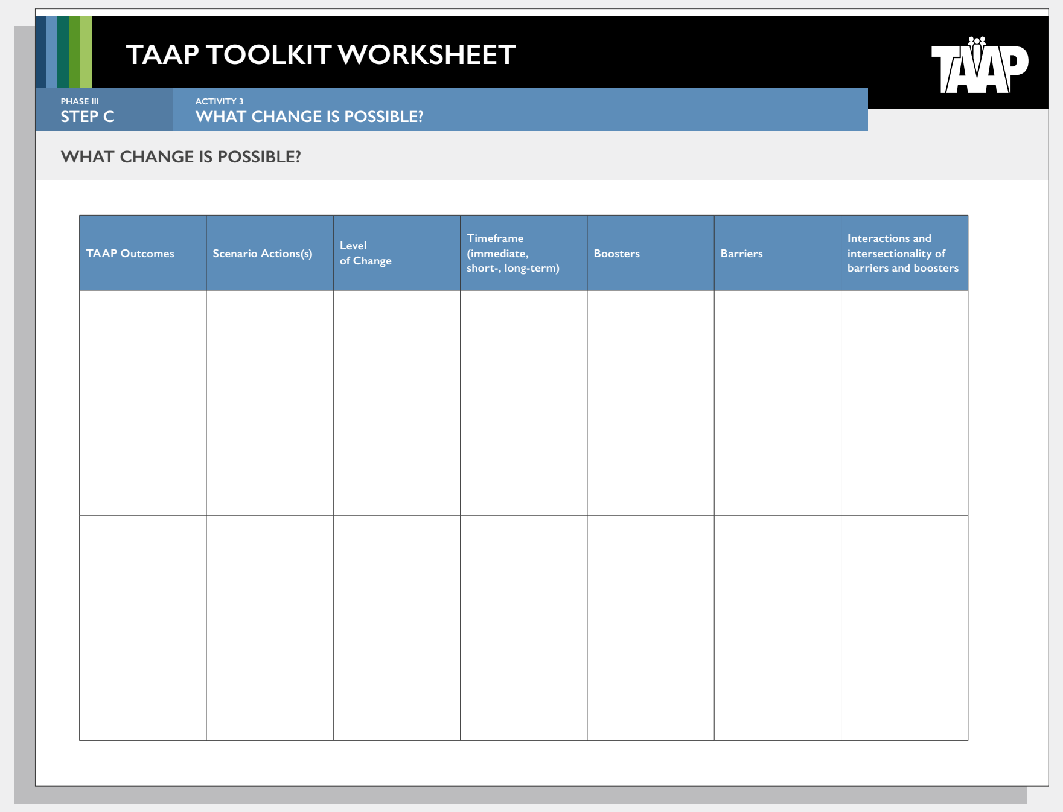

TAAP TOOLKIT WORKSHEET

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WHAT CHANGE IS POSSIBLE?

WHAT CHANGE IS POSSIBLE?

TAAP Outcomes	Scenario Actions(s)	Level of Change	Timeframe (immediate, short-, long-term)	Boosters	Barriers	Interactions and intersectionality of barriers and boosters

CONTINUE

PART 3 WHAT CHANGE IS POSSIBLE?

Crafting Project Indicators

Now that you have identified your TAAP Outcomes, it is time to craft project indicators to monitor your project's contribution to achieving those TAAP Outcomes.

At this stage, return to your core project documents such as results framework and indicators. "To make sure they are inclusion sensitive, there is an activity in the Cross-Cutting Section: Inclusive Monitoring, Evaluation and Learning that will help you:

STEP A, ACTIVITY I: ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS

Now that you have completed Worksheet What Change is Possible?, discuss with the group the extent to which it would be feasible to revisit it periodically during project implementation to see which TAAP outcomes are being achieved and whether (and how) they may have changed.

END OF PHASE III

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PHASE IV
INCLUSIVE IMPLEMENTATION

By the time you finish this phase, you will have:

- Practical steps for integrating inclusion sensitivity and responsiveness into your essential project functions, e.g. workplan, hiring, procurement and budgeting, risk management, project close-out.
- Practical ideas for leveraging inclusion boosters and opportunities and addressing any barriers that emerge during implementation.

THE BASICS

Phase IV puts the previous phases' learning and analysis into practice. Phase IV's activities guide the team through ensuring inclusion sensitivity in essential project functions and monitoring for inclusion boosters and barriers, including identity-based violence (IBV) and other manifestations of exclusion. It offers strategies to promote opportunities for change and to address resistance in the project context.

The output from this phase is an inclusion action plan designed to ensure that inclusion is pursued in a coordinated, collaborative, and integrated manner. Ideally, the entire project implementation team should be engaged in the activities in this phase.

CONTINUE >

PHASE IV

INCLUSIVE IMPLEMENTATION

WHAT	Inclusive Implementation of the project design.
WHO	Project leadership, staff, participants, partners, and stakeholders.
WHEN	Implementation happens throughout the project cycle, from funding to close-out.
HOW	Participatory approaches are central to Phase IV. The activities are designed to be adaptable to contexts with multiple stakeholders.
WHY	We can't achieve the ultimate objective - increasing the agency, access, and power of all people—unless inclusive programing plans are actually implemented.

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PHASE IV BASICS
STEP A Reflect on Inclusive Design Results
STEP B Ensure Inclusion Sensitivity in Essential Project Functions
STEP C Monitoring for Inclusion Opportunities and Barriers
STEP D Write the Social Inclusion Action Plan

PHASE IV
INCLUSIVE IMPLEMENTATION

Phase IV of the Toolkit has specific steps and associated activities. While the steps and activities suggest a linear sequence of events, in actual implementation there is often a more dynamic flow to the work. Some steps or activities may be occurring simultaneously and the work often circles back to revisit earlier steps.

STEP A Reflect on Inclusive Design Results	Activity 1: Debrief the Inclusive Design Results
STEP B Ensure Inclusion Sensitivity in Essential Project Functions	Activity 1: Develop Inclusion-Sensitive Work Plan
	Activity 2: Develop a Project-Level Team Culture and Capacity for Inclusion
	Activity 3: Risk Management Through an Inclusion Lens
	Activity 4: Inclusion-Sensitive Project Close-Out
STEP C Monitoring for Inclusion Opportunities and Barriers	Activity 1: Monitoring IBV and Accessibility as Sample Manifestations of Exclusion and Discrimination
	Activity 2: Promote Opportunities for Change
	Activity 3: Addressing Resistance
STEP D Social Inclusion Action Plan	Write the Social Inclusion Action Plan

CONTINUE

PHASE IV
STEP A

REFLECT ON THE INCLUSIVE DESIGN RESULTS

REFLECT

NOTE TO FACILITATOR

Some of the team members may have seen the prior activities as a series of thought exercises or learning opportunities.

Here in Phase IV, it will become clear that the organization actually does intend to implement a more holistic inclusion approach in their work. This may require a mental shift, possibly a challenging one, for some team members. The facilitator should try to create an all-learning environment by cultivating contributions from all levels of staff and by applying safe-space protocols—including asking that participants agree to assume good intentions. Consider combining the debrief with a mini-training on why inclusion matters and with an overview of definitions and good practices. Depending on the context you may want to think about the merits and drawbacks of engaging local partners and stakeholders in this process. As you work with the group, ensure that there is someone responsible for taking notes, and that those notes are shared with participants. These notes can be reviewed at a scheduled time in the future, so that progress in monitoring the identified boosters and barriers can be measured. The notes also form part of the Inclusion Action Plan.

As you move from design to implementation, it is important to reflect on your team's commitment, capacity, and skills to ensure inclusion sensitivity throughout the project lifecycle.

Make sure that your team, including any newly joined members, share the commitment to "walking the talk," and a vision of how that would work in practice. Even if a team member did not participate in the earlier social inclusion analysis or inclusive design phases, he or she can still participate in Phase IV.

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PHASE IV
STEP A

REFLECT ON THE INCLUSIVE DESIGN RESULTS

ACTIVITY I

DEBRIEF THE INCLUSIVE DESIGN RESULTS

Description	Worksheet, brainstorming, discussion, reflection	
Overview	Team members summarize core components of each output of **PHASE III: INCLUSIVE DESIGN.** Each group then uses a worksheet to brainstorm possible boosters and barriers to implementing the project. Finally, each group maps the staff, partners, stakeholders, and participants who have a role to play in each output of design and how that translates to implementation.	
Objectives	• To ensure collective understanding of key results of Phase III work • To develop an inventory of inclusion boosters and barriers for implementing each output of the inclusive design • To inform the team about the stakeholders, priority recommendations, and how the Theory of Change relates to project activities and outcomes • To understand the storyline of the project (TAAP Scenario), the opportunities and challenges afforded by the Inclusion-Sensitive Budget, and the targeted level of change that emerged from the What Change is Possible? exercise **(PHASE III, STEP C, ACTIVITY 3)** • To inform development of the next implementation steps in Phase IV	
Why do this activity?	To ensure that the outputs of Phase III are meaningfully processed by the design and implementation team. (The notes will be incorporated into the Inclusion Action Plan.)	
Prerequisite activity?	Yes	Inclusive Design (Phase III, all steps and activities)
Facilitator needed?	Yes	Internal
Time	8 hours over 2 days	
Materials	Flip chart, sticky notes, markers	
Participants	Required: Design and implementation team. Recommended: Partners	

CONSULT WITH PARTNERS

CONTINUE

WORKSHEET

DEBRIEF THE INCLUSIVE DESIGN RESULTS

WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*

How the Activity Is Done

Team members work in groups to summarize core components of each output of the Phase III Inclusive Design process.

Each group should review:

Who are the Stakeholders Now? **(PHASE III, STEP A, ACTIVITY 3)**
Prioritize Inclusion Analysis Recommendations **(PHASE III, ACTIVITY B, ACTIVITY I)**
Theory of Change **(DISCUSSED IN TAAP OVERVIEW)**
TAAP Scenario **(PHASE III, STEP C, ACTIVITY I)**
Inclusion Sensitive Budget **(PHASE III, STEP C, ACTIVITY 2)**
What Change is Possible? **(PHASE III, STEP C, ACTIVITY 3)** work products

Each group should write the name of the output at the top of a flip chart page and brainstorm that output's boosters, barriers, and other considerations. Groups then use Worksheet IV.A.1 Reflecting on the Design Phase to brainstorm boosters and barriers to making those outputs a reality. Representatives from each group then share 1-2 responses for each box. The facilitator collates responses and validates the final list with the whole group; that validated list will become one part of the project's Inclusion Action Plan.

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STEP B

ENSURING INCLUSION SENSITIVITY IN ESSENTIAL PROJECT FUNCTIONS

This step will help you to integrate inclusion approaches throughout your essential project functions, and to anticipate and manage opportunities and barriers for each.

Step B includes four activities:

ACTIVITY 1	Develop Inclusion-Sensitive Workplan
ACTIVITY 2	Develop a Project-Level Team Culture and Capacity for Inclusion
ACTIVITY 3	Risk Management Through an Inclusion Lens
ACTIVITY 4	Inclusion-Sensitive Project Close-Out

CONTINUE

PHASE IV
STEP B

ACTIVITY I
DEVELOP YOUR INCLUSION-SENSITIVE WORKPLAN

Description	Worksheet, discussion, reflection	
Overview	This is a process for integrating inclusive sensitivity and responsiveness into the project workplan, accounting for the diversity of partners and stakeholders. Each activity is reviewed so that designated staff, stakeholders, and participants can fully engage in the project.	
Objectives	• To discuss how inclusion sensitivity and responsiveness align with project goals or whether stand-alone inclusion goals are needed • To support integration of inclusion sensitivity and responsiveness into the workplan, including implementation and on-going management • To consider boosters and barriers for marginalized and excluded identities to fully participate in, and benefit from, project activities • To prioritize any desirable accommodations and modifications • To determine who is responsible for inclusion sensitivity and responsiveness	
Why do this Activity?	An inclusion-sensitive workplan holds the project team accountable to inclusion commitments. It also signals to a funder the importance that the team places on inclusion sensitivity and responsiveness.	
Prerequisite activity?	Yes	Debrief the Inclusive Design Results (Phase IV, Step A, Activity 1)
Facilitator needed?	Yes	Internal
Time	8 hours (over 2 days)	
Materials	Worksheets IV.B.1(i) and IV.B.1(ii) INCLUSION CONSIDERATIONS FOR DEVELOPING OR UPDATING WORKPLAN	
Participants	Design and Implementation team, partners	

WORKSHEET AVAILABLE
Download in the One-Stop Toolshop

CONSULT WITH PARTNERS

PARTICIPATORY
APPROACHES

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DEVELOP YOUR INCLUSION-SENSITIVE WORKPLAN

* The activity includes two worksheets.

NOTE TO FACILITATOR

For an existing project, the Develop Your Inclusion-Sensitive Workplan activity can be used to update the project workplan to bring in an inclusion lens. For a new project, this activity ensures that a workplan reflects inclusion as an active commitment.

THE FIRST worksheet, **INCLUSION CONSIDERATIONS FOR DEVELOPING OR UPDATING WORKPLAN,** has guiding questions for the team. If staff answer "yes" to any questions, guide participants through the considerations at the top of the chart. If the answer to any question is "no," guide participants through a discussion of why the plan does not address inclusion approaches and what will it take to adopt inclusion approaches. The completed worksheet can be used to guide the development of the inclusion-sensitive workplan.

THE SECOND worksheet, **ILLUSTRATIVE ABBREVIATED WORKPLAN,** includes a sample workplan with space for the project team to insert ideas. A project work plan elaborates on the project activities as they align with project objectives and anticipated results, identifying the sequencing, timing, accountability and resources necessary for each activity. Workplans typically incorporate inputs, outputs, and expected outcomes.

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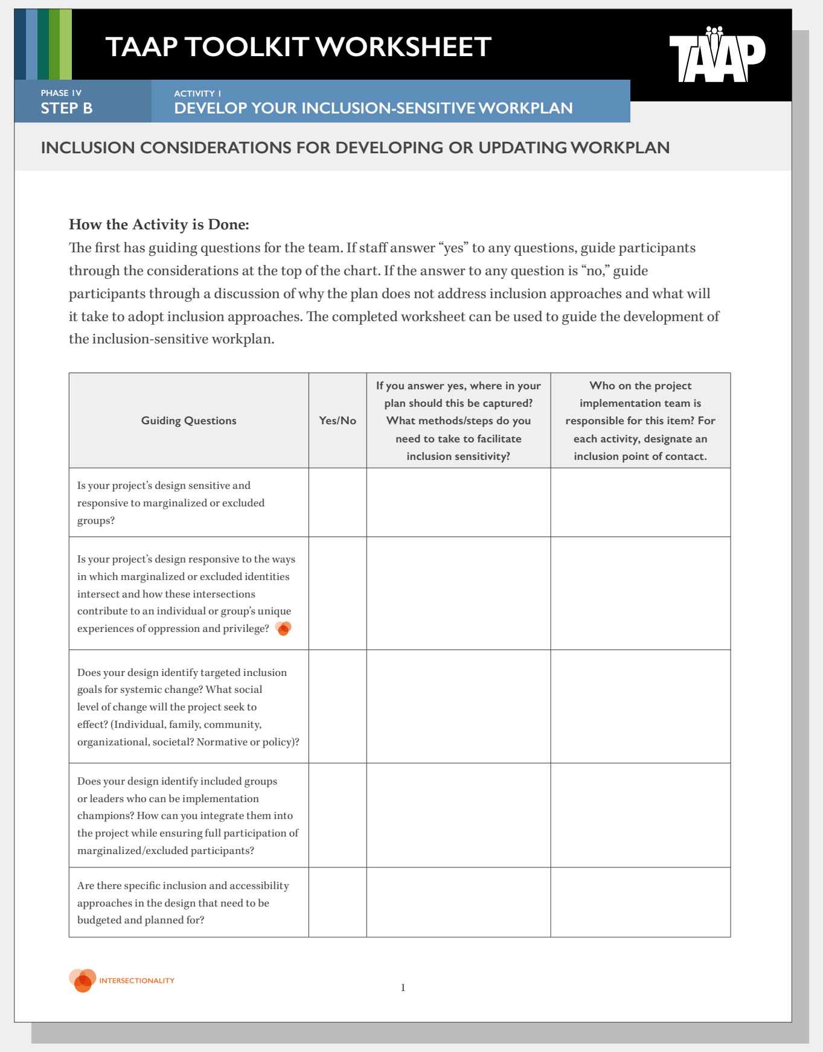
INCLUSION CONSIDERATIONS FOR DEVELOPING OR UPDATING WORKPLAN

WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*



Below are sample questions from the worksheet. Download it on the right.

Guiding Questions	Yes/No	If you answer yes, where in your plan should this be captured? What methods/steps do you need to take to facilitate inclusion sensitivity?	Who on the project implementation team is responsible for this item? For each activity, designate an inclusion point of contact.
Is your project's design sensitive and responsive to marginalized or excluded groups?			
Is your project's design responsive to the ways in which marginalized or excluded identities intersect and how these intersections contribute to an individual or group's unique experiences of oppression and privilege ?			
Does your design identify targeted inclusion goals for systemic change? What social level of change will the project seek to effect? (Individual, family, community, organizational, societal? Normative or policy)?			
Does your design identify included groups or leaders who can be implementation champions? How can you integrate them into the project while ensuring full participation of marginalized/excluded participants?			

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ILLUSTRATIVE ABBREVIATED WORKPLAN*

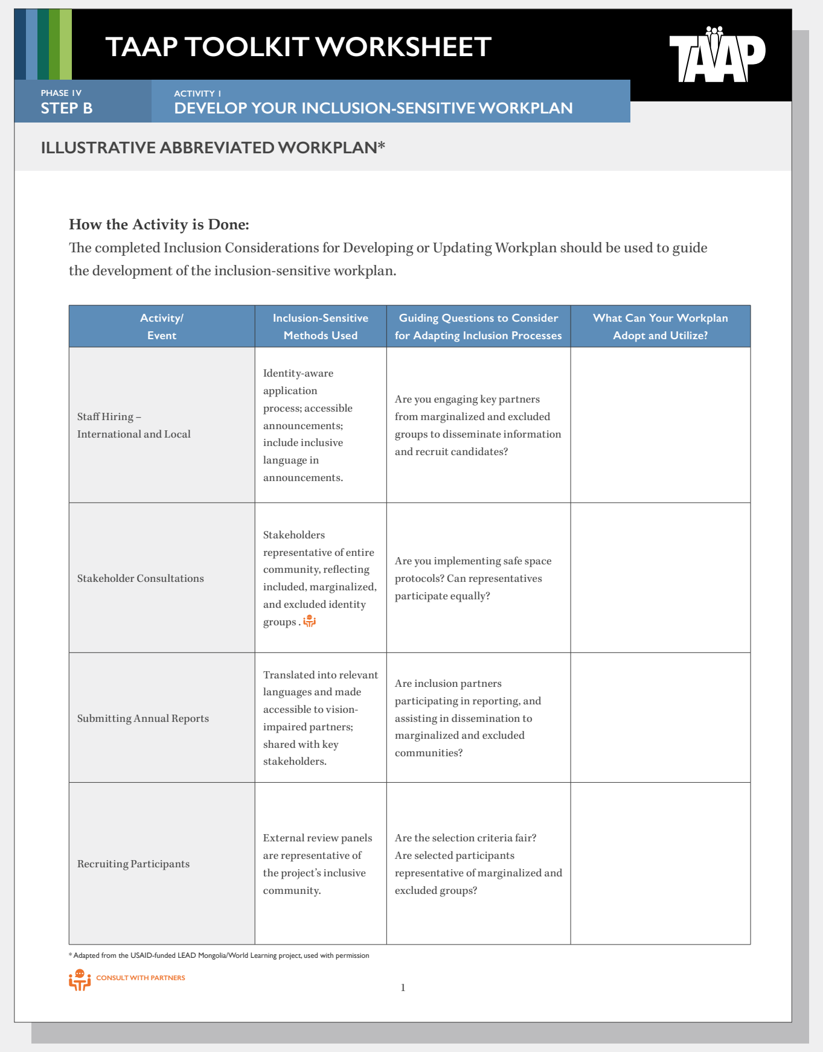
WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*

Below are sample questions from the worksheet. Download it on the right.

Activity/Event	Inclusion-Sensitive Methods Used	Guiding Questions to Consider for Adapting Inclusion Processes	What Can Your Workplan Adopt and Utilize?
Staff Hiring – International and Local	Identity-aware application process; accessible announcements; include inclusive language in announcements.	Are you engaging key partners from marginalized and excluded groups to disseminate information and recruit candidates?	
Stakeholder Consultations	Stakeholders representative of entire community, reflecting included, marginalized, and excluded identity groups.	Are you implementing safe space protocols? Can representatives participate equally?	
Submitting Annual Reports	Translated into relevant languages and made accessible to vision-impaired partners; shared with key stakeholders.	Are inclusion partners participating in reporting, and assisting in dissemination to marginalized and excluded communities?	



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* Adapted from the USAID-funded LEAD Mongolia/World Learning project, used with permission

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ACTIVITY 2
DEVELOP AN ORGANIZATIONAL CULTURE AND CAPACITY FOR INCLUSION

NOTE TO FACILITATOR

This activity has three parts:

Recruitment, onboarding, and staff management. There are three worksheets (downloadable copies in the One-Stop Tool Shop). Staff use the worksheets to reflect on how they will apply inclusion-sensitive practice in the project; the completed worksheets become part of the Inclusion Action Plan.

WORKSHEET AVAILABLE
Download in the One-Stop Toolshop

Description	Action plan, brainstorming, reflection	
Overview	Project teams develop a plan to promote a shared commitment to inclusion by reflecting on, and planning ways to integrate, inclusion-sensitive practices.	
Objectives	• To provide examples of good practices for establishing a project-level culture of inclusion • To explore possibilities for implementing good practices at the project level	
Why do this activity?	Staff buy-in helps to establish a culture of inclusion, creating a foundation from which managers can build greater capacity to implement fully inclusive projects. This activity will help the team develop plans to build this culture. The completed worksheets lead to an action plan with formal strategies and policies.	
Prerequisite activity?	Yes	Organizational Inclusive Inquiry and Reflection **(Phase I, Step B [all activities])**
Facilitator needed?	Yes	Internal
Time	2 hours	
Materials	WORKSHEETS IV.B.2(I); IV.B.2(II); AND IV.B.2(III) (Recruiting New Staff; Onboarding; Managing Inclusive Teams)	
Participants	Implementation team, other support teams, human resource manager	

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WORKSHEET

RECRUITING NEW STAFF

WORKSHEET

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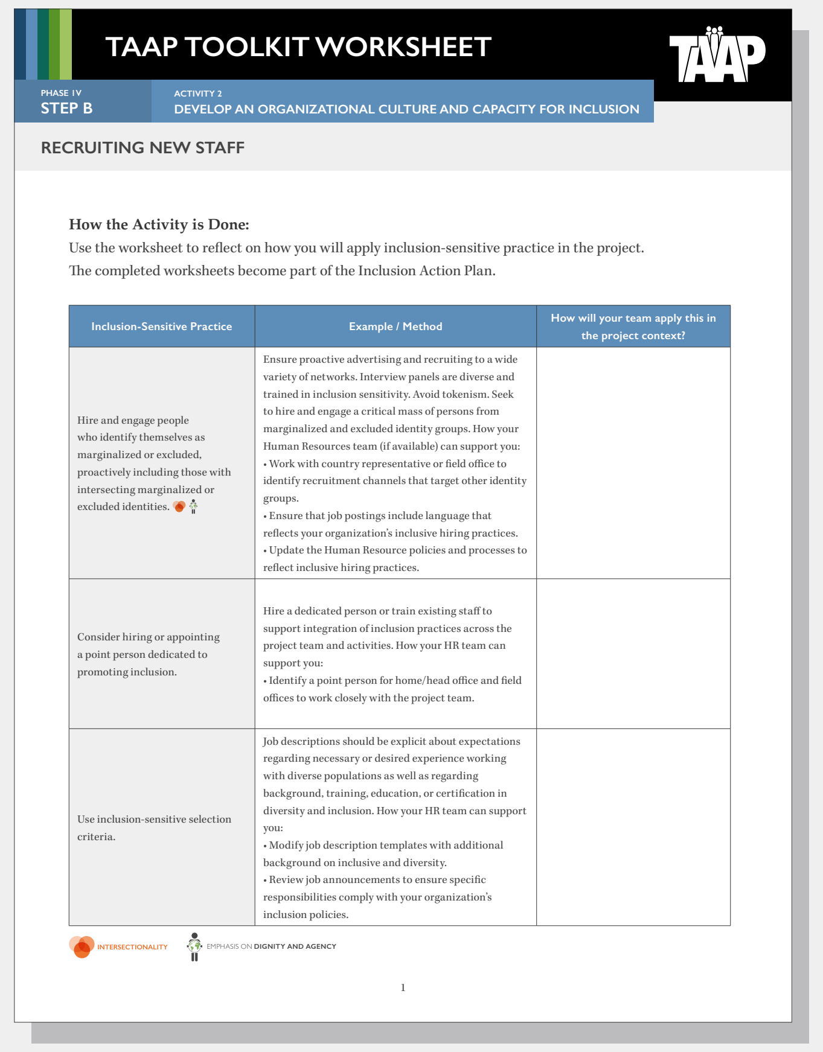

Below are sample questions from the worksheet. Download it on the right.

Activity/Event	Example / Method	How will your team apply this in the project context?
Hire and engage people who identify themselves as marginalized or excluded, proactively including those with intersecting marginalized or excluded identities.	Ensure proactive advertising and recruiting to a wide variety of networks. Interview panels are diverse and trained in inclusion sensitivity. Avoid tokenism. Seek to hire and engage a critical mass of persons from marginalized and excluded identity groups. How your Human Resources team (if available) can support you: • Work with country representative or field office to identify recruitment channels that target other identity groups. • Ensure that job postings include language that reflects your organization's inclusive hiring practices. • Update the Human Resource policies and processes to reflect inclusive hiring practices.	
Consider hiring or appointing a point person dedicated to promoting inclusion.	Hire a dedicated person or train existing staff to support integration of inclusion practices across the project team and activities. How your HR team can support you: • Identify a point person for home/head office and field offices to work closely with the project team.	

INTERSECTIONALITY

EMPHASIS ON
DIGNITY AND AGENCY

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ONBOARDING

Below are sample questions from the worksheet. Download it on the right.

Inclusion-Sensitive Practice	Example / Method	How will your team apply this in the project context?
Provide training and coaching.	Training covers inclusion awareness, concepts, related tools, and how inclusion relates to the job. How your HR team can support you: • Work closely with your team to incorporate inclusion and diversity awareness into expanded onboarding processes.	
Clearly articulate the inclusion-related roles and responsibilities of each staff member.	Those responsible for monitoring and evaluation should also be responsible for disaggregating inclusion-related data. ↗ Those responsible for budgeting should also be responsible for ensuring the budget includes reasonable accommodation. Those responsible for participant recruitment or delivering training should also be responsible for ensuring inclusive outreach. How your HR team can support you: • Incorporate inclusion responsibilities into position scopes of work.	

↗ CROSS REFERENCE TO MEL

WORKSHEET

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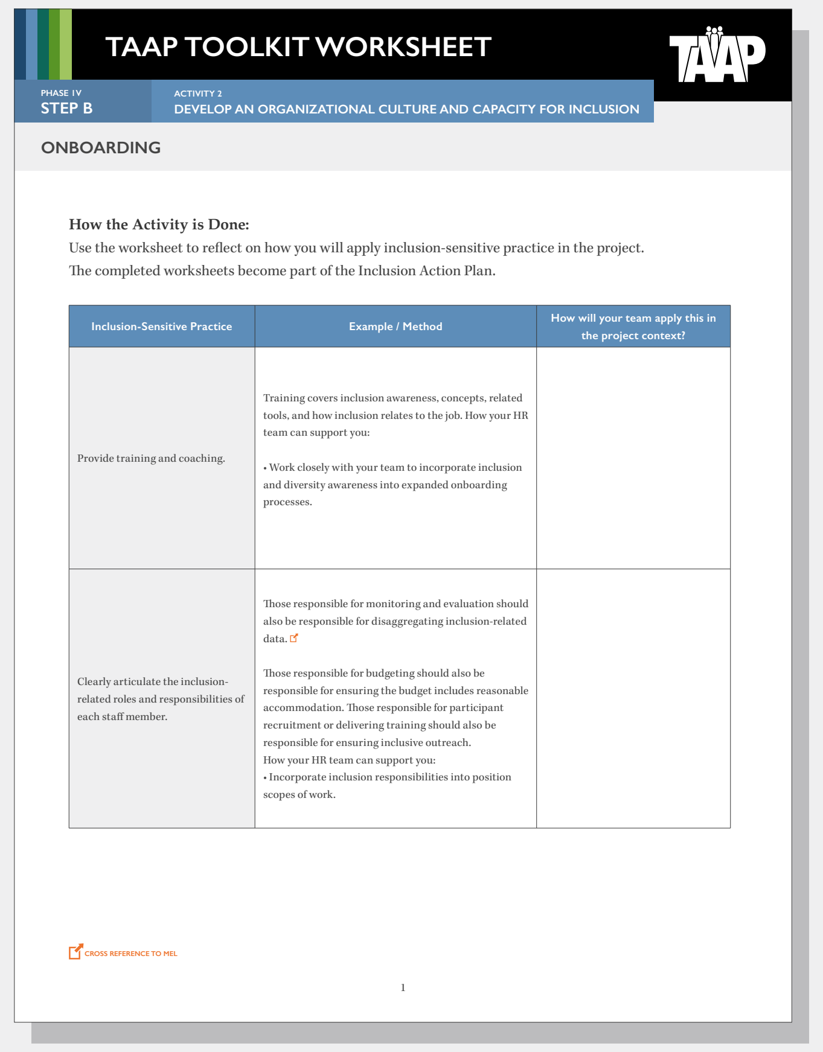

TAAP TOOLKIT WORKSHEET

PHASE IV
STEP B

ACTIVITY 2
DEVELOP AN ORGANIZATIONAL CULTURE AND CAPACITY FOR INCLUSION

ONBOARDING

How the Activity is Done:
Use the worksheet to reflect on how you will apply inclusion-sensitive practice in the project.
The completed worksheets become part of the Inclusion Action Plan.

Inclusion-Sensitive Practice	Example / Method	How will your team apply this in the project context?
Provide training and coaching.	Training covers inclusion awareness, concepts, related tools, and how inclusion relates to the job. How your HR team can support you: • Work closely with your team to incorporate inclusion and diversity awareness into expanded onboarding processes.	
Clearly articulate the inclusion-related roles and responsibilities of each staff member.	Those responsible for monitoring and evaluation should also be responsible for disaggregating inclusion-related data. ↗ Those responsible for budgeting should also be responsible for ensuring the budget includes reasonable accommodation. Those responsible for participant recruitment or delivering training should also be responsible for ensuring inclusive outreach. How your HR team can support you: • Incorporate inclusion responsibilities into position scopes of work.	

↗ CROSS REFERENCE TO MEL

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WORKSHEET

MANAGING INCLUSIVE TEAMS

Below are sample questions from the worksheet. Download it on the right.

Inclusion-Sensitive Practice	Example / Method	How will your team apply this in the project context?
Provide space to engage in dialogue around inclusion.	Engage staff to discuss TAAP Inclusion principles. How do they move the needle toward inclusion? Use appreciative inquiry[22] to understand what staff are already doing to promote inclusion; acknowledge those efforts. Provide time at staff meetings to share successes and challenges with inclusion so that staff can provide feedback and support to one another. How your HR team can support you: • Coordinate meetings to discuss inclusion successes and challenges. Work with the project team to identify subject matter experts to facilitate.	
Build inclusion into professional development opportunities.	Encourage staff to set inclusion-related goals. Encourage staff to build skills that will support inclusion outcomes.	
Build inclusion into performance evaluation processes.	When evaluating staff, reflect: Do we support employees to meet their inclusion goals? For self-evaluation, encourage staff to cite specific examples of how they support inclusion.	

WORKSHEET

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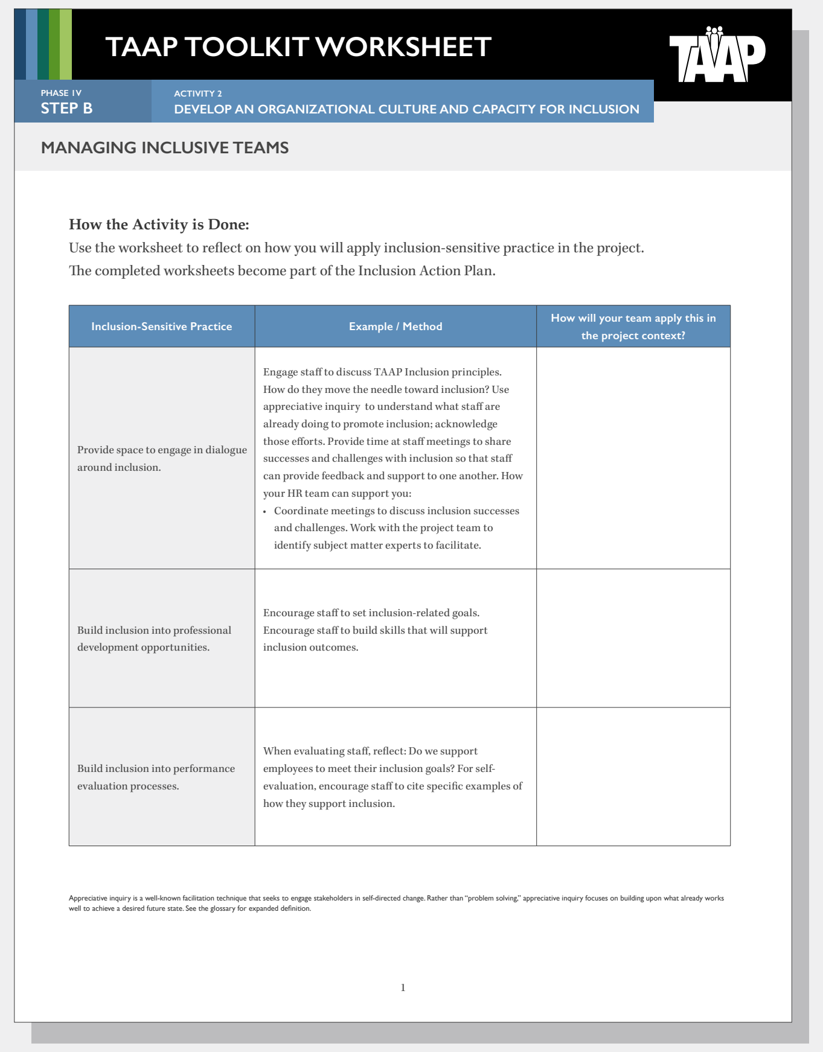

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[22] Appreciative inquiry is a well-known facilitation technique that seeks to engage stakeholders in self-directed change. Rather than "problem solving," appreciative inquiry focuses on building upon what already works well to achieve a desired future state. See the glossary for expanded definition.

PHASE IV
STEP B

ACTIVITY 3

RISK MANAGEMENT THROUGH AN INCLUSION LENS ⚠

Description	Worksheet, consultation	
Overview	Participants explore the population of stakeholders who are at risk based on the intersection of their marginalized and excluded identities. A set of guiding questions will be used to solicit feedback to a risk management plan (pre-existing or draft of a new plan), followed by more specific questions. It will end with a call for recommendations for mitigating project risks.	
Objectives	• To provide safe spaces to discuss plans to mitigate the risk of inclusion-based harm to stakeholders • To recognize risks the project may face and take reasonable precautions to prevent risks to project staff, participants, partners, property, or reputation	
Why do this activity?	The project team will have a contextually relevant, identity-based understanding and information about the situation of at-risk marginalized or excluded identity groups and how they are, or can be, impacted by their relationship to the project. The report-out from the discussion will inform the project's risk management plan.	
Prerequisite activity?	Yes	A risk management plan (Note: Assuming your organization has a preexisting risk management plan, it may reside with the operations team, compliance, or legal. If your organization does not have a risk management plan, consider recommending one.)
Facilitator needed?	Yes	Internal
Time	4 hours	
Materials	Flip chart, sticky notes, markers	
Participants	Design and Implementation team, partners, stakeholders	

⚠ EXERCISE CARE

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RISK MANAGEMENT THROUGH AN INCLUSION LENS

NOTE TO FACILITATOR

As the project team develops its context-sensitive risk management plan, involve selected partners and other stakeholders to ensure that the plan in fact has inclusion-sensitive mitigation and response strategies.

This activity must be carefully put together in terms of who is invited (from across identity groups), how they are invited, where the meeting is located, where lists of invitees are stored, and who else is in the room. Inviting participants to such a convening may unintentionally put people at risk. In such cases, it may be advisable to conduct several rounds of this activity with different clusters of stakeholders.

- Consider co-leading with a partner from an at-risk identity group to ensure that the framing questions, logistics, and follow-on are true to TAAP principles.
- Engage at-risk groups in drafting the risk analysis and mitigation strategies instead of presenting a draft to them for feedback. Ensure that any existing or draft risk management plan is shared with all participants ahead of time.
- Anticipate that there may be power imbalances and identity-based tensions among participants and consider how to respond, including offering identity-specific settings (or alternative means of feedback, such as online surveys, that do not involve potentially problematic group dynamics).

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RISK MANAGEMENT THROUGH AN INCLUSION LENS

1 Review the Target At-Risk Population.

- Review the identity groups that emerged from **PHASE II INCLUSION ANALYSIS, STEP C, ACTIVITY 1: MAP YOUR DATA AND FINDINGS.**
- Discuss the ways in which marginalized or excluded, at-risk populations may be negatively impacted by your project.

EMPHASIS ON
DIGNITY AND AGENCY

INTERSECTIONALITY

INTERNAL TEAM DISCUSSION

2 Queries for Developing an Inclusion-Sensitive Risk Management Plan Discussion

- Do you have general concerns that would affect you or your community about the latest security/risk management plan? If so, what are those concerns?
- What are your concerns about physical security related to the project including factors such as time, location, accessibility, or the identities, including intersecting identities, of staff or participants?
- What are your concerns about digital security related to the project, such as confidentiality, privacy, and security of information? Are the existing protocols sufficient?
- Are there ways that the project is being implemented that give you cause for concern, from an identity-based security perspective?
- What are your specific recommendations for strengthening the plan to better meet community needs? What approaches have you used and found to be effective?
- What can the marginalized or excluded community do to address risks? What possibilities exist to foster protective community-based networking and protection approaches?

CONTINUE ›

RISK MANAGEMENT THROUGH AN INCLUSION LENS

3 Consolidate Feedback to Inform the Project Security/Risk Management Plan

The project team should discuss which accountability measures will be put in place and how will they also inform the general public of the measures. The chart below can be used by staff after the workshop to inform or update the security/risk management plan. Identity-based physical risk might be at the individual level (a participant is assaulted because of their participation in the project).

An example of identity-based conflict risk would be the challenges of staff or partners with accessibility limitations to remove themselves from harm's way. Digital risk might range from online harassment or cyber-bullying to theft of confidential information. Political risk might involve individual participants or your organization and might range from heightened levels of scrutiny or harassment by public officials to backlash in the form of punitive or restrictive new laws.

EMPHASIS ON
DIGNITY AND AGENCY

NOTE TO FACILITATOR

Engage the project team and key stakeholders in a discussion about accountability. Communities have the right to review all relevant information about the project, to state those concerns, and to have those concerns acknowledged and addressed.

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INCLUSION CONSIDERATION FOR RISK MANAGEMENT PLAN

Below are sample questions from the worksheet. Download it on the right.

Risk Type	Likelihood of occurrence	Level of impact on project, staff and partners	How risk affects partners/ stake-holders differently based on identity	How can you manage or mitigate risks to partners and stakeholders belonging to different identity groups?	What confidential measures can be put in place so that individuals affected by the program can report any negative impacts?
Physical					
Digital					
Political					
Conflict					
Other?					

WORKSHEET

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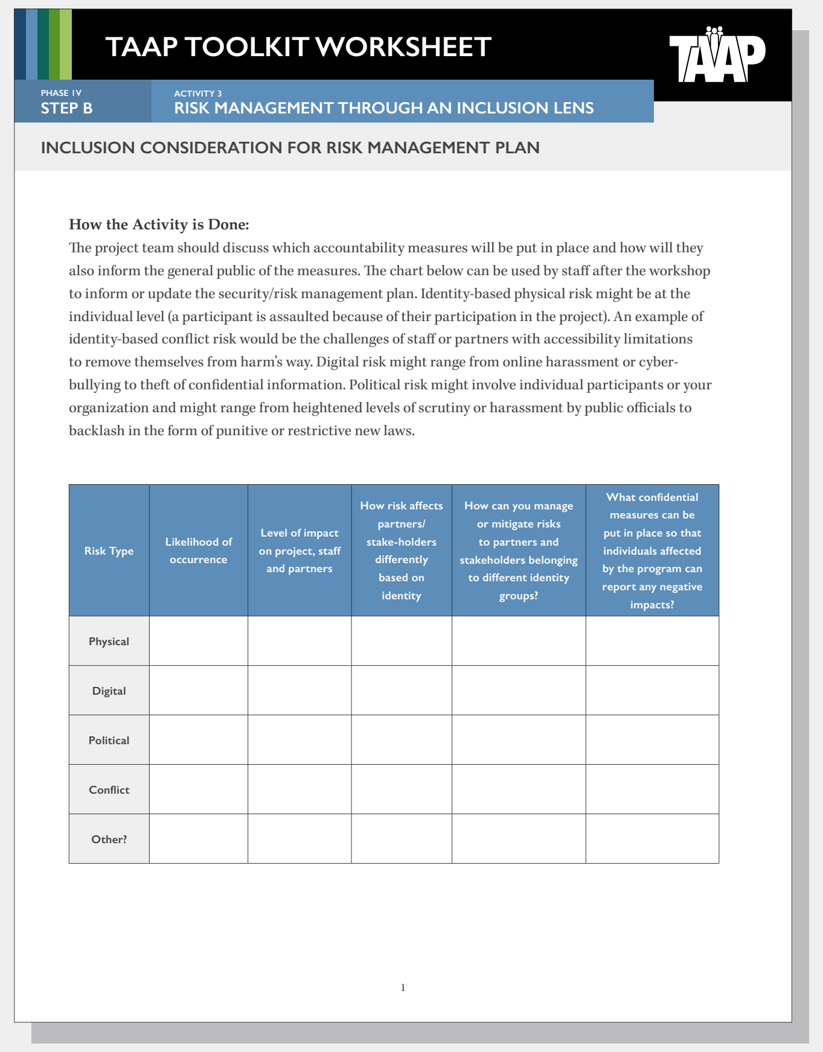

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ACTIVITY 3
RISK MANAGEMENT THROUGH AN INCLUSION LENS

INCLUSION CONSIDERATION FOR RISK MANAGEMENT PLAN

How the Activity is Done:
The project team should discuss which accountability measures will be put in place and how will they also inform the general public of the measures. The chart below can be used by staff after the workshop to inform or update the security/risk management plan. Identity-based physical risk might be at the individual level (a participant is assaulted because of their participation in the project). An example of identity-based conflict risk would be the challenges of staff or partners with accessibility limitations to remove themselves from harm's way. Digital risk might range from online harassment or cyber-bullying to theft of confidential information. Political risk might involve individual participants or your organization and might range from heightened levels of scrutiny or harassment by public officials to backlash in the form of punitive or restrictive new laws.

Risk Type	Likelihood of occurrence	Level of impact on project, staff and partners	How risk affects partners/ stake-holders differently based on identity	How can you manage or mitigate risks to partners and stakeholders belonging to different identity groups?	What confidential measures can be put in place so that individuals affected by the program can report any negative impacts?
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Other?					

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ACTIVITY 4
INCLUSION-SENSITIVE PROJECT CLOSE-OUT

This activity is not intended to develop a project close-out plan.

Instead it ensures that any such plan already developed reflects inclusion sensitivity. Work with your team to complete the following worksheet and discuss results.

Description	Discussion, consultation, worksheet/guiding questions	
Overview	Questions guide staff through various close-out activities to identify opportunities for minimizing disproportionate impacts on marginalized and excluded identity groups.	
Objectives	• To ensure that all stakeholders are aware of, and have input into, how the inclusion aspects of the project close-out process will be implemented • To ensure that close-out processes are sensitive to different identities	
Why do this activity?	This activity will result in recommendations to inform a project close-out plan that recognizes how the close-out process can impact different identities.	
Prerequisite activity?	Yes	Development of a draft close-out plan (developed by the project team, the operations team, or in collaboration. Many grant-funded programs produce mandatory written close-out plans.)
Facilitator needed?	Yes	Internal
Time	4 hours	
Materials	Flip chart, sticky notes, markers	
Participants	Design and implementation team, partners (optional)	

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INCLUSION-SENSITIVE PROJECT CLOSE-OUT

WORKSHEET

PDF *Version*

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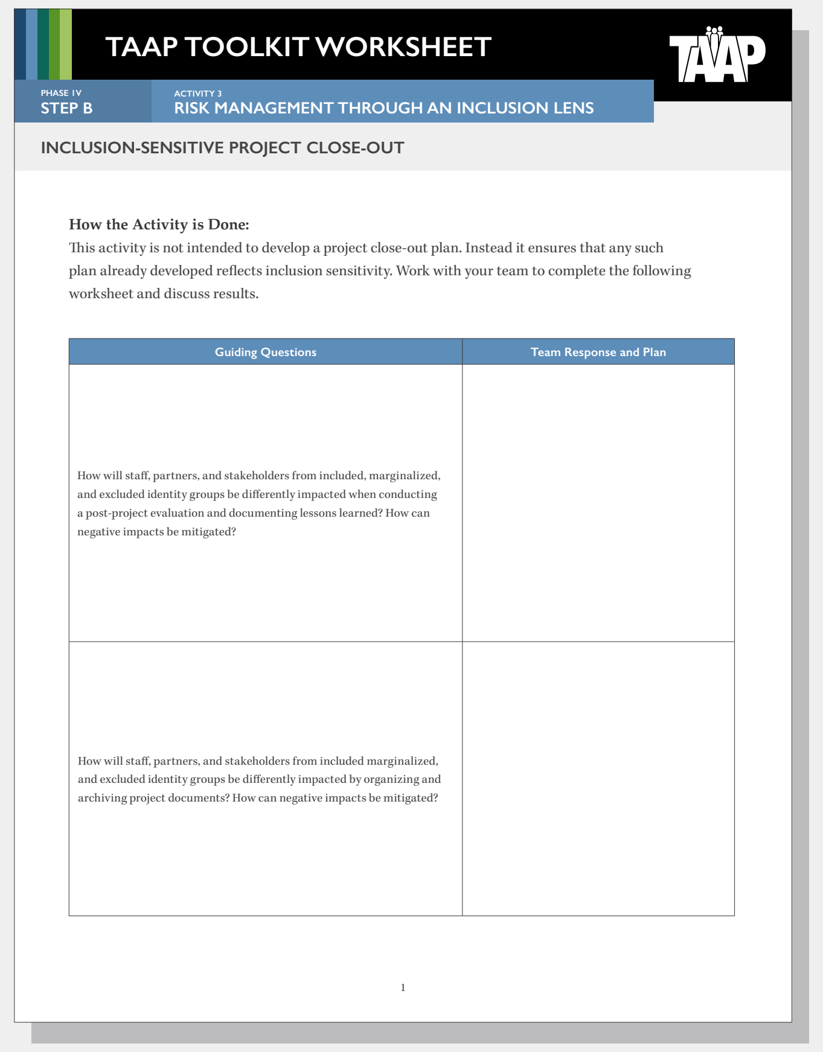
Below are sample questions from the worksheet. Download it on the right.

Guiding Questions	Team Response and Plan
How will staff, partners, and stakeholders from included, marginalized, and excluded identity groups be differently impacted when conducting a post-project evaluation and documenting lessons learned? How can negative impacts be mitigated?	
How will staff, partners, and stakeholders from included marginalized, and excluded identity groups be differently impacted by organizing and archiving project documents? How can negative impacts be mitigated?	
How will staff, partners, and stakeholders from included, marginalized, and excluded identity groups be differently impacted by the destruction and disposal of project documents not destined for the archives? How can confidentiality be maintained and negative impacts mitigated in the document-shredding or disposal processes?	
How will staff, partners, and stakeholders from included, marginalized, and excluded identity groups be differently impacted by gathering feedback from project stakeholders, or by assessment of project partners' and participants' abilities to continue project objectives? How can negative impacts be mitigated? How can the project support local staff and partners' capacity to continue project objectives and push for transformative change?	



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ACTIVITY 3
RISK MANAGEMENT THROUGH AN INCLUSION LENS

INCLUSION-SENSITIVE PROJECT CLOSE-OUT

How the Activity is Done:
This activity is not intended to develop a project close-out plan. Instead it ensures that any such plan already developed reflects inclusion sensitivity. Work with your team to complete the following worksheet and discuss results.

Guiding Questions	Team Response and Plan
How will staff, partners, and stakeholders from included, marginalized, and excluded identity groups be differently impacted when conducting a post-project evaluation and documenting lessons learned? How can negative impacts be mitigated?	
How will staff, partners, and stakeholders from included marginalized, and excluded identity groups be differently impacted by organizing and archiving project documents? How can negative impacts be mitigated?	

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STEP C

MONITORING FOR INCLUSION OPPORTUNITIES AND BARRIERS

NOTE TO FACILITATOR

This step has three context-monitoring activities.

Activity 1 engages the project team and partners in monitoring and mitigation plans around two issues—identity-based violence (IBV) and accessibility—that often emerge during project implementation. Activity 2 engages project implementation teams to be aware of opportunities to promote positive social change. Activity 3 engages project implementation teams and partners to identify resistance to positive social change and mechanisms for mitigating or removing the resistance.

ACTIVITY 1

MONITORING IDENTITY-BASED VIOLENCE (IBV) AND ACCESSIBILITY AS SAMPLE MANIFESTATIONS OF EXCLUSION AND DISCRIMINATION ⚠

Description	Guiding questions, worksheet	
Overview	Guide the team and selected partners through questions about two examples—IBV and accessibility—of challenges that are manifestations of marginalization and exclusion so that the team can develop a plan for monitoring and mitigating those two challenges and prepare to address others.	
Objectives	• To reflect on the findings about IBV, accessibility and other manifestations of discrimination identified in Phases II and III • To develop a project plan for monitoring and mitigating these challenges • To identify other identity-based challenges specific to the project	
Why do this activity?	The resulting project plan for monitoring and mitigating the challenges becomes part of the Inclusion Action Plan.	
Prerequisite activity?	Yes	Inclusion Analysis (Phase II, all steps and activities) Inclusive Design (Phase III, all steps and activities)
Facilitator needed?	Yes	Internal
Time	2 hours	
Materials	Phase II and III recommendations, flip charts, markers, handouts	
Participants	Design and implementation team, selected partners	

⚠ EXERCISE CARE

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MONITORING IDENTITY-BASED VIOLENCE (IBV) AND ACCESSIBILITY AS SAMPLE MANIFESTATIONS OF EXCLUSION AND DISCRIMINATION ⚠

INSTRUCTIONS TO FACILITATOR

Topics discussed in these activities are sensitive; create a safe space for sharing.

1 Reviewing Findings

Participants work in groups to review findings from the Social Inclusion Analysis and Inclusive Design phases with regard to Domain 6: Dignity, Safety and Wellness, to re-familiarize themselves with findings related to Identity-based violence and other manifestations of exclusion and discrimination.

2 Identifying and Monitoring IBV and Accessibility as Examples of Manifestations of Exclusion and Discrimination: Guiding Questions and Worksheet.

The sample challenges are only intended to guide discussion as the team looks at how internal policies and processes can support efforts to monitor and address manifestations of exclusion and discrimination. Teams will use the findings from Phases II and III to identify project-specific manifestations and to develop plans to address these at a context-specific level.

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MONITORING IDENTITY-BASED VIOLENCE (IBV) AND ACCESSIBILITY AS SAMPLE MANIFESTATIONS OF EXCLUSION AND DISCRIMINATION

Below are sample questions from the worksheet. Download it on the right.

Entry Points for Monitoring and Mitigating Identity-Related Challenges	Example Challenge: Identity-Based Violence (IBV and Sexual Harassment)	Example Challenge: Accessibility (i.e., ensuring that the project activities proactively enable full participation)	Project Plan/Action Steps for Identifying, Monitoring, and Mitigating Identity-Related Challenges
Policy	Assuming the implementing organization has a clear anti-harassment policy with a clear, contextualized definition of harassment: How have the organization's policy, reporting structures, and consequences for violations been articulated to all staff, volunteers, consultants, partners, participants, and suppliers? Determine opportunities in the project workplan for monitoring potential incidents of IBV and sexual harassment, ideally with the input of marginalized or excluded groups.	Does the project plan include a clear policy for reasonable accommodations such as funds for remote participants to attend gatherings or to pay for childcare so that parents can attend? Has the policy been articulated to all staff, consultants, volunteers, suppliers, partners, and participants?	

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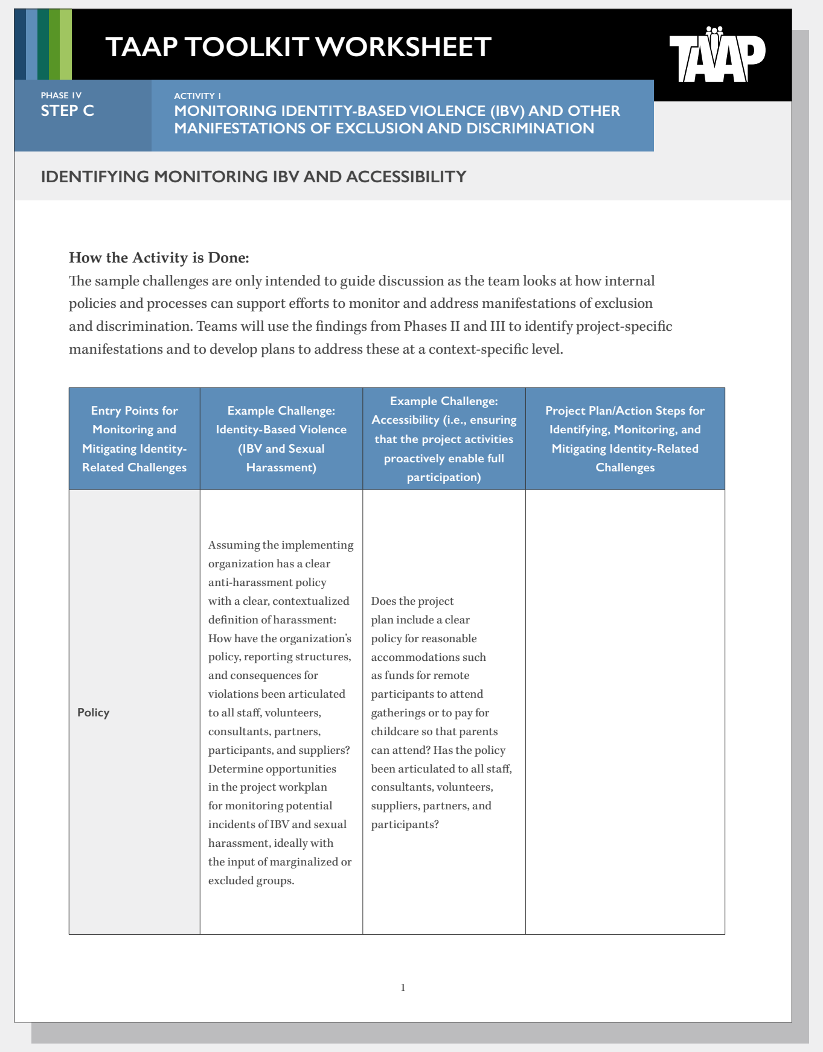

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ACTIVITY I
MONITORING IDENTITY-BASED VIOLENCE (IBV) AND OTHER MANIFESTATIONS OF EXCLUSION AND DISCRIMINATION

IDENTIFYING MONITORING IBV AND ACCESSIBILITY

How the Activity is Done:
The sample challenges are only intended to guide discussion as the team looks at how internal policies and processes can support efforts to monitor and address manifestations of exclusion and discrimination. Teams will use the findings from Phases II and III to identify project-specific manifestations and to develop plans to address these at a context-specific level.

Entry Points for Monitoring and Mitigating Identity-Related Challenges	Example Challenge: Identity-Based Violence (IBV and Sexual Harassment)	Example Challenge: Accessibility (i.e., ensuring that the project activities proactively enable full participation)	Project Plan/Action Steps for Identifying, Monitoring, and Mitigating Identity-Related Challenges
Policy	Assuming the implementing organization has a clear anti-harassment policy with a clear, contextualized definition of harassment: How have the organization's policy, reporting structures, and consequences for violations been articulated to all staff, volunteers, consultants, partners, participants, and suppliers? Determine opportunities in the project workplan for monitoring potential incidents of IBV and sexual harassment, ideally with the input of marginalized or excluded groups.	Does the project plan include a clear policy for reasonable accommodations such as funds for remote participants to attend gatherings or to pay for childcare so that parents can attend? Has the policy been articulated to all staff, consultants, volunteers, suppliers, partners, and participants?	

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ACTIVITY 2
PROMOTE OPPORTUNITIES FOR CHANGE

NOTE TO FACILITATOR

This activity will require the project implementation team and partners to think creatively.

It challenges participants to reflect and identify opportunities for inclusion outcomes. This activity can be conducted as a check-in at regular intervals throughout Phase IV's implementation work.

Description	Reflection, brainstorming, planning	
Overview	Project implementation team and partners reflect on identity-based changes they are seeking in the project's operating context.	
Objectives	• To reflect on formal and informal pathways to transform agency, access and power, building awareness of where identity-based change is happening in the project • To develop a plan to regularly explore opportunities to assess and leverage formal and informal paths to transforming agency, access and power	
Why do this activity?	Practitioners need to take a long-term view of change. It is important for project teams to think creatively and adaptively, linking project activities to formal and informal paths to power. At the end, the project team will have a plan to promote opportunities for change into the team's organizational culture.	
Prerequisite activity?	No	
Facilitator needed?	Yes	Internal
Time	2 hours	
Materials	Flip chart, sticky notes, markers	
Participants	Project implementation team, partners	

CROSS REFERENCE TO IIS

THINK BIG
THINK THE IMPOSSIBLE

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PROMOTE OPPORTUNITIES FOR CHANGE

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Part 1

The group identifies examples of positive identity-based change they see in the project context. Where have they observed examples of success in changing identity-based norms and institutions? What were the social levels of the change? Individual? Family? Community? Organizational? Societal? Normative? Policy? Reflect and discuss: How did these changes come about? ↘ How sustainable are they? How do we know they are successful in the first place? How can the team contribute to or leverage these changes? What are the methodologies being used for change? Reflect on a real-world example from a program in Jamaica where Patient Bill of Rights posters are placed in clinics serving HIV-positive patients. Then discuss the posters' message to staff and stakeholders, and how that message promotes the agency and dignity of patients. The group should then consider their own project's context and discuss examples where agency and dignity exist or can be promoted. Looking ahead 10 years, what would be the signs that long-term, transformative change had occurred?

↘ CROSS REFERENCE TO IIS

2

Part 2

Using the results of the reflection exercise in Part 1, the group brainstorms a plan for regularly observing and discussing opportunities to promote change. One participant creates a chart to record responses to the following questions:

- Who will be responsible for leading such discussions?
- When will discussions occur?
- What may be the outcome of these discussions?

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ACTIVITY 3
ADDRESSING RESISTANCE

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Description	Reflection, planning, advocacy	
Overview	When working toward inclusive implementation there will be obstacles. This activity helps your team address different types of resistance they may meet within the workplace, with partners, or with project participants.	
Objectives	• To identify where resistance occurs, why it is occurring, and what mechanisms can be used to counter it • To persuade those in power to own and support inclusion principles and implementation	
Why do this activity?	Advocacy campaigns aim to understand, educate, find common interests, and create allies; they are helpful when faced with resistance in a sensitive situation. Engaging in non-adversarial advocacy can serve inclusive implementation best by demonstrating how inclusion benefits all of society, and that inclusive societies are more likely to be peaceful and prosperous.	
Prerequisite activity?	Yes	Stakeholder Analysis and Mapping (Phase II, Step A, Activity 2) Social Inclusion Analysis report (final output of Phase II) Explore Root Causes (Phase II, Step C, Activity 2)
Facilitator needed?	Yes	Internal
Time	4 hours	
Materials	Flip chart, markers, copies of Social Inclusion Analysis report and of work products from Stakeholder Analysis and Mapping (Phase II, Step A, Activity 2) and Explore Root Causes (Phase II, Step C, Activity 2)	
Participants	Implementation team, partners	

ADDRESS
POWER IMBALANCES

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ADDRESSING RESISTANCE

Advocacy campaigns can be a successful approach when resistance to inclusion comes from misguided beliefs: for example, when some may believe that improving the rights or inclusion of marginalized or excluded groups can only come at the expense of others. In these instances, it's important to demonstrate that inclusion helps to elevate everyone's situation.

However, resistance can also be around more practical concerns. If the scope of a proposed inclusion effort is (or is perceived to be) especially ambitious, it may be competing with other priorities for time and attention, or it may raise political challenges with which stakeholders would prefer not to have to deal. Cost is another practical consideration; for example, to add wheelchair ramps to every public building, or to engage Braille readers or sign language interpreters, or to translate and print every official document in multiple languages. In low-income countries, such concerns may be legitimate. Your advocacy message and dissemination strategy should consider both sides of the issue to ensure it is realistic and contextually appropriate.

There are many possible methods you can use to address resistance to inclusion. They fall into two broad categories.

- NON-ADVERSARIAL ADVOCACY
- ADVERSARIAL ADVOCACY

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ADDRESSING RESISTANCE

NON-ADVERSARIAL ADVOCACY

Framing the inclusion project in a non-threatening way. Show resisters that including marginalized and excluded groups does not mean disadvantaging others, that improving the rights of marginalized or excluded people does not take away rights of the majority, rather, it improves the rights of all. An example of non-adversarial advocacy might be social media campaigns to educate and disseminate a message of inclusion to a larger population, swaying the opinions of decision-makers and those in power, and broadening the reach of an inclusion message.

ADVERSARIAL ADVOCACY

An effective technique when resistance comes from a higher level, for example from government or individuals in prominent positions. Creating peer pressure by showing how neighboring countries are more inclusive can impact the way the national government considers inclusion.

How the Activity Is Done

This activity engages the team and partners in reflecting on where they might find resistance to identity-based change (who are the resisters) and the basis of resistance (societal, institutional, or both).

Organize participants into small groups to explore the guiding questions and populate the worksheet (in Activity 3).

CONTINUE ›

REFLECT

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ADDRESSING RESISTANCE

CROSS REFERENCE TO IIS

1 Guiding Questions

- How do we know there is resistance? What is the impact on our project?
- In what cultural, social, political, legal, and political context does the resistance exist? What factors may be shaping it?
- What is motivating power holders to oppose change? What are the power dynamics?
- What assumptions are we making as team members?

Groups debrief and report. The facilitator helps narrow down core insights for Part 3 discussion.

2 Using Insights you Developed

- Is the space for promoting inclusion opening or closing? Why?
- Are there domestic stakeholders wanting change? Why?
- Are they organized, empowered, and influential enough to drive reforms? Why or why not?
- Are there citizen groups with which we can work, that are organized and empowered, able and willing to demand or create change?
- Which factors determine the right time and best way to take advantage of opportunities?
- How can we persuade power holders to support inclusion?
- What consequences would resisters experience if they became allies instead? To whom are powerful actors accountable, how and why?
- Is it possible to ascertain root causes of resistance?

The team's responses to the questions above will help determine how to engage key leaders and elite coalitions or groups.

CONTINUE >

WORKSHEET

PLANNING TO ADDRESS RESISTANCE

WORKSHEET

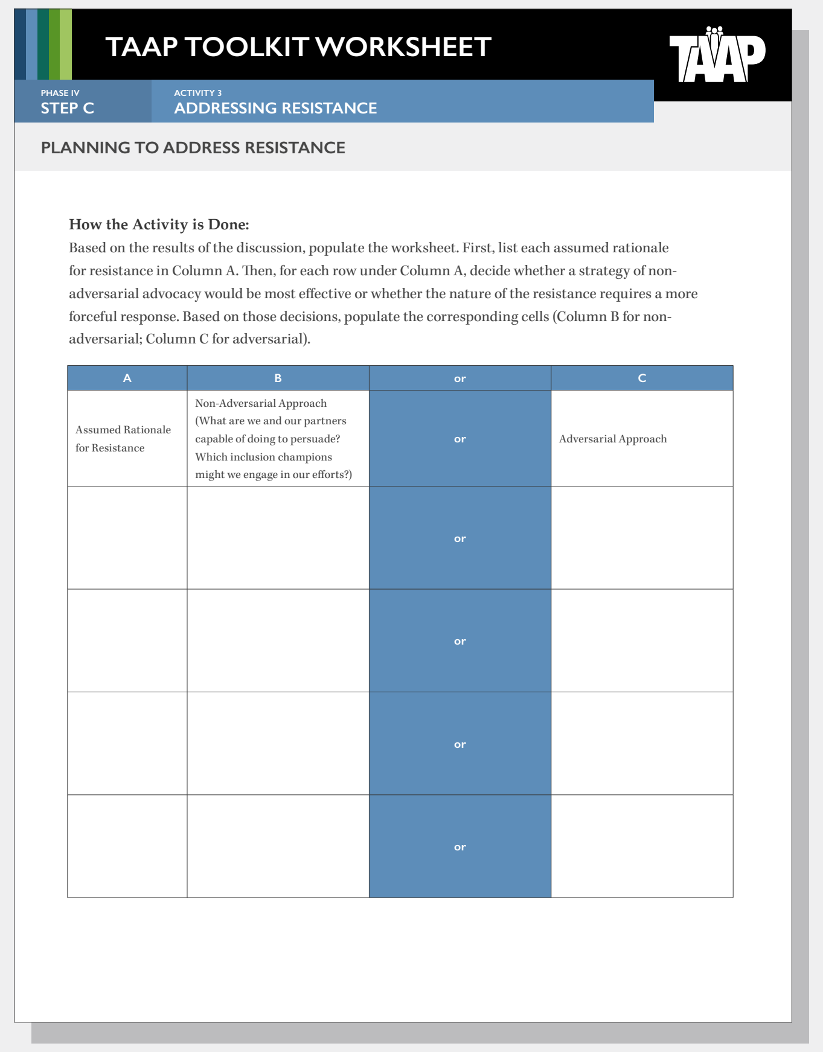
PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*

Based on the results of the discussion, populate the worksheet. First, list each assumed rationale for resistance in Column A. Then, for each row under Column A, decide whether a strategy of non-adversarial advocacy would be most effective or whether the nature of the resistance requires a more forceful response. Based on those decisions, populate the corresponding cells (Column B for non-adversarial; Column C for adversarial).

Below are sample questions from the worksheet. Download it on the right.

A	B	or	C
Assumed Rationale for Resistance	Non-Adversarial Approach (What are we and our partners capable of doing to persuade? Which inclusion champions might we engage in our efforts?)	or	Adversarial Approach
		or	
		or	
		or	
		or	



TAAP TOOLKIT WORKSHEET

PHASE IV
STEP C

ACTIVITY 3
ADDRESSING RESISTANCE

PLANNING TO ADDRESS RESISTANCE

How the Activity is Done:
Based on the results of the discussion, populate the worksheet. First, list each assumed rationale for resistance in Column A. Then, for each row under Column A, decide whether a strategy of non-adversarial advocacy would be most effective or whether the nature of the resistance requires a more forceful response. Based on those decisions, populate the corresponding cells (Column B for non-adversarial; Column C for adversarial).

A	B	or	C
Assumed Rationale for Resistance	Non-Adversarial Approach (What are we and our partners capable of doing to persuade? Which inclusion champions might we engage in our efforts?)	or	Adversarial Approach
		or	
		or	
		or	
		or	

The information captured in this activity will become part of the Inclusion-Sensitive Action Plan (Phase IV, Step D, Activity 1) and revisited regularly throughout implementation.

CONTINUE

PHASE IV

STEP D

WRITE THE SOCIAL INCLUSION ACTION PLAN

After you have integrated inclusion throughout the essential project implementation functions, as well as Phase IV, Step C, Activities 1, 2 and 3, that enhance and complement how inclusion is integrated in to project objectives, it is time to start writing the Social Inclusion Action Plan.

The Action Plan codifies the commitments for supporting and complementing the other project objectives through stand-alone results. The Inclusion-Sensitive Work Plan and the Social Inclusion Action Plan together capture the project's plans for inclusion-sensitivity and responsiveness on a cross-cutting level as well as for stand-alone inclusion activities. Below is a sample outline for a Social Inclusion Action Plan.

SOCIAL INCLUSION ACTION PLAN OUTLINE

A. Title Page; Introduction

B. Key Inclusion Commitments: Inclusion-Sensitive Workplan

C. Key Inclusion Commitments: Organizational Culture and Capacity

  i. Recruiting New Staff

  ii. Onboarding

  iii. Managing Inclusive Team

D. Key Inclusion Commitments: Risk Management through an Inclusion Lens

E. Key Inclusion Commitments: Inclusion-Sensitive Project Close-out

F. Key Inclusion Commitments: Monitoring for Inclusion Opportunities and Barriers

G. Key Inclusion Commitments: Promoting Opportunities for Change

H. Key Inclusion Commitments: Addressing Resistance

END OF PHASE IV

CONTINUE >

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CROSS-CUTTING
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- **CROSS-CUTTING (XC) SECTION:** Inclusive Monitoring, Evaluation & Learning **(MEL)**

- **CROSS-CUTTING (XC) SECTION:** Integrating Inclusive Impact & Sustainability **(IIS)**

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START HERE

CROSS-CUTTING (XC) SECTION

INCLUSIVE MONITORING, EVALUATION & LEARNING (MEL)

THE BASICS

Sound project management requires that monitoring, evaluation, and learning be built into the analysis and design from the beginning and consistently integrated throughout implementation.

The activities in this cross-cutting section promote accountability to stakeholders and ensure that continuous learning improves our effectiveness at transforming agency, access, and power.

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CROSS-CUTTING (XC) SECTION

INCLUSIVE MONITORING, EVALUATION & LEARNING (MEL)

WHAT	Monitoring, evaluating, and learning (MEL) is the process of developing measures, gathering data, and evaluating results to strengthen a program's outcomes and to capture its lessons. This section strengthens those processes throughout the project cycle.
WHO	The organization's MEL and program staff, in consultation with project participants, relevant stakeholders, and members of the organization most involved in TAAP work.
WHEN	Throughout the project cycle.
HOW	• Ensure that program results and the MEL agenda examine issues of inclusion, marginalization, exclusion, inter-group power dynamics, agency, access, personal power and the transformation of those. • Ensure that data is disaggregated by core inclusion segments. • Engage socially included, marginalized and excluded groups in the MEL processes.
WHY	As a *data management* process, inclusive MEL improves the quality of data, and offers in-depth and clear analysis of complex phenomena. It also ensures accountability of the project towards its stakeholders and helps to monitor the extent to which the project achieves its social inclusion goals. As a *participatory process,* inclusive MEL is an empowerment tool that can provide participants with skills to design, collect, analyze, and understand data, helping them determine how data can be used to effectively address issues concerning their lives.

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CROSS-CUTTING (XC) SECTION

INCLUSIVE MONITORING, EVALUATION & LEARNING (MEL)

This phase of the Toolkit has specific steps and associated activities. While the steps and activities suggest a linear sequence of events, in actual implementation there is often a more dynamic flow to the work. Some steps or activities may be occurring simultaneously and the work often circles back to revisit earlier steps.

STEP A Develop an Inclusive MEL System	Activity 1: Assess the Relevance and Completeness of Your Existing Indicators
STEP B Implementing Inclusive MEL	Activity 1: Develop Data Collection Tools and Processes Activity 2: Considerations for Inclusive Data Analysis
STEP C Learn, Pause and Reflect	Activity 1: Silent Talk

CONTINUE

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XC-MEL

STEP A

DEVELOP AN INCLUSIVE MEL SYSTEM

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ACTIVITY 1

ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS

Description	Questionnaire (and worksheets), brainstorming, checklist, technical advice, analysis	
Overview	This activity is composed of three parts: • Align inclusion indicators with TAAP Theory of Change • Assessment and analysis exercise. • Technical advice on disaggregation levels that should be considered for inclusion indicators	
Objectives	• To align components of inclusiveness between outcomes and indicators • To inform the choice of indicators to capture inclusive results	
Why do this activity?	Here we discuss two concepts of indicators: inclusion indicators and components of *inclusiveness* in the indicators themselves. The results of this activity can be used to strengthen indicators.	
Prerequisite activity?	No	N/A
Facilitator needed?	Yes, if group work – No, if individual	Internal
Time	10-15 minutes for each indicator	
Materials	None	
Participants	Design and Implementation team, support teams, partners, participants, stakeholders	

CONTINUE ›

PART I TAAP THEORY OF CHANGE INDICATORS AND OTHER INCLUSION INDICATORS

NOTE TO FACILITATOR

The TAAP Theory of Change outlines the ways TAAP tools help achieve more inclusive interventions and results.

The results of the TAAP Theory of Change can also be adapted and used for specific programs that focus on achieving social inclusion. Consult www.taapinclusion.org for illustrative indicators for social inclusion against the Theory of Change. These indicators also can be modified and used within your projects. We will refer to them in this toolkit as “inclusion indicators.” The indicators and the results will be kept live on the TAAP website (www.TAAPInclusion.org) as they grow and change over time.

* On the right is a list of illustrative inclusion indicators drawn from various projects.

EXAMPLE:

1. Number of men participating in civil society efforts on gender equality issues.
2. Amount of budgetary allocation provisioned for employment and support to female and male teachers with disabilities from rural areas.
3. Extent to which organizations are able to sustain effective participation of marginalized or excluded groups in their activities.

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PART 2 ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS

NOTE TO FACILITATOR

The practical activities and analysis in this activity help modify project indicators so they become more inclusive. These are relevant for both qualitative and quantitative indicators.

The exercise on the following page can be applied to indicators regardless of the level of change they are measuring (process, output, outcome, impact). Responses to several questions in the assessment sheet may be the same. Encourage the groups to take notes about this in the comment box; the analysis may reveal a need to either revise or strengthen the indicator.

How the Activity Is Done

To determine whether an indicator is inclusive, we first need to verify that 1) the result that it aims to measure is itself inclusive, and 2) that it is well suited to measure the result for which it was designed.

On the following page is a checklist of analysis to help in that verification process. Select an objective and an indicator to analyze and go through the questions, recording your answers in the response columns. Review your responses at the end to find out whether your indicators are complete and whether they fully address the intent of inclusiveness in the result.

CONTINUE ›

WORKSHEET

PART 2 ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS

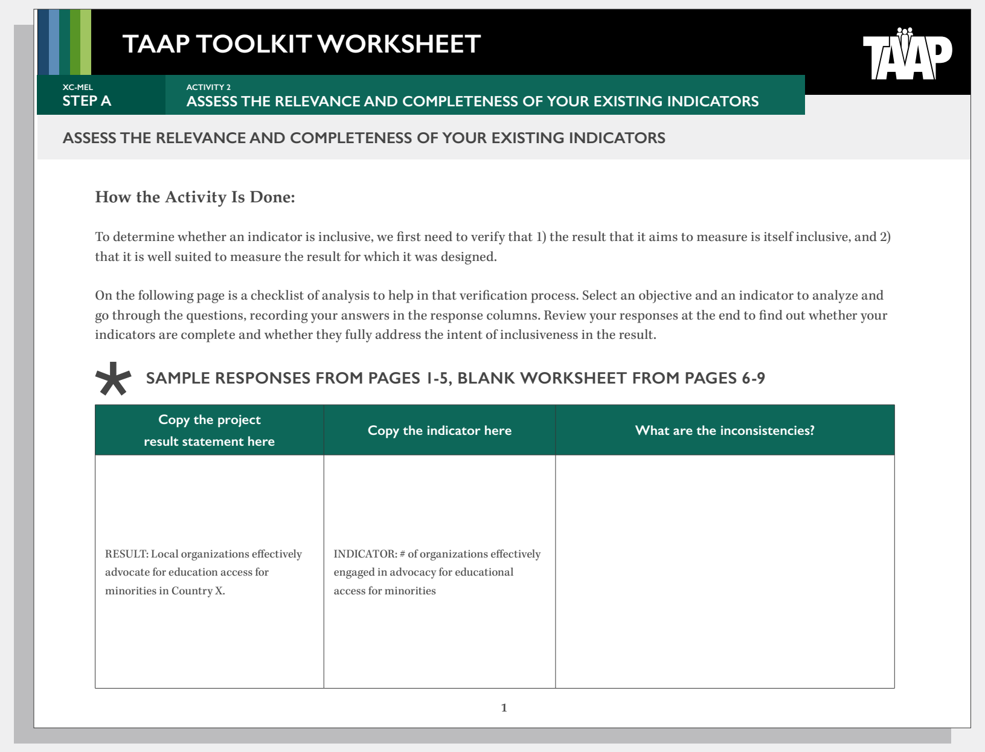
WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*

Below are sample questions from the worksheet. Download it on the right.

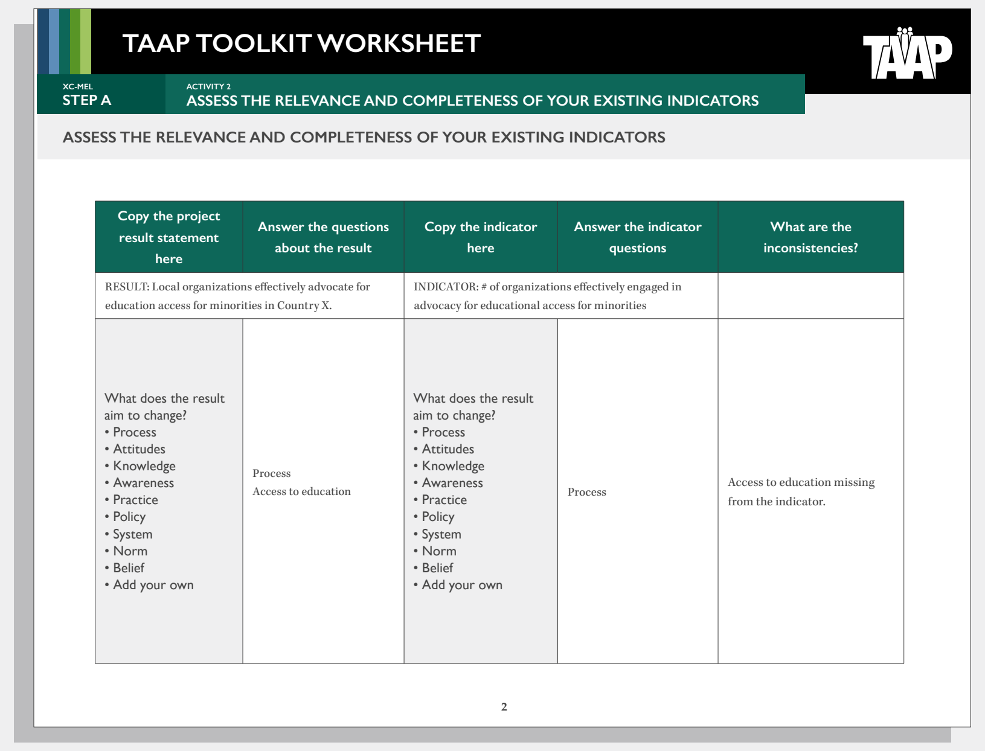
Copy the project result statement here	Answer the questions about the result	Copy the indicator here	Answer the indicator questions	What are the inconsistencies?
RESULT: Local organizations effectively advocate for education access for minorities in Country X.		INDICATOR: # of organizations effectively engaged in advocacy for educational access for minorities		
What does the result aim to change? • Process • Attitudes • Knowledge • Awareness • Practice • Policy • System • Norm • Belief • Add your own	Process Access to education	What does the result aim to change? • Process • Attitudes • Knowledge • Awareness • Practice • Policy • System • Norm • Belief • Add your own	Process	Access to education missing from the indicator.
Who will benefit from this result?	Minorities	Who or what is the measurement unit?	Organizations	The indicator does not measure change in the result.
How will they benefit from the change?	Minorities will gain access to education.	How do we collect data for this indicator?	Count organizations that are engaged in advocacy.	We are not capturing in the indicator the bearers of change.


TAAP TOOLKIT WORKSHEET

ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS

How the Activity Is Done:

SAMPLE RESPONSES FROM PAGES 1-5, BLANK WORKSHEET FROM PAGES 6-9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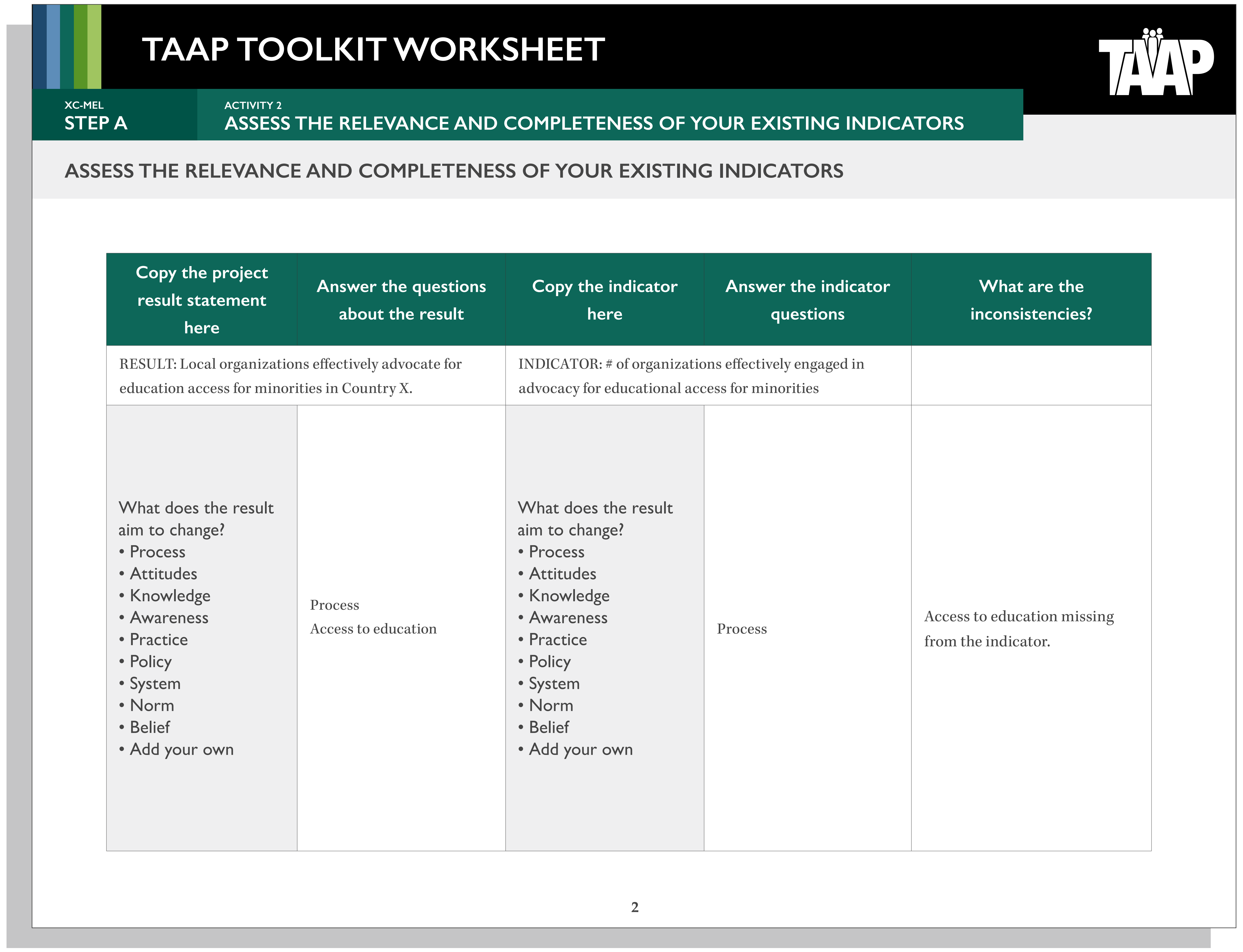
PART 2 ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS

As you see from the example on the previous page and on the worksheet, the indicator needs to be rephrased. Pointers in the last column help to revise it by bringing in new concepts and ideas.

In the example the indicator was not inclusive because it did not capture change that the outcome was aiming to achieve for the excluded population. This assessment can also show that the type of change sought in the result cannot be captured by one indicator, and that other indicators will need to be developed. In short, this analysis can help to align the indicator with the result it is aiming to achieve.



TAAP TOOLKIT WORKSHEET

XC-MEL
STEP A

ACTIVITY 2
ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS

ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS

Copy the project result statement here	Answer the questions about the result	Copy the indicator here	Answer the indicator questions	What are the inconsistencies?
RESULT: Local organizations effectively advocate for education access for minorities in Country X.		INDICATOR: # of organizations effectively engaged in advocacy for educational access for minorities		
What does the result aim to change? • Process • Attitudes • Knowledge • Awareness • Practice • Policy • System • Norm • Belief • Add your own	Process Access to education	What does the result aim to change? • Process • Attitudes • Knowledge • Awareness • Practice • Policy • System • Norm • Belief • Add your own	Process	Access to education missing from the indicator.

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PART 3 DEVELOP THE DISAGGREGATION LEVELS OF THE INDICATOR

NOTE TO FACILITATOR

The best way to gather meaningful and readable data from indicators is to first determine the level of disaggregation needed.

Before deciding the levels of disaggregation, please refer to the Social Inclusion Analysis (the chief output from Phase II) and create a list of the characteristics of exclusion. Refer to that list as you develop the disaggregation levels to ensure that all those and only those levels that are important for your purposes are captured.

How the Activity Is Done

Apply your knowledge of context-sensitive practices to identify the most appropriate indicators for the project.

A sample list follows on the next page. Not all levels are possible, necessary, or safe to include for all projects.

CONTINUE >

PART 3 DEVELOP THE DISAGGREGATION LEVELS OF THE INDICATOR

Appropriate Indicators Sample List

- **Sex**
- **Gender**
- **Age**
- **Religion**
- **Disability**
- **Ethnicity/Origin**
- **Migration status**
- **Race**
- Access to information communication technology
- Conflict/non-conflict exposure
- Distance of dwelling from basic services
- Documented/undocumented
- Dwelling conditions
- Employment status/ Occupation
- Family composition/Status in family
- Language
- Level of vulnerability
- Level of education
- Location
- Residence status
- Urban/Rural setting
- Wealth/income /economic status
- Other areas as relevant

KEY POINT

Inclusion indicators and those that aim to monitor level of inclusion in results will have the following elements:

- *Access*
- *Quality*
- *Equity*
- *Ownership/Empowerment*
- *Others*

Disaggregation choices must be contextualized. Most indicators that seek to track progress relative to global initiatives (e.g., the Sustainable Development Goals targets) apply, at a minimum, the bold-face categories from the preceding list. We recommend disaggregating at those levels as well, as budget and circumstances allow.

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XC-MEL
STEP B

IMPLEMENTING INCLUSIVE MEL

ACTIVITY 1
DEVELOP DATA COLLECTION TOOLS AND PROCESSES

Description	Questionnaire (and worksheets), prioritization exercise, brainstorming, discussion, checklist, technical advice, reflection, rating and assessment, analysis	
Overview	This activity includes three parts: • Brainstorming/risk analysis process to identify who should participate in data collection • Identifying whether the data collection tools or methods are appropriate. It also includes brief technical advice on how to rengthen those • Considering the ethics of data collection on inclusiveness and the inclusion of those groups who are represented in the content of the data	
Objective	To live out TAAP values by making the data collection process itself more inclusive.	
Why do this activity?	This activity helps make data collection methods, processes, and tools more inclusive and participatory, while maintaining the technical strength of data.	
Prerequisite activity?	No	N/A
Facilitator needed?	Yes	External to the project
Time	4 hours or more depending on the context	
Materials	Flip chart, colored papers, three different colored sticky notes, markers/pens	
Participants	Design and Implementation team, other support teams, partners, participants, stakeholders	

CONTINUE ›

PART I DECIDING THE LEVEL OF PARTICIPATION IN DATA COLLECTION PROCESSES

NOTE TO FACILITATOR

You should engage program stakeholders meaningfully in MEL work—a participatory approach is one of the TAAP principles.

Conducting participatory data collection on inclusion issues not only enriches the data, it empowers the participating data collectors to influence the ways that data which affect their lives is collected and used. Some settings allow more participation than others, and some marginalized or excluded groups might be able to participate more than others.

When deciding how to make M&E more inclusive, and how to maximize participation of marginalized or excluded groups in data management processes, it is important to understand the implications on their lives and on your project. Be prepared to note discussions relating to the areas of risk analysis (below). You can refer to these as the teams move forward with the risk analysis.

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PART I DECIDING THE LEVEL OF PARTICIPATION IN DATA COLLECTION PROCESSES

How the Activity Is Done

CONTEXT CENSORING

Before implementing this activity, send out a survey to test the team's understanding of inclusive data collection. Analyze the responses and verify those at a face-to-face meeting.

The following questions will help.

- How do you define inclusive data collection for your project's context?
- What do you want to achieve by inclusive data collection?
- How will the data be collected?
- To make the data collection inclusive, whom do we invite to participate?
- How will they participate?
- Whom have we not invited to participate in data collection? Why?

CONTINUE >

PART I DECIDING THE LEVEL OF PARTICIPATION IN DATA COLLECTION PROCESSES

How the Activity Is Done

At the start of the meeting, share and verify with the group your summary of their responses. If there are disagreements about who will and will not participate in the data collection, discuss and bring the group to consensus.

Referring to the Phase II Social Inclusion Analysis and to the Local Snapshots produced earlier **(PHASE III, STEP A, ACTIVITY 2)**, facilitate the following exercise to understand why a group may be excluded and the ways those reasons could create challenges to their participation in data collection.

- Based on survey data, determine 3-4 types of groups the team suggested to involve and 3 -4 groups the team decided not to involve.
- Break into small groups, assigning each group with an identity group to consider. Ask the groups to discuss their assigned group's involvement against the risk chart below, and discuss whether the project should collect data from that population.
- Create a master sheet of the following tool and combining all responses.

PARTICIPATORY APPROACHES

Continue to the worksheet on the following page.

CONTINUE >

WORKSHEET

PART I RISK LEVELS FOR DATA COLLECTION

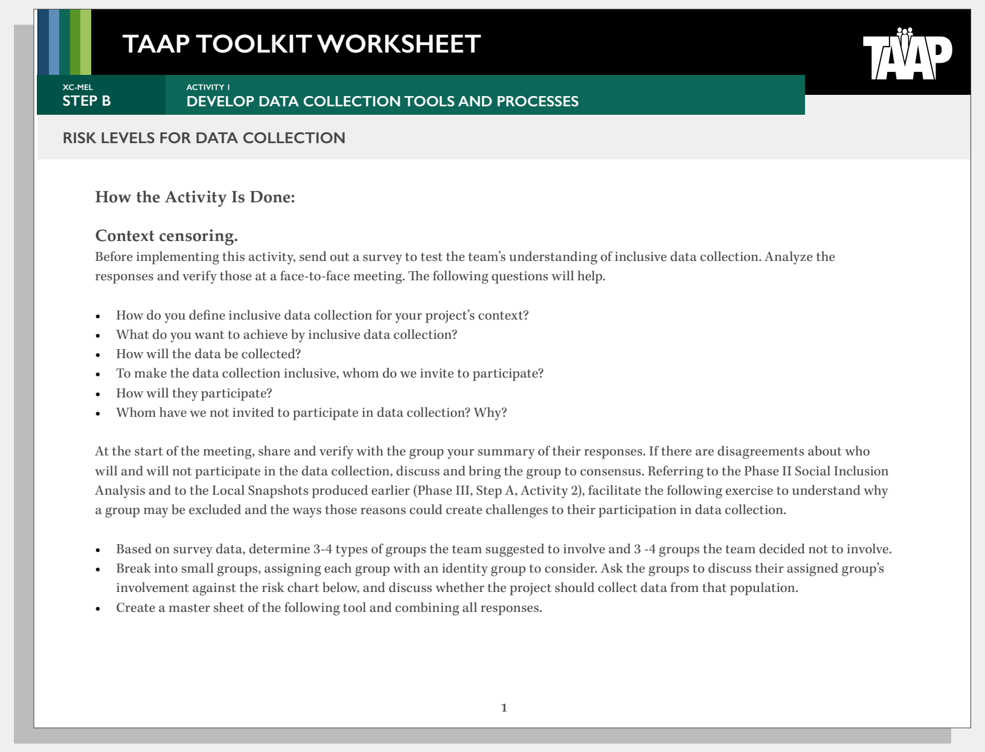
Below are sample questions from the worksheet. Download it on the right.

	Copy the project result statement here	Beneficiary collecting data	Level of Risk High, Medium, Low	What can we do to minimize these issues?	What can the data collectors do to minimize the issues?
1	**SAFETY AND SECURITY RISKS:** Their presence at the data collection site may cause conflict.	Data Group 1:			
		Data Group 2:			
		Data Group 3:			
2	**EMOTIONAL CHALLENGES:** The types of questions they will ask to others may raise unpleasant memories of their own lives.				
3	**KNOWLEDGE GAPS:** They have never engaged in data collection before.				
4	**NEGATIVE ATTITUDES:** Respondents may not want to engage with them or be respectful to them due to their identity.				

WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*



TAAP TOOLKIT WORKSHEET

XC-MEL STEP B

ACTIVITY 1 DEVELOP DATA COLLECTION TOOLS AND PROCESSES

RISK LEVELS FOR DATA COLLECTION

How the Activity Is Done:

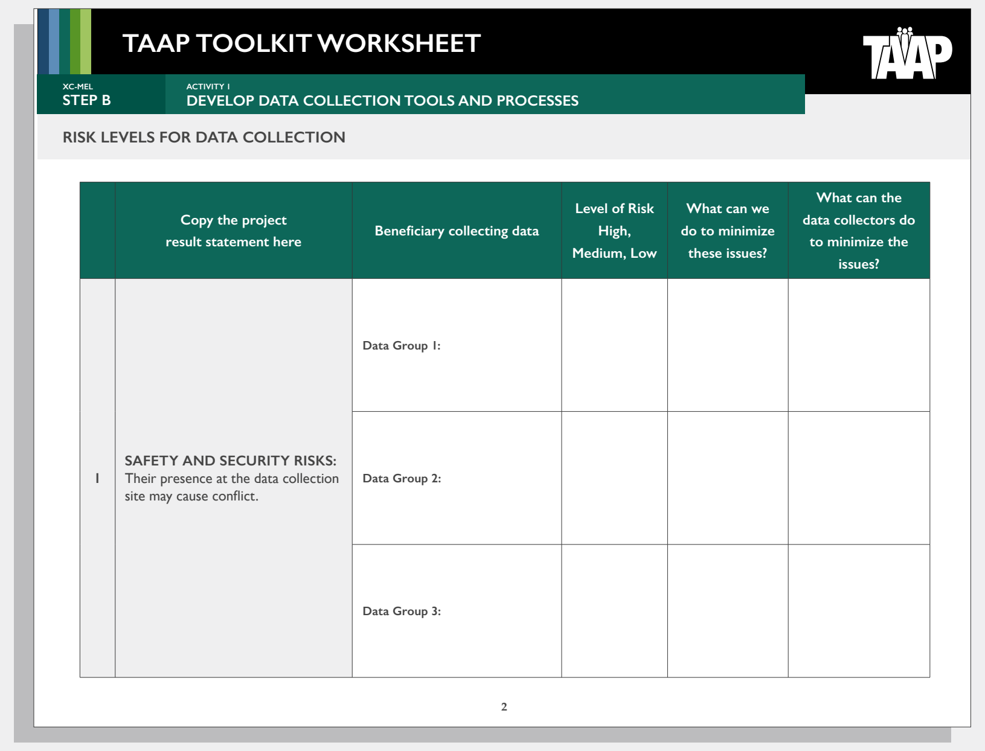
Context censoring.
Before implementing this activity, send out a survey to test the team's understanding of inclusive data collection. Analyze the responses and verify those at a face-to-face meeting. The following questions will help.

- How do you define inclusive data collection for your project's context?
- What do you want to achieve by inclusive data collection?
- How will the data be collected?
- To make the data collection inclusive, whom do we invite to participate?
- How will they participate?
- Whom have we not invited to participate in data collection? Why?

At the start of the meeting, share and verify with the group your summary of their responses. If there are disagreements about who will and will not participate in the data collection, discuss and bring the group to consensus. Referring to the Phase II Social Inclusion Analysis and to the Local Snapshots produced earlier (Phase III, Step A, Activity 2), facilitate the following exercise to understand why a group may be excluded and the ways those reasons could create challenges to their participation in data collection.

- Based on survey data, determine 3-4 types of groups the team suggested to involve and 3 -4 groups the team decided not to involve.
- Break into small groups, assigning each group with an identity group to consider. Ask the groups to discuss their assigned group's involvement against the risk chart below, and discuss whether the project should collect data from that population.
- Create a master sheet of the following tool and combining all responses.

1



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XC-MEL STEP B

ACTIVITY 1 DEVELOP DATA COLLECTION TOOLS AND PROCESSES

RISK LEVELS FOR DATA COLLECTION

	Copy the project result statement here	Beneficiary collecting data	Level of Risk High, Medium, Low	What can we do to minimize these issues?	What can the data collectors do to minimize the issues?
1	**SAFETY AND SECURITY RISKS:** Their presence at the data collection site may cause conflict.	Data Group 1:			
		Data Group 2:			
		Data Group 3:			

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PART I RISK LEVELS FOR DATA COLLECTION

How the Activity Is Done

Summarizing the discussions and key considerations of the exercise above, reinforce the following messages:

- When we involve stakeholders in data collection, their involvement should be active.
- We may need to adapt data collection tools and methods, or provide training.
- We need to work with our staff, partners, and stakeholders to raise awareness of how best to engage with data collectors.
- We need to incorporate learning, reflection and adaption cycles throughout the process.
- We need to monitor how well the data collection process proceeds.

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PART 2 STAKEHOLDER CONSULTATIONS

How the Activity Is Done

If the context permits, it is always beneficial to engage potential data collectors to further define and clarify the purpose of their involvement and role they can play. The previous activity revealed that there will be areas of risks that may not be completely addressed by the program teams, but the data collectors themselves may be able to minimize the issues. Hold a separate consultation meeting with all the groups who were (and were not) selected to participate in data collection.

The groups of project participants that have not been approached to participate in data collection must be informed why. This will raise their awareness and may increase their willingness to participate as respondents. It will also help avoid any potential conflict with identity groups that were selected to serve as data collectors.

Here are a few themes that can be included in the discussion:

- Explain the team's decisions, and the purpose and expected results of data collection.
- Explain why the team decided to include or not include representatives from their group.
- Share a summary of the findings from Worksheet XC-MEL, B, 1(i) Risk Levels for Data Collection, and invite them to share their inputs.
- Invite them to agree or disagree with the project's recommendation regarding involvement.
- If they decide to participate, explain that their participation is completely voluntary and they can opt out at any time.

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PART 3 RESPECTFUL AND ETHICAL DATA COLLECTION

NOTE TO FACILITATOR

Before beginning, revisit the TAAP principles.

Tools and mechanisms might vary depending on your working context, the capacity of the data collector, the inclusion focus of your data collection, and the abilities of your respondents.

How the Activity Is Done

Use the following checklist on the following page *"Are my methods and tools inclusive?"* individually or in small working groups.

CONTINUE >

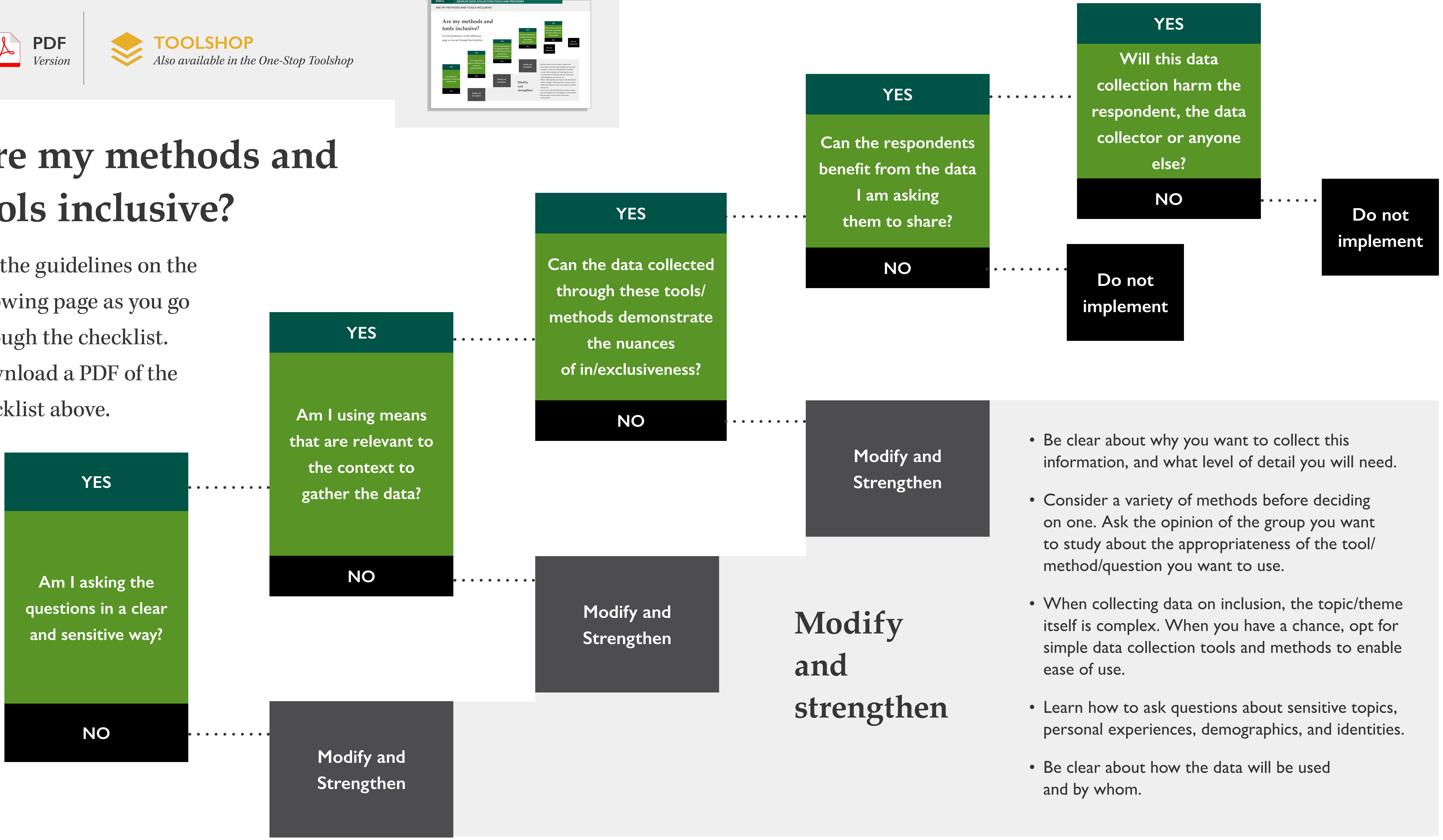
XC-MEL GRAPHIC

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*

Are my methods and tools inclusive?

Use the guidelines on the following page as you go through the checklist. Download a PDF of the checklist above.



YES

Am I asking the questions in a clear and sensitive way?

NO

Modify and Strengthen

YES

Am I using means that are relevant to the context to gather the data?

NO

Modify and Strengthen

YES

Can the data collected through these tools/ methods demonstrate the nuances of in/exclusiveness?

NO

Modify and Strengthen

YES

Can the respondents benefit from the data I am asking them to share?

NO

Do not implement

YES

Will this data collection harm the respondent, the data collector or anyone else?

NO

Do not implement

Modify and strengthen

- Be clear about why you want to collect this information, and what level of detail you will need.
- Consider a variety of methods before deciding on one. Ask the opinion of the group you want to study about the appropriateness of the tool/ method/question you want to use.
- When collecting data on inclusion, the topic/theme itself is complex. When you have a chance, opt for simple data collection tools and methods to enable ease of use.
- Learn how to ask questions about sensitive topics, personal experiences, demographics, and identities.
- Be clear about how the data will be used and by whom.

CONTINUE ›

PART 3 RESPECTFUL AND ETHICAL DATA COLLECTION

Go through the checklist to note any gaps in your data-collection process.

Before data collection, decide what to do if trauma, abuse, or exploitation is revealed to you during data collection by primary and secondary respondents. Be prepared also to accommodate different abilities. Plan on where and how you will store your data (digital and physical) to ensure it is not accessed by unauthorized users. Critically review your questions to make sure all the questions you are asking are useful.

See the following page for a list of informed-consent rules and practical safety and security measures.

CONTINUE >

LEARN FROM WHAT WORKS:

The Girl Effect's Technology Enabled Girl Ambassadors (TEGA) is a peer-to-peer research approach that meets the Lean Research* standards. With more traditional research approaches, consent is often gained passively with a researcher reading a statement and respondents signing a piece of paper or verbalizing their agreement. TEGA's engaged consent process requires respondents to demonstrate comprehension of what they are consenting to through listening to an audio file, answering a multiple-choice question and obtaining verbal consent that is recorded and uploaded to the TEGA Content Hub (TEGA Lean Research Case Study Oct 2016). Although TEGA was not a TAAP project, this example illustrates TAAP's participatory and deliberative approaches principle.

Lean Research is a framework for conducting research in international development, and is a community of practice committed to implementing this framework, jointly organized by faculty and researchers at MIT D-Lab and The Fletcher School, Tufts University.

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PART 3 RESPECTFUL AND ETHICAL DATA COLLECTION

Informed-consent rules and practical safety and security measures.

- Explain why you are collecting the data.
- Explain why they were chosen to be a respondent.
- Explain how their data can help address the issue you are investigating.
- Explain why their cooperation is important in collecting the information you need.
- Explain the extent of privacy and confidentiality you can offer.
- Clarify your responsibility as a researcher.
- Clarify their role as respondents.
- Clarify that participation is completely voluntary, and that the respondent can stop the process at any point during the interview.
- Explain how much time it will take and stick to it.
- Allow users to self-describe their identity.
- Be aware of your own biases.
- Explain what will happen with the collected information and how others may benefit.
- Do not require a response.
- Use semi-structured interviews when asking about exclusion. It builds trust before asking respondents to disclose personal information.
- Offer multi-select checkboxes, not single-select options.
- Be informed on the ethics of taking photographs during data collection.
- Leave a contact number where you can be reached.
- If you have to take action on any of the information disclosed to you, operate within the local and contextual protection protocols. Tell your respondents how you have ensured your adherence to those protocols, and explain what will happen next.

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XC-MEL
STEP B

ACTIVITY 2

CONSIDERATIONS FOR INCLUSIVE DATA ANALYSIS

Description	Discussion, checklist, technical advice	
Overview	This activity includes two parts: • Technical advice on strengthening inclusiveness in qualitative data analysis. • Technical advice on planning quantitative data collection and analysis.	
Objective	To strengthen inclusion during data analysis for quantitative and qualitative data.	
Why do this activity?	To strengthen inclusiveness in data analysis processes.	
Prerequisite activity?	No	N/A
Facilitator needed?	No	N/A
Time	Depending on the task and context.	
Materials	None	
Participants	Design and implementation team, selected partners, stakeholders	

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PART I QUALITATIVE ANALYSIS

NOTE TO FACILITATOR

Qualitative data analysis is a systematic, structured process, when large amounts of data are analyzed to offer an explanation, perspective, or opinion about the phenomenon being studied.

In this type of analysis, the researcher's experience and skills are especially important because it is their interpretation of the data that determine the findings. In this case, personal values, knowledge, life, childhood experiences, and the many other factors that have shaped the researcher come into play. It is important that while we study inclusion, we also involve individuals who have sufficient experience within the groups we study. Inclusive data analysis follows the same practice as any other effective participatory M&E process. It helps identify and address personal, organizational and societal biases that we explored in Phase I. It informs the project and lessons learned, and serves as knowledge for others. The results of data analysis determine what we learn about addressing discrimination and exclusion, and how we choose to work more inclusively.

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PART I QUALITATIVE ANALYSIS

NOTE TO FACILITATOR

The technical advice in this part covers the step of coding for qualitative data analysis. It provides an exercise for identifying patterns, and connections among those patterns, when reporting. It does not cover other important steps of data analysis, including data quality checks, validation, and triangulation. Users should look to other resources for support in these areas.

Examples of qualitative data collection methods:

- Key Informant Interview or individual Interview
- Focus Group Discussions
- Observations
- Pictures
- Stories
- Testimonials
- Diaries
- Other documented material
- Logs
- Others

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PART I QUALITATIVE ANALYSIS

How the Activity Is Done

Read through the information below, taking notes on how to address gaps in your own data analysis processes.

1. When conducting data analysis on inclusion themes, consider grouping the data by the respondent groups, and ensure that your analysis represents the groups of respondents whose views you are presenting.

2. When determining structures of the codes consider a dual approach:
   - Develop your coding structures around key concepts of TAAP (Agency, Access, Power, and Transformation)
   - Develop a coding structure to follow how a respondent group experiences the inclusion/marginalization/exclusion issue you are studying.

3. Check the quality of your coding system by examining whether:
   - codes are simple and straightforward.
   - terminology used for codes is accepted by the study group.
   - you should use descriptions of the codes to avoid misunderstanding.
   - the code easily translates into the local language of the respondent.

4. When the coding structure is fully developed, consult respondent groups to check whether it reflects their experiences of social inclusion, marginalization, and exclusion.

5. In your analysis, focus on identifying key findings and mechanisms that are transformative of agency, access, and power. Discuss and review data to identify power relationships among identity groups. Contextualize those for your Phase II Social Inclusion Analysis report.

CONTINUE ›

PART 2 QUANTITATIVE ANALYSIS

NOTE TO FACILITATOR

Quantitative data is represented by numbers: percentages; ratios; prices; scales, and other numerical forms.

Analysis of quantitative data varies, depending on the study design, data collection tools used, and the sampling approached. It is not the purpose of this toolkit to build capacity on various quantitative analysis methods, since we assume that the organization's M&E team will possess some capacity and since there are many good general resources available online. The checklist below is designed to run a quality check to ensure that quantitative data analysis is inclusion-sensitive.

Examples of quantitative data collection tools:

- *Surveys*
- *Project records*
- *Attendance rates*
- *Demographic information*
- *Biophysical measurements*

How the Activity Is Done

Go through the checklist. Take notes where you need to make improvements, based on your specific project and its context, to your quantitative data collection and analysis.

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WORKSHEET

PART 2 QUANTITATIVE ANALYSIS

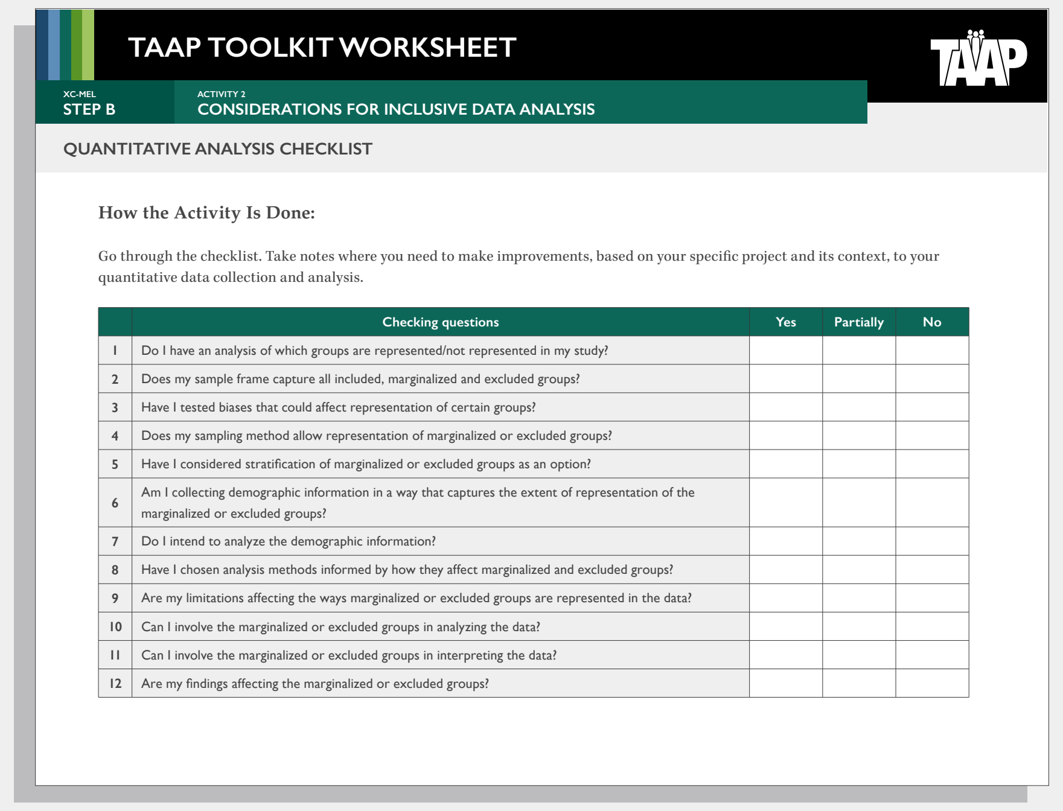
Below are sample questions from the worksheet. Download it on the right.

	Checking questions	Yes	Partially	No
1	Do I have an analysis of which groups are represented/not represented in my study?			
2	Does my sample frame capture all included, marginalized and excluded groups?			
3	Have I tested biases that could affect representation of certain groups?			
4	Does my sampling method allow representation of marginalized or excluded groups?			
5	Have I considered stratification of marginalized or excluded groups as an option?			
6	Am I collecting demographic information in a way that captures the extent of representation of the marginalized or excluded groups?			
7	Do I intend to analyze the demographic information?			
8	Have I chosen analysis methods informed by how they affect marginalized and excluded groups?			
9	Are my limitations affecting the ways marginalized or excluded groups are represented in the data?			
10	Can I involve the marginalized or excluded groups in analyzing the data?			
11	Can I involve the marginalized or excluded groups in interpreting the data?			
12	Are my findings affecting the marginalized or excluded groups?			

WORKSHEET

PDF *Version*

TOOLSHOP *Also available in the One-Stop Toolshop*



TAAP TOOLKIT WORKSHEET

XC-MEL
STEP B

ACTIVITY 2
CONSIDERATIONS FOR INCLUSIVE DATA ANALYSIS

QUANTITATIVE ANALYSIS CHECKLIST

How the Activity Is Done:

Go through the checklist. Take notes where you need to make improvements, based on your specific project and its context, to your quantitative data collection and analysis.

	Checking questions	Yes	Partially	No
1	Do I have an analysis of which groups are represented/not represented in my study?			
2	Does my sample frame capture all included, marginalized and excluded groups?			
3	Have I tested biases that could affect representation of certain groups?			
4	Does my sampling method allow representation of marginalized or excluded groups?			
5	Have I considered stratification of marginalized or excluded groups as an option?			
6	Am I collecting demographic information in a way that captures the extent of representation of the marginalized or excluded groups?			
7	Do I intend to analyze the demographic information?			
8	Have I chosen analysis methods informed by how they affect marginalized and excluded groups?			
9	Are my limitations affecting the ways marginalized or excluded groups are represented in the data?			
10	Can I involve the marginalized or excluded groups in analyzing the data?			
11	Can I involve the marginalized or excluded groups in interpreting the data?			
12	Are my findings affecting the marginalized or excluded groups?			

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PART 3 VALIDATING FINDINGS AND RECOMMENDATIONS

NOTE TO FACILITATOR

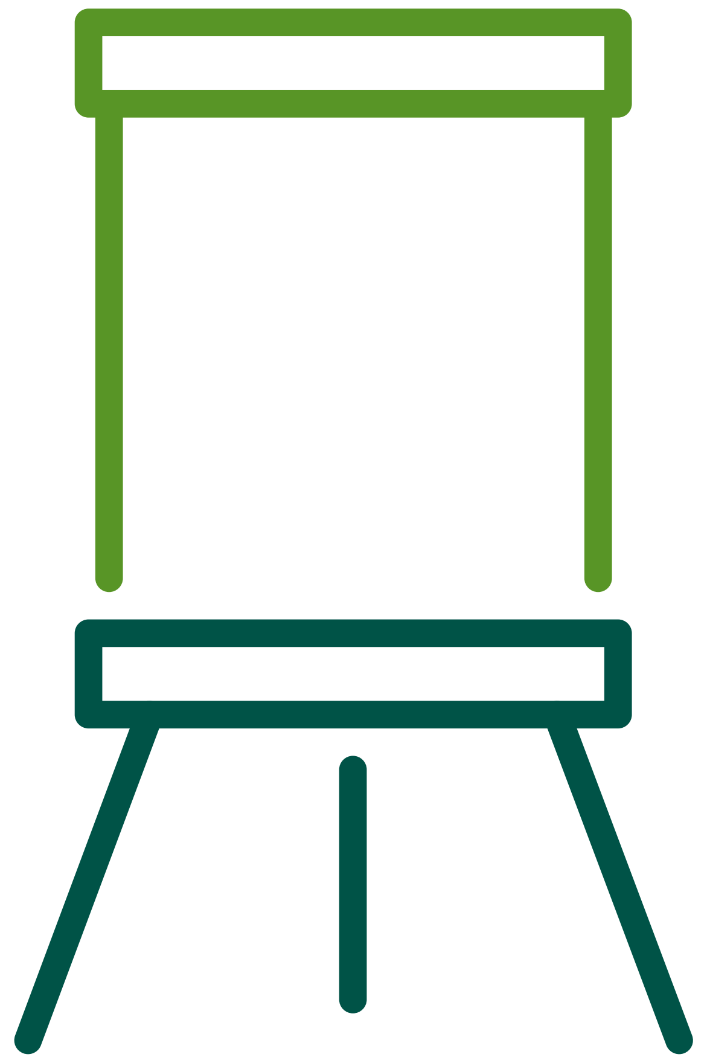
Once the data is analyzed, involve stakeholders and program participants to review preliminary findings and recommendations.

This feedback will give a deeper understanding of how various groups are affected, and provide ideas about how to make changes if necessary. Choose no more than five of your findings to ensure a thorough discussion. Take notes and produce a brief overview of stakeholder discussion to refine findings and recommendations.

How the Activity Is Done

Group participants by the group they represent, giving them stickers or icons, and asking them to self-select the findings they want to discuss.

For this activity, you will use the Validating Findings and Recommendations chart on the following page. You will also need a flipchart and markers.



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PART 3 VALIDATING FINDINGS AND RECOMMENDATIONS

How the Activity Is Done

For each of the findings, use the flip chart to write down the following categories and ask them to place their icons/signs.

Finding and recommendation	Do I want this finding and recommendation in the report?		Are my views and expectations represented in this finding and recommendation?		Do I benefit from this finding and recommendation?		Do I know how to strengthen this finding and recommendation?	
	YES	NO	YES	NO	YES	NO	YES	NO

Regroup participants (across representative groups) around each finding and recommendation. Assign a chair who will take detailed notes during discussion. The notes should focus on identifying the power dynamics of one group relative to another, and the ways those can be balanced.

* Guiding questions to support the discussion can be found on the next pages.

CONTINUE ›

PART 3 VALIDATING FINDINGS AND RECOMMENDATIONS

GUIDING QUESTIONS TO SUPPORT THE DISCUSSION:

- Do I want this finding and recommendation in the report? Why? Why not?
- Is the finding / recommendation putting any individual or group at risk?
- Can this finding be paraphrased to avoid the risk?
- Are there issues more important than this one that are not sufficiently captured?
- Does this finding/recommendation have potential to cause more marginalization or exclusion for certain groups by giving more visibility to others?
- If this finding /recommendation is in the report, can it serve as a mechanism to bring more visibility to socially marginalized or excluded groups?

Are my views and expectations represented in this finding?

- Does the language fully represent other groups that are excluded?
- Are the words in the finding and recommendation ethical?
- Is the concept and the content of the finding and recommendation ethical?
- Are anyone's views excluded because mine are included? Is there anyone whose views are included as a result of mine being excluded?
- Can it be written more comprehensively to capture all relevant groups?

Do I benefit from this finding?

- Are there any benefits for me in this finding /recommendation?
- Because I benefit from this finding /recommendation, is anyone else not? Because I do not benefit from this finding /recommendation, is anyone benefiting?
- Are these benefits making one group more powerful over the other?
- Are these benefits giving empowerment to excluded groups?

Do I know how to strengthen this finding? What is missing?

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XC-MEL
STEP C

LEARN, PAUSE, AND REFLECT

ACTIVITY 1

SILENT TALK

Description	Mapping, discussion, reflection, analysis	
Overview	This activity is a reflection process, with two consecutive parts: • Report member data collection experiences, and map experiences on a diagram. • Consolidate and conclude necessary data collection improvements.	
Objective	To learn from the participants on what went well and what needs improvement.	
Why do this activity?	This exercise allows data collectors to share their experiences of engaging in inclusive MEL, and to structure that experience for future learning. Debriefing will support the team to learn and adapt, and will strengthen capacity to engage others effectively.	
Prerequisite activity?	Yes	Participants in this activity will have participated in Validating Findings and Recommendations (XC-MEL, Step B, Activity 2, Part 3)
Facilitator needed?	Yes	External
Time	4 hours	
Materials	Flip chart with outline of the human diagram drawn for all the working groups, three different colored sticky notes, markers/pens	
Participants	Design and Implementation team, support teams, partners, participants, stakeholders	

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PART I INDIVIDUAL REFLECTIONS

NOTE TO FACILITATOR

This activity involves drawing an outline of a human body (neither identifiably male nor female).

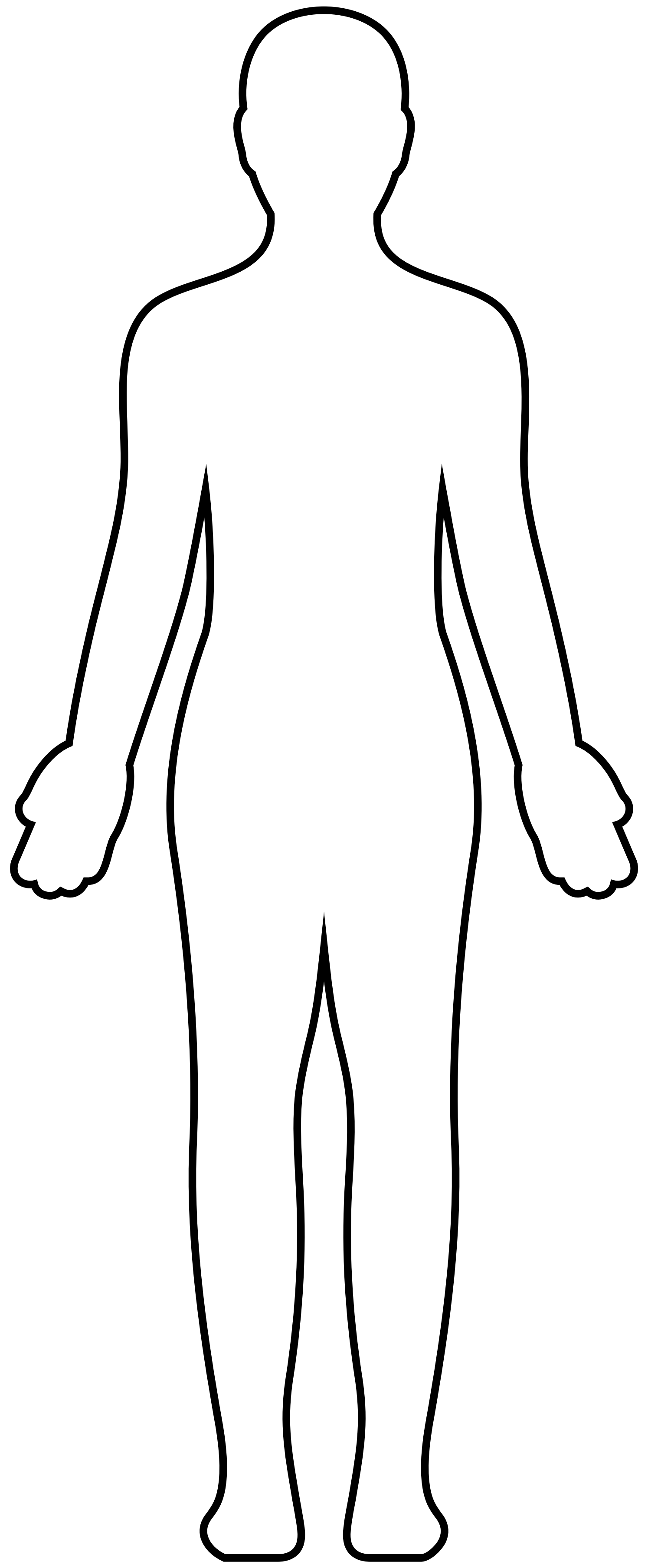
It asks participants to locate their experiences, and connect feelings and thoughts with capacities. If in certain contexts, a human body map is not culturally acceptable, consider using another more appropriate image. There are parts of this activity that require listening and silence. Silence is important, because it helps those reflecting to organize their thoughts. During the activity pay particular attention to the existing similarities between groups, so that you can easily merge the responses of the groups onto the larger sheet.

How the Activity Is Done

Pair your participants randomly.

Prepare a print out of the human body diagram for each pair, and draw a large one on the floor for the conclusion of the activity.

CONTINUE >



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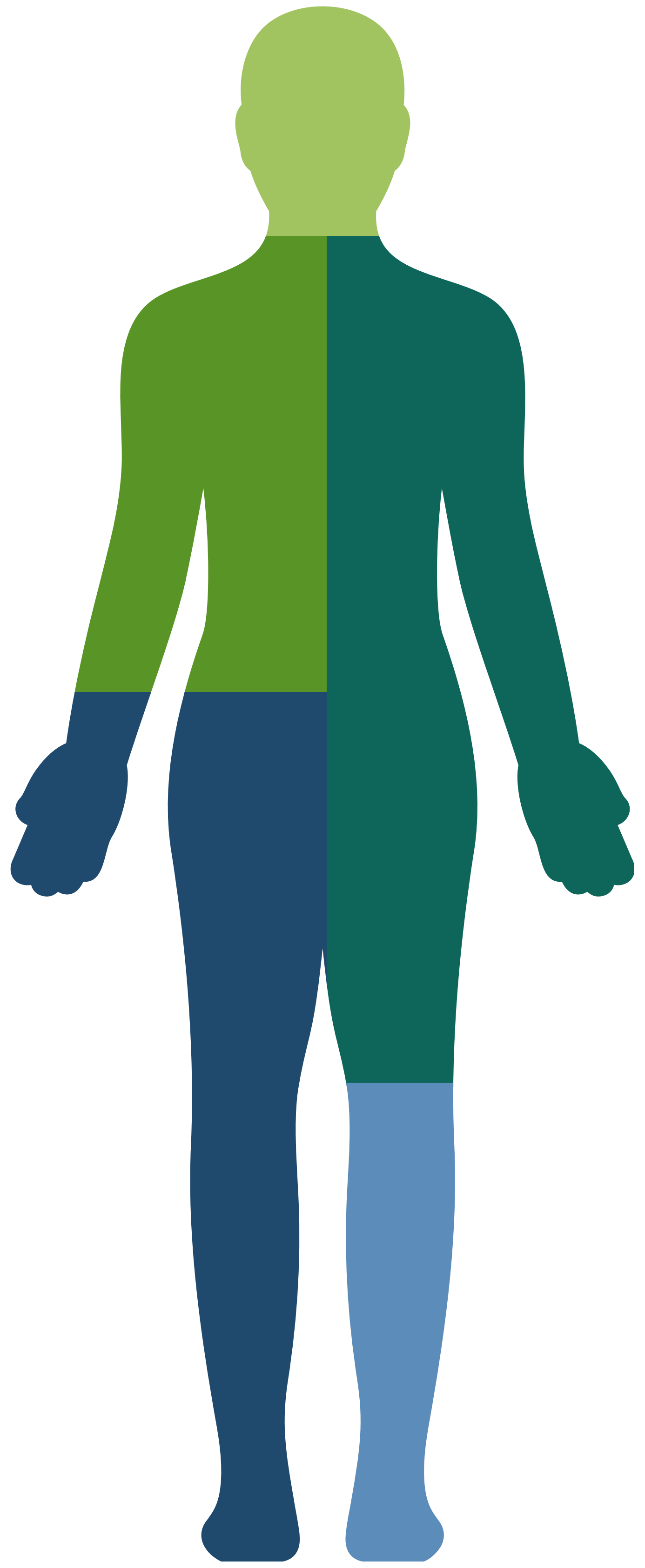
PART I INDIVIDUAL REFLECTIONS

How the Activity Is Done (Continued)

Pair your participants randomly. If you had a mixed group, pair them intentionally to ensure that each pair contains one member of a group that experiences exclusion related to the topic at hand. Give each pair a red and blue marker, and a print out of the Human Body Diagram as shown here. Instruct that each person in the pair will take turns reflecting and speaking about the following topics for five minutes without interruption.

- *Considering my participation in the process of validating the findings and recommendations, what were my positive experiences?*
- *What were my negative experiences of the process?*
- *Were there any specific difficulties that I faced during this process? What were they? What did I do about them?*
- *Were there any enlightening moments? What were they?*



If speakers stop talking before 5 minutes, their partner should not jump in. Sometimes keeping silence helps the speaker to think and continue reflecting, and come back to the conversation.

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PART I INDIVIDUAL REFLECTIONS

How the Activity Is Done (Continued)

Once the five minutes of the first speaker are over, the second member will try to locate the experiences of the first member on the human body diagram, describing the experience with two-three words and/or a picture or drawing. Do not give more than five minutes for this. Encourage them to think visually about their experience. For example, if one of the members uses wheelchair, and for them accessing some of the data collection sites was difficult, the drawing might be an icon of lack of access and done on the foot with a red marker. If another member described being overwhelmed with emotion by hearing everyone's stories, the other member of that pair might put a sad face near the heart (or near the stomach, if that is the locus of strong emotion in the cultural context).

If a third member was learning a lot by hearing the stories of the respondents about their experiences of exclusion, the other member of that pair might draw a happy (or thoughtful) face or some other icon using blue marker near the heart. Someone might have experienced gaining lots of new ideas during data collection – that might be represented by an icon of a light bulb with a blue pen, near the head. *The red marker should indicate negative experiences, the blue marker-positive.*

During this process, the second member who is taking the notes on the human body diagram can ask clarifying questions. The pair then switches roles, and repeats the exercise.

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PART 2 GROUP REFLECTION TO IDENTIFY RECOMMENDATIONS

How the Activity Is Done (Continued)

Have a large human diagram drawn on a wall or on a flip chart. Invite pairs to come forward and redraw their experiences thinking of what is important for the team to know from the discussions they had one-on-one. Encourage them to reflect both positive and negative. Explain that positive experiences can be replicated and scaled up. Negative experiences can be addressed through solutions. Give two minutes for each pair. Once the first pair has finished their drawing, ask the next pair to come forward without repeating what already has been drawn. During this process, no one can speak, except the facilitator. (The pairs who are drawing their experiences can draw and simultaneously explain their drawings.)

After the group drawing is complete, split into two groups. Group 1 will focus on positive experiences and Group 2 on negative, to identify and list all significant positive and negative experiences and offer solutions in terms of *what can be scaled up, built on* (Group 1: Positive), and *what needs to be strengthened, improved, eliminated* (Group 2: Negative). During this time, they should feel free to talk across the two groups. Allow 40 – 60 minutes for each group to work. Ask the groups to identify a speaker and reflect back. Give each group five minutes to reflect and share their suggestions. At this stage the findings and recommendations are not going to be too detailed and will likely need to be fleshed out.

END OF XC-MEL

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CROSS-CUTTING (XC) SECTION

INTEGRATING INCLUSIVE IMPACT & SUSTAINABILITY (IIS)

The work you do in this section aims at moving your inclusion efforts beyond a "project mentality," and towards a focus on transformative change.

This process is based on systems thinking, examining the larger context of actors and factors that influence inclusion. Use this section to consider how your inclusion activities and implementation approaches can positively influence the larger system, leveraging boosters and opportunities in the context of your work.

THE BASICS

These activities should take place at the same time as project design and implementation. They are informed by the Phase II Social Inclusion Analysis report and link with the monitoring and evaluation framework. This is an iterative, ongoing approach. Periodically revisit this section to examine the progress you are making toward sustainable inclusion and consider how to adjust your approach to increase those results.

CONTINUE >

www.taapinclusion.org provides a list of peer-reviewed resources on Systems Thinking.

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CROSS-CUTTING (XC) SECTION

INTEGRATING INCLUSIVE IMPACT & SUSTAINABILITY (IIS)

WHAT	This section focuses on impact and sustainability for inclusion. Explore the long-term impact that your project can have on social norms, institutions, and power structures for inclusion, and how the benefits can be sustained beyond the life of the project.
WHO	Design and implementation teams, partners and stakeholders, participants
WHEN	Simultaneously with Phases II and IV and Cross-Cutting Section MEL
HOW	This process applies systems thinking about causes of marginalization and exclusion, opportunities for inclusion, and how each is influenced by a complex set of actors. Teams will explore this interplay in order to plan toward impact and sustainability.
WHY	Your project can contribute to sustainable inclusion in the larger environment. Understanding how your actions, and those of your partners, support or hinder inclusion is critical to transformative change.

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CROSS-CUTTING (XC) SECTION

INTEGRATING INCLUSIVE IMPACT & SUSTAINABILITY (IIS)

This phase of the Toolkit has specific steps and associated activities. While the steps and activities suggest a linear sequence of events, in actual implementation there is often a more dynamic flow to the work. Some steps or activities may be occurring simultaneously and the work often circles back to revisit earlier steps.

STEP A Reflect on Desired Change and Identify Entry Points	Activity 1: Reflecting on Desired Change Activity 2: Creating a Systems Map
STEP B Mobilize for Change	Activity 1: Envisioning Sustained Impact Activity 2: Making an Impact and Sustainability Plan

CONTINUE

XC-IIS
STEP A

ACTIVITY 1
REFLECTING ON DESIRED CHANGE AND IDENTIFYING ENTRY POINTS

NOTE TO FACILITATOR

Prior to the workshop, ask participants to review the "What Change is Possible" table, and the products generated from the Social Inclusion Analysis Debrief. You may consider overlaying a Political Economy Analysis (PEA) on to the systems mapping effort, as PEAs are a tool used to unpack how power is used to manage resources, and are especially valuable for exploring the role that political will has on enabling or undermining reform and progress.

Description	Discussion, prioritization, reflection	
Overview	Note: If you have recently completed the prerequisite activities and have identified desired long-term impact, then you can go to the next activity. This activity supports reflection on Explore Root Causes, What Change is Possible, Promote Opportunities for Change; and Develop Inclusive MEL System. In this work, the team identifies boosters, barriers, and stakeholders relevant to sustainability of the desired change. It also considers causes contributing to the status of change, and benefits if that change is achieved.	
Objectives	• To reflect on/refine long-term change to which the project seeks to contribute • To identify boosters, barriers, and stakeholders relevant to sustainability	
Why do this activity?	This activity supports thinking beyond project parameters, toward long-term change.	
Prerequisite activity?	Yes	Explore Root Causes (Phase II, Step C, Activity 2) Who Are the Stakeholders Now? (Phase II, Step A, Activity 3) What Change is Possible? (Phase III, Step C, Activity 3) Promote Opportunities for Change (Phase IV, Step C, Activity 2) Writing the Social Inclusion Action Plan (PHASE IV, STEP D) Develop Inclusive MEL System (XC-MEL, Step A, Activity 1)
Facilitator needed?	Yes	Internal
Time	2-3 hours	
Materials	Flip chart, sticky notes, markers, tape, copies of reports and worksheets from prerequisite activities	
Participants	Project design and/or project implementation team, partners, stakeholders	

REFLECT

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REFLECTING ON DESIRED CHANGE

How the Activity Is Done

Ask the group to reflect on the TAAP inclusion outcomes identified during the What Change is Possible? activity in Phase III. Which are long-term? In small groups, brainstorm the larger areas of change to which the TAAP inclusion outcomes could contribute. Have groups report back and describe their rationale for the desired change they selected. Prompt groups to discuss why this change would be strategic.

Write responses on a flip chart. **60 MINUTES**

After the group determines one or two transformative social changes to which the project's long-term impact could feasibly contribute, discuss what can be done within your project that will make progress towards that change, or set the stage for future change. **15 MINUTES**

Review the problem tree (i.e., root causes) worksheet that you developed under Phase III. Ask participants to add other root causes or consequences that will help show the big change the project is pursuing.

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REFLECTING ON DESIRED CHANGE

How the Activity Is Done (Continued)

Are any of the causes or consequences on the original problem tree not relevant when considering the big change? Has the understanding of the causal relationships shifted since the program began?

Write responses on the flip chart. 15 MINUTES

Ask participants to review the stakeholder maps from **PHASE II** and **PHASE III** with "the big change" in mind. Who are the key actors for driving this systemic or normative level of change? Why are the key actors motivated to drive the systemic or normative level of change? When is inclusion likely to be ripe for further expansion? When are marginalization or exclusion likely to ease or to become even worse? Are there stakeholders who should be added or deleted? Which are the barriers or boosters to change? Which are most influential? Which does the project already engage? Which should the project engage?

Write responses on the flip chart. 25 MINUTES

After the workshop update the *What Change is Possible?* stakeholder matrix, problem tree, and results pyramid as needed to reflect the discussion.

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XC-IIS
STEP A

ACTIVITY 2
CREATING A SYSTEMS MAP

Description	Brainstorming, discussion, reflection	
Overview	A systems map visually represents the actors and other factors influencing the social inclusion problem that the project seeks to address as well as the project's relationship to these actors and factors. It helps to show entry points for the project to support transformative change.	
Objectives	• To reveal insights into power dynamics affecting impact and sustainability • To deepen understanding of relationships among, and influence of, system components	
Why do this activity?	The systems map builds understanding of the project's place within the system of actors and factors that are barriers and boosters to transformative change.	
Prerequisite activity?	Yes	Social Inclusion Analysis (Phase II) Create a Local Snapshot (Phase III, Step A, Activity 2) Define Who the Stakeholders Are Now (Phase III, Step A, Activity 3) Explore Root Causes (Phase II, Step C, Activity 2) What Change is Possible? (Phase III, Step C, Activity 3) Promoting Opportunities for Change (Phase IV, Step C, Activity 2)
Facilitator needed?	Yes	Experience with systems mapping desirable
Time	Half to full day	
Materials	Flip chart, sticky notes, pencil, markers, highlighters, tape, reports and worksheets from prerequisite activities	
Participants	Implementation team, partners, stakeholders	

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CREATING A SYSTEMS MAP

How the Activity Is Done

KEY POINT

Ask the group to review the data collected in the Social Inclusion Analysis, Local Snapshot, Stakeholder Mapping, Problem Tree, What Change is Possible?, and Opportunities for Change activities in advance.

Although data collected for the social inclusion analysis will be useful, this activity may require advance collection of more data for key factors such as patterns or prevalence (degree to which an inclusion/exclusion factor or data point appears over and over again) and salience (the power or importance of a factor in the eyes of respondents or experts).

At the top of a flip chart, write the long-term social change to which the project seeks to contribute. Ask the group to write down the actors and factors that influence the problem on sticky notes, and place the notes on the flip chart. (It may be useful to review the domains of analysis: Who has access to and control over resources and how would transformative social change come about to make access more equal? What are the knowledge, beliefs and perceptions about included, marginalized and excluded identities and how would transformative social change come about that would improve knowledge, belief and perceptions about marginalized and excluded identity groups?

THINK BIG
THINK THE IMPOSSIBLE

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CREATING A SYSTEMS MAP

How the Activity Is Done (Continued)

Who controls power and decision-making, and how would transformative social change come about that would address power imbalances? What are the different roles and responsibilities of identity groups and how would transformative social change come about that would make the roles and responsibilities more equal? What is the status of human dignity, safety, and wellness for each identity and how would transformative social change come about to transform the human dignity, safety and wellness for all identity groups?)

Each actor or factor should have its own sticky note. **30 MINUTES**

Group similar notes together and eliminate duplicates. Ask participants to identify those factors or drivers they believe most strongly influence the barriers and boosters to transformative change. Place this high-influence grouping at the center of the flip chart.

Facilitate a group discussion about how each of the actors and factors identified influence the problem, their levels of influence, and their relationship to each other. Cluster interrelated factors around the center point, arranging them so that those that influence each other are close together. Draw lines and arrows between the sticky notes to show relationships. A one-way arrow shows that the actor influences another actor. A two-way arrow shows that both influence each other.

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CREATING A SYSTEMS MAP

How the Activity Is Done (Continued)

A heavy line shows strong influence while a thin line shows weaker influence, and dotted lines show indirect influence. Revise the clusters and lines as needed until you find an arrangement that the group agrees upon based on the understanding of the context.

Remove some sticky notes that are not as essential, or add new actors. Once a draft map emerges, ask the group to pause and consider the following questions:

1. What does the map reveal about the prospects for long-term impact? For sustainability of transformative change?
2. What is missing? What is not fitting in?
3. What is connected that shouldn't be? What is not connected that should be?
4. Are there areas where progress could be made rather readily? Are there areas where progress might be more challenging?
5. Which items on the map are boosters to positive change? Which are barriers? Highlight areas that are working or not working.

Consider how your responses to these questions correspond to the actors and factors to which your project is connected. These are likely entry points for additional work. Save the flip chart map for use in the next activity.

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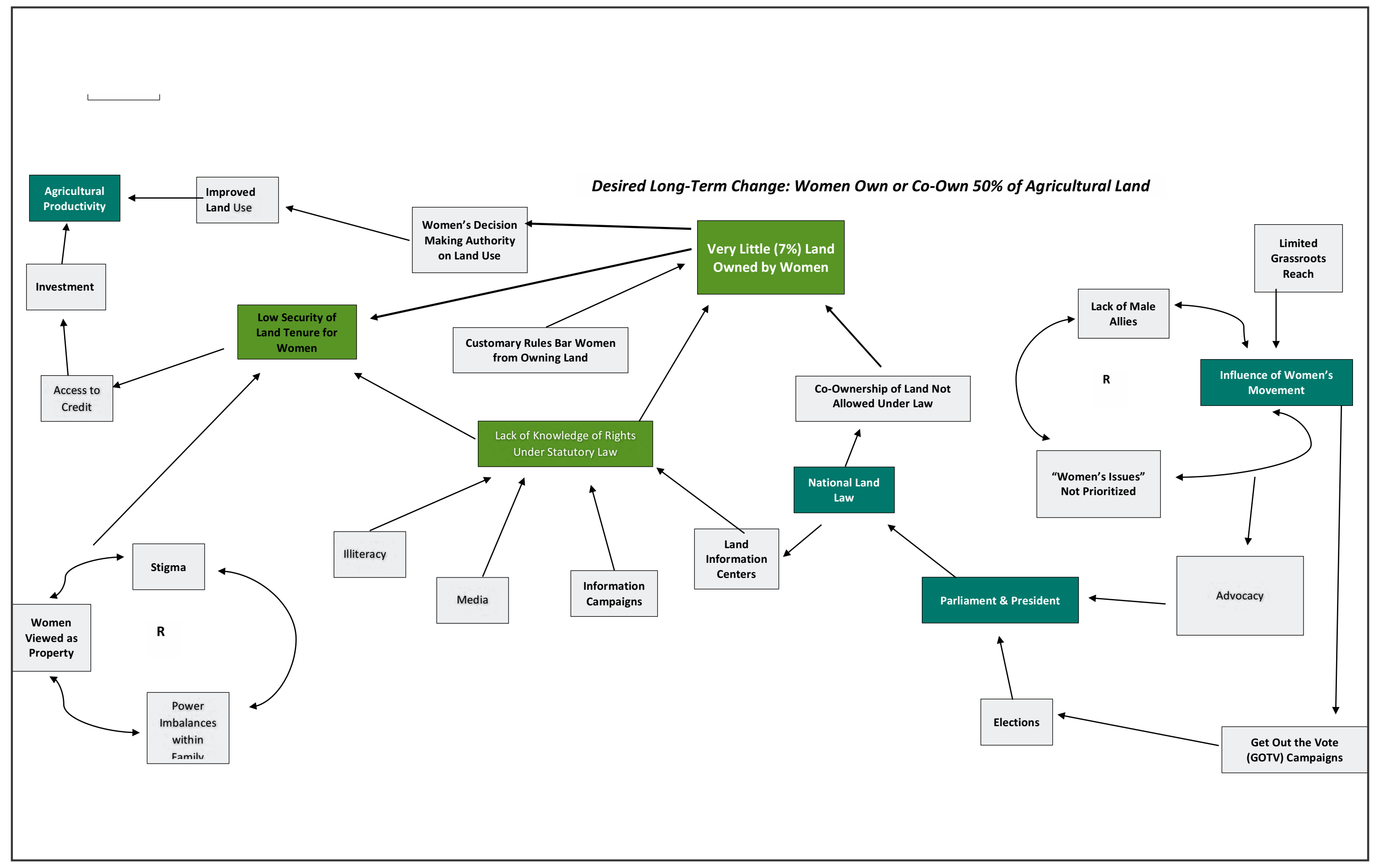
CREATING A SYSTEMS MAP

How the Activity Is Done (Continued)

The illustrative systems map (p.264) is based on a project in Uganda that seeks to increase the percentage of agricultural land owned by women.[23] The factors influencing women's land ownership are complex. They include socio-cultural practices within communities and families, structural barriers, and diverse actors. The map below is one way of depicting these factors and the relationship between factors so that the project team can more easily visualize where the project could have influence.



(see page 264 for full size)

Each arrow shows influence. For example, because the law does not allow husbands and wives to co-own land, land is owned by the husband alone. Because women do not own the land, they can easily be forced from it if their husbands divorce them or die. The team could draw "+" or "-" symbols next to the arrows to indicate the nature of the influence. For example, an increase in access to credit leads to increased investment (+).

CONTINUE ›

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[23] This scenario is linked to the women's access to land project shown in Phase II Step C Activity 1: Map Your Data and Findings. The scenario was inspired by the Uganda Country Profile in the UN Food and Agriculture Program's Gender and Land Rights Database. (http://www.fao.org/gender-landrights-database/country-profiles/countries-list/land-tenure-and-related-institutions/en/?country_iso3=UGA)

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CREATING A SYSTEMS MAP

How the Activity Is Done (Continued)

In some cases several factors may jointly influence each other. On this map we have depicted joint influence through two causal loops, both marked with "R" at the center to indicate that in these two cases the factors reinforce themselves. For example, when the influence of the women's movement grows, it encourages more men (male allies) to support what are often considered "women's issues" (such as removing barriers to women's land ownership), and when "women's issues" are prioritized, the women's movement has more influence.

Likewise, when the women's movement has less influence, women's issues are not as well prioritized, and they are likely to attract fewer male allies. This example depicts only the gender dimension of these actors and factors. Identifying and integrating sensitivity to other intersecting social identities (i.e., women with disabilities or from a disadvantaged ethnic group) will result in a clearer understanding of the inclusion situation in the system, and ultimately, a more effective response.

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INTERSECTIONALITY

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CREATING A SYSTEMS MAP

How the Activity Is Done (Continued)

The map also reveals that there are several entry points for contributing to the desired long-term change. These include increasing knowledge about rights under the law, advocating for changes to the law where necessary (i.e., the 1998 Land Act), addressing cultural traditions which devalue women, assisting the women's movement to improve its influence, and encouraging parliament and the executive branch to prioritize women's land ownership.

Although the project team may not be able to address all these factors, it can determine where it is most likely to have impact. A project working in local communities could help link grassroots women with national advocates, support local information campaigns to educate communities about women's rights, and integrate messages which value women's agency into the project's activities. A project focused on strengthening parliament could foster relationships with members of parliament, parliamentary staff, women's advocates, and research organizations to gather evidence about the likely benefits of increased women's land ownership (improved agricultural productivity) and could propose draft language for amendments to the existing Land Act. Such a project could foster coalitions across other identity-based advocacy organizations. A systems map might provide insights in to the role of the private sector as an actor of change, or as an actor maintaining the status quo.

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EMPHASIS ON
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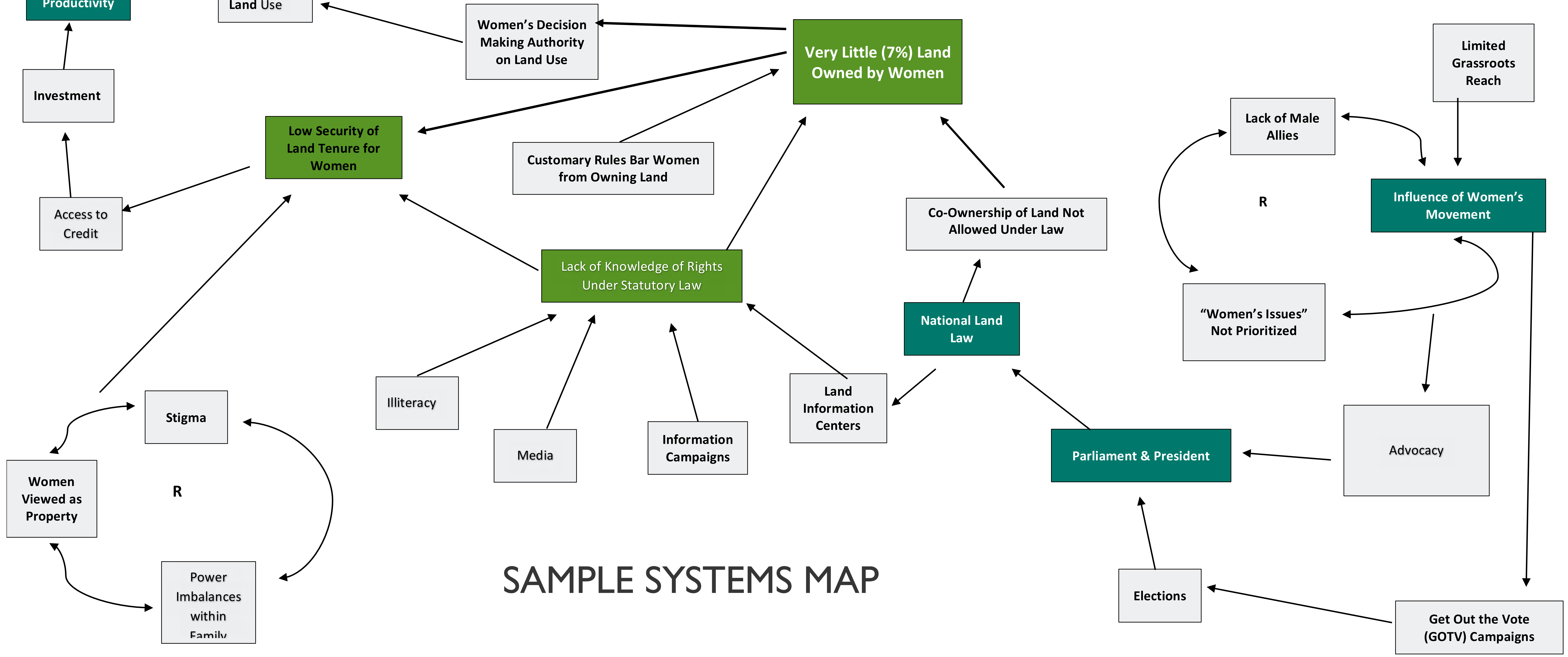
CREATING A SYSTEMS MAP

CONTINUE >

Desired Long-Term Change: Women Own or Co-Own 50% of Agricultural Land



Agricultural Productivity

Improved Land Use

Women's Decision Making Authority on Land Use

Very Little (7%) Land Owned by Women

Investment

Low Security of Land Tenure for Women

Customary Rules Bar Women from Owning Land

Access to Credit

Lack of Knowledge of Rights Under Statutory Law

Co-Ownership of Land Not Allowed Under Law

National Land Law

Limited Grassroots Reach

Lack of Male Allies

R

Influence of Women's Movement

"Women's Issues" Not Prioritized

Stigma

Women Viewed as Property

R

Power Imbalances within Family

Illiteracy

Media

Information Campaigns

Land Information Centers

Parliament & President

Advocacy

Elections

Get Out the Vote (GOTV) Campaigns

SAMPLE SYSTEMS MAP

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CREATING A SYSTEMS MAP

How the Activity Is Done (Continued)

Systems thinking and mapping can help a project team prioritize interventions that leverage boosters and champions in the system. In *Systems Thinking For Social Change: A Practical Guide to Solving Complex Problems, Avoiding Unintended Consequences, and Achieving Lasting Results* the author highlights the benefits of systems thinking, providing as an example "the idea that providing temporary shelter for the chronically homeless will end homelessness. But while shelters would seem to be the most humane and timely response to homelessness, they're actually an ineffectual "quick fix" that divert time, effort, and resources away from a more lasting, systemic solution such as providing permanent housing. A more systemic solution to homelessness also would improve relationships among all stakeholders, including the people who provide support services to the homeless as well as homeless people themselves."[24]

This example reinforces the power of participatory approaches, i.e., the people who are supposed to benefit from social change are "too often excluded" from the actual planning process intended to drive that change. Thinking systemically, drives development practitioners to focus on the people who have the most at stake. Thinking systemically and inclusively (recognizing and responding to disparities between and among diverse and multiple stakeholders with varying degrees and types of influence) will bring an even more powerful lens to the mapping exercise.

PARTICIPATORY
APPROACHES

CONTINUE ›

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[24] Stroh, David Peter. Systems Thinking For Social Change: A Practical Guide to Solving Complex Problems, Avoiding Unintended Consequences, and Achieving Lasting Results, 2015.

PHASE XC-IIS
STEP B

MOBILIZING FOR CHANGE

Background:

Here you can begin planning how your project can contribute to expanding agency, access, and power for marginalized or excluded groups. This type of change requires tackling entrenched norms, institutions, and power structures. Transformative change does not come unless there is a strong demand for it from a range of actors. Successful social movements often employ a range of strategies, such as reinforcing what is working well locally, and tools such as litigation and policy advocacy to affect laws and the way they are applied, civil disobedience to dramatize concerns, public campaigns to garner broader support, informing citizens about their rights, and monitoring the actions of those in power. In short, there are many pathways to transformative social change.

The activities in Step B: Mobilizing for Change help you define the most strategic advocacy role for your project, and specific actions to take. Consider your potential to influence norms, institutions, and power structures within the communities or technical areas in which you work. First, refine your understanding of entry points. Second, design an inclusion impact and sustainability plan.

See possible strategies on the following page.

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STEP B

MOBILIZING FOR CHANGE

Possible strategies include:

- Explore the feasibility of convening an advisory group, to determine how a project can mobilize to demand change
- Increase and broaden coalitions for change by forging connections between organizations that have common interests, including across diverse and intersecting identity groups
- Ensure actors driving change have access and opportunity to meaningfully engage in your project
- Highlight women and people from other marginalized or excluded groups in publications, social media platforms, and events to inspire others and counteract stereotypes
- Link local actors with regional or international networks
- Highlight the needs of local stakeholders to potential funders

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PHASE XC-IIS
STEP B

ACTIVITY 1
ENVISIONING SUSTAINED IMPACT

Description	Brainstorming, discussion, reflection	
Overview	Revise the systems map to consider how it would look if the problem were solved by actors in the community themselves, and reflect on the project's potential role in supporting those actors.	
Objectives	• To envision how relationships between actors and factors need to be altered for change to take place, and how the relationships can be renewed as the system changes • To identify the stewards for change over time • To determine specific actions the project can take to contribute to change	
Why do this activity?	This activity helps participants visualize how change can come about. Comparing the systems maps shows how actors currently not connected could, together, boost inclusion.	
Facilitator needed?	Yes	Creating a Systems Map (XC-IIS, Step A, Activity 2)
Facilitator needed?	Yes	Internal
Time	2-4 hours	
Materials	Flip chart, sticky notes, pencil, markers, highlighters, tape	
Participants	Implementation team, partners, participants	

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XC-IIS THE BASICS
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STEP B Mobilize for Change
ACTIVITY 1 2

ENVISIONING SUSTAINED IMPACT

How the Activity Is Done (Continued)

Post the flip chart systems map developed under Step A Activity 2 on the wall or distribute individual copies. Post a blank sheet of flip chart paper on the wall.

Give participants time to study and consider the original map. Are there any other changes they would make? **10 MINUTES**

Break participants into small groups and ask them to consider this question, "Envision how this map would look if the problem you want to address were already solved. What would the map look like?"

Guiding Questions:

- Which actors or factors would be added or removed?
- Which connections would be made or would increase?
- Which connections would decrease or be broken?
- Can any of the barriers change to boosters?

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ENVISIONING SUSTAINED IMPACT

How the Activity Is Done (Continued)

Have each group report. Discuss as a group and update the map. What patterns emerge? Where is the project situated? Can the project assist in bringing in the desired new actors, in strengthening connections between actors in ways that would help create the desired new map?

Can it influence current barriers to become boosters of change, or at least to become less of a barrier? **10 MINUTES**

Determine specific actions the project will take to contribute to the future state of the system. Consider whether these actions require adjustments to your sustainability plan, to the project workplan you developed in **PHASE IV STEP B ACTIVITY 1 INCLUSION-SENSITIVE WORKPLAN** or to the **INCLUSION ACTION PLAN** developed at the end of Phase IV. Consider how you will measure whether you are contributing to the desired change; develop indicators accordingly to track progress.

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PHASE XC-IIS
STEP B

ACTIVITY 2
MAKE AN IMPACT AND SUSTAINABILITY PLAN

Description	Brainstorming, discussion, technical advice	
Overview	This activity guides the team to articulate which inclusion activities are highest priority to deepen impact and sustainability. Develop a plan to ensure adequate resource allocation to implement and track progress in those areas. Create an impact and sustainability plan focused on contributing to lasting change in the project's operating environment, and on sustaining project benefits for marginalized or excluded groups.	
Objective	To create a detailed plan for sustaining priority inclusion benefits beyond the life of the project and contributing to long-term impact.	
Why do this activity?	An Impact and Sustainability Plan outlines concrete actions needed for timely impact and sustainability planning throughout project design.	
Prerequisite activity?	Yes	Creating a Systems Map (XC-IIS, Step A, Activity 2)
Facilitator needed?	Yes	Internal
Time	3-4 hours	
Materials	Systems map, handout of ideas, flip chart, sticky notes, markers, tape	
Participants	Project design and/or project implementation team, partners	

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MAKE AN IMPACT AND SUSTAINABILITY PLAN

NOTE TO THE FACILITATOR

Prior to the activity, skim this section and review the systems map. Be prepared to prompt participants to consider some of the illustrative actions listed as well as to engage with those who do not support change. Prepare six pieces of flip chart paper.

1. Label five sheets of paper with each of the earlier TAAP Phases (Phases I-IV and Cross-Section Section MEL). On each sheet of paper write two questions:

   "How does this phase inform our inclusive impact and sustainability thinking?"
   "What actions can we take, or contribute to, to maximize inclusive impact and sustainability planning in this phase?"

2. Hang these on the wall before the activity starts.

On the sixth sheet draw the simple action-planning matrix:

Phase or Section	Action to Maximize Impact and Sustainability	Deadline	Responsible Person	Resources Needed

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MAKE AN IMPACT AND SUSTAINABILITY PLAN

How the Activity Is Done

At the beginning of the activity, explain its purpose to participants. **1 MINUTE**

Ask participants to individually brainstorm responses to the two questions on each flip chart. Ask participants to write each answer on a sticky note and place on the appropriate flip chart. Encourage participants to think of as many responses as possible.

Ask for five volunteers. Assign one to each flip chart. Have the volunteer quietly read through and group the sticky notes around common actions/themes. **4 MINUTES**

Ask the volunteer to read the responses aloud and explain the groupings. **10 MINUTES**

Allow the group to discuss. Do they agree with the groupings? Have we missed anything? Should we add anything? **15 MINUTES**

Go to the sixth flip chart. For each of the opportunities agreed upon, populate the corresponding row on the matrix: identify the action that needs to be taken, the deadline for when it should be completed, and the person or partner institution responsible for ensuring the action takes place. **15 MINUTES**

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MAKE AN IMPACT AND SUSTAINABILITY PLAN

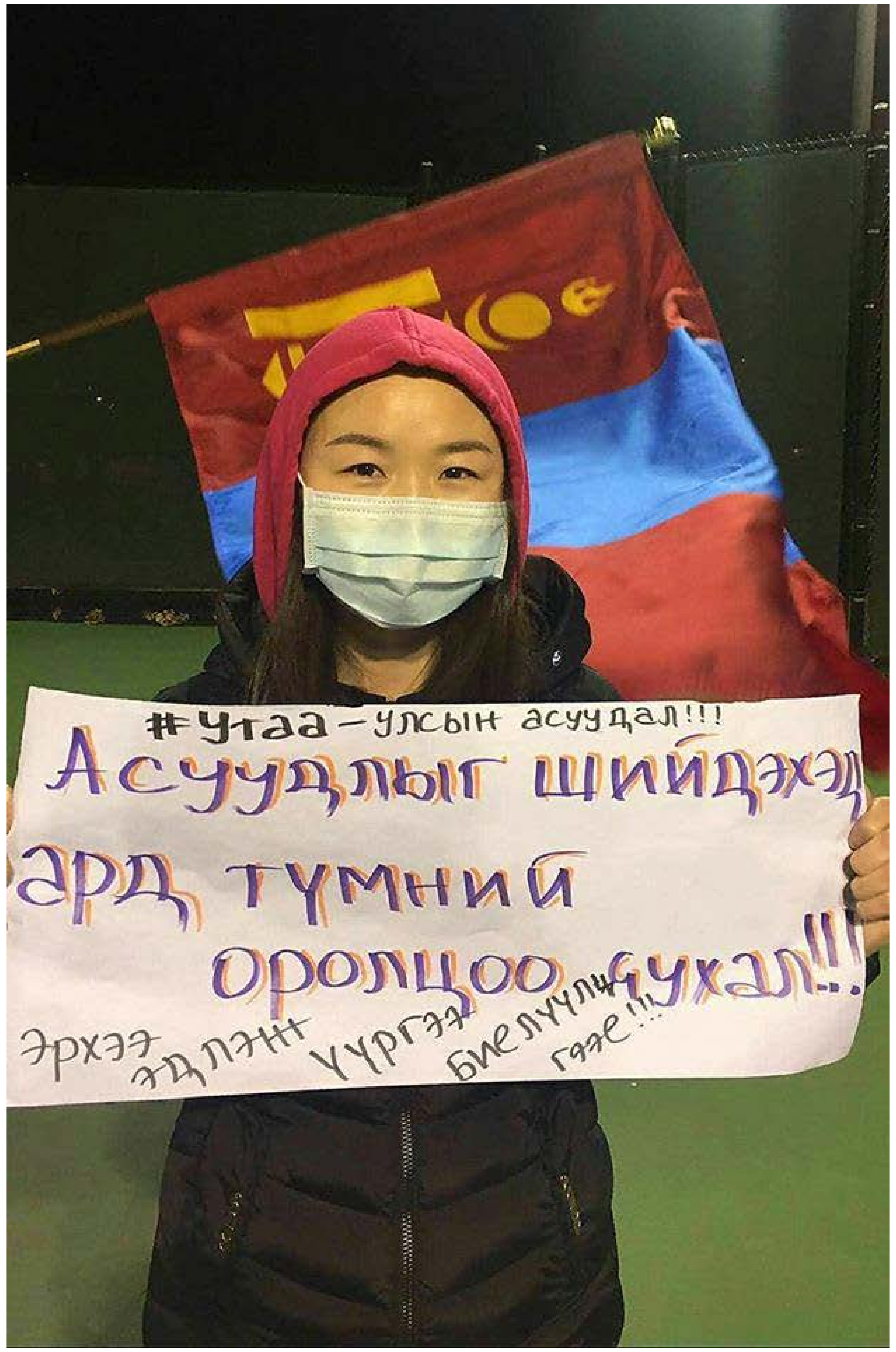
How the Activity Is Done (Continued)

Add this information to the project's overall impact and sustainability plan (if one exists) and to other relevant documents such as the monitoring and evaluation plan and annual workplans.

Review periodically to update, adjust, and track progress towards completion.

END OF XC-IIS

CONTINUE ›



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ANNEX I: *INTERSECTIONALITY*

What is Intersectionality?

An intersectional lens and programming approach recognizes that multiple social identities such as sex, gender identity, sexual orientation, disability, race and ethnicity intersect can interact and intensify inclusion and exclusion within society. These identities are affected by the broader existence of privilege and oppression in society. No person is singularly a woman, or disabled, or LGBTI and therefore intersecting identities must be appreciated and considered, particularly when designing inclusion-sensitive programs. The term intersectionality was coined in 1987 (although the concept dates back earlier) by Dr. Kimberlé Williams Crenshaw, a civil rights advocate and law professor, to help explain the dual oppression of African-American women.

Intersectionality has since become broadly accepted as necessary to the task of achieving the fully inclusive societies envisioned as part of the Sustainable Development Goals. Failure to understand Intersectionality may lead, for example, to rural women with disabilities being referred only to health and rehabilitation services, while being overlooked for women's economic empowerment programs which could also potentially benefit them. Staff, community leaders, and family members may assume that such a woman identifies solely as a person with disabilities, while failing to recognize her other needs based on other aspects of identity.

> *"There is no such thing as a single-issue struggle because we do not live single-issue lives"*
>
> – AUDRE LORDE

INTERSECTIONALITY

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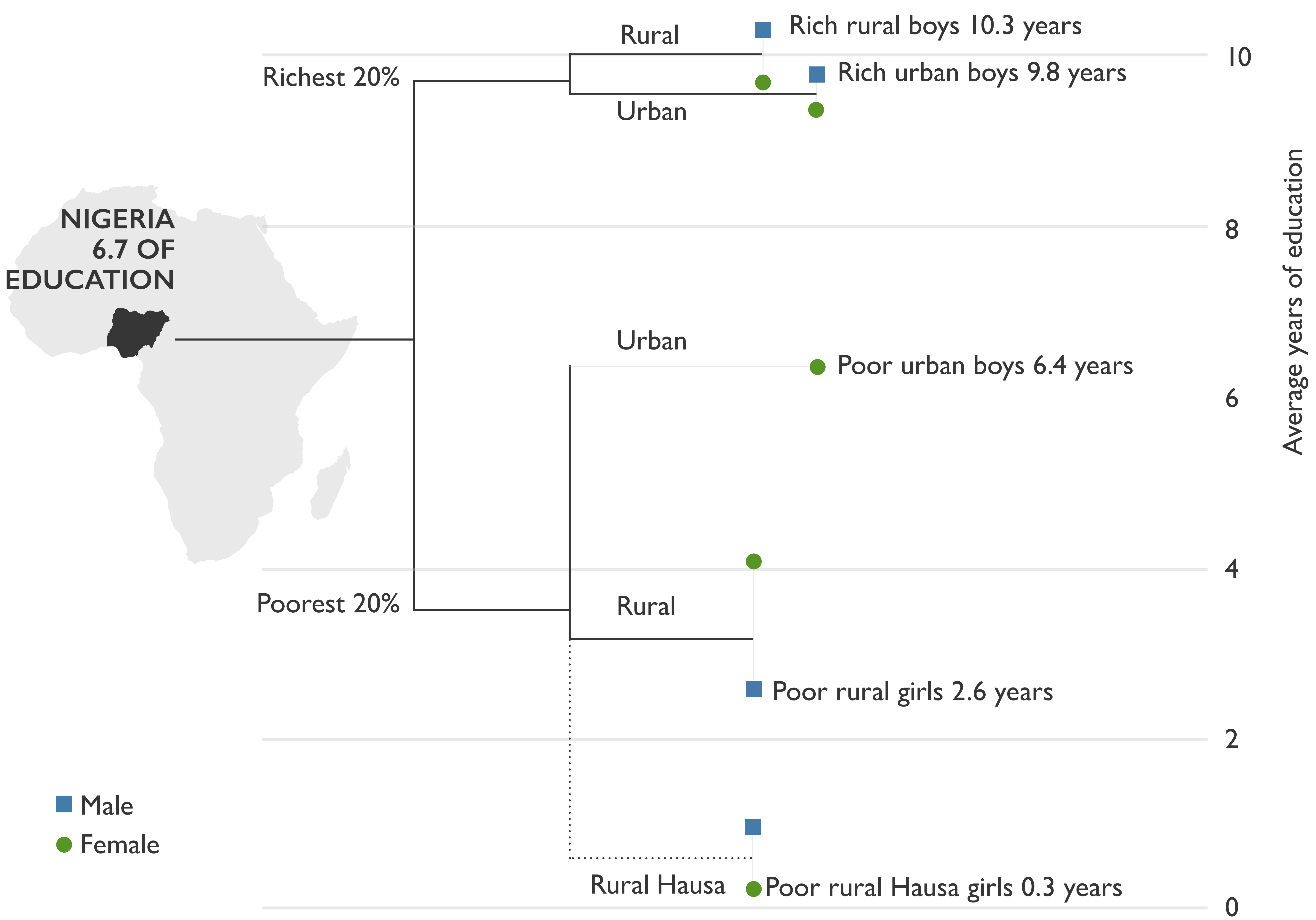
THE EDUCATIONAL INEQUALITY TREE:[25] MAPPING MARGINALIZATION



The Education Inequality Tree (taken from a 2010 UNESCO Education for All Global Monitoring Report: see below) further illustrates the impact of intersecting identities which privilege some identities (e.g., rich rural boys with an average of 10 years of education) while compounding the marginalization of others (e.g., poor, rural, Hausa girls with an average of three months). Experiences of advantage or disadvantage, power or marginalization, are compounded by multiple identities. These experiences can also vary between contexts or evolve over time.

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[25] Adapted from the UNESCO EFA Global Monitoring Report 2010

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What does intersectionality mean in the context of development work?

The use of an intersectional lens goes beyond just understanding the impact of different social identities on people's lived experiences. It means putting that understanding into practice, using intersectionality to design more inclusion-sensitive interventions for transformative social change.

In the TAAP approach, intersectionality is at the heart of the work, threaded through all the activities but most explicitly in **PHASE II, INCLUSION ANALYSIS.**

How does a TAAP Inclusion Analysis apply an Intersectional lens?

The analysis framework in **PHASE II, STEP C, ACTIVITY I: MAP YOUR DATA AND FINDINGS** maps data in a way that makes visible the intersectionality of identities. The activity guides practitioners through a process of placing key social identities on a spectrum of "Included, Marginalized, and Excluded." Practitioners can then identify which identities are most excluded across most or all of the six domains (law, perceptions and beliefs, access to resources, etc.) and where those identities overlap. Teams then discuss how intersectionality may affect the findings and recommendations of the inclusion analysis, adjusting the project design if advisable.

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What does a Social Inclusion Analysis hope to achieve with regard to Intersectionality?

- **FIRST, AN UNDERSTANDING OF HOW INTERSECTIONALITY AFFECTS AGENCY, ACCESS, AND POWER.**
  The Social Inclusion Analysis aims to understand which identities are affected, and how, so that project activities can be sensitized to consider Intersectionality.

- **SECOND, TO MAKE INTERSECTION-SENSITIVE RECOMMENDATIONS.**
  The intersectionality-based findings of an Inclusion Analysis may result in recommendations for interventions that address not only individuals from disadvantaged groups but also those who are disadvantaged at multiple levels. Project teams may decide to prioritize people experiencing multiple overlapping disadvantages (e.g., older women who are also ethnic minorities). A focus on programs that are directed towards those with the most complex and intersecting identities may have the additional benefit of also reaching those who have less complex identities but some similar overlapping concerns and needs (e.g., highly educated white women who may benefit from gender-based assistance but who do not face exclusion on the basis of ethnicity, sexuality, etc.).

- **THIRD, THE ABILITY TO CREATE INTERSECTION-RESPONSIVE WORKPLANS AND SOCIAL INCLUSION ACTION PLANS.**
  Development teams can and should take the Phase II Inclusion Analysis recommendations and translate them into concrete strategies for more effective outreach, either at the outset of program implementation or to form the basis for any necessary midcourse corrections.

- **FINALLY, TO CREATE INDICATORS FOR TRACKING PROGRESS AGAINST RESULTS.**
  A tracking mechanism (perhaps including a set of indicators or disaggregation categories) may be developed and applied to help monitor the progress on the extent to which various interventions consider intersectionality.

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How can the outcomes from intersectionality-sensitive findings, approaches, and recommendations be sustained?

- **BY BUILDING COALITIONS.**
  As organizations sharpen their focus to support and advocate for a particular identity group (e.g., women and girls, persons with disabilities, or older persons), it becomes increasingly important to understand the multiple forms of discrimination that persons of that identity group may face. There may be opportunities to join forces with organizations advocating on behalf of other marginalized or excluded identities that intersect, thereby leveraging shared political interests and resources.
- **THROUGH MORE EFFECTIVE ADVOCACY.**
  Analysis based on disaggregated data can highlight trends regarding those who have been (or are most likely to be) left behind in policies and practice. For example, if ethnicity, as it intersects with place of residence or wealth group, can be shown to affect health and education outcomes across a given context, it can reveal the need to address development gaps and issues of social discrimination even if those have proven difficult or politically fraught in the past. Advocates of transformative social change may use this data to convince policymakers to support increasing education or health services to particular populations or to strengthen anti-discrimination laws and measures.
- **BY BUILDING THE EVIDENCE BASE.**
  Civil society organizations can gather and analyze disaggregated data over time to build evidence that particular populations are disproportionately impacted by development gaps. This can inform advocacy efforts at local, national, and international levels, including reporting to international bodies that promote and monitor the status of human rights and development.

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SOCIAL INCLUSION ANALYSIS TERMS OF REFERENCE (ToR) TEMPLATE

The TAAP Inclusion Terms of Reference (TOR) defines the activities to be done and indicate the issues, budget and expertise related to a TAAP Social Inclusion Analysis.

Terms of Reference (TOR) are a strategy-level document that defines the tasks and duties required of staff or a project contractor, and highlights project background and objectives at a high level. The template on the right will help you to lay out the planned activities, expected inputs and outputs, project budget, working schedules, and job descriptions.

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WORKSHEET

WORKSHEET

PDF
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TOOLSHOP
Also available in the One-Stop Toolshop

TAAP
INCLUSION
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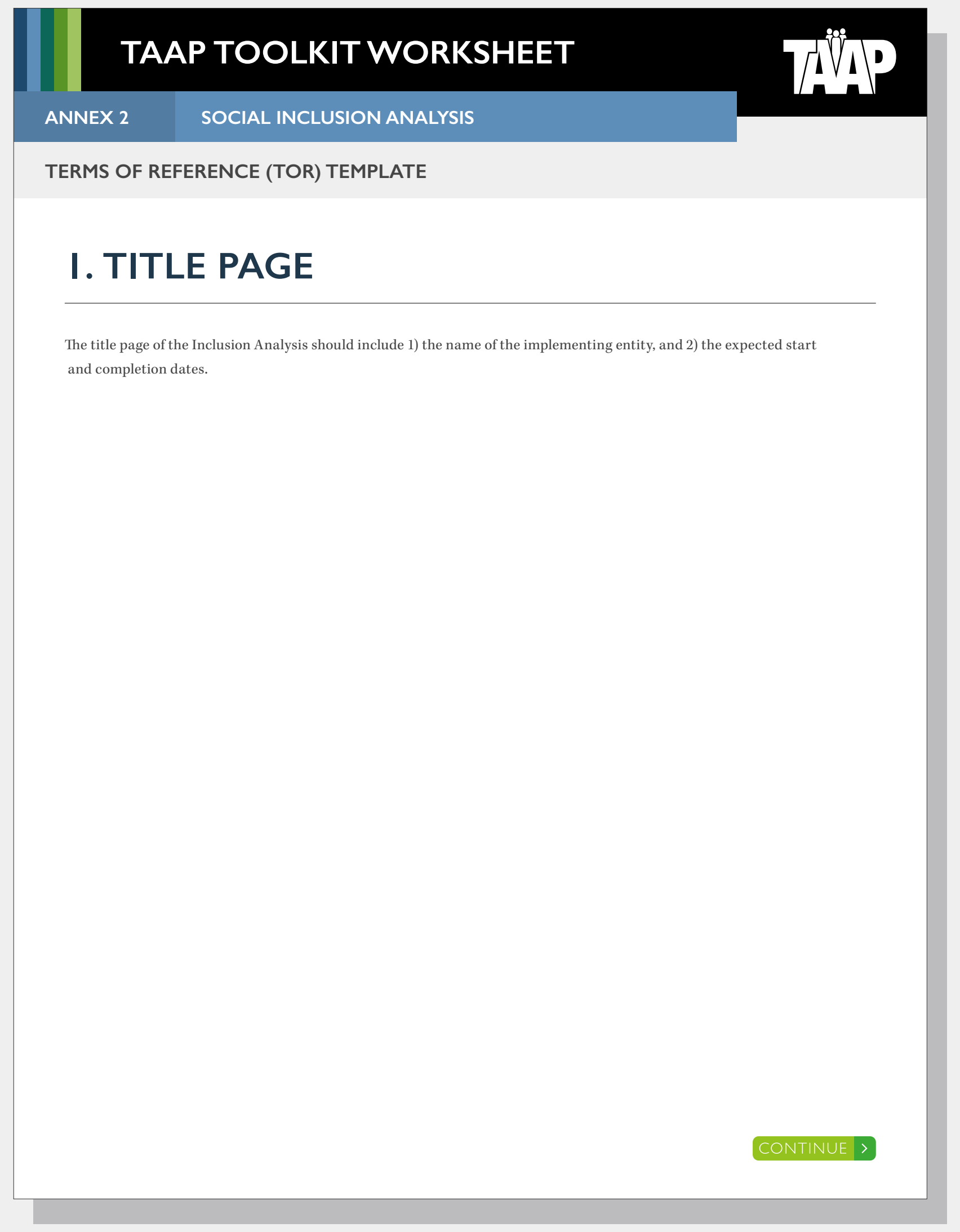

TAAP TOOLKIT WORKSHEET

ANNEX 2 SOCIAL INCLUSION ANALYSIS

TERMS OF REFERENCE (TOR) TEMPLATE

I. TITLE PAGE

The title page of the Inclusion Analysis should include 1) the name of the implementing entity, and 2) the expected start and completion dates.

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I JUST WANT TO... A GUIDE FOR TARGETED USAGE

Taking on the entire TAAP approach to transformative social change is a long-term endeavor. Every inclusion step you take makes a difference.

The information in ANNEX 3 supports you to integrate inclusion into specific components of your organizational and project-level commitment so that you are intentionally and persistently building your culture and capacity for transformative change.

For your convenience, this annex identifies resources within this toolkit and on the TAAP website that focus on a specific aspect of inclusion.

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SECTION I STARTING POINTS

Specific 'I Just Want to...." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... Start introducing TAAP to my organization	Developing a culture and commitment to inclusion starts with building political will. If you do not already have an organizational inclusion statement, you can find ideas for crafting one in **PHASE I, STEP B, ACTIVITY 2: ORGANIZATIONAL QUESTIONNAIRE.** Also, the TAAP scenarios (www.taapinclusion.org) and global snapshots (www.taapinclusion.org) on the website provide examples of how the approach has been used, and the learning that emerged. These are useful toward building the case that inclusion matters—and that it works.
I JUST WANT TO... Do a simpler version of the Inclusion Analysis	You can simplify some of the activities and worksheets, but ensure that the following three conditions are met: (1) Maintain the rigor of the methodology through a systematic approach to your inclusion analysis design and data management processes. This includes validating your findings and recommendations through consultation with local voices. (2) Ensure that your documentation of the analysis shows how you analyzed the current status of the agency, access, and power of included, marginalized and excluded groups. (3) Ensure that your approach is based on a clear understanding of how that status will be affected by your intervention and how your intervention contributes to transformative social change. **PHASE II, STEP A, ACTIVITY 1: DEFINE THE SCOPE** **PHASE II; STEP C: ACTIVITY 1: MAP DATA AND FINDINGS**

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SECTION I STARTING POINTS

Specific 'I Just Want to…." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... Start TAAP at Phase III. Can I do that if I haven't done an Inclusion Analysis?	You can start at Phase III provided you: apply your knowledge of the context; consult with key informants and representatives of local included, marginalized, and excluded identity groups; and conduct desk research to understand the local inclusion context (and to complete the activities named above). This will give you a great starting point before you move into Inclusive Implementation. We recommend you do the following in Phase III: ACTIVITY A.2 - CREATE A LOCAL SNAPSHOT ACTIVITY A.3 - WHO ARE THE STAKEHOLDERS NOW? ACTIVITY C.1 - MAKE YOUR PROJECT A TAAP SCENARIO ACTIVITY C.2 - BUDGETING FOR INCLUSION ACTIVITY C.3 - WHAT CHANGE IS POSSIBLE?
I JUST WANT TO... Have a framework for designing an inclusive project.	The core framework for designing an inclusive project requires integrating the 5 TAAP Principles across the project cycle. You can also use the guiding questions and illustrative actions in the Make Your Project a TAAP Scenario activity to adapt your project to the TAAP approach and analytical framework. Also, see the TAAP scenarios (www.taapinclusion.org) on the website. (PHASE III STEP C, ACTIVITY 1: MAKE YOUR PROJECT A TAAP SCENARIO)

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SECTION I STARTING POINTS

Specific 'I Just Want to...." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... Know which identity groups are included, marginalized or excluded in my context?	There are several activities that will help you with this important identification process. Choose the most relevant activity(ies) based on your needs or where you are in the process of understanding your context. PHASE I: RECOGNIZING EVERYDAY INCLUSION PHASE II: STAKEHOLDER ANALYSIS AND MAPPING PHASE II: IDENTIFY RESPONDENTS PHASE II: MAP INTERSECTIONALITIES PHASE III: WHO ARE THE STAKEHOLDERS NOW? PHASE III: PRIORITIZE INCLUSION ANALYSIS RECOMMENDATIONS PHASE III: VALIDATE PRIORITIZATION WITH KEY STAKEHOLDERS

END OF SECTION I

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SECTION 2 INTEGRATING INCLUSION IN AN EXISTING PROGRAM

Specific 'I Just Want to...." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... Ensure that my team has a common understanding and definition of inclusion, and that everyone in my organization and working on a project has the same baseline understanding.	Properly defining what we mean by inclusion is essential to promoting inclusive approaches at personal, organizational and project-levels. Creating a common understanding of inclusion includes adapting TAAP's definition of inclusion to align with your organization's mission and values, defining how inclusive approaches work in practice, the value it will provide, who will benefit, how we will know if we're successful, what risks are present, what is and isn't included, who owns the process, and so on. These require a lot of thought and preparation before what we traditionally think of as "getting started." You might begin by reviewing, together with your team, the **FIVE TAAP PRINCIPLES** to see how they align with your individual and organizational mission and value. There may be guiding principles of development programming that more closely align with your mission and values. Next, implement the activities in **PHASE 1: INCLUSIVE INQUIRY AND REFLECTION** to explore individual and organizational identity and inclusion sensitivity. Evaluate your inclusion sensitivity as well as the organization's policies and practices with regard to inclusion, including the organizational approach to ensuring that all team members share a common understanding, which might include inclusion-focused training and awareness raising events, team retreats, working groups, newsletters and integrating inclusion milestones in employee and team goals and objectives.

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Specific 'I Just Want to…." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... Ensure that my team is prepared when they come across exclusion and discrimination.	Start with building inclusion awareness in the context. The Recognizing Everyday Inclusion activity in Phase I increases stakeholder awareness of the signs of inclusion, marginalization, and exclusion. This activity can be carried out at the community level or at the project team level. The team can then engage local stakeholders in assessing which signs of inclusion, marginalization, and exclusion are relevant to the project. **PHASE I, STEP C, ACTIVITY I: RECOGNIZING EVERYDAY INCLUSION INDICATORS** Once teams become aware of the signs of inclusion, marginalization, and exclusion, they can monitor and address these barriers, and can proactively leverage boosters for change. **PHASE IV, STEP C, ACTIVITY I: MONITORING IBV AND OTHER FORMS OF EXCLUSION AND DISCRIMINATION** **PHASE IV, STEP C, ACTIVITY 2: PROMOTE OPPORTUNITIES FOR CHANGE.**

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SECTION 2 INTEGRATING INCLUSION IN AN EXISTING PROGRAM

Specific 'I Just Want to…." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... Integrate inclusion in work plans for existing projects.	Start by reflecting on how the **5 TAAP PRINCIPLES** can be integrated throughout the work plan. Then, see **PHASE IV, STEP B, ACTIVITY 1** Develop Your Inclusion-Sensitive Workplan which engages teams in: (1) Discussing how inclusion sensitivity and responsiveness align with project goals or whether stand-alone inclusion goals are needed; (2) Supporting integration of inclusion-sensitivity and responsiveness in the work plan, including implementation and management; (3) Considering boosters and barriers for marginalized and excluded identities to fully participate in and benefit from, project activities; (4) Prioritizing any desirable accommodations and modifications, and (5) Determining who is responsible for inclusion-sensitivity and responsiveness. Finally, use the guiding questions in **PHASE IV, STEP A, ACTIVITY 1: REFLECT ON THE DESIGN PHASE** to examine who benefits from your current programmatic planned results.

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Specific 'I Just Want to...." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... Integrate inclusion in work plans for existing projects.	Start with reflecting on and engaging your partners in a discussion of TAAP's Context Sensitivity principle. Identify the local power and marginalization dynamics and plan ways to avoid the negative and maximize positive effect. **PRINCIPLE 2: CONTEXT SENSITIVITY** 🔍 Then use the guiding questions in the **PHASE IV, STEP B, ACTIVITY 3 RISK MANAGEMENT** 🔍 through an Inclusion Lens to identify inclusion-related risks and explore possible mitigation strategies. Finally, use the **XC-MEL, STEP B, ACTIVITY 1 / PART 1: DECIDING THE LEVELS OF PARTICIPATION IN DATA COLLECTION PROCESSES.** 🔍 It contains guidance on processes to identify who should participate in data collection, and about ethical and risk-management considerations related to data collection and usage.
I JUST WANT TO... Address situations in the context where our inclusion efforts are meeting resistance.	See **PHASE IV, STEP C, ACTIVITY 3: ADDRESSING RESISTANCE** 🔍 where you will identify where resistance is, why it is occurring, and how to counter it effectively, persuading those in power to own and support inclusion principles and implementation.

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Specific 'I Just Want to…." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... Know if my M&E plan is inclusive?	XC-MEL, STEP A, ACTIVITY I: ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS XC-MEL, STEP C, ACTIVITY I: SILENT TALK

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SECTION 3 HIRING AND MANAGEMENT PROCESSES

Specific 'I Just Want to…." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... **Ensure that my team has greater inclusion awareness and personal development objectives.**	A good place to start is the individual reflection and rating scale exercise in **PHASE I, STEP A, ACTIVITY 2 INDIVIDUAL INCLUSION-SENSITIVITY RATING SCALE AND PERSONAL STATEMENT** which challenges staff to review current and needed practices to increase inclusion-sensitivity at the individual level.
I JUST WANT TO... **Ensure that our hiring processes are inclusive.**	Good practices for ensuring that hiring processes are inclusive are found in the **PHASE I, STEP B, ACTIVITY 2: ORGANIZATIONAL QUESTIONNAIRE** under "Talent Management" and in **PHASE IV, STEP B, ACTIVITY 2: DEVELOP AN ORGANIZATIONAL CULTURE AND CAPACITY FOR INCLUSION,** which has worksheets on recruiting new staff, onboarding, and managing inclusive teams. We recommend that recruiters proactively reach out to potential staff and consultants from marginalized and excluded identities for inclusion-focused and non-inclusion focused work.
I JUST WANT TO... **Ensure that personnel from diverse backgrounds are hired and reflect the diversity of beneficiaries and stakeholders?**	See above.

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SECTION 4 INCLUSIVE BUDGETS

Specific 'I Just Want to…." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... Understand the role that our finance team plays in promoting inclusion?	The finance team can promote inclusion through financial vehicles that recognize and incorporate the costs associated with including marginalized and excluded groups in a project. For example, if your target population includes people with disabilities, your finance team should ask: "Are you budgeting for visual or audio aids, or accessible venues for the participants?" **PHASE I, STEP B, ACTIVITY 2: ORGANIZATIONAL QUESTIONNAIRE** includes guiding questions and suggested strategies and actions for inclusive budgets and inclusive procurement. **PHASE III, STEP C, ACTIVITY 2: BUDGETING FOR INCLUSION** provides a worksheet for developing an inclusion-sensitive budget. **PHASE IV, STEP B, ACTIVITY 1: DEVELOP YOUR INCLUSION-SENSITIVE WORKPLAN** provides considerations for the financial costs of supporting inclusive practices.
I JUST WANT TO... Use a standard percentage to budget for inclusion in my overall project budget?	**PHASE III, STEP C, ACTIVITY 2: BUDGETING FOR INCLUSION** provides a worksheet for developing an inclusion-sensitive budget. TAAP Toolkit partner Mobility International USA (MIUSA) recommends allocating an additional 3-5% of total program costs and 1-3% of administrative costs as a reasonable starting estimate to ensure that all program participants can benefit fully and employees can do their jobs effectively. Budgeting for inclusion is dependent on the project and can fluctuate based on what is needed. This is why thoughtful completion of **PHASE III, STEP C, ACTIVITY 2 BUDGETING FOR INCLUSION** is so important.

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I JUST WANT TO... A GUIDE FOR TARGETED USAGE

SECTION 5 SUSTAINABILITY

Specific 'I Just Want to…." query	Where you can find it in this toolkit or on the TAAP website
I JUST WANT TO... Ensure my existing project is as sustainable as it can be	Start by reflecting on and engaging your partners in a discussion of **TAAP'S THINK BIG/THINK THE IMPOSSIBLE PRINCIPLE** which challenges us to continually look beyond our daily work routine, give priority to interventions that challenge systems and change norms, and to support actors in the community to address problems and renew solutions over time. See **CREATE A SYSTEMS MAP** and **MAKE AN IMPACT AND SUSTAINABILITY PLAN IN XC-IIS STEP B: ACTIVITY 2** to guide your sustainability planning efforts.

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- **NAVIGATION**
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- **DOWNLOADABLE**
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ICON *LEGEND*

ACTION ICONS

These action icons draw your attention to resources, statements, or key words.

KEY POINT

Identifies an important point to consider.

CROSS REFERENCE TO MEL

Identifies an opportunity to reflect on inclusive monitoring, evaluation, and learning section.

CROSS REFERENCE TO IIS

Identifies an opportunity to reflect on inclusive impact & sustainability (IIS).

EXERCISE CARE

Identifies a place to be aware of opportunities to safely include and engage people of all identities.

INTERSECTIONALITY

Identifies the concept of intersectionality—How our individual identities (race, gender, disability status, and age) interact in ways that can intensify the inclusion or exclusion we experience.

REFLECT

Identifies a place to pause and reflect on what you've discovered in this section or activity.

CONSULT WITH PARTNERS

Identifies a place where you consult with partners for honest engagement, mutual accountability and commitment to integrating inclusion.

STAND ALONE

Identifies an activity which supports you to integrate specific components of inclusion into your organizational or programmatic commitment.

CLICKABLE ICONS

These clickable icons are links to quickly find details, templates, worksheets, or other information.

FIND IT ONLINE

Link takes you to website and/or other online resource.

WORKSHEET AVAILABLE

Download worksheet in the One-Stop Toolshop.

MORE DETAILS

Link takes you to a detailed descriptions of this term.

PDF *Version*

WORKSHEET

Link takes you a PDF worksheet.

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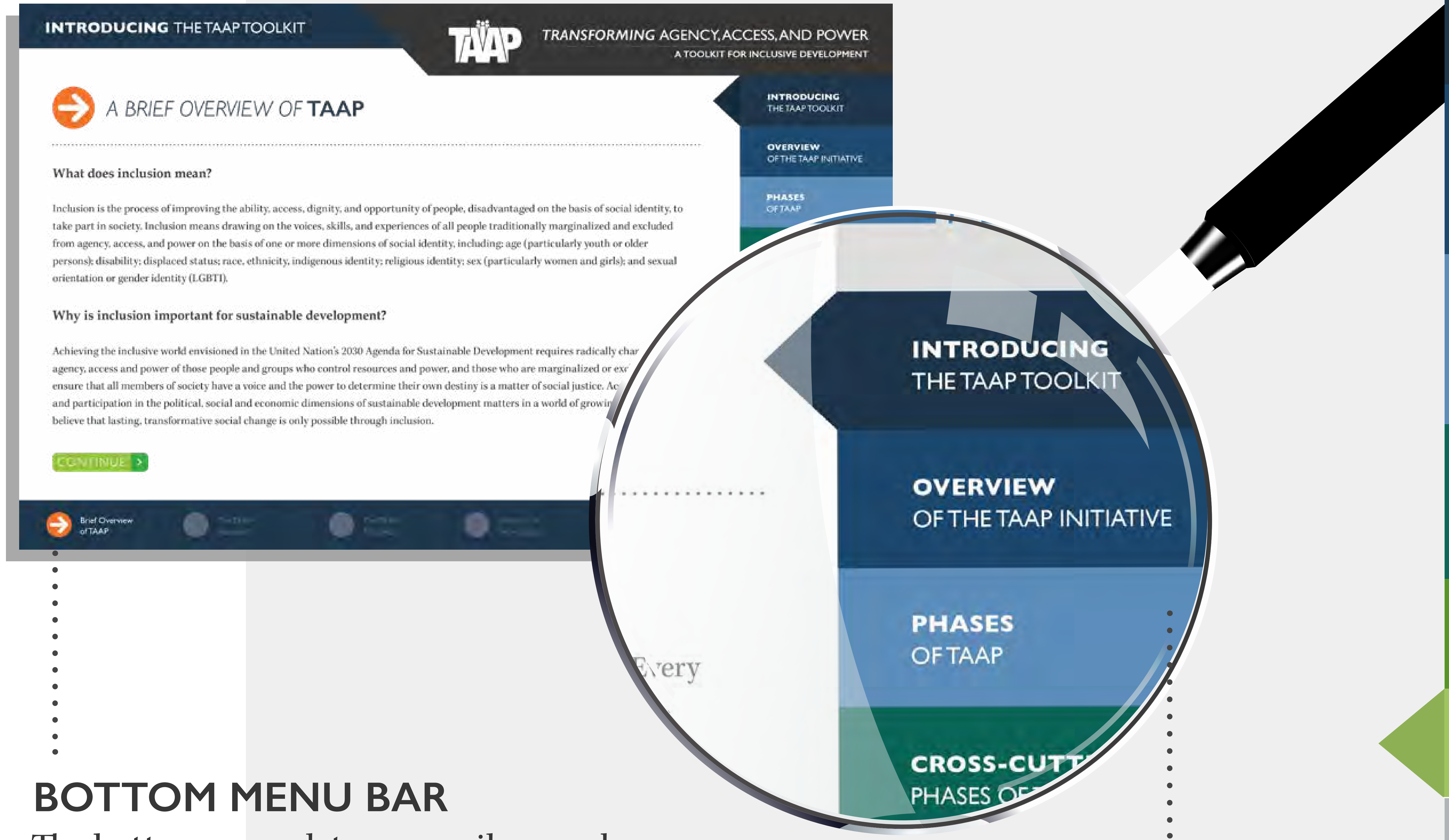
HOW TO USE THE TAAP TOOLKIT

This toolkit's interactive PDF technology makes it easy to navigate through the extensive material.

- No piece of content is more than two clicks away from any other, and the navigation sidebar and bottom menu let you easily see at all times where you are and how to get anyplace else.
- The toolkit also contains a glossary of terms, useful annexes, and the "one stop tool shop" where users can find downloadable versions of the handouts, worksheets, and other tools illustrated in this volume.
- Finally, along with links to materials on TAAP's own website, the toolkit contains links to other sites and helpful third-party resources.



A BRIEF OVERVIEW OF **TAAP**

What does inclusion mean?

Inclusion is the process of improving the ability, access, dignity, and opportunity of people, disadvantaged on the basis of social identity, to take part in society. Inclusion means drawing on the voices, skills, and experiences of all people traditionally marginalized and excluded from agency, access, and power on the basis of one or more dimensions of social identity, including: age (particularly youth or older persons); disability; displaced status; race, ethnicity, indigenous identity; religious identity; sex (particularly women and girls); and sexual orientation or gender identity (LGBTI).

Why is inclusion important for sustainable development?

Achieving the inclusive world envisioned in the United Nation's 2030 Agenda for Sustainable Development requires radically char agency, access and power of those people and groups who control resources and power, and those who are marginalized or exc ensure that all members of society have a voice and the power to determine their own destiny is a matter of social justice. Ac and participation in the political, social and economic dimensions of sustainable development matters in a world of growin believe that lasting, transformative social change is only possible through inclusion.

BOTTOM MENU BAR

The bottom menu lets you easily see where you are in any given section or activity. This is indicated by an orange arrow.

NAVIGATION SIDEBAR

The sidebar navigation allows you to see all of the Toolkit sections without any trouble.

THE SIDEBAR AND BOTTOM MENU

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PHASE I, STEP A, ACTIVITY I

Below you will find each of the worksheets available for individual download.

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GUIDING QUESTIONS FOR INITIAL REFLECTION

PDF *Version*

WORKSHEET

GUIDING QUESTIONS FOR BUILDING SOCIAL IDENTITY AWARENESS

PDF *Version*

WORKSHEET

SOCIAL IDENTITY WHEEL-BLANK

PDF *Version*

CONTINUE

TOOLKIT *WORKSHEETS*

PHASE I, STEP A, ACTIVITY 2

Below you will find each of the worksheets available for individual download.

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INDIVIDUAL RATING WORKSHEET — PDF *Version*

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TOOLKIT *WORKSHEETS*

PHASE I, STEP B, ACTIVITY I

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GUIDING QUESTIONS FOR INITIAL ORGANIZATIONAL REFLECTION

PDF *Version*

WORKSHEET

GUIDING QUESTIONS FOR BUILDING ORGANIZATIONAL SOCIAL IDENTITY AWARENESS

PDF *Version*

WORKSHEET

SAMPLE ORGANIZATIONAL IDENTITY WHEEL

PDF *Version*

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PHASE I, STEP B, ACTIVITY 2

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ORGANIZATIONAL QUESTIONNAIRE — PDF *Version*

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TOOLKIT *WORKSHEETS*

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Below you will find each of the worksheets available for individual download.

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EVERYDAY INCLUSION — PDF *Version*

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PHASE II, STEP A, ACTIVITY 1

Below you will find each of the worksheets available for individual download.

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DETERMINE THE SCOPE OF THE SOCIAL INCLUSION ANALYSIS

PDF *Version*

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STAKEHOLDER ANALYSIS MATRIX — PDF *Version*

WORKSHEET

STAKEHOLDER ENGAGEMENT WORKSHEET — PDF *Version*

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Below you will find each of the worksheets available for individual download.

* No Worksheets for Phase II, Step A, Activity 3 available.

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PHASE II, STEP B, ACTIVITY 1

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RANK DOMAINS BY LEVEL OF IMPORTANCE — PDF *Version*

WORKSHEET

IDENTIFY YOUR RESPONDENTS AND DATA COLLECTION TOOLS — PDF *Version*

WORKSHEET

HOW TO ASK QUESTIONS — PDF *Version*

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TOOLKIT *WORKSHEETS*

PHASE II, STEP C, ACTIVITY 1

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WORKSHEET

MAPPING DATA AND FINDINGS WITH TAAP DOMAINS AND TAAP COMPONENTS PDF *Version*

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* No Worksheets for Phase II, Step C, Activity 3 available.

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SOCIAL INCLUSION ANALYSIS REPORT-PRACTICE OUTLINE

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DEBRIEF THE INCLUSION ANALYSIS — PDF *Version*

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CREATE A LOCAL SNAPSHOT

PDF *Version*

WORKSHEET

GUIDING QUESTIONS TO SUPPORT LOCAL SNAPSHOT DEVELOPMENT

PDF *Version*

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QUESTIONS TO VALIDATE YOUR PRIORITIZATION

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MAKE YOUR PROJECT A TAAP SCENARIO — PDF *Version*

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REFLECTING ON THE DESIGN PHASE	PDF *Version*

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PHASE IV, STEP B, ACTIVITY 1

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WORKSHEET

INCLUSION CONSIDERATIONS FOR DEVELOPING OR UPDATING WORKPLAN

PDF *Version*

WORKSHEET

ILLUSTRATIVE ABBREVIATED WORKPLAN

PDF *Version*

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RECRUITING NEW STAFF — PDF *Version*

WORKSHEET

ONBOARDING — PDF *Version*

WORKSHEET

MANAGING INCLUSIVE TEAMS — PDF *Version*

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INCLUSION CONSIDERATION FOR RISK MANAGEMENT PLAN — PDF *Version*

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WORKSHEET

INCLUSION-SENSITIVE PROJECT CLOSE-OUT — PDF *Version*

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IDENTIFYING MONITORING IBV AND ACCESSIBILITY — PDF *Version*

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PLANNING TO ADDRESS RESISTANCE

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TOOLKIT *WORKSHEETS*

XC-MEL, STEP A, ACTIVITY 1

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WORKSHEET

ASSESS THE RELEVANCE AND COMPLETENESS OF YOUR EXISTING INDICATORS

PDF *Version*

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XC-MEL, STEP B, ACTIVITY 1

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WORKSHEET

RISK LEVELS FOR DATA COLLECTION — PDF *Version*

XC-MEL GRAPHIC

ARE MY METHODS AND TOOLS INCLUSIVE? — PDF *Version*

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XC-MEL, STEP B, ACTIVITY 2

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WORKSHEET

QUANTITATIVE ANALYSIS CHECKLIST

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XC-IIS, STEP A

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XC-IIS, STEP B

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ANNEX 2:
SOCIAL INCLUSION ANALYSIS
TERMS OF REFERENCE (ToR) TEMPLATE

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ToR TEMPLATE WORKSHEET — PDF *Version*

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www.helpage.org

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www.leonardcheshire.org/international

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www.miusa.org

Founded in 1989, the Women's Refugee Commission is a leading expert on the needs of refugee women and children, and the policies that can protect and empower them. The Women's Refugee Commission improves the lives and protects the rights of women, children, and youth displaced by conflict and crisis by researching their needs, identifying solutions, and advocating for programs and policies to strengthen their resilience and drive change in humanitarian practice.

www.womensrefugeecommission.org

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Thank you for your commitment to making the world more inclusive for us all.

We hope that these tools will help you take action against exclusion and towards transformative social change.