



International
Domestic Workers
Federation



International
Labour
Organization

Planning for Success:

a **Manual** for
domestic workers and their
organizations



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First published 2017

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Planning for success: a manual for domestic workers and their organizations

International Labour Office – Jakarta: ILO, 2017

ISBN 978-92-2-130009-0 (print) ; ISBN 978-92-2-130010-6 (web pdf)

Also available in Bahasa Indonesia: 978-92-2-830813-6 (web pdf); Tagalog: 978-92-2-830815-0 (web pdf); Cambodian: 978-92-2-830819-8 (web pdf); Tamil: 978-92-2-830821-1 (web pdf)

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Funding for this publication is provided by the United States Department of Labor under Cooperative Agreement number IL-23990-13-75K. Points of view or opinions do not necessarily reflect the views or policies of United States Department of Labor, nor does mention of trade names, commercial products, or organizations imply endorsement by the United States Government.

Front cover photo – Hong Kong Federation of Asian Domestic Workers Unions (FADWU)

Photo credit: Rob and Ivan



IDWF-ILO-PROMOTE-Jala PRT Regional Training for Trainers of Domestic Workers: Plan for Empowerment and Change, Indonesia

Photo credit: IDWF

Foreword

Domestic workers take care of the well-being of families, and enable labour markets, companies and societies at large to flourish. But, their working conditions are not the same as those of other workers. They often work long hours at meager wages, and are usually not protected by labour laws and social policies. Domestic work is undervalued as it is considered a women's job that does not merit adequate pay. Domestic workers also often come from groups and communities that are historically discriminated and, therefore, disadvantaged, due to their gender, race or ethnicity, colour, caste, religion, social or national origin, class, or migrant status.

In order to redress these inequalities, domestic workers have organized in various parts of the world for many decades. These organizations represent the voice of the many millions of women and men who work in the households and homes of others to defend their rights, advocate and negotiate for labour and social protection like other workers, and take part in decision-making on economic, labour and social laws and policies that affect their work and life. Organizing has been challenging for domestic workers, as they work in isolation in individual households, and they face severe time constraints. In addition, laws regulating labour, civil society, women's or migrants' organizing can make it particularly difficult for domestic workers to join, form and lead organizations. This is a major drawback in the Asia and Pacific region.

Over the past decade, much progress has been made, however. Domestic workers' organizations have been organizing in many different ways, as local groups, associations, trade unions, networks, collectives and/or cooperatives. A large number of domestic workers' organizations was founded in the last few years, thanks to the world-wide campaign on decent work for domestic workers led by the International Domestic Workers' Network (IDWN) and the adoption of international labour standards – Convention No. 189 and Recommendation No. 201 on decent work for domestic workers – by the member States of the International Labour Organization (ILO) in 2011. In 2013, domestic workers' organizations worldwide turned their network into the International Domestic Workers Federation (IDWF). Since then the IDWF has been growing steadily, from 48 founding members in 42 countries to 63 affiliates in 51 countries by mid 2017.

Domestic worker leaders and members need to learn how to plan for success to build strong and sustainable organizations. Planning is an under-rated activity in many organizations, left mostly to the leadership. However, planning is crucial to any organization if it wants to fulfill its goals. Everyone – leaders, members, and partners – should take part and be involved fully in the planning process AND in making the plan a reality. Effective planning is very important for membership-based voluntary organizations, like those of domestic workers, which have limited assets and funds, but are rich in human resources. Effective planning gives them a much better chance to achieve what they want.

This manual aims to help domestic workers and their organizations to understand and learn how to plan for success. It explains what is effective planning, and why planning can help domestic workers to realize both their organizational and personal goals. It provides planning tools and shows how to plan effectively for successful results.

The manual was developed by the IDWF and the ILO under the PROMOTE Project with financial support from the US Department of Labor (USDOL). The Project aimed at promoting decent work for domestic workers and eliminating child labour in domestic work, among others by building institutional capacities of domestic workers' organizations. The manual is the last in a series of three joint IDWF-ILO publications for domestic workers and their organizations produced with support of the PROMOTE Project. The first is a handbook on how to tackle child labour in domestic work which aims to strengthen the role of domestic workers and their organizations in eliminating exploitative, harmful and hazardous child domestic work which is still quite common in many countries in the Asia and Pacific region. The second provides eight good practices from domestic workers' organizations and IDWF affiliates in Asia, sharing experiences and expertise, "do's and don'ts", and lessons in areas such as how to build sustainable domestic workers' organizations, how to promote decent work and empower domestic workers through job matching, skills training, unionizing and cooperative development, and how to commit employers and governments to provide decent jobs to domestic workers and to fight child labour in domestic work.



Leaders of the Cambodia Domestic Workers Network (CDWN) meet new members, Cambodia
Photo credit: Yim Sothy and Samphous Von

We thank the main author of this trainers' manual, Elsa Ramos-Carbone, and the participants of the two regional training of trainers' workshops in Indonesia and in Uganda in 2016 who helped to field-test the manual. Our thanks also go to the following individuals whose assistance and support were crucial in the production of this manual: Fish Pui Ip, Peng Choi and Yee Ting Ma of the IDWF, Simrin Singh, Arum Ratnawati, Mohammed Nour and Arun Kumar of the ILO, and to Richard Baker, Michèle Karamanof and Nelien Haspels.

We hope that this manual will inspire domestic workers, their organizations, and their supporters, like the trade unions, women's, human rights and migrants' organizations, to build strong organizations of domestic workers. As it is only through organizing and collective action in the labour, economic and social spheres that domestic workers will obtain respect and the rights afforded to other workers to decent jobs that earn a decent living, and to access labour and social protection throughout their lives.

Elizabeth Tang
IDWF General Secretary

Michiko Miyamoto
Director, ILO Country Office for
Indonesia and Timor-Leste

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Abbreviations and acronyms

C189	the Convention Concerning Decent Work for Domestic Workers
CSO	civil society organization
FADWU	Federation of Asian Domestic Workers Unions
IDWF	International Domestic Workers Federation
ILO	International Labour Organization
KUDHEIHA	Kenya Union of Domestic, Hotel, Educational Institution, Hospital and Allied Workers
NDWM	National Domestic Workers’ Movement, India
NDWT	Network of Domestic Workers, Thailand
NDWU	National Domestic Workers’ Union India
NGO	non-governmental organization
SMART	specific, measurable, achievable, realistic and relevant, and time-bound and timely
SWOT	strengths, weaknesses, opportunities, threats



Training of Trainers' Workshop for domestic worker leaders from South Asia, Sri Lanka
Photo credit: IDWF

The manual – Aims, contents, how to use



Aims

This manual is mostly for domestic workers and their organizations. It aims to help you :

- understand the importance of effective planning for your organizational and personal success;
- know the principles, parts, and processes that make for effective planning; and
- apply in practice the techniques and tools of effective planning.



Contents

The manual has two modules:

Module 1: Effective planning for organizational success.

Module 2: Domestic workers: Planning for empowerment and change at the personal level.

Each module starts with a guide page containing the aims, a list of the activities, handouts and tools, and a summary timetable for training workshops and group discussions.

The activities include group work, brainstorming, and other group and personal exercises. Activities stimulate personal and group ideas and sharing. Each activity sheet contains its aims, the estimated time for the activity, the list of handouts and materials for the session, the step-by-step training process and the key messages.

Handouts and tools give essential information on various topics, case studies, and good practices that are important for domestic workers and their organizations. You can use these to introduce sessions, prepare slide presentations, and to start discussions. You can add case studies and examples based on your own experience or those of other domestic workers' organizations. You can photocopy and distribute the handouts or tools for participants to use during the session or after the training when they organize their own planning activities. Each handout ends with a list of sources for further reference.

Materials list the equipment, forms, cards or any other things that you may need to prepare before you start the activity and will use during the activity.



Check, prepare and photocopy any handouts and materials before a session starts.

Most of the tools found in Module 1 are "generic", meaning that they can be used by anyone or any group, at any time, for planning anything: an event (e.g. a general assembly of your domestic workers' organization, or a meeting with a local government body), a campaign (e.g. for the ratification of **the Convention Concerning Decent Work for Domestic Workers – C189** – or for social security coverage for domestic workers), or your personal plan to improve your skills or income. These tools will also be used in Module 2, which focuses on personal planning.



How to use the manual

This manual can be used for personal learning or for training activities, discussions, and meetings – in particular, for planning sessions for organizational development or restructuring, campaigns, or events. A trainer is required for group learning. Notes for trainers are found at the end of the activity sheets. Individuals or groups familiar with the planning process, or who may have already done planning exercises, may use the manual to review or revisit ideas, tools, or techniques.

The manual promotes the experiential learning method. Its contents are practical and experienced-based, and are geared towards learning by doing and reflection.



Notes for Trainers

- * Effective planning is a step-by-step process. When using the manual for training, you should follow the sequence of activities so that participants can understand the logic of the planning cycle.
- * Identify what knowledge, experience, and skills the participants already have about planning. Have they done planning exercises? What have they learned?
- * Use the activities and discussion to share knowledge, experience, and skills. Pay particular attention to the key messages in the activity sheets.



Domestic workers joining the Women's March to stand up to fear and hate, USA
Photo credit: National Domestic Workers Alliance (NDWA)

Coming to terms: Key planning definitions

For this manual to be useful, care must be taken when translating or adapting it for domestic workers and their organizations in the Asia-Pacific region and elsewhere. We all come from different backgrounds, cultures, and experiences; as a result, there may be disagreements or confusion about definitions for common planning terms in English. Often, key words – separately and together – have different meanings for different people, even for those who speak the same language. This can become a barrier to effective planning. It is important to ensure from the beginning that there is a common understanding amongst everyone involved of the meaning of the words and phrases used. This is particularly true for the words vision, goals, objectives, outcomes, strategy, outputs, activities, inputs and indicators.

The first rule is: **Make sure that key concepts are easily understood by the users.** In many cases, the exact meaning of an English word or expression may not be found in, or translated exactly into, Bahasa Indonesia, Hindi, Thai or other languages. In some cases, an explanation may be necessary.

A second rule is: **Think of a phrase combining easily-understood words in your language, which together explain the idea or concept.** Do not be afraid to say it in your own words.

Here is a list of words and phrases, with their meanings and explanations, to guide you in translating and using this manual. For planning on a personal level, these terms can also be used. Simplify and customize them according to your situation and needs. Most of the examples are taken from the Five-Year Strategic Plan of the IDWF for 2016–2020 (see H1.4).

Core values

Core values are at the centre of your organization. They are what your organization stands for, and what it believes is most important. Core values are part of the mission, vision and goals of your organization, and are essential to effective planning. Core values are often expressed in statements that begin with phrases such as “we believe,” “we care about,” “we value,” or “we commit to.” People join or support your organization because they share or believe in your core values. An organization’s constitution or statutes set out its core values, e.g. transparency, accountability, internal democracy. Often, core values are written in a statement. An example is the IDWF’s statement: “The IDWF is a membership-based, democratic, global organization of domestic and household workers. The IDWF believes that domestic work is work, and all domestic and household workers deserve to enjoy the same rights as all other workers.”

Mission

A mission statement gives **the purpose** of your organization. It answers the question “Why do we do what we do?” Your organization’s mission statement should come from core values and should last for the lifetime of the organization, with small changes along the way to ensure that it is consistent with your vision and vice-versa. A mission statement should not be a list of everything you do so that you can’t be distinguished from other organizations. Rather, it should be clear on why you do what you do – for example: “Ensuring the rights of domestic workers and household workers to decent working and living standards, as per ILO Convention No. 189.”

- * The aims of an activity say what may be learned from it. Look carefully at the aims and think about how to achieve them. Explain the aims at the start of each activity, so that everyone knows what to do and why they are doing it.
- * Prepare for every session and activity. Check the handouts, materials and equipment and make photocopies to give to participants before a session starts. Make sure that you have the information your participants need in order to think about the subject, decide what they want to do, and how they want to do it.
- * Change or adapt any activity in this manual according to the number, profile, background, needs, and expectations of the participants; the training budget; time available; and the availability of material required. For instance:
 - a. Combine activities or shorten them.
 - b. Schedule the training over a specified period (for example, three or four consecutive Sundays; avoid long breaks; give homework).
 - c. Coloured cards or paper may be replaced by sheets of white paper that are cut differently or marked with different signs.
- * Be creative. Encourage participants to come up with ideas to solve problems when they arise.
- * **The tasks of moderators and reporters:** At the start of the first group work, take time to explain the roles and tasks of the moderator and reporter. Be sure that these roles rotate among the participants, as part of their learning experience. The moderator organizes the flow of the discussion, keeps the group focused, manages the time, and makes sure that everyone participates and no one dominates. The moderator should remain neutral and not give personal views. The reporter listens carefully and takes down the important things being discussed. She or he must be objective, accurate, and brief in the report. Some activities in the manual include a reporting form to help the reporters.

Vision and goal

A **vision** statement is a description of **what you want your organization to become in the future**. It answers questions such as: “Where do you want to be in three or five years?” Or “If you could create the organization of your dreams, and have the effect you most want, what would your organization be like in 2020?” Vision statements inspire action and get everyone working together toward the same outcome. Similarly, a **goal** is something of much importance that you are **aiming for in the future. It is the long-term result of your plan**. It says what your organization hopes to achieve in a clear and exact way. Your vision and goal are linked to your core values and mission. For example, the IDWF vision and goal in its Strategic Plan for 2016-2020 is: “By 2020, a strong, democratic, and united domestic and household workers’ global organization will be contributing to the protection and advancement of the rights of its 670,000 members, and the rights of domestic and household workers everywhere.”

Other common terms for the vision and goal of organizations are: ‘overall objective’ (used by the IDWF) or ‘development objective’ (used by the ILO). Whatever the term used, **the goal is the big thing that you want to achieve** and which will make a real difference to your members, potential members, and society – or to your life, if it is a personal goal. An example of a personal goal could be: “By 2020, I will have my own apartment.”

Objectives, outcomes and strategies

Immediate **objectives** are specific, measurable statements of what you will do to achieve your goal within a certain time. Immediate objectives are milestones, that you need to reach to achieve your goal. The IDWF uses the term “immediate objectives”, as distinct from its overall objective or goal. Its Five-Year Strategic Plan states as one immediate objective: “By 2020, 670,000 domestic and household workers represented by 80 affiliated organizations in at least 60 countries are organizing to increase their power to affect the decisions that affect their lives, are actively contributing to the strength of their workers’ organizations, are engaging with the work of the IDWF, and taking ownership of the federation.”

Outcomes are the changes in awareness, attitude, skills, knowledge, behaviour, or status that you want to see in a person or group of people, resulting from the achievement of your objectives. Outcome-based objectives are desirable because they identify the change that must happen for your objective to be accomplished. As an example, Outcome 1 of the IDWF Strategic Plan reads: “By 2020, the IDWF will have built and strengthened its organizational structure and operations to accommodate a membership of 670,000 domestic and household workers (an increase from 330,000 in 2015) represented by 80 affiliates in 60 countries, ensuring that domestic and household workers everywhere who want to organize have the support they need to do so; and a global data base resource for domestic worker organizations and researchers.”

A **strategy** is a summary statement of “what you want to do, for whom, with whom and how”. Strategies are practical ideas about how you will make the best use of your resources to achieve your objectives and obtain the outcomes you want. Strategies answer the question: “How will we go about achieving our goals and objectives?” Strategies describe a general approach or methods, not specific activities or projects. Examples of the IDWF strategies to achieve its immediate objective by 2020 are: 80 affiliates in at least 60 countries are “participating in IDWF decision-making processes; participating in and leading strategic campaigns to improve the lives of domestic workers; providing capacity building for organizations and leaders; representing the IDWF publicly and in external communications; and taking action in solidarity with other IDWF affiliates.”

Outputs, activities, inputs, and indicators

Outputs are the results of your activities, or the specific things you plan to do/have done to help to achieve your outcomes and objectives, thus moving towards achieving your goal. They are the visible evidence of your plan in action. Examples include: a training manual on child domestic work; a certain number of domestic workers trained in household technology; or a number of organizers trained.

Activities are the specific actions (for example, programmes, projects, or events) that you plan to do for a determined period of time (often, annually). These are usually prioritized and grouped in a work plan or plan of work. Activities lead to realizing outputs that must be accomplished to achieve a stated objective. When defining activities, always indicate which individuals or groups are responsible for carrying them out.

Inputs are the things you need to have to be able to carry out activities, produce outputs and achieve the objectives/outcomes and goals of an organization or a person. The most important inputs are people (human resources, like yourself, other domestic workers and persons who support domestic workers). Money (financial resources) is another important input to realize your plans. Another important input for domestic workers and their organizations is the time they can spend to meet, discuss and carry out joint activities.

Indicators measure whether you are on track in undertaking activities, producing outputs, and reaching your objectives, outcomes, and longer-term goal, vision, and mission. Success indicators show the progress of work plans and the progress towards your objectives and goal. During the planning process, specific success indicators are discussed and agreed upon. Indicators to measure success can be set at each level. For activities: Was the membership enrolment form printed? Or: Did the meeting to finalize the organizing plan for new members take place? If not, why? For outputs: Was the membership enrolment form for new members produced? Or: One-third of 100 trained domestic workers became organizers who attracted 3,000 new members to the organization.

A word about tools and techniques

A few planning tools and techniques in this manual will probably be the most difficult to translate, as these are acronyms of English words. Perhaps SMART and SWOT (see T1.1 and T1.2) – which are among the most widely-used planning terms – have equivalents in your language. Find out if this is the case; otherwise, find a symbol or translate the words in the acronym and combine the first letters together (and if the acronym makes sense, so much the better).

Sources

Glossary of strategic planning terms, <http://www.navaa.org/sp/toolkit/SP%20glossary.pdf>.

Toolbox – Tip sheets, Planning to win: the just enough guide for campaigners, Spitfire Strategies and Moore Foundation, <http://planningtowin.org/toolbox/5395f008611b1e044d>.

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"Smart Domestic Worker" campaign, Thailand
Photo credit: Pi Noy from HomeNet

Module 1 – Effective planning for organizational success



Strategic planning workshop - Strengthening trade unions of domestic workers, Brazil
Photo credit: IDWF

Guide page

Module 1 of the manual is about the “ABC” of effective planning: what it is; why it is important; how it is done; and who does it.



Aims

After completing this module – in a group or individually – you are expected to:

- Understand why effective planning is most important to the success of your domestic workers' organization.
- Know the principles, parts, and processes in effective planning.
- Be able to apply in practice the tools and techniques of effective planning, to help you achieve your organizational goals.



NOTE

Part 1: Successful planning in domestic workers' organizations. Activities A1.1 to A1.10, and handouts H1.1, H1.2, H1.4 and H1.5 are about learning how to plan effectively in domestic workers' organizations. The first four activities explain what planning is, why it is needed and what are the basic planning principles and parts. Activities 1.5 to A1.8 go through the planning cycle of organizations part by part. Activity 1.9 is about prioritizing, and A1.10 is a practical exercise on how to develop a plan of action for organizational success.

Part 2: Developing a successful organizing campaign plan. Activities A1.11 to A1.15, and handouts H1.3 and H1.5 are specifically about learning how to plan a successful organizing campaign plan. Activities 1.11 to A1.15 can form a stand-alone training programme on organizing. The first four activities serve as an introduction to A1.15, a practical exercise on how to draw up an organizing campaign plan for a domestic workers' organization.



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Timetable for Part 1 – Successful planning in domestic workers’ organizations

Activities A1.1 – A1.10

ACTIVITY	AIMS	TIME
A1.1: How do you plan? What is planning?	<ul style="list-style-type: none"> To look at the way you plan. To understand what is planning. 	60 minutes
A1.2: What is effective planning? Why is it needed?	To understand: <ul style="list-style-type: none"> What is effective planning. Why planning is important for domestic workers and their organizations. 	100 minutes
A1.3: The principles of effective planning.	<ul style="list-style-type: none"> To understand the principles of effective planning. 	120 minutes
A1.4: The basic parts of effective planning.	<ul style="list-style-type: none"> To identify the basic parts of effective planning. To understand the planning cycle. 	90 minutes
A1.5: Where are you now? An analysis of your organization.	<ul style="list-style-type: none"> To check the condition of your organization; identifying your strengths and weaknesses and the problems and challenges you face. To learn how to apply the SWOT analysis tool. 	120 minutes
A1.6: What is the vision and goal of domestic workers’ organizations?	<ul style="list-style-type: none"> To learn what are the core values and mission of domestic workers’ organizations. To know how to write the vision and goal of a domestic workers’ organization based on its core values and mission. 	120 minutes
A1.7: Setting objectives and outcomes.	<ul style="list-style-type: none"> To learn how to set objectives and outcomes linked to your organization’s vision statement and goal, using the SMART planning tool and checklist. 	170 minutes
A1.8: Setting strategies, outputs, activities, inputs, and indicators.	<ul style="list-style-type: none"> To learn how to set strategies, outputs, activities, inputs, and indicators. 	150 minutes
A1.9: Making difficult decisions: What are your priorities?	<ul style="list-style-type: none"> To learn how to make informed choices when faced with several options. 	60 minutes
A1.10: Writing a plan for organizational development and success: Putting what you have learned into practice.	<ul style="list-style-type: none"> To understand the logic of the planning process. To make a plan for organizational development and success, putting into practice what you have learned. 	210 minutes
TOTAL		1,200 minutes, or 20 hours ; divided into three days

Timetable for Part 2 – Developing a successful organizing campaign plan

Activities A1.11 – A1.15

ACTIVITY	AIMS	TIME
A1.11: Why is organizing a priority for domestic workers’ organizations?	<ul style="list-style-type: none"> To understand the importance of organizing. 	90 minutes
A1.12: The basic parts of effective planning for an organizing campaign.	<ul style="list-style-type: none"> To identify the basic parts of effective planning for an organizing campaign. 	60 minutes
A1.13: Analysis of your membership.	<ul style="list-style-type: none"> To check the membership situation in your organization, and identify the challenges you face. To learn how to apply the SWOT analysis tool. 	120 minutes
A1.14: Setting objectives and outcomes for your organizing campaign plan.	<ul style="list-style-type: none"> To learn how to set objectives and outcomes related to the membership of your organization, using the SMART and SWOT tools. 	180 minutes
A1.15: Writing a successful organizing campaign plan.	<ul style="list-style-type: none"> To learn how to set strategies, outputs, activities, inputs, and indicators. To understand the logic of the planning process. To make an organizing campaign plan for your organization, putting into practice what you have learned. 	270 minutes
TOTAL		720 minutes, or 12 hours ; divided into two days



IDWF-ILO Community of Practice Visioning Event, 2014, Hong Kong, China
 Photo credit: IDWF

Activities

Part 1 – Successful planning in domestic workers' organizations

A1.1	How do you plan? What is planning?
A1.2	What is effective planning? Why is it needed?
A1.3	The principles of effective planning
A1.4	The basic parts of effective planning
A1.5	Where are you now? An analysis of your organization
A1.6	What is the vision and goal of domestic workers' organizations?
A1.7	Setting objectives and outcomes
A1.8	Setting strategies, outputs, activities, inputs, and indicators
A1.9	Making difficult decisions: What are your priorities?
A1.10	Writing a plan of action for organizational development and success: Putting what you have learned into practice



Capacity Building Workshop for Domestic Workers by the Domestic Services Workers Union (DSWU), Ghana

Photo credit: DSWU

Activity A1.1 How do you plan? What is planning?

Aims	To look at the way you plan. To understand what is planning.
Time	60 minutes

Handouts

- Activity handout 1: List of cases for individual exercise.
- Activity handout 2: Form: How do you plan? (blank).
- Activity handout 3: Form: How do you plan? (example).

Materials

- The trainer photocopies the activity handouts, one for each participant before the start of the session.



Process

- Individual exercise; brainstorming.

Step 1 – Individual exercise 20 minutes

1. The trainer explains the goal and process of the activity, and tells the participants that this is not a test, but a way for them to share experiences. The trainer distributes Activity handouts 1 and 2, reads out the list of cases for the individual exercise (Activity handout 1), and explains the blank form (Activity handout 2), giving examples from Activity handout 3 to make sure everything is clear.
2. The trainer tells participants to choose one of the cases which they experienced personally from the list or choose another case that they experienced as they wish.
3. Each participant thinks back on what she or he did, step by step, and completes the blank form.

Step 2 – Brainstorming 40 minutes

4. The trainer asks, by a show of hands, who was successful, somewhat successful, or not successful, then asks one or two participants for each case to read out their forms.
5. Participants comment on the presentations, relating them to their own experiences.
6. The trainer asks participants to explain what “planning” means to them, and notes down the key words on the board or flip chart, and summarizes the key ideas.
7. The trainer asks participants to agree on a common meaning of “planning”. How does the meaning compare to point 1 of the key messages below? If it is similar, the wording does not matter. Display the common meaning on the board.
8. The trainer sums up and thanks the participants.

KEY MESSAGES

- Planning is the **process** of thinking about and organizing the actions needed to produce an output and reach an objective or an outcome, or something we want to achieve, happen, or have.
- Planning is a constant activity in our lives. We all plan, every day, any time, anywhere, individually or as a part of a group. We plan to get something done, or undone; to get or get rid of something. We plan to go somewhere, or change our destination, and plan again. Sometimes, things go to plan; sometimes only partially; and sometimes not at all. This is why we should learn and use skills in effective planning to help us achieve the big goals for ourselves and for our organizations.
- **A plan is like a map.** When following a plan, you can see how much progress you have made and how far you are from your goal. Knowing where you are helps you to make good decisions on what directions to take, and what changes to make, if things go wrong.



Note for Trainers

- * This activity can serve as an ice-breaker and an introduction to a training workshop or session on effective planning.
- * Read through the form with the participants before the exercise. Give an example, using Activity handout 3.
- * Information provided by the participants can help to start the brainstorming session in Activity A1.2.



A1.1: Activity handout 1

List of cases for individual exercise

1. Applying for a job in a household in another town or city.
2. Applying for a job as a domestic worker abroad.
3. Organizing a birthday party for 30 children.
4. Buying an apartment or a house.
5. Learning a new skill (for example: a language, paralegal training, cooking a special dish, or caring for children or the elderly).
6. Negotiating with your employer to improve your working and living conditions (example: better pay, weekly day off, annual holidays, working hours, accommodation, and health and safety).
7. Going on a trip.
8. Budgeting monthly expenses.



A1.1: Activity handout 2

Form: How do you plan? (blank)

Case: _____

Expected outcome(s) _____

Were you successful? Yes: No: Somewhat:

Why? _____

What did you achieve?

What specific actions or steps did you take to achieve your expected result or outcome?	List your a) strong points b) weak points	What could you have done better? How? Why?
1.	a) b)	
2.	a) b)	
3.	a) b)	



A1.1: Activity handout 3

Form: How do you plan? (example)

Case: Negotiating with my employer for a salary increase.

Expected outcome(s): 50 per cent salary increase

Were you successful? Yes: No: Somewhat:

Why?

It was the first time I spoke to my employer about improving my working conditions.

What did you achieve?

- a) My salary was increased slightly (by 20 per cent).
- b) My employer agreed to a "13th-month" bonus.
- c) I overcame my fear and was able to talk about other issues such as decreasing my daily working time from 10 to eight hours (we agreed to nine hours).

What specific actions or steps did you take to achieve your expected result or outcome?	List your a) strong points b) weak points	What could you have done better? How? Why?
1. I asked my domestic worker friends how much they earned and what their working and living conditions were, to compare my situation with theirs.	a) I was able to persuade two people to give me information. b) I could not persuade any others to tell me anything.	I could have prepared better by getting information from other people in my women's group, or family members or neighbours.
2. I observed my employer's mood to decide on the best time to talk with her (on her day off, after the children had left for school).	a) This was a good idea, as she was friendly when I asked to talk with her.	
3. I explained to my employer why I was entitled to a 50 per cent salary increase.	a) I was able to give the reasons for my request (I have been working for three years with no salary increase; other DWS in the area have higher salaries than me, and better working conditions). b) I was very nervous and it was difficult to argue against her.	I could have prepared better by talking to more experienced domestic workers and asking their advice. I could have thought about other arguments (how family members and their friends say my work is good). I could have role-played with a friend, a trainer or leader of my organization.



IDWF/FES Capacity Building Workshop for Migrant Domestic Workers, Africa
Photo credit: IDWF

Activity A1.2 What is effective planning? Why is it needed?

Aim	To understand: <ul style="list-style-type: none"> • What is effective planning. • Why planning is important for domestic workers and their organizations.
Time	100 minutes

Handout

- H1.1 – Effective planning: What? Why? How? Who?

Materials

- Coloured cards or half A4 paper; marker pens; masking tape.



Process

- Brainstorming; group work; reporting and general discussion.

Step 1 – Brainstorming 30 minutes

1. The trainer explains the goal of the activity, and draws attention to the meaning of “planning” displayed on a board or flip chart.
2. The trainer chooses one or two ideas from the discussions during Activity A1.1 and starts a brainstorming session on **what is effective planning**.
3. The trainer distributes five cards or coloured pieces of paper to each participant and asks the participants to write a word or a phrase about effective planning (one idea per card).
4. As the participants explain their cards, the trainer pins them on the board, grouping them by ideas.
5. The trainer sums up with a list of words and phrases describing effective planning (see the key messages).



KEY MESSAGES

Effective planning is planning for success.

- It is thinking about and organizing, in order, the actions you must take to reach an objective or goal.
- It puts on paper, in clear language, the long- and short-term directions your organization has chosen to take to reach a goal.
- It sets out a realistic timetable and identifies who should be responsible for starting, implementing, supervising, checking, and evaluating the actions and steps to be taken to reach a certain objective or goal.
- It makes it easy for everyone – your leaders, members, partners and supporters – to understand where you want to go and how you will get there. This is important when people in the organization leave, or new ones join.
- It is based on good information, evidence, and experience.
- It identifies honestly your strengths and weaknesses.
- It lets you think about new ideas, and makes it easier for people in the organization to work together.
- It checks whether you have the necessary human and financial resources, and is essential for successful fund raising.
- It is a reminder that life is uncertain, and helps you decide what to do if things go wrong. Anything can happen to help or stop the progress in achieving your goals – for example, natural or man-made disasters, a good or bad event in the family or community, a change in government policy or law, or important people leaving or joining the group.
- It lets your organization be flexible and able to change plans if needed, always aware of developments at local, national, and global levels.
- It takes commitment and time to plan, but it prevents a waste of time and energy later.

Step 2 – Group work 30 minutes

6. Participants are divided into groups of six to eight. Groups choose their moderators and reporters. The trainer gives out 10 cards of the same colour to each group reporter.
7. Reporters mark (a) on the first set of five cards and (b) on the second set of five.
8. Groups discuss and give their opinion on the:
 - a) five main reasons why effective planning is important for domestic workers' organizations; and
 - b) five main problems with effective planning for domestic workers' organization.
9. Reporters write down on the cards the answers of their group: one idea per card.
10. While the groups are working, the trainer prepares two flip chart papers. The first is headed “(a) Reasons for effective planning”; the second “(b) Problems with effective planning”.

Step 3 – Reporting and general discussion 30 minutes

11. Reporters take turns explaining their group's cards relating to 8(a). The trainer pins the cards on the board or flip chart, grouping them according to ideas. Participants are asked to comment on the cards and agree on the main reasons why effective planning is important for domestic workers' organizations.
12. The same procedure is followed for 8(b).
13. The trainer sums up the discussion, referring to the key messages below, and thanks everyone for their participation.



KEY MESSAGES

Effective planning is very important for membership-based, non-profit, voluntary organizations, like yours, which have limited assets and money, and few staff, but have a lot of people as potential members and supporters:

- It gives you a much better chance of achieving your goals.
- It makes it easier to understand where you want to go and how you plan to get there.
- It helps you focus on what you and your organization hope to achieve, and what you can realistically expect to get done with the resources you have.
- It makes you think about what is a priority, what is most important, what is most urgent and what has the most effect.
- It changes ideas into specific “to do” items, a very important step in getting your organization moving.
- It prepares your members to be active agents for change and participate in moving towards a common goal.



Effective planning is often difficult for domestic workers and their organizations because:

- They face big challenges and have limited resources. They feel too busy to stop and think.
- Development of an organization or of an individual is a complex process, because there are many inside and outside influences. Planning helps in making choices, for example: Who should be a key partner among many similar organizations? (“We are domestic workers’ organizations and want to work closely with trade unions, women’s organizations, and human rights organizations.”)
- They often need to get funding from outside donors for their activities and daily expenses. It can be difficult to prioritize and stick to the plan, if donors decide they want to pay for different things.
- There may be strong reasons to keep things as they are – especially if some people are comfortable not making any big changes or plans.
- Effective planning requires looking into the future – which is sometimes difficult to do in changing local, national and global environments. People may also have different ideas about what will happen and what will make a difference.



Note for Trainers

- * Copy flip chart (b) with the list of planning problems identified by the participants for use in next session A.1.3.



“Let’s write a contract” and “My Fair Home” Campaign, Republic of Korea
Photo credit: National House Manager’s Cooperative

Activity A1.3 The principles of effective planning

Aim	To understand the principles of effective planning.
Time	120 minutes

Handouts

- H1: Effective planning: What? Why? How? Who?
- List of planning problems identified in activity A1.2.

Materials

- Flip charts or computer and screen for slide presentation.
- Trainer prepares a task sheet with the questions in step 4 on a board, flip chart or slide.



Process

- Introduction; group work; reporting and general discussion.

Step 1 – Introduction; general discussion 40 minutes

1. The trainer explains the aim and process of the activity.
2. The trainer gives a short presentation, jotting key words on a flipchart or with a slide presentation like PowerPoint, on the principles of effective planning and who does it (see the key messages below). The trainer encourages participants to ask questions and give comments and ideas. The trainer invites those from organizations who have done planning exercises to share their experiences. Was it a top-down or bottom-up activity? Who participated? Were the members aware that they were planning? Did they have the chance to give their views and feedback? Were the communication channels open between the core planning group and the rest of the organization? Was the plan written down? Was it sent out to all leaders, members and other important interested people?

Step 2 – Group work 40 minutes

3. Participants are divided into groups of six to eight. The trainer hands out the list of planning problems identified in Activity A1.2.
4. Groups assign their moderators and reporters. They discuss and give their common view on the following questions:
 - a) Why must effective planning be inclusive and participatory? How can this be ensured when domestic workers' organizations carry out their planning?
 - b) Who should be part of the core planning group? Why?
 - c) How can the problems identified in Activity A1.2 be overcome?

The trainer asks the groups to give specific answers with examples.

Step 3 – Reporting and general discussion 40 minutes

5. One reporter gives the group's views on question a). Other reporters or group members confirm, add, or disagree. The trainer helps with the exchange of opinions, and asks participants to agree.
6. This procedure is followed for questions b) and c).
7. The trainer ends the discussion, sums up the key points, and thanks all the participants.



KEY MESSAGES

Key principles – Effective planning is:

- **Inclusive and participatory.** It is democracy in action. All members, leaders, and key partners are involved and have their say, so that they own and are responsible for the plan, from its design to its realization. This builds shared understanding and helps everyone feel more capable of improving their own lives and jobs, and being active agents of change to achieve the goals they have chosen. People need to be part of the thinking, not just the doing. The success and sustainability of your organization depend on the ongoing commitment of your members and leaders. From the start, get everybody involved. Organize small discussion groups and ask everyone to participate in the process in some way.

continued >>>



- **Clear.** Everyone should easily understand everything in your plan, so be sure that you say what you mean, and mean what you say.
- **Evidence-based.** Your plan must be based on facts, not guesses or wishes. It should be authoritative (meaning that you know what you are saying, and can prove it) and not dramatic (you are not writing a campaign leaflet).
- **Methodical and systematic.** Achieving your goal will not happen overnight. You must break down your plan into building blocks, with the objective and goal always in sight. A step-by-step approach is essential. Being methodical and systematic will make it easier to prioritize and identify what must come first, what comes next, and so on. It will be helpful also in identifying problems and adjusting your plan to overcome these.
- **Realistic.** Plan with your feet on the ground. Know what you have – your strengths; but also what you do not have – your weaknesses. Identify what can threaten your plan and what opportunities you can use to help achieve your goal. Sometimes, you have to make difficult choices. If you try to do too many things at the same time, you may end up doing nothing. For many people, good planning is making informed decisions about what not to do.
- **Creative.** Do not be afraid to use your imagination and to “think out of the box”, especially when it seems like a problem is too difficult to solve.

Who does the planning?

- The planning should be led by a **core planning group** representing the key people who can put into effect, or will be affected by, the plan.
- These are, first, your members and leaders. Your key partners and supporters, like trade unions, women's organizations, or human rights organizations, and major donors, should also be represented. Their input and advice will be of great help to the core group.
- The core group members should be committed to working together and sharing the various tasks.
- Throughout the process, the core group must be guided by the principles of effective planning – in particular, that the planning process is inclusive and participatory.

Activity A1.4 The basic parts of effective planning

Aims	To identify the basic parts of effective planning. To understand the planning cycle.
Time	90 minutes

Handouts

- Coming to terms: Key planning definitions.
- H1.1: Effective planning. What? Why? How? Who?
- H1.2: The planning cycle.
- Activity handout: Horse parable picture cards.

Materials

- Flipcharts for writing down the key messages or computer and screen for slide presentation.
- Trainer prepares an outline of H1.2 on a flip chart or on a computer slide.
- Trainer checks if the horse parable picture cards are suitable for the group. If needed, the animal can be changed to one that is more familiar to the group.
- Trainer prepares copies of the activity handout, one set of six pictures for each group, and shuffles each set so that they are not in order.

Process

- Introduction; group work; reporting and general discussion.

Step 1 – Introduction 30 minutes

1. The trainer explains the aim and process of the activity, and introduces the basic parts of planning. The trainer briefly explains each part and encourages participants to ask questions.
2. The trainer explains the planning cycle (H1.2), showing the diagram on a flip chart or slide, and asks participants for questions or comments.

Step 2 – Group work 30 minutes

3. Participants are divided into groups of six to eight. Groups assign their moderator and reporter. The trainer gives each group one set of the activity handout with the six horse parable picture cards, and explains that there is one picture each for a problem, a goal, an objective, an output, an activity, and the inputs. The trainer tells the groups to make up the story, to discuss what planning part each picture represents and to order them in a logical sequence.
4. Groups discuss and agree what picture represents what, they put the picture cards in a logical order and paste them on a flip chart or board so that the other groups can see.

Step 3 – Reporting and general discussion 30 minutes

5. The trainer invites each reporter to show the outcome of the group work. Other reporters or group members confirm, add, or disagree. The trainer helps with the exchange of opinions, and asks participants to agree:
 - a. The thirsty horse is the problem.
 - b. The fountain and woman are inputs.
 - c. The woman leading the horse to the fountain is an activity.
 - d. The horse present at the fountain is an output.
 - e. The drinking horse is the objective.
 - f. The happy horse is the goal.
6. The trainer ends the debate, sums up the key points, and thanks all the participants.

KEY MESSAGES

The basic parts of effective planning are:

- The **analysis** of your organization's situation: It is the start of effective planning. It shows the problems and challenges you face.
- The **vision** and **goal**: The vision statement describes how you want your organization to be in the future. The goal is the big thing that you want to achieve, that will really help your members, potential members, and domestic workers in general.
- The immediate **objectives** and **outcomes**: Immediate objectives are exact, measurable statements about what you want to achieve and will do to reach your goals within a certain time. Outcomes are the expected results of achieving your objectives.
- The **strategy**. A strategy is a summary statement of "what you want to do, for whom, with whom and how". Strategies are practical ideas about how you will make the best use of your resources to achieve your objectives and obtain the outcomes you want. Strategies describe general ways or methods, not specific activities or projects.
- The **outputs**. Outputs are the expected results, or the products or services that you and your organization will produce to make progress towards achieving your objectives.
- The **activities**. These are the specific actions (for example, programmes, projects or events) that you plan to do during a certain time, in order to produce your outputs.
- The **inputs**. These are the things you need to have, like people, money and other resources to carry out the activities.
- A **plan of action** sets out the vision/goal, the objectives/outcomes, the strategies, the outputs, the activities and inputs with a time frame and who will do what. A plan of action helps you to prioritize and make sure that you have or get what you need. A plan of action gives answers to the questions:
 - What is the vision statement and the goal – the things that I want **to achieve** in the long term (usually five to 10 years)?
 - What are the objectives/outcomes – the things that I want **to achieve** in the short-term (usually three to five years)?
 - What are the outputs – the things I need **to produce** to be able to achieve the objectives?

continued >>>



- What are the activities – the things I need **to do** to produce the outputs?
- What are the inputs – the things I need **to have** to carry out the activities?
- The indicators measure whether you are doing the right things. Indicators can be developed at every level. Indicators for activities are: Have you done what you planned to do. If not, why not? Indicators for outputs are: Have you produced your outputs? If not, why not? Indicators for objectives/outcomes are about the impact and effects of your achievements.
- Monitoring and evaluation. Monitoring is regular checking of your activities and actions, and finding out how effective your strategies are in achieving your objectives, and bringing you closer to your goal. Evaluation is a structured process to measure the progress made and the success of your plan in achieving your objectives and goal, to review what went well and what needs improving, and to identify and reflect on the lessons learned and possible good practices.



Note for Trainers

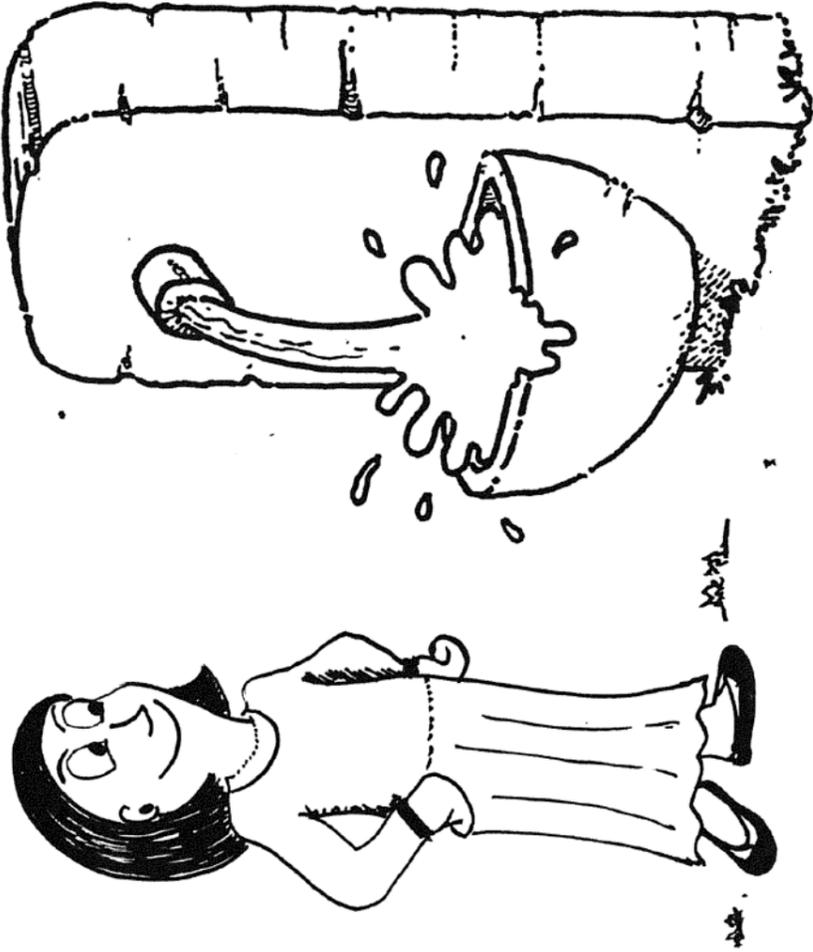
- * This activity introduces the basic parts of effective planning. Some participants may already be familiar with the planning process, ideas, and terms, but you should still check and make sure that all participants have the same understanding of the key terms. Even in English, terms such as “goal”, “vision”, or “overall, long-term or development objective”, can have the same or different meanings, and different organizations may use terms such as “strategy”, “(immediate or short-term) objective” or “outcome”, “output”, and “indicator” in the same or different ways. Domestic workers’ organizations may choose some terms over others, as it is preferable if they select the words or phrases that best express what they want to say.
- * The group work helps the participants to understand what the basic parts of effective planning are, and how these are linked. Participants must understand which picture card represents which main planning part. The order may differ between the groups, for example, “f, e, d, c, b, a” or “a, f, b, c, d, e”. Other combinations can also be fine as long as the groups have correctly matched the pictures with the planning cycle parts and present the story in a logical order.
- * Tell the participants that doing actual planning with practical activities will give them a better understanding of the basic planning parts.



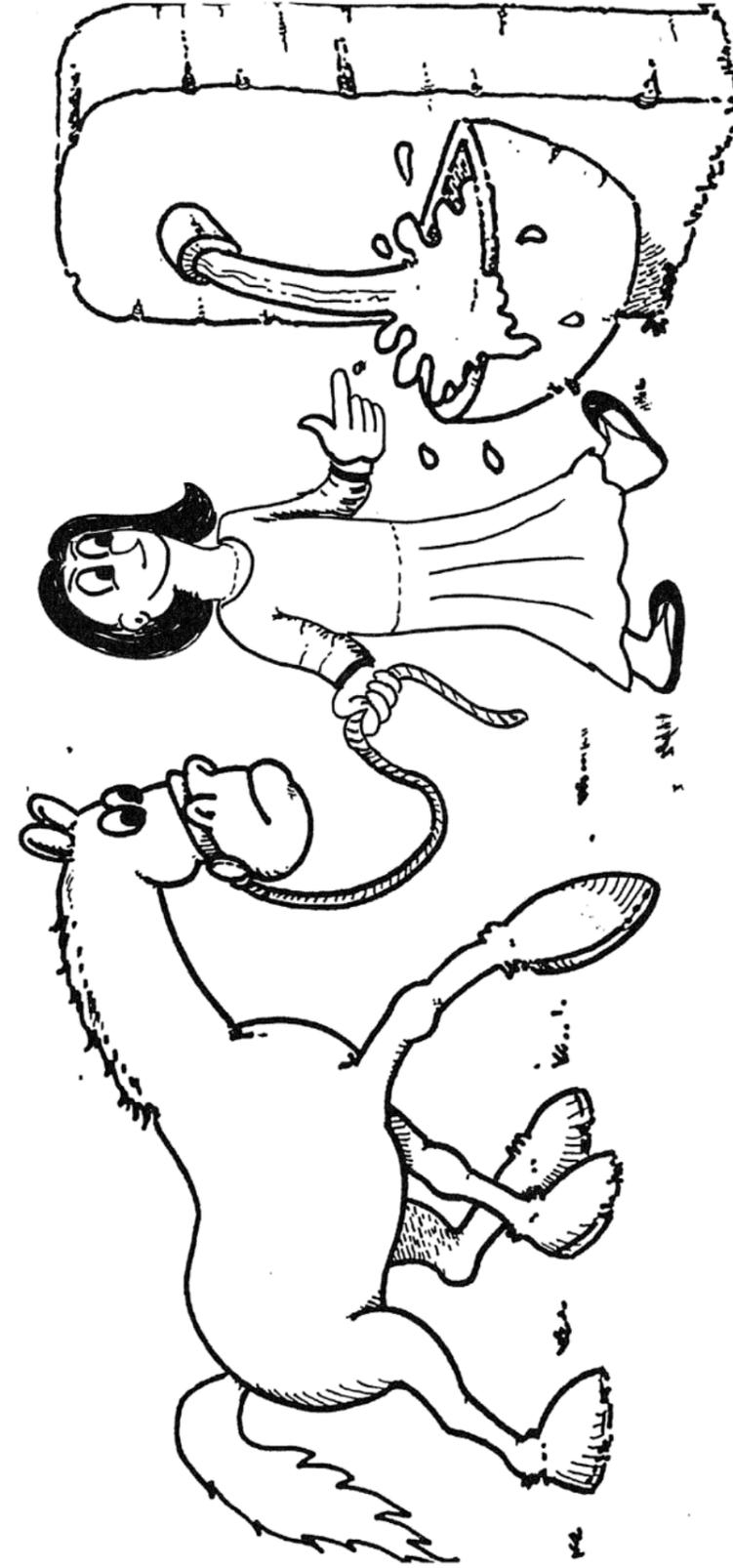
A1.4: Activity handout: horse parable picture cards



A1.4: Activity handout: horse parable picture cards



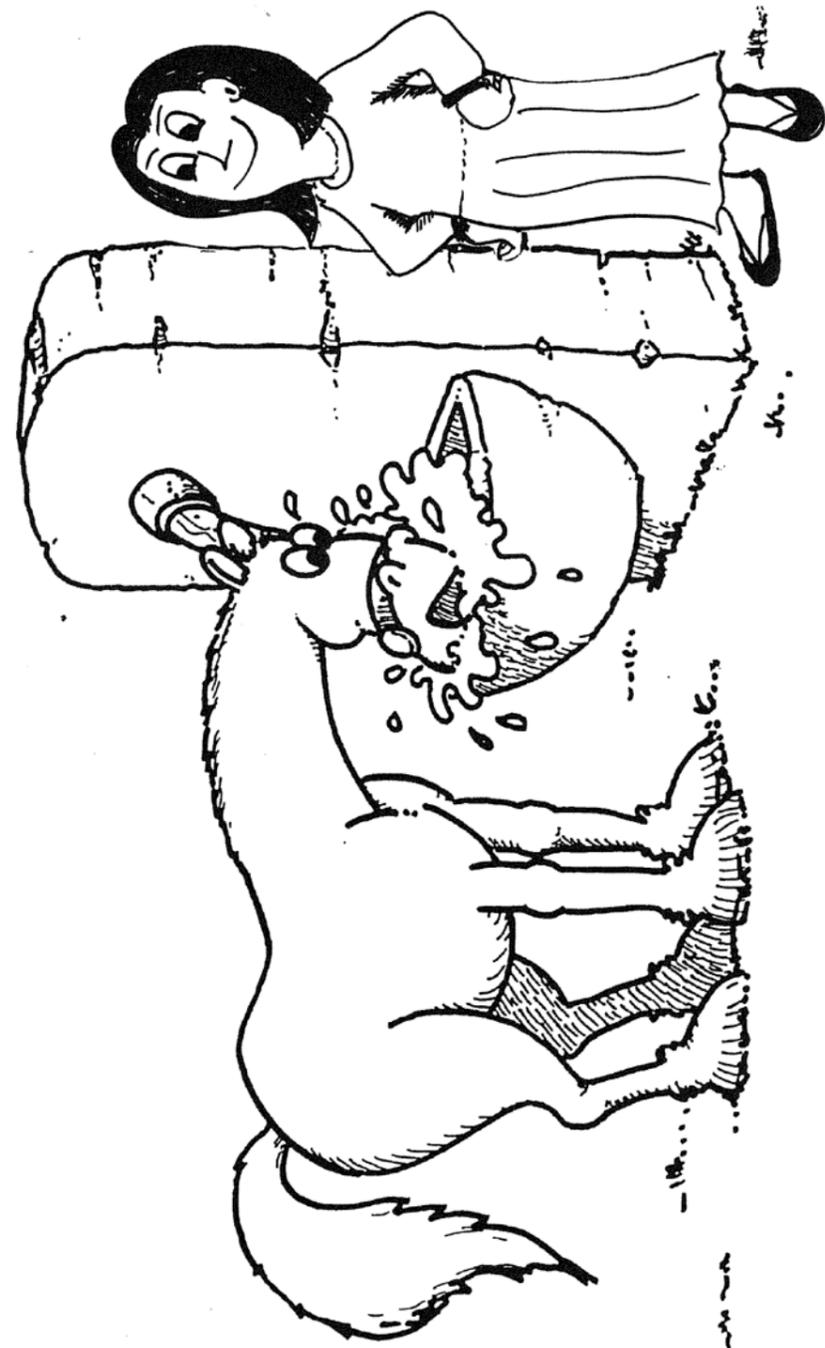
A1.4: Activity handout: horse parable picture cards

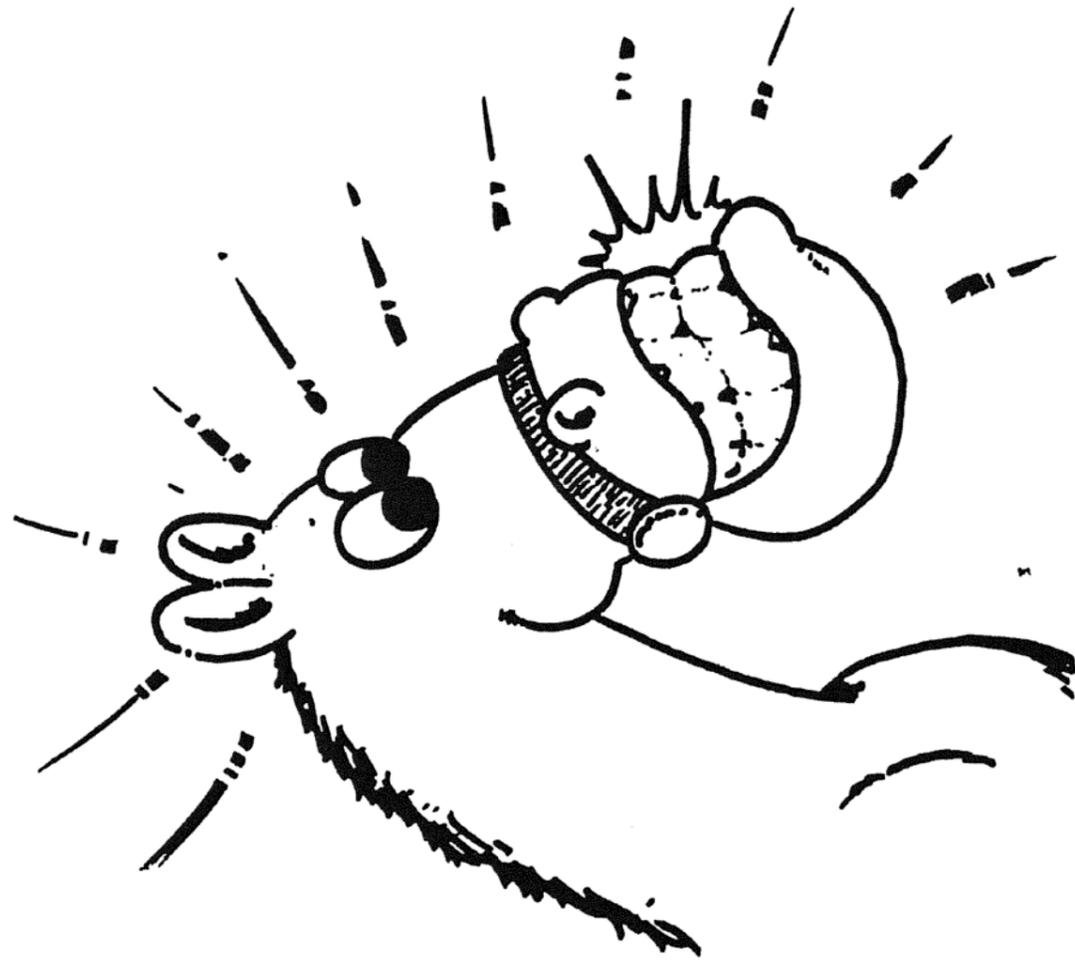


A1.4: Activity handout: horse parable picture cards



A1.4: Activity handout: horse parable picture cards





Activity A1.5 Where are you now? An analysis of your organization

Aims	To check the condition of your organization, identifying your strengths and weaknesses and the problems and challenges you face. To learn how to apply the SWOT analysis tool.
Time	120 minutes

📄 Handouts

- H1.1: Effective planning: What? Why? How? Who?
- Activity handout 1: SWOT form: Analysis of present condition (blank).
- Activity handout 2: SWOT form: Analysis of present condition (example).

✂️ Materials

- Flip chart or computer and screen for showing a slide.
- Prepare a slide or flip chart with the blank SWOT Form (Activity handout 1).
- Copy Activity handout 1, one for each participant for use during step 2.



Process

- Introduction; individual exercise; sharing and general discussion.

Step 1 – Introduction 45 minutes

1. The trainer explains the aim and process of the activity, and why the real start of planning is taking a close look at where you are now. This self-examination can show the problems and identify the challenges you are facing. Are you happy with the way things are going? Is this where you intended to be when you started your organization? How far have you gone in achieving what you want to do? How are you going about your organization's mission? What have you done well? What could you have done better? Are you growing slowly but surely, or are you not moving forward, and losing members? Why?
2. The trainer introduces the SWOT analysis tool with Activity handout 1, explaining what each square means and asking participants who have used it before to share their experiences. The trainer then shows how the tool can be used in examining the condition of an organization, using Activity handout 2.

Step 2 – Individual exercise 30 minutes

3. The trainer gives out copies of the blank SWOT analysis tool (Activity handout 1) one for each participant and tells them what to do. Each participant should:
 - a. Remember the goals (vision, overall objective) of your organization, and choose one goal to examine with the SWOT tool.
 - b. Think about how the organization has achieved its goal so far.
 - c. Fill in the SWOT form and answer the four questions.



The first annual meeting of IMECE Domestic Workers Union, Turkey
Photo credit: IMECE

Step 3: Sharing and general discussion 45 minutes

4. The trainer asks participants to share their SWOT analysis forms and give their comments and inputs:
 - Did this tool help in checking the condition of their organization?
 - Did they have any difficulties? Explain.
 - Were they able to know the difference between inside and outside forces that affect the organization? Strengths and weaknesses? Threats and opportunities?
 - Can they use the findings of the SWOT to identify the problems to be solved, and the threats and challenges they face? Similarly, will the SWOT help them to identify their strengths and the opportunities they have to build their organization?
5. The trainer sums up and thanks the participants for their contributions.



Note for Trainers

- * This activity may be divided into two sessions, with step 1 being the first, and steps 2 and 3 the second. Have a short break between the sessions.
- * The SWOT analysis tool – a popular planning tool for organizations and companies around the world – may have an equivalent in your language. If not, find a symbol or translate the words in the acronym and combine the first letters together (and if the acronym makes sense, so much the better). If you yourself are translating the SWOT analysis tool, it is important that the words “strengths”, “weaknesses”, “opportunities”, and “threats”, are well understood by the participants in the exercise. For example, in some languages the word “strength” may mean only physical strength, and not social, political or psychological strengths, so you will need to find a word or expression to describe all the strengths in your organization.



A1.5: Activity handout 1

SWOT form: Analysis of present conditions (blank)

1. Select one goal (vision or overall objective) of your domestic workers' organization as stated in its constitution or statutes, and answer the SWOT questions for this goal:

What are the INTERNAL (within the organization) STRENGTHS (positive things)? 1. 2. 3.	What are the INTERNAL (within the organization) WEAKNESSES (negative things)? 1. 2. 3.
What are the EXTERNAL (outside the organization) OPPORTUNITIES (positive things)? 1. 2. 3.	What are the EXTERNAL (outside the organization) THREATS (negative things)? 1. 2. 3.

2. What are your conclusions after doing the SWOT analysis?

2.1: Has your organization achieved this goal so far (Yes. No. Somewhat)? Explain your answer.

2.2: How can the positive things (internal and external) be best used?

2.3: How can the negative things (internal and external) be reduced?

2.4: Should your organization continue to go for this goal (vision or mission)? Why?



A1.5: Activity handout 1

SWOT form: Analysis of present conditions (example)

Subject: One goal of your organization, the National Domestic Workers' Union (NDWU), as stated in its constitution or statutes, is *ratification and effective implementation of ILO Convention No. 189 on Decent Work for Domestic Workers (C189)*.

<p>What are the INTERNAL (within the organization) STRENGTHS (positive things)?</p> <p>Full agreement at the NDWU Congress (two years ago) to campaign for ratification of the convention.</p> <p>Three leaders have attended the IDWF regional workshop on the Convention and campaign strategies for its ratification and effective implementation.</p> <p>Campaign plan written and adopted by the leadership shortly after the NDWU Congress.</p> <p>Money for the campaign, in the annual budget of the NDWU (now in its second year).</p>	<p>What are the INTERNAL (within the organization) WEAKNESSES (negative things)?</p> <p>Around 40 per cent of NDWU members are not familiar with the campaign plan.</p> <p>Poor checking of progress of the campaign plan.</p> <p>The NDWU has too many priorities and problems to solve.</p>
<p>What are the EXTERNAL (outside the organization) OPPORTUNITIES (positive things)?</p> <p>Ratification of C189 is on the agenda of the National Committee on Domestic Work, which is made up of representatives of government, trade unions, domestic workers' organizations, women's organizations, and employers' organizations.</p> <p>The national trade union centre, women's organizations, and other civil society organizations (CSOs) are now taking up the problems of domestic workers.</p> <p>The NDWU is getting public attention as an important organization for domestic workers in the country.</p>	<p>What are the EXTERNAL (outside the organization) THREATS (negative things)?</p> <p>Support and money for the National Committee may be cut or reduced if a conservative party wins the national election.</p> <p>Other problems may cause friends of the NDWU to have less time and money to strongly support the NDWU and its campaign on decent work for domestic workers.</p> <p>The media may lose interest in domestic workers in favour of other "marginalized" groups.</p>



Domestic workers demanding their rights as workers, Dominican Republic
Photo credit: Elena Perez

Activity A1.6 What is the vision and goal of domestic workers' organizations?

<p>Aims</p>	<p>To learn what are the core values and mission of domestic workers' organizations.</p> <p>To know how to write the vision statement and goal of a domestic workers' organization based on its core values and mission.</p>
<p>Time</p>	<p>120 minutes</p>



Handouts

- Coming to terms: Key planning definitions.
- H1.1: Effective planning: What? Why? How? Who?
- H1.2: The planning cycle.
- H1.4: The Five-Year (2016-2020) Strategic Plan of the IDWF.
- Activity handout: Background of the NDWU in the Republic of Atlantis.



Materials

- A flip chart for each group; marker pens.
- The Trainer prepares copies of the Activity handout for the participants.



Process

- Introduction and brainstorming; group work; reporting and general discussion.

Step 1 – Introduction and brainstorming 45 minutes

1. The trainer explains the aim and process of the activity.
2. The trainer starts the brainstorming session by explaining “core values”, “mission”, “vision” and “goal”. The other parts of planning come from these. The trainer asks participants to give examples of “core values” of their organization, giving some examples from the NDWU in the Activity handout. The trainer asks whether these values are made clear in their constitution and statutes, and are they clear to all of the members?
3. The trainer asks participants to explain their organizations’ mission statements. When participants do not have examples of mission statements, the trainer gives some examples from the NDWU in the Activity handout, and asks: Why are mission statements important? Do they relate to the core values of the organization?
4. When the trainer is sure that all of the participants understand these ideas, the trainer starts the next step, asking participants to develop a statement with the main goal of the NDWU (see the key messages below). The trainer divides the participants into groups of six to eight, and distributes a copy of the activity handout on the background of the NDWU to all participants.

Step 2 – Group work 30 minutes

5. Groups choose their moderators and reporters. Reporters are asked to pay attention to the process, as they must describe how their groups worked in their reports. Moderators are asked to read out the text of the activity handout in their group.
6. The job of the groups is to **write a statement with the main goal** for their organization, the NDWU. After discussing the write-up on the NDWU, the group members must think about and agree on a common vision of how they want to see the organization in five years’ time, and write this “possible dream” in a clear, concise (short) statement.
7. Each reporter writes the group’s statement of the NDWU vision/goal on a flip chart.

Step 3 – Reporting and general discussion 45 minutes

8. The trainer asks each reporter to present the group’s statement of the vision/goal for the NDWU, and briefly describe how the statement was developed. Was everyone able to give their opinions and ideas, or not? Were all the members satisfied with the final statement, or were there different ideas?
9. The participants comment on the statements: Were they precise? Concise? Clear? Inspiring?
10. The participants vote, by show of hands, for the two best statements of the NDWU vision/goal. Why?
11. The trainer sums up the key points of the activity and thanks everyone for their participation.



KEY MESSAGES

- **Core values:** Core values are at the centre of your organization. They are what your organization stands for, and what it believes is most important. Core values are part of both the mission and vision of your organization, and are essential to effective planning. Core values are often expressed in statements that begin with phrases such as “we believe,” “we care about,” “we value,” or “we commit to.” People join or support your organization because they share or believe in your core values. An organization’s constitution or statutes set out its core values, e.g. transparency, accountability, internal democracy. Often, core values are written in a statement. An example is the IDWF’s statement: “The IDWF is a membership-based, democratic, global organization of domestic and household workers. The IDWF believes that domestic work is work, and all domestic and household workers deserve to enjoy the same rights as all other workers.”
- **Mission:** A mission statement gives **the purpose** of your organization. It answers the question “Why do we do what we do?” Your organization’s mission statement should come from the core values and should last for the lifetime of the organization, with small changes along the way to ensure that it is consistent with your vision and vice-versa. A mission statement should not be a list of everything you do so that you can’t be distinguished from other organizations. Rather, it should be clear on why you do what you do – for example: “Ensuring the rights of domestic workers and household workers to decent working and living standards, as per ILO Convention No. 189.”
- **Vision and goal:** The vision and goal of your organization is something of great importance that you are aiming for in the future. The vision and goals of an organization are a description of what you want your organization to become in the future. It answers questions such as: “Where do you want to be in five to ten years?” Or “If you could create the organization of your dreams, and have the effect you most want, what would your organization look like in 2030?”

Vision statements and goals inspire action and get everyone working together toward the same outcome – for example the IDWF vision and goal (overall objective) is: “By 2020, a strong, democratic, and united domestic and household workers’ global organization will be contributing to the protection and advancement of the rights of its 670,000 members, and the rights of domestic and household workers everywhere.”



Note for Trainers

- * If there is time, split the activity into two sessions: step 1 for the first, and steps 2 and 3 for the second session.
- * To make the sessions more fun, give prizes for the groups with the two best statements of the NDWU vision/goal.
- * Keep a copy of the two best statements of the NDWU vision/goal for use in A.1.7.



A1.6: Activity handout

Background of the National Domestic Workers' Union (NDWU) of the Republic of Atlantis

The National Domestic Workers' Union (NDWU) of the Republic of Atlantis was founded (started) in November 2011. The two-day founding conference brought together 500 domestic workers: 400 lived and worked in the capital; the others came from three of the six provinces of the Republic. The conference adopted the NDWU constitution. The constitution affirms the human and labour rights of all workers, particularly of domestic workers – nationals and migrants – under international and/or national instruments (standards, documents, or agreements), notably ILO Convention No. 189. The constitution describes the NDWU as a nationwide, membership-based organization of domestic workers, nationals, and migrants, guided by the core values and principles of democracy, transparency, accountability, and solidarity.

The constitution states the mission of the NDWU as ensuring:

- the respect and promotion of the human and labour rights of domestic workers by the government, employers, and the public;
- full coverage for all domestic workers in national labour legislation and social protection schemes;
- the ratification of ILO Convention No. 189 on decent work for domestic workers (C189);
- the setting-up of a National Task Force on Domestic Work (including government, employers' organizations, trade unions, and other civil society organizations with full representation of domestic workers' organizations) to plan, implement, and coordinate activities to promote decent work for domestic workers;
- access to basic education and skills training for domestic workers and the development of professional skills standards for domestic workers; and
- access to an effective complaints mechanism and to help hotlines and shelters.

The constitution sets out the structure and decision-making process of the organization:

- A national conference every two years.
- Fifteen members of a national executive committee elected by the conference, to include the chair, vice-chairs, secretary, treasurer, and auditors, and their duties.
- Discussion and adoption of a two-year action plan by the conference after talks with everyone in the organization.

After a review of the last six years, the NDWU has decided for the first time to start a planning exercise on how it can be more active and effective in pursuing its mission. The Union now has 100,000 members who pay a membership fee; 5,000 of them are migrants from neighbouring countries. It publishes a newsletter every three months, and gets attention in the media and from the public.

A recent survey of domestic workers in the Republic shows that there are approximately 2 million domestic workers in the country, around a third of whom are from neighbouring countries. The survey also shows that the majority of domestic workers do not receive the minimum wage and are not covered by the Labour Code.

Activity A1.7 Setting objectives and outcomes

Aim	To learn how to set objectives and outcomes linked to your organization's vision and goal, using the SMART planning tool and checklist.
Time	170 minutes

Handouts

- Coming to terms: Key planning definitions.
- H1.1: Effective planning: What? Why? How? Who?
- H1.2: The planning cycle.
- H1.4: The Five-Year (2016-2020) Strategic Plan of the IDWF.
- T1.2: SMART planning tool and checklist.
- Activity handout: List of vision/goal, objectives and outcomes (blank).

Materials

- Flip charts, board or computer and screen, and marker pens.
- Trainer prepares copies of the goals and vision statements voted the best and the second-best in Activity A1.6 and of the activity handout, one each for each group.



Process

- Brainstorming; group work; reporting and general discussion.

Step 1 – Brainstorming 45 minutes

1. The trainer explains the aim and process of the activity.
2. The trainer recalls the discussion on the basic parts of effective planning (A1.5), and says this session is about setting objectives and outcomes. The trainer explains what are objectives and outcomes, using the IDWF objective and outcomes (H1.4) as examples, and asks participants to give further examples.
3. The trainer writes down the definition of objectives and outcomes on a flip chart or board, or shows the relevant slides on the screen.
4. The trainer distributes and explains the SMART tool (T1.2) and shows how it is used.
5. The trainer gives the instructions for the group work: Participants will work in small groups and develop objectives and outcomes, based on a vision statement developed in A1.6, and using the SMART tool.

Step 2 – Group work 65 minutes

6. Participants are divided into groups of six to eight. Each group works on the statement with the five-year vision and goal that was voted the best in Activity A1.6. If there are more than three groups, the other groups are assigned the second-best statement of the vision and goal of the NDWU.
7. Groups choose their moderators and reporters. Each moderator is given a statement of the NDWU vision and goal, and each reporter is given a copy of the blank Activity handout to complete, and copy on a flip chart for presentation. Each reporter should also report on how the group identified the objectives and outcomes.

8. The moderator reads out and ensures that group members fully understand the statement(s) of the NDWU vision/goal which will be the basis for setting the objectives and outcomes.
9. Group members then discuss and agree on the objective that should be achieved by the NDWU in three to five years, using the SMART tool. The reporter then writes the identified and agreed objective at the top of a flip chart paper. If there are more objectives, each is written on a separate sheet. If there are too many objectives, the moderator urges the group to prioritize two objectives.
10. The moderator takes one objective at a time and asks group members to develop specific outcomes that will move the organization towards each objective. Again, the SMART tool should be used in setting these outcomes. If there are too many, the moderator should ask the group to prioritize two outcomes. The reporter writes the outcomes under the relevant objectives.

Step 3 – Reporting and general discussion 60 minutes

11. Reporters take turns presenting their flip chart papers, briefly describing how their groups worked (five minutes each). **Each reporter keeps the forms to be used at the start of Activity A1.8.**
12. Participants are asked to comment on the objectives and outcomes set by the groups, using the SMART tool as a checklist. They should also give their opinions on the process itself. What difficulties did they have, and how were these overcome? Finally, the trainer sums up by stating the importance of using the SMART tool in setting objectives and outcomes.



KEY MESSAGES

- Establish your objectives and outcomes based on what you know about your situation now, and the problems and issues you have identified. What do you want to change? What do you want to achieve?
- Often, people confuse goals, objectives and outcomes, because these words describe what they want to achieve. For example, when a person says “My goal is to lose weight” or “My objective is to lose weight” or “In three months time, I want to lose two kilos” everyone understands this. However, in planning, these words have different meanings as a goal is a more long-term aim than an objective, and an outcome specifies what are the effects of reaching your objectives:
 - A goal is something big and important that you are aiming for in the future. It is the long-term result of your plan. Your goal answers the question “What do you want?” The IDWF Strategic Plan refers to this as the “overall objective”.
 - An objective is a specific and measurable achievement within a certain time period that will help you towards achieving your goal. Setting objectives will answer the question “How can you make it happen?” The IDWF Strategic Plan refers to this as the “immediate objective”.
 - Outcomes are the desired changes that happen as a result of achieving your objectives. If you aim to build the capacity of domestic worker organizers, and hold three training workshops for 30 organizers, what outcomes do you expect? A 30 per cent increase in membership? An outreach to three new regions? Ninety more organizers who can train other potential organizers? Try to put a number so that you can measure your outcomes. The IDWF strategic plan specifies its immediate objective through five outcomes (see H1.4 for examples).

continued >>>



- Setting objectives is a very important step in planning for success. Well-formulated objectives will guide you and your organization in setting priorities, and deciding what to do and how to do it. The SMART tool is helpful when setting and checking your objectives. Is each of your objectives:
 - Specific?
 - Measurable?
 - Achievable?
 - Relevant and Realistic?
 - Time-bound and Timely?
- It is “SMART” to develop outcome-based objectives, because they identify the specific change that must happen for achieving your objective. An outcome refers to a change that you want to see in a person or group of people, or in a situation resulting from the achievement of your objective. Examples of SMART outcome-based objectives are: “Increased capacity of 50 domestic worker leaders to develop their organizations and attract 500 unorganized domestic workers’ to become a member of a domestic workers’ organization within two years”; or “A national or state law revised or adopted that extends labour protection which already exists for other workers to domestic workers within three years”.
- Set as many objectives as you can to achieve your identified goal. Then, go through your list and prioritize the three most important objectives. What is most important? What is most urgent? What do you need to do first? What will have the best effect? Prioritizing your objectives and looking at your resources and capacities honestly and realistically will help you in deciding your plan of action to reach these objectives.



Note for Trainers

- * Split this activity into two sessions: steps 1 and 2 for the first, and step 3 for the second (this will also allow the reporting and general discussion to go on longer, as needed).
- * This is an important moment in the planning process, and enough time should be given to this activity, especially if the participants (or core planning groups) do not have much experience in planning.
- * In your introduction, show the planning cycle diagram (H1.2), and where objective and outcome setting is, so that participants understand the logic and flow of the planning process.



A1.7: Activity handout

List of vision/goal, objectives and outcomes (blank).

Statement of vision/goal:

Objective 1:	Outcomes: 1. 2. 3.
Objective 2:	Outcomes: 1. 2. 3.



“We are workers! We deserve standard working hours!” Hong Kong, China
Photo credit : Rob and Ivan

Activity A1.8 Setting strategies, outputs, activities, inputs, and indicators

Aim	To learn how to set strategies, outputs, activities, inputs and indicators.
Time	150 minutes



Handouts

- Coming to terms: Key planning definitions.
- H1.1: Effective planning: What? Why? How? Who?
- H1.2: The planning cycle.
- T1.4i: Plan of action (blank)
- T1.4ii: Plan of action (example: five-year plan of action for organizational development and success of the NDWU).
- List of vision/goal, objectives and outcomes, completed by each group in Activity A1.7.



Materials

- Flip charts or computer and screen.
- The Trainer prepares one flip chart paper (with five headings: Objectives, Strategies, Outputs, Activities, Inputs and Indicators) for each reporter.



Process

- Brainstorming; group work; reporting and general discussion.

Step 1 – Brainstorming 60 minutes

1. The trainer explains the aims of the activity, which deals with the next part of the planning cycle: setting strategies, outputs, activities, inputs and indicators for reaching the objectives and goal of a domestic workers' organization.
2. The trainer asks participants to brainstorm on the meaning of “strategy” and why it is an important step in effective planning. The trainer writes down key words and phrases on the board, and asks participants to explain, share, and develop their opinions and ideas. When there are enough ideas, the trainer sums up the discussion and gives the definition, showing this on a flipchart or slide, and giving a few practical examples from the example plan of action form (T1.4ii).
3. The trainer follows the same procedure with the words “outputs”, “activities”, “inputs”, and “indicators” and gives a few practical examples from tool T1.4ii, and distributes this tool to the participants.
4. The trainer sums up and gives the key messages.



KEY MESSAGES

- A **strategy is a summary statement of “what you want to do (objectives), for whom (targets), with whom (actors), and HOW”**. A strategy is a set of practical ideas on how to make the best use of your resources to achieve your objectives. It is a way to describe how you will get things done. It is less specific than an action plan or work plan and answers the question “How do we get from here to there?” The strategy or strategies you use to reach your objectives must be based on careful consideration of your resources and priorities. Setting clear strategies gives long-term coherence and direction to the actions and decisions of your organization. A common approach to strategic thinking is the SWOT analysis.
- **Outputs** are the specific things that you will produce that will help to achieve your objectives and outcomes, and moving towards your goal. They are the visible evidence of your plan of action. (Examples: a training manual on child labour in domestic work produced; a certain number of domestic workers trained on household technology; a certain number of organizers trained on how to organize unorganized domestic workers.)
- **Activities** are the specific actions that you plan to do for a determined period of time (often, annually). These are usually prioritized and grouped in a work plan or plan of work. Activities lead to realizing outputs that must be accomplished to achieve a stated objective.
- It is critical that you check **realistically** your available resources, or the **inputs** that you need – people, money, expertise, and skills – before starting your work plan. When checking resources, many people think of money and equipment only. Money can be a great help in getting things done, but other things such as the skills, experience, commitment, and enthusiasm of your members are equally, if not more, important for achieving your objectives and, ultimately, your goal. So, too, are your contacts and good working relationships within your communities, and with NGOs and public authorities. Remember that although existing resources may not be enough, there are many potential resources to look for.

continued >>>



- **Indicators** measure whether you are on target in getting your inputs, doing activities, producing outputs, and reaching your objectives/outcomes, and longer-term vision/goals, and mission. Indicators are specific things that show if you have been successful, and help you with checking your progress. Things to measure success can be set at each level. (For activities: Did the organizing campaign for new members happen? If not, why? For outputs: 100 domestic workers capable of providing care to elderly people after completing training on elderly care. For outcomes and objectives: Ten per cent increase in domestic worker membership of the organization every year. Or, two of every three domestic workers get a salary increase after skills training and certification)
- During the planning process, the **outputs, activities, inputs and indicators** should be clearly identified for each strategy (and its corresponding objective/outcome and goal), as they **form the basis for checking progress towards reaching the objective/outcome and goal, and whether the plan of action is successful or not.**

Step 2 – Group work 45 minutes

5. The same groups as in Activity A1.7 come together again. The trainer gives out the blank plan of action form (T1.4i) and the List of vision/goal, objectives and outcomes, completed by each group in Activity A1.7.
6. Groups choose their moderators and reporters.
7. The trainer tells the groups to look at the objectives and outcomes they identified in Activity A1.7, and select one objective.
8. Group members discuss and agree on what strategy or strategies, outputs, activities, inputs and indicators to set in order to reach one of the objectives. The reporters complete form T1.4i and copy it on a flip chart.

Step 3 – Reporting and general discussion 45 minutes

9. The reporters take turns presenting their group flip charts and describing how their group worked (five minutes each).
10. Participants are asked to comment on the reports, giving their opinions on the process itself. What difficulties, if any, did they have, and how were these solved?
11. The trainer sums up by stating the importance of setting clear and specific strategies, outputs, activities, inputs, and indicators.



Notes for trainers

- * If you are doing the workshop in your language, be sure that the words or phrases you use for “strategy”, “outputs”, “activities”, “inputs” and “indicators” have the same meaning as their English definitions (see “Coming to terms: Key planning definitions”).
- * Split this activity into two sessions, with Step 1 being the first, and steps 2 and 3 the second. Have a break in between.

Activity A1.9 Making difficult decisions: What are your priorities?

Aim	To learn how to make informed choices when faced with several options.
Time	60 minutes

Handouts

- H1.1: Effective planning: What? Why? How? Who?

Materials

- Three boxes (or buckets or bowls). The trainer marks the boxes "A", "B", and "C".
- Post-it notes or cards (three for each participant), and flip charts.

Process

- Plenary activity and general discussion.
 1. The trainer asks participants to list all the programmes, projects, activities, and actions carried out by their organizations, and asks one or two participants to write these on a board or flip charts.
 2. The trainer puts the three boxes on a table or on the floor, marked "A", "B", and "C".
 3. The trainer asks the question: "If our funds were to drop by 50 per cent, which programmes, activities and actions would we stop doing first?" Each person writes down the programmes, activities, or actions on a post-it or card and drops it in box "C".
 4. The trainer asks the second question: "If our funds were to drop by 75 per cent, what would we stop doing next?" Each person writes down an answer on a post-it or card and drops it in the box marked "B".
 5. The trainer then asks: "What would we never stop doing?" Each person writes down an answer on a post-it or card and drops this in box "A".
 6. The results are discussed: What are the things that you can stop doing? What are the things that you should never stop doing?
 7. The trainer sums up by stating that life is full of choices and options; often, we have to make hard choices to achieve our goals.

Source: James, R., *How to do strategic planning: a guide for small and diaspora NGOs*, Common Ground Initiative, Peer Learning Programme <http://www.intrac.org/data/files/resources/729/Strategic-Planning-A-PLP-Toolkit-INTRAC.pdf>.

Activity A1.10 Writing a plan of action for organizational development and success: Putting what you have learned into practice?

Aims	To understand the logic of the planning process. To make a plan for organizational development and success, putting into practice what you have learned.
Time	210 minutes

Handouts

- Coming to terms: Key planning definitions.
- H1.1: Effective planning: What? Why? How? Who?
- H1.2: The planning cycle.
- For the group work in step 2:
 - List of vision/goal, objectives and outcomes, completed by each group in Activity A1.7.
 - T1.1: The SWOT analysis tool.
 - T1.2: The SMART planning tool.
 - T1.4i: Plan of action form (blank).
 - T1.4ii: Plan of action form (example: five-year plan of action for organizational development and success of the NDWU).
 - Activity handout 1: Background of the NDWU.
 - Activity handout 2: Task sheet for group work.

Materials

- Flipcharts or computer and screen for slides; and marker pens.

Process

- Introduction; group work; presentations and general discussion.

Step 1 – Introduction 60 minutes

1. The trainer explains the aim and process of Activity A1.10. After going through the previous activities (examining your organization's condition, its strengths and weaknesses; identifying the main vision and goal of a domestic workers' organization; learning how to set objectives and outcomes; identifying strategies, outputs, activities, inputs and indicators; and setting priorities), participants are now ready to make a plan of action for organizational development and success. (The IDWF refers to its plan of action as the Strategic Plan 2016-2020.)
2. Showing the planning cycle diagram (H1.2) on a board or flip chart (or computer screen), the trainer reviews the planning cycle with the participants, checking their level of understanding about each step, the ideas, and the logic of the process. The trainer explains the remaining parts of the planning cycle, namely implementation of the plan of action, monitoring, and evaluation.



KEY MESSAGES

- **Implementation** of the plan of action of your organization: Organizations have a tendency to skip the very important process of setting goals and objectives, and instead go immediately to planning activities and actions. There are a number of reasons for this: lack of time, the need to respond to immediate problems, unexpected grants or donations, the absence of a clear plan. But it is important that you follow the planning process so that you do not end up going the wrong way, wasting your time and other limited resources. When you are very clear and confident about what you want to achieve and how to make it happen, it will be easier to make a plan of action and activities, establish realistic time lines, divide the work, and use your money and resources wisely.
 - Monitoring is an **ongoing** process to assess progress, identify difficulties, check whether there are problems, and if yes, take remedial action. Monitoring is concerned with ensuring that inputs, through activities, are transformed into outputs. Are you doing the things you said you would do? Are you making progress in achieving the results you wanted? Monitoring is checking your activities and actions to see how effective your strategies are in reaching your objectives, thus bringing you closer to your goal. Regular monitoring will make it easier for you to decide if you need to change your plan.
 - Evaluation is a **structured process** to assess the progress made towards the achievement of your objectives, outcomes and goals, and the impact and effects of your work. It is a key tool for enhancing the implementation of ongoing work, and for improving the preparation and planning of a new plan of action. An evaluation helps you decide whether your work is successful in meeting your objectives and goals, and to think about lessons learned and good practices for the future. End-of-plan evaluation lets you judge its success, repeat and expand activities that worked and that you can improve, and let go of those that did not. There are four main reasons for doing an evaluation:
 - To check whether your plan of action achieved its intended objectives and whether progress is made towards achieving the goal of your organization.
 - To understand **how** the plan of action achieved its objectives, why it worked or why it may not have worked.
 - To check how sustainable and meaningful the plan was for your members and key stakeholders, and your organization as whole.
 - To inform decision-makers on how to build on and improve your next plan of action.
 - **Evaluation** is not only about demonstrating success; it is also about **learning why things did not work**. Identifying and learning from mistakes are key elements of evaluation. Evaluation is not finding out about everything, but **finding the things that matter**.
3. Before the participants break into groups, the trainer gives out to everyone the following:
- The blank plan of action form (T1.4i) and the example plan of action form (T1.4ii).
 - The SWOT tool (T1.1) for use during the group work.
 - The List of vision/goal, objectives and outcomes, identified by each group in Activity A1.7.
 - The background of the NDWU (Activity handout 1).
 - The task sheet for the group work (Activity handout 2).

4. The trainer explains the group work step-by-step using Activity handout 2. The trainer asks if there are questions about the other handouts (which have been used in earlier sessions) and clarifies as needed to make sure that everything is clear.

Step 2 – Group work 90 minutes

5. Participants are divided into groups of six to eight. As far as possible, those who worked together in activities A1.7 and A1.8 should work together again. Groups choose their moderators and reporters. All groups work on the NDWU case (Activity handout 1).
6. The moderator guides the group members through the task sheet (Activity handout 2) step-by-step, and the reporters complete the blank plan of action form (T1.4i).

Step 3 – Presentations and general discussion 60 minutes

7. Each reporter presents the group's T1.4i template, and describes the process of the group work (eight minutes).
8. After the reports, participants give their comments and opinions about the exercise. Were the principles of effective planning used: inclusive and participatory, methodical and systematic, and realistic? What difficulties, if any, did they have in doing the exercise? For example, using the SWOT tool? Setting the strategies? Or, identifying the outputs, activities, inputs or indicators? The trainer clarifies, as needed.
9. The trainer summarizes the discussion, thanking the participants for their hard work. The trainer explains that participants have now completed part 1 of the first module on effective planning for organizational success, they have learned what is effective planning and how to do it.
10. The trainer draws the attention of the participants to the other tools in the manual, which they may find useful when they plan, both at personal and organizational levels. The trainer explains briefly each tool:
- T1.3: Checklist for effective planning.
 - T1.4: Outline of the plan of action for organizational development and success.
 - T1.5: Work plan form (blank).
 - T1.6: Communication matrix.
11. The trainer then draws their attention to part 2 of module 1 which is about planning an organizing campaign and will be discussed in future training sessions.
12. The trainer ends by reminding everyone that there is no magic way to effective planning. The planning process does not need be complicated or overwhelming. There is no right or wrong way to plan. The most important thing is to look at the available choices and work out what approach offers the best match with your organization's values, principles, and resources.



Note for trainers

- * This activity is the “proof of the pudding” – the one that best shows the learning results. Divide it into two or three sessions, with breaks in between. Take the time necessary to make sure that the participants fully understand the basic ideas, steps, and tools for effective planning. Go around the groups to check if more guidance or explanation is needed, and to watch how everyone takes part.



A1.10: Activity handout 1

Background of the National Domestic Workers Union (NDWU) of the Republic of Atlantis

The National Domestic Workers' Union (NDWU) of the Republic of Atlantis was founded (started) in November 2011. The two-day founding conference brought together 500 domestic workers: 400 lived and worked in the capital; the others came from three of the six provinces of the Republic. The conference adopted the NDWU constitution. The constitution affirms the human and labour rights of all workers, particularly of domestic workers – nationals and migrants – under international and/or national instruments (standards, documents, or agreements), notably ILO Convention No. 189. The constitution describes the NDWU as a nationwide, membership-based organization of domestic workers, nationals, and migrants, guided by the core values and principles of democracy, transparency, accountability, and solidarity.

The constitution states the mission of the NDWU as ensuring:

- the respect and promotion of the human and labour rights of domestic workers by the government, employers, and the public;
- full coverage for all domestic workers in national labour legislation and social protection schemes;
- the ratification of ILO Convention No. 189 on decent work for domestic workers (C189);
- the setting-up of a National Task Force on Domestic Work (including government, employers' organizations, trade unions, and other civil society organizations with full representation of domestic workers' organizations) to plan, implement, and coordinate activities to promote decent work for domestic workers;
- access to basic education and skills training for domestic workers and the development of professional skills standards for domestic workers; and
- access to an effective complaints mechanism and to help hotlines and shelters.

The constitution sets out the structure and decision-making process of the organization:

- A national conference every two years.
- Fifteen members of a national executive committee elected by the conference, to include the chair, vice-chairs, secretary, treasurer, and auditors, and their duties.
- Discussion and adoption of a two-year action plan by the conference after talks with everyone in the organization.

After a review of the last seven years, the NDWU has decided to start a planning exercise on how it can be more active and effective in its mission. It will be the first time the Federation has done an activity like this.

The federation now has 100,000 members who pay a membership fee; 5,000 of them are migrants from neighbouring countries. It publishes a newsletter every three months. It is getting attention in the media and from the public because of its participation in national activities organized by its partner unions and NGOs (May Day, 8 March, Child Labour Day). Since 2012, it has been organizing activities on Domestic Workers' Day, 16 June, which has resulted in articles and interviews of its leaders in newspapers and magazines, and TV coverage, as well. It receives some support from the IDWF – which it joined in 2013 – and sister organizations from Europe, for its programmes and activities, but there is not always enough money. Local NGOs and unions are providing valuable support for its operations (including rent-free office, venues for events, training programmes, and advice and mentoring).

There is another organization of domestic workers in the Republic of Atlantis – the Association of Domestic Workers in RA – founded in 2013 – which has about 1,000 members, most of whom are migrants. The two organizations have been working together on joint campaigns (such as ratification of C189).

A survey of domestic workers in the Republic just done by a leading university shows that there are approximately 2 million domestic workers in the country, around a third of whom are from neighbouring countries. The survey also shows that the majority of domestic workers do not receive the minimum wage and are not covered by the Labour Code.



A1.10: Activity handout 2

Task sheet for group work

1. Based on the goal and objectives your group identified in Activity A1.7, choose **one** objective to reach the goal.
2. List the strategies – what do you need to do to reach the selected objective. Concentrate on answering the question **How?**
3. Examine the list of strategies together and take out the strategies that are clearly “wishful thinking” – things that will not be possible. You can do a quick version of the “prioritizing” activity (A1.9) and select three to four strategies.
4. When you have agreed on three to four strategies, proceed with a SWOT analysis for each strategy, to help you to decide whether it is a strategy that has a good chance of success or not. Reporters are asked to hand in the completed SWOT forms to the trainer after the group work.
5. When you have decided on the two most promising strategies, go to the next phase: Identify the outputs, activities, inputs, and indicators for each strategy (see examples in T1.4ii).
6. The reporter writes down the outcome of the group discussion.



Domestic workers fight for their rights, Pakistan
Photo credit: Saad Muhammad

Activities

Part 2 Developing a successful organizing campaign plan

A1.11	Why is organizing a priority for domestic workers' organizations?
A1.12	The basic parts of effective planning for an organizing campaign.
A1.13	Analysis of your membership.
A1.14	Setting objectives and outcomes for your organizing campaign plan.
A1.15	Writing a successful organizing campaign plan.

Activity A1.11 Why is organizing a priority for domestic workers' organizations?

Aim	To understand the importance of organizing.
Time	90 minutes

Handouts

- H1.3: Developing an effective organizing campaign plan.

Materials

- Coloured cards or half-A4 sheets (20 for each reporter; if possible, one colour for each group).
- Four flip charts or large board for use in step 3.

Process

- Brainstorming; group work; general discussion.

Step 1 – Brainstorming 20 minutes

1. The trainer explains the aim and process of the activity, and asks participants to brainstorm on what is “organizing”, giving examples and sharing their experiences. How did they become members? Have they recruited new members themselves? The trainer notes down key words on a board or flip chart.
2. The trainer sums up the brainstorming and asks participants to agree on a meaning of “organizing” (see the key messages below), then writes this on a board or flip chart.

Step 2 – Group work 40 minutes

3. Participants form groups of six to eight. Groups choose their moderators and reporters.
4. Groups discuss and give their common opinion on the following:
 - a. Five reasons why domestic workers should join domestic workers' organizations. The reporters write down one reason per card.
 - b. Is it easy to organize domestic workers? Explain your answer. The reporters write down one answer per card.
 - c. Five reasons why domestic workers' organizations should put organizing as their top priority. The reporters write down one reason per card.

Step 3 – General discussion 30 minutes

5. The trainer asks one group reporter to give the group's answer to a) and pin the cards on the board with spaces in between, to start grouping ideas. Other reporters follow, pinning their cards under the relevant groups of ideas or starting new groups of similar ideas.
6. The trainer asks another reporter to give the group's answers to b), and asks other reporters whose groups have a similar opinion to add their ideas. Ask reporters of groups that disagree to explain their reasons. The trainer seeks agreement from the participants.

7. For question c), follow the same procedure as a) and b).
8. The trainer sums up the discussion, gives the key messages below, and thanks the participants.

KEY MESSAGES

Organizing is the lifeblood of workers' organizations whose force depends on their members.

- Domestic workers need to organize and organizing should be an important, ongoing activity of your domestic workers' organization, if it is to be a strong voice for the defense and promotion of the rights and interests of domestic workers. Members bring skills and experience that they can use to benefit your organization. More members mean that you can do more work as an organization.
- Organizing is about **recruiting** unorganized workers and encouraging them to join a domestic workers' organization. Organizing is also about keeping members. Organizations often get off to a good start and recruit many people, only to lose them after a few months. Having active members is very important to making your plans successful. When you recruit domestic workers, you should listen to them, help them to address their needs, and provide them with services that they want, to keep them happy and active in the organization.
- Members and possible members want their organizations to be useful to them. This means organizing and campaigning on issues that matter to domestic workers, and creating a sense that your organization helps them to address their needs and solve their problems and issues. It means, where possible, finding ways to talk positively with employers.
- The more members you have, the more ideas and opinions are given and discussed. This leads to better decision-making.
- Communication is very important. Members want to know what their organization is doing for them, and why. They want to feel that the organization listens to them and acts on their concerns. Communication between members is important, particularly in sharing problems and solutions. Your organization can help domestic workers keep in touch with each other.
- Through organizing, domestic workers can:
 - Come together to share problems and solutions.
 - Build their organization (group, association, trade union, cooperative, network) around common issues to bargain, negotiate and advocate for better working conditions, and labour and social protection with employers, and local, state and national governments.
 - Publicize existing rights and work together to prevent abuse and exploitation.
 - Start help lines and advice services for domestic workers in need.
 - Campaign for better working conditions: decent wages and working hours, regular time off and holidays, and social protection with maternity protection, and better living conditions, specially for live-in domestic workers.
 - Help develop savings and insurance schemes, and welfare services.

continued >>>



- When domestic workers join an organization, union, network, association, cooperative, or collective, they:
 - gain self-confidence, recognition and respect for their work;
 - know where to go for help when they have a problem at work;
 - can meet with others to talk about common issues, and learn from each other.
 - work together to solve problems and improve their working conditions;
 - have someone to speak for them if they feel they are being treated unfairly;
 - take part in choosing who will speak with local authorities or government officials, employers and their organizations, and the media, on their behalf; and
 - learn new skills through training activities.
- It is not easy to organize domestic workers who face many problems in forming, joining and leading organizations or associations. Because of their isolation and long working hours, many do not know about organizations that can give them support, help, or a safe place to stay when they run away from abusive employers. Some may know about organizations but may be afraid to contact them for fear of upsetting their employers or losing their jobs. New arrivals and live-in domestic workers may not have access to a community outside their employers' home. Migrant women domestic workers may face even more problems that stop them from joining organizations.

You need to plan your organizing work well so that you can reach out to domestic workers and can convince them to join, stay in and contribute to your organization.

Activity A1.12 The basic parts of effective planning for an organizing campaign

Aim	To identify the basic parts of effective planning for an organizing campaign.
Time	90 minutes



Handouts

- Coming to terms: Key planning definitions.
- H1.2: The planning cycle.
- H1.3: Developing an effective organizing campaign plan.



Materials

- Flip charts or computer and screen for slide presentation.



Process

- Introduction and general discussion.
 1. The trainer introduces the basic parts of effective planning with a flipchart or slides. The trainer explains each part and encourages participants to ask questions and seek explanations.
 2. The trainer shows and explains the project cycle diagram (H1.2).

KEY MESSAGES

The **basic parts** of effective planning are:

- The **analysis** of your organization's condition – the real start of effective planning. It shows the problems you face in organizing domestic workers.
- The **vision and goal** – the big thing that you want to achieve, which will increase the number of members, and keep them active and involved in building your organization.
- The **objectives or outcomes** – specific, measurable statements of what you will do to achieve your goal within a certain time frame.
- The **strategy** – is a summary statement of **what you want to, for whom, with whom and how**. Strategies are practical ideas about how you will make the best use of your resources to achieve your objectives and obtain the desired outcomes. Strategies describe the general approach or methods, not specific activities or projects.
- The **outputs, activities, inputs and indicators**. Outputs are the things you **produce**, activities are the things you **do**, and inputs are the things you need to **have** to enable you to undertake activities, produce outputs and achieve your objectives. Indicators **measure** whether you are on track in undertaking activities, producing outputs, and reaching your objectives, outcomes, and longer-term goal and vision.

continued >>>





Who does the planning? Most domestic workers' organizations have an organizing committee that does planning, supervising, and checking on recruitment campaigns. The committee's members and responsibilities may be set out in the statutes or decided by the executive board. The organizing committee members are often leaders and organizers. This committee should form a core group to write your organizing campaign plan. It may decide to appoint experienced organizers or leaders from the proposed recruitment areas to join the group. The core group members should be able to work together and share the various responsibilities and the work to be done. Throughout the process, they must be guided by the principles of effective planning, in particular that organizing should be done by all members and that all members are given a chance to decide on the organizing campaign plan.

You must **put on paper** your organizing campaign plan. It should state in clear language the long- and short-term directions your organization has chosen to take, to reach your campaign goal. This makes it easier for everyone – your leaders, members, partners, and supporters – to understand where you want to go and how you will get there. **The actual format of the plan is not important; write it down in a form you can use.**

In planning your organizing campaign, you need not go through all the effective planning parts listed above. The constitution or statutes of your organization already set out its core values, mission, vision and goal. Your organizing campaign plan should be based on these.

If your organization has already adopted an organizational plan for a certain period, it should contain the vision statement, and the goals, objectives, and strategies you wish to follow in the coming years to achieve this vision. It is likely that your organization has already planned to increase the membership and has already set some targets in terms of numbers or percentages. The plan for your organizing campaign should take this into account, and be based on the earlier plan, unless there are good reasons not to. It is also possible that your organization is new or has never made a clear plan to increase the membership; in such cases you need to start from scratch.



Notes for trainers

- * This activity introduces the basic parts of effective planning. Some participants may already be familiar with the planning process, ideas, and terms, but you should still check and make sure that all participants have the same understanding of the key terms. Even in English, terms such as “goal”, “vision”, or “overall, long-term or development objective”, can have the same or different meanings, and different organizations may use terms such as “strategy”, “(immediate or short-term) objective” or “outcome”, “output”, and “indicator” in the same or different ways. Domestic workers' organizations may choose some terms over others, as it is preferable if they select the words or phrases that best express what they want to say.
- * If participants have not done Activity 1.4, the trainer should include steps 2 and 3 from Activity 1.4 (group work, reporting and discussion on the horse parable) as this usually serves as an eye opener for the participants on the logic and main parts of the planning cycle.
- * Assure participants that the following activities will give them a better understanding of the main parts of effective planning.

Activity A1.13 Analysis of your membership

Aims	To check the membership situation in your organization, and identify the challenges you face. To learn how to apply the SWOT analysis tool.
Time	120 minutes

Handouts

- H1.2: The planning cycle.
- H1.3: Developing an effective organizing campaign plan.
- Activity handout 1: SWOT form: Analysis of present membership (blank).
- Activity handout 2: SWOT form: Analysis of present membership (example).

Materials

- Flip charts or computer and screen for showing slides on SWOT.
- The trainer writes the SWOT diagram on a flipchart or on a slide.



Process

- Introduction; individual exercise; sharing and general discussion.

Step 1 – Introduction 45 minutes

1. The trainer explains the aim and process of the activity. She or he points out that the start of planning of a successful organizing campaign is taking a close look at the condition of your membership. The trainer asks participants what they would want to know if they start planning such a campaign, and writes their responses on a flipchart. After several responses from the participants, the trainer summarizes and adds the points that have not yet been brought up from the list below:
 - a. How many members do you have? What percentage are they of the total number of domestic workers in the geographical area you cover (national, state-wide, regional or provincial, city-wide or in specific neighbourhoods)?
 - b. Do they get proper help on joining and contributing to the organization, and basic training on the rights of domestic workers? What other services does your organization provide to them?
 - c. Do you have enough information about your members? Are they paying their membership fees on time? Do they regularly attend meetings of their groups, or branches? Do they take part in your organization's key activities (bi-monthly meetings; training workshops or sessions; activities on 1 May, 16 June, 8 March)? Is it easy to get them to demonstrations organized by you or with your allies?
 - d. Are you satisfied with their commitment to and involvement in helping to strengthen your organization?
 - e. How successful were your previous membership campaigns? How are you achieving your organization's mission, vision, goals or objectives regarding organizing domestic workers?
 - f. What went well when organizing earlier? What could have gone better?
 - g. Are you growing fast, or slowly but surely, or are you not progressing and losing members? Why?

2. The trainer explains that through this self-examination you can find the problems, understand the challenges, and start planning what must be done and how to make it happen. A basic tool for this exercise is the SWOT analysis tool. The trainer introduces the SWOT analysis tool with Activity handout 1, explaining what each square means and asking participants who have used it before to share their experiences. The trainer then shows how the tool can be used in examining the membership conditions of the organization, using Activity handout 2 with the NDWU example.

Step 2 – Individual exercise 30 minutes

3. The trainer gives out the Activity handout 1: SWOT form: Analysis of present membership (blank) to all the participants and instructs them to do the following.
 - For participants from more established domestic workers' organizations which have organizing aims and/or targets, each participant should:
 - Remember and write down the objective related to organizing and increasing the membership of your organization as the subject of the SWOT exercise.
 - Think how the organization has achieved its mission, vision, goal or objective regarding its membership.
 - Complete the SWOT form and answer the four questions.
 - For participants from new domestic workers' groups or organizations which have no goals or objectives related to organizing, each participant should :
 - Think and review what the current membership situation is.
 - Think of an aim to increase the membership in one year from now.
 - Complete the SWOT form and answer the four questions.

Step 3 – Sharing and general discussion 45 minutes

4. The trainer asks volunteer participants to share their SWOT analysis form and give their comments and inputs on the use and usefulness of the SWOT analysis form and on their findings related to their membership and organizing :
 - Did this tool help in checking the condition of the membership of their organizations?
 - Did they have difficulties? Explain.
 - Were they able to know the difference between internal and external forces? Strengths and weaknesses? Threats and opportunities?
 - What were common strengths and opportunities related to the membership of their organization?
 - What were common weaknesses and threats related to the membership of their organization?
 - Can they use the findings of the SWOT to build on their strengths and opportunities, see the problems to work on, and the threats and challenges they face?
5. The trainer sums up and thanks the participants for their contributions.

KEY MESSAGES

The SWOT analysis tool (strengths, weaknesses, opportunities, threats) (see T1.1)

The set-up of the SWOT analysis is easy, as it looks at positive and negative things from an internal and external (inside and outside) view under four headings:

- **Strengths** are positive things in your organization. Examples might include a talented group of leaders, members or volunteers; a high number of fee-paying members; most members regularly coming to meetings; young leaders doing good work; a good organizing committee; or a successful savings cooperative.
- **Weaknesses** are negative things in your organization. Examples might include not enough money for organizing; not enough interest among members; not enough trained organizers; always needing the help of others (volunteers or organizations) for outreach activities; or a poor member record system.
- **Opportunities** are positive things outside your organization. Examples might include more non-members coming to your events; your organization's growing reputation in the community; or new progressive laws and regulations on domestic work, ensuring the right to organize.
- **Threats** are negative things outside your organization. Examples might include less money from regular donors; economic problems in the country; cuts in public spending for social security and health; or local governments that are not interested in helping domestic workers.

The key to doing a SWOT analysis is to think about ways to make the most of the positive things and reduce the effect of the negative ones. When you are writing your plan, brainstorm about ways to use your strengths, take advantage of opportunities, and overcome weaknesses and threats.



Notes for trainers

- * This activity may be divided into two sessions, with step 1 being the first, and steps 2 and 3 the second. Have a short break between the sessions.
- * It may be that the SWOT analysis tool has its equivalent in your language. If this is not the case, find a symbol or translate the words and combine the first letters together (and if the acronym makes sense, so much the better). If you are translating the SWOT analysis tool yourself, make sure that the words "strengths", "weaknesses", "opportunities", and "threats" are well-understood in the context of the exercise. In some languages the word "strength" refers only to physical strength, and not to social, political or psychological strengths, so you will need to find a word or a term to describe all the strengths in your organization.

A1.13: Activity handout 1

SWOT form: Analysis of present membership (blank)

Subject:

- For established domestic workers' organizations: One future objective of your organization related to organizing and the membership (for example, training, recruitment campaign, membership fees, cooperative development).
- For new domestic workers' groups or organizations: One possible aim of your group or organization related to organizing:

<p>What are the INTERNAL (within the organization) STRENGTHS (positive things)?</p> <p>1.</p> <p>2.</p> <p>3.</p>	<p>What are the INTERNAL (within the organization) WEAKNESSES (negative things)?</p> <p>1.</p> <p>2.</p> <p>3.</p>
<p>What are the EXTERNAL (outside the organization) OPPORTUNITIES (positive things)?</p> <p>1.</p> <p>2.</p> <p>3.</p>	<p>What are the EXTERNAL (outside the organization) THREATS (negative things)?</p> <p>1.</p> <p>2.</p> <p>3.</p>

Conclusion

- What is the current situation?
 - For established organizations: Has your organization achieved this goal so far? (Yes? No? Somewhat?) Explain your response.
 - For new organizations: what is the current membership situation: Is organizing a priority? (Yes? No? Somewhat?) Explain your response.

2. How can the positive things (internal and external) be best used?

3. How can the negative things (internal and external) be reduced?

4. Should your organization continue to follow this goal? Why?

A1.13: Activity handout 2

SWOT form: Analysis of present membership (example)

Subject: One of the objectives of the NDWU, as stated in its strategic five-year plan is that *by 2022, 200,000 domestic workers (including migrants) are organized in the country to increase their power to influence the decisions that affect their lives, and contribute to strengthening the NDWU.*

<p>What are the INTERNAL (within the organization) STRENGTHS (positive things)?</p> <p>Full agreement at the NDWU Congress to carry out a five-year organizing campaign to increase membership by 25 per cent by 2022.</p> <p>Present membership of 150,000 covers three of the six major provinces.</p> <p>The organizing committee is very active, with teams in the three provinces.</p> <p>The IDWF and a European sister organization promise to provide 50 per cent of the organizing budget.</p> <p>Core planning group for the organizing campaign set up by the organizing committee ready to propose the plan to the executive board in two months.</p>	<p>What are the INTERNAL (within the organization) WEAKNESSES (negative things)?</p> <p>Ten full-time organizers are too busy to take on any more work.</p> <p>Six potential organizers are identified, but they are not ready to accept full-time responsibility.</p> <p>Five organizers speak other local languages.</p> <p>Twenty per cent of the members go to the social functions but not to the meetings or training events of the organization.</p> <p>Five of the 30 elected members of the executive board are not active.</p> <p>Membership fees can pay only for the running costs of the organization.</p>
<p>What are the EXTERNAL (outside the organization) OPPORTUNITIES (positive things)?</p> <p>Ratification of C189 is on the agenda of the National Committee On Domestic Work. The NDWU has two representatives on the nine-member committee which also includes the Ministry of Labour, the Ministry of Women, The National Human Rights Commission, organizations of employers and workers, and other civil society organizations (CSOs).</p> <p>The national trade union centre, women's organizations, and other CSOs are taking up the problems of domestic workers.</p> <p>The NDWU is getting public attention as the best organization of domestic workers in the country, and is getting more domestic workers to join it.</p>	<p>What are the EXTERNAL (outside the organization) THREATS (negative things)?</p> <p>Support and money for the National Committee on Domestic Work may be cut or reduced if a conservative party wins the next national election.</p> <p>Other issues may take away the attention of supporters from the need to strongly support the NDWU and its campaign for decent work for domestic workers.</p> <p>There may not be enough money for organizing campaigns because of economic problems in donor countries.</p>



“Smart Domestic Worker” campaign, Thailand
Photo credit: Pi Noy from HomeNet

Activity A1.14 Setting the objectives and outcomes for your organizing campaign plan

Aim	To learn how to set objectives and outcomes related to the membership of your organization, using the SMART and SWOT tools.
Time	180 minutes

Handouts

- Coming to terms: Key planning definitions.
- H1.2: The planning cycle.
- H1.3: Developing an effective organizing campaign plan.
- H1.4: The Five-Year (2016-2020) Strategic Plan of the IDWF.
- T1.1: The SWOT analysis tool.
- T1.2: The SMART planning tool and checklist.
- Activity handout: Setting objectives and outcomes: Report form.

Materials

- Flip charts, board or computer and screen; marker pens for each group.

Process

- Brainstorming; group work; general discussion.

Step 1 – Brainstorming 40 minutes

1. The trainer explains the aim and process of the activity.
2. Recalling the discussions on the basic parts of effective planning (A1.4 and A1.12), the trainer explains the difference between a vision/goal, objectives and outcomes, and asks participants to give examples.
3. The trainer writes down the definition of a vision/goal and objectives and outcomes on the board or flip chart, or shows slides on the screen.

4. The trainer explains the SMART tool (T1.2 with example) and shows how it is used.
5. The trainer gives the instructions for the group work.

Step 2 – Group work 80 minutes

6. Participants are divided in groups of six to eight. All groups work on the five-year vision and goal of the NDWU of the Republic of Atlantis: “By 2022, the NDWU is a strong, democratic, and united organization of domestic workers contributing to the protection and advancement of the rights of its 200,000 members and domestic workers in the country.”
7. Groups choose their moderators and reporters. Each reporter is given the Activity handout to complete and then copy on a flip chart for presentation to the whole group. The reporter should also report on how the group identified the objective.
8. The moderators make sure that group members understand the NDWU vision and goal, which will be used to set the objectives.
9. Group members discuss and agree on one objective that should be achieved by the NDWU in five years, applying the SMART tool. When everyone agrees, the reporter writes down the objective on the top of the flip chart. If there are more objectives, each is written down on a separate sheet. If there are too many objectives, the moderator tells the group to choose the most important one, using the SWOT analysis, if necessary.
10. The moderator takes one objective at a time and asks group members to list specific outcomes that will move the organization towards achieving the objective. Again, the SMART tool should be used in setting the outcomes. If there are too many, the moderator should ask the group to choose the two most important ones, using the SWOT tool. The reporter writes down the outcomes under the relevant objectives.

Step 3 – Reporting and general discussion 60 minutes

11. Reporters take turns presenting their flip charts, briefly describing how their groups worked (five minutes each).
12. Participants are asked to comment on the objectives and outcomes set by the groups using the SMART checklist. They should also give opinions on the process itself: What difficulties, if any, did they have, and how were these solved?
13. The trainer sums up by stating the importance of applying the SMART and SWOT tools in setting objectives and outcomes.

KEY MESSAGES

- Establish your **objectives and outcomes** based on what you know about your situation now, and the problems you have identified (see the outcomes of A1.11 and A1.13). What do you want to change? What do you want to achieve?
- Often, people confuse goals, objectives and outcomes, because these words describe what they want to achieve. For example, when a person says “My goal is to lose weight” or “My objective is to lose weight” or “In three months time, I want to lose two kilos” everyone understands this. However, in planning, these words have different meanings as a goal is a more long-term aim than an objective, and an outcome specifies what are the effects of reaching your objectives:
 - A goal is something big and important that you are aiming for in the future. It is the long-term result of your plan. Your goal answers the question “What do you want?” The IDWF Strategic Plan refers to this as the “overall objective”.

continued >>>



- An objective is a specific and measurable achievement within a certain time period that will help you towards achieving your goal. Setting objectives will answer the question “How can you make it happen?” The IDWF Strategic Plan refers to this as the “immediate objective”.
 - Outcomes are the desired changes that happen as a result of achieving your objectives. If you aim to build the capacity of domestic worker organizers, and hold three training workshops for 30 organizers, what outcomes do you expect? A 30 per cent increase in membership? An outreach to three new regions? Ninety more organizers who can train other potential organizers? Try to put a number so that you can measure your outcomes. The IDWF strategic plan specifies its immediate objective through five outcomes (see H1.4 for examples).
- Setting objectives is a very important step in planning for success. Well-formulated objectives will guide you and your organization in setting priorities, and deciding what to do and how to do it. The SMART tool is helpful when setting and checking your objectives. Is each of your objectives:
- **S**pecific?
 - **M**easurable?
 - **A**chievable?
 - **R**elevant and **R**ealistic?
 - **T**ime-bound and **T**imely?
- It is “SMART” to develop outcome-based objectives, because they identify the specific change that must happen for achieving your objective. An outcome refers to a change that you want to see in a person or group of people, or in a situation resulting from the achievement of your objective. Examples of SMART outcome-based objectives are: “Increased capacity of 50 domestic worker leaders to develop their organizations and attract 500 unorganized domestic workers’ to become a member of a domestic workers’ organization within two years”; or “A national or state law revised or adopted that extends labour protection which already exists for other workers to domestic workers’ within three years”.
- Set as many objectives as you can to achieve your identified goal. Then, go through your list and prioritize the three most important objectives. What is most important? What is most urgent? What do you need to do first? What will have the best effect? Prioritizing your objectives and looking at your resources and capacities honestly and realistically will help you in deciding your plan of action to reach these objectives.



Notes for trainers

- * Split this activity into two sessions: steps 1 and 2 for the first, and step 3 for the second (this will also allow the reporting and general discussion to go on longer, if necessary).
- * This is an important moment in the planning process, and enough time should be given to this activity, especially if the participants (or core planning groups) do not have much experience in planning.
- * In your introduction, talk about the planning cycle diagram (H1.2), showing where objective and outcome setting is, so that participants understand the logic and flow of the process.



A1.14: Activity handout

Setting objectives and outcomes: Report form

Vision and goal: “By 2020, the NDWU is a strong, national, democratic, and united domestic workers’ organization contributing to the protection and advancement of the rights of its 200,000 members and domestic workers in the country.”

Objective 1:	Outcomes:
Objective 2:	Outcomes:

Activity A1.15 Writing a successful organizing campaign plan

Aims	To learn how to set strategies, outputs, activities, inputs and indicators. To understand the logic of the planning process. To make an organizing campaign plan for your organization, putting into practice what you have learned.
Time	270 minutes

Handouts

- H1.2: The planning cycle.
- H1.3: Developing a successful organizing campaign plan.
- Coming to terms: Key planning definitions.

For the group work:

- T1.2: The SMART planning tool and checklist.
- T1.4ii: Plan of action form (example).
- T1.7: Organizing campaign plan form.
- Activity handout: Making an organizing campaign plan: Group work task sheet.

Materials

- Flip charts, board, or computer and screen for slides; marker pens for each group.

Process

- Brainstorming; group work; presentations, general discussion.

Step 1 – Brainstorming 60 minutes

1. The trainer explains the aim and process of Activity A1.15, and asks participants to brainstorm on the meaning of “strategy” and why it is an important step in effective planning. The trainer writes key words and phrases on the board, encouraging participants to explain, share, and develop their opinions. When there are enough ideas, the trainer sums up the discussion and gives the definition on a flip chart or slide.
2. The trainer follows the same procedure with the words “outputs”, “activities”, “inputs” and “indicators”, and gives examples.
3. The trainer reviews the planning cycle with the participants, checking their level of understanding of the steps, ideas, and logic of the process using the key messages on page 81.
4. The trainer distributes the following handouts to everyone and discusses them one by one:

- The example plan of action form of the NDWU (T1.4ii) and blank organizing campaign plan form (T1.7). The trainer goes through the NDWU example plan of action form and makes sure that everyone understands it. The blank form is to be completed by the group reporters, based on the outcome of the groups' discussions.
- The SWOT (T1.1) and SMART (T1.2) tools which the groups can use during the group work.
- The task sheet for the group work (Activity handout). The trainer goes through the steps to make sure that everything is clear.

KEY MESSAGES

- **A strategy is a summary statement of “what you want to do, for whom, with whom and how”.** A strategy is a set of practical ideas on how to make the best use of your resources to achieve your objectives. It is a way to describe **how** you will get things done. It is less detailed than an action plan and answers the question “**How** do we get there from here?” The strategy or strategies you use to reach your objectives must be based on careful consideration of your resources and priorities. Setting clear strategies gives long-term coherence and direction to the actions and decisions of your organization. A common approach to strategic thinking is the SWOT analysis.
- **Outputs** are the specific things you will do that will help to achieve your outcomes and objectives, moving towards your goal. They are the visible evidence of your plan in action. (Examples: your training manual for organizers updated and printed; a certain number of new organizers trained.)
- **Activities** are the specific actions that you plan to do for a determined period of time (often, annually). These are usually prioritized and grouped in a work plan or plan of work. Activities lead to realizing outputs that must be accomplished to achieve a stated objective.
- It is critical that you check **realistically** your available resources, or the **inputs** that you need to have – people, money, expertise, and skills – before starting your work plan. When checking resources, many people think of money and equipment only. Money can be a great help in getting things done, but other things such as the skills, experience, commitment, and enthusiasm of your members are equally, if not more, important in achieving your objectives and, ultimately, your goal. So, too, are your contacts and good working relationships within your communities, and with NGOs and public authorities. Remember that although existing resources may not be enough, there are many potential resources to look for.
- **Indicators** measure whether you are on target for activities, producing outputs, and reaching your objectives, outcomes, and longer-term goals, vision, and mission. Discuss and agree upon specific things that show if you have been successful, to help with checking your progress. Things to measure success can be set at each level. (For activities: Did all the launching events of the organizing campaign take place? If not, why? For outputs: New members recruited in each of the campaign target areas. For outcomes and goals: Percentage increase in total membership and income of organization; greater public recognition of the organization as the voice of domestic workers in the country: wider media coverage, active participation in government agencies and NGO bodies.)

During the planning process, the **outputs, activities, inputs and indicators** should be clearly identified for each strategy (and the corresponding objective and goal), as they **form the basis for checking progress towards reaching the goal, and for checking the success of the plan of action.**

Step 2 – Group work 90 minutes

5. Participants are divided into groups of six to eight, by organization. If all participants belong to the same organization, divide them by branch or region. Groups choose their moderators and reporters.
6. The moderators guide the group members through the task sheet step-by-step and the reporters record the outcome of the groups' discussions on the blank organizing campaign plan form (T1.7).

Step 3 – Presentations and feedback 60 minutes

7. Each reporter presents the group's organizing campaign plan, and describes the process of the group work (8 minutes).
8. Participants give their comments and opinions. Were the forms clear and specific? Were the principles of effective planning used: inclusive and participatory, methodical and systematic, realistic? What difficulties, if any, did they have in doing the exercise? In using the SWOT and SMART tools? In setting the strategies? In identifying the outputs, activities, inputs and indicators? In choosing what was most important?
9. The trainer summarizes the discussion, thanking the participants for their hard work.

Step 4 – General discussion and conclusion 60 minutes

10. The trainer reads out the other important parts of successful planning: the work plan, monitoring, and evaluation (see the key messages below).
11. The trainer draws the attention of the participants to the other tools in the manual, which they may find useful when they plan their organizational campaign. The trainer explains briefly each tool:
 - T1.3: Checklist for effective planning.
 - T1.4: Outline of the plan of action for organizational development and success.
 - T1.5: Work plan form (blank).
 - T1.6: Communication matrix.
12. The trainer ends this last activity by reminding everyone that there is no magic way to do effective planning. The planning process does not have to be complicated. There is no right or wrong way to plan. The most important thing is to look at the available choices and work out what approach offers the best match with your organization's values, principles, and resources.



KEY MESSAGES

- **Implementation** of the plan of action of your organization: Organizations have a tendency to skip the very important process of setting goals and objectives, and instead go immediately to planning activities and actions. There are a number of reasons for this: lack of time, the need to respond to immediate problems, unexpected grants or donations, the absence of a clear plan. But it is important that you follow the planning process so that you do not end up going the wrong way, wasting your time and other limited resources. When you are very clear and confident about what you want to achieve and how to make it happen, it will be easier to make a plan of action and activities, establish realistic time lines, divide the work, and use your money and resources wisely.

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- Monitoring is an **ongoing** process to assess progress, identify difficulties, check whether there are problems, and if yes, take remedial action. Monitoring is concerned with ensuring that inputs, through activities, are transformed into outputs. Are you doing the things you said you would do? Are you making progress in achieving the results you wanted? Monitoring is checking your activities and actions to see how effective your strategies are in reaching your objectives, thus bringing you closer to your goal. Regular monitoring will make it easier for you to decide if you need to change your plan.
- Evaluation is a **structured process** to assess the progress made towards the achievement of your objectives, outcomes and goals, and the impact and effects of your work. It is a key tool for enhancing the implementation of ongoing work, and for improving the preparation and planning of a new plan of action. An evaluation helps you decide whether your work is successful in meeting your objectives and goals, and to think about lessons learned and good practices for the future. End-of-plan evaluation lets you judge its success, repeat and expand activities that worked and that you can improve, and let go of those that did not. There are four main reasons for doing an evaluation:
 - To check whether your plan of action achieved its intended objectives and whether progress is made towards achieving the goal of your organizing campaign plan.
 - To understand **how** the organizing campaign plan achieved its objectives, why it worked or why it may not have worked.
 - To check how sustainable and meaningful the organizing campaign plan was for your members and key stakeholders, and your organization as whole.
 - To inform decision-makers on how to build on and improve your next organizing campaign plan.
- **Evaluation** is not only about demonstrating success; it is also about **learning why things did not work**. Identifying and learning from mistakes are key elements of evaluation. Evaluation is not finding out about everything, but **finding the things that matter**.



Notes for trainers

- * Divide this activity into four sessions according to the steps, with breaks between.
- * Take the time needed to make sure that the participants understand fully the basic ideas, steps, and tools of effective planning.
- * Go around the groups to check if further help or explanation is needed, and to see how everyone takes part.
- * If you are doing the training in your language, be sure that the words or phrases you use for "strategy", "outputs", "activities", "inputs" and "indicators" have the same meaning as their English definitions (see "Coming to terms: Key definitions" at the beginning of the manual).

A1.15: Activity handout

Making an organizing campaign plan: Group work task sheet

Your group has been chosen as the core group to draw up the five-year organizing campaign plan for your organization to increase membership and coverage. Your tasks are:

1. Do a quick check of your membership now:
 - a. How many registered, fee-paying members do you have?
 - b. Where are they located?
 - c. How many are active (come to meetings, activities, and programmes regularly)? Explain.
 - d. Since the start of your organization, has the membership grown, fallen, or remained stable? Why?
 - e. What are the problems facing your organization, in particular about your members? (Think about their quality of participation and commitment to the organization and the number of members.)
2. Based on the above analysis, choose one objective to reach the goal of increasing your membership and coverage.
3. List the strategies – what do you need to do reach the selected objective. Concentrate on answering the question: How?
4. Check the list of strategies together, and take out the strategies that are clearly “wishful thinking” – the ones you know you cannot achieve. Use the SMART checklist and select the two most viable strategies.
5. For the two selected strategies, identify the outputs, activities, inputs and indicators (see examples in T.1.4ii).
6. The reporter notes the group's decisions and completes the Organizing campaign plan form T1.7, then copies this on a flip chart sheet for presentation.



Domestic workers joining the Women's March to stand up to fear and hate, USA
Photo credit: National Domestic Workers Alliance (NDWA)

Handouts

H1.1	Effective planning. What? Why? How? Who?
H1.2	The planning cycle
H1.3	Developing an effective organizing campaign plan
H1.4	The Five-Year (2016-2020) Strategic Plan of the IDWF
H1.5	Case studies and good practices



H1.1 – Effective planning: What? Why? How? Who?

1. What is planning?

We all plan, every day, any time, anywhere, individually or as a part of a group. We plan to get something done, or undone; to get or get rid of something. We plan to go somewhere, change our destination, and plan again.

Planning is the process of thinking about and organizing the actions needed to reach a goal or an outcome, or something we want to achieve, happen, or have.

We have big goals, such as getting a well-paid job, giving a good education to our children, getting elected to our organization's general council, getting good and fair working conditions, buying a house, going on holiday, running the marathon, or learning a language. Whether these things stay dreams or become real very much depends on our planning. We also have smaller goals, such as following a short course to improve a skill, losing weight in the new year, learning to cook a special dish, or organizing a birthday party. We do a bit of planning even for our day-to-day activities, such as our family's weekly shopping, the jobs in our employers' house, and getting to work on time.

In a way, life is always about planning. Sometimes, things go to plan, sometimes only partly, and sometimes not at all. This is why we need to learn and use skills in effective planning, especially for the big goals we set for ourselves and our organizations. Success does not just happen; it is planned for.

2. Why is effective planning important for your domestic workers' organization?

Effective planning is very important for membership-based, non-profit, voluntary organizations like yours, which have with limited assets and money, and few staff, but are rich in human resources. Effective planning gives your organization, whether it is a group, association, union, collective, cooperative, network, or federation, a much better chance to achieve what you want.

A plan is the document that comes from this process. It puts on paper, in clear language, the long- and short-term directions your organization has chosen to reach a goal. This makes it easier for everyone – your leaders, members, partners, and supporters – to understand where you want to go and how you will get there. This is important when people in the leave or new people join.

The actual format of the plan is not important; what is important is that you write it down in a form you can use. Making clear plans helps you decide what you and your organization hope to achieve, and what you can realistically expect to get done based on the resources you have. Planning together turns ideas into real “to do” things, a very important step in getting your organization moving.

Planning also prepares your members to be active in bringing change, and to take part in the move towards the common goal. In a simpler way, this is the same process to follow when you plan for personal success (see Module 2).

A plan is like a map. When following a plan, you can see how much progress you have made and how far you are from your goal. Knowing where you are helps you to make good decisions on what direction to take, and changes to make, if needed.

3. What is effective planning and why should you do it?

Effective planning is planning for success:

- It is about thinking, deciding and organizing the actions you must take to reach a goal, and the objectives you have identified.
- It puts on paper, in clear language, the long- and short-term directions your organization has chosen to take to reach a goal.
- It sets out a realistic timetable and identifies who should be responsible for starting, implementing, supervising, checking, and evaluating the actions and steps to be taken to reach a certain objective or goal.
- It makes it easy for everyone – your leaders, members, partners and supporters – to understand where you want to go and how you will get there. This is important when people in the organization leave, or new ones join.
- It is based on good information, evidence, and experience.
- It identifies honestly your strengths and weaknesses.
- It lets you think about new ideas, and makes it easier for people in the organization to work together and to work together successfully with other organizations
- It checks whether you have the necessary human and financial resources, and is essential for successful fund raising.
- It is a reminder that life is uncertain, and helps you decide what to do if things go wrong. Anything can happen to help or stop the progress in achieving your goals – for example, natural or man-made disasters, a good or bad event in the family or community, a change in government policy or law, or important people leaving or joining the group.
- It lets your organization be flexible and able to change plans if needed, always aware of developments at local, national, and global levels.
- It takes commitment and time to plan, but it prevents a waste of much time and energy later.

Effective planning may sound difficult, and it can be at times, but it can be a rewarding and positive experience in many ways. What it needs is commitment and time. It will not work if many people in your organization think it would be a waste of time (“We already know where we want to go”) or are happy with the way things are (“Everything seems to be okay”).

Similarly, if you feel this way about your personal life, you will not have the energy to consider making any changes or improvement to it. Some people do not want “to rock the boat” – call for change, or say what they really think – because they are afraid or suspicious of change or, worse, of confronting reality. Thankfully, most domestic workers and their organizations are not like this.

Box 1 – Challenges that jeopardize effective planning

Effective planning is often difficult for non-profit organizations like domestic workers' groups, associations, unions, cooperatives, other collectives, networks, or federations because:

- They face big problems and have limited resources. They feel too busy to stop and think.
- Development of an organization or of an individual is a complex process, because there are many inside and outside influences. Planning helps in making choices, for example: Who should be the key partner among many similar organizations? (“We are domestic workers' organizations and want to work closely with trade unions, women's organizations, and human rights organizations.”)
- They often need to get funding from outside donors for their activities and daily expenses. It can be difficult to prioritize and stick to the plan, if donors decide they want to pay for different things.

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- There may be strong reasons to keep things as they are – especially if some people are comfortable not making any big changes or plans.
- Effective planning requires looking into the future – which is sometimes difficult to do in changing local, national and global environments. People may also have different ideas about what will happen and what will make a difference.

Adapted from: James, R., *How to do strategic planning (a guide for small and diaspora NGOs)*, Peer Learning Program – Common Ground Initiative, <http://www.intrac.org/data/files/resources/729/Strategic-Planning-A-PLP-Toolkit-INTRAC.pdf>.

4. What are the principles of effective planning?

Effective planning is:

- **Inclusive and participatory.** It is democracy in action. All members, leaders, and key partners are involved and have their say, so that they own and are responsible for the plan, from its design to its realization. This builds shared understanding and helps everyone feel more capable of improving their own lives, and being active agents of change to achieve the goals they have chosen. People need to be part of the thinking, not just the doing. The success and sustainability of your organization depends on the ongoing commitment of your members and leaders. From the start, get everybody involved. Organize small discussion groups and ask everyone to participate in the process in some way.
- **Clear.** Everyone should easily understand everything in your plan. So, be sure that you say what you mean, and mean what you say.
- **Evidence-based.** Your plan must be based on facts, not guesses or wishes. It should be authoritative (meaning that you know what you are saying, and can prove it) and not dramatic (you are not writing a campaign leaflet).
- **Methodical and systematic.** Achieving your goal will not happen overnight. You must break down your plan into building blocks, with the goal always in sight. A step-by-step approach is essential. Being methodical and systematic will make it easier to prioritize and identify what must come first, what comes next, and so on. It will be helpful also in identifying problems and adjusting your plan to overcome these.
- **Realistic.** Plan with your feet on the ground. Know and recognize what you have – your strengths; but also what you do not have – your weaknesses. Identify what can threaten your plan and what opportunities you can use to help achieve your goal. Sometimes, you have to make difficult choices. If you try to do too many things, you may end up doing nothing. For many people, good planning is making informed decisions about what not to do.
- **Creative.** Do not be afraid to use your imagination and to “think out of the box”, especially when it seems like a problem is too difficult to solve.

5. Who does the planning?

The planning should be led by a **core group** representing the key people who can put into effect, or will be affected by, the plan.

These are, first, your members and leaders. Your key partners – the trade unions, women's organizations, human rights organizations, major donors – or any relevant people or organizations for your organization should also be represented. Their input and advice will be of great help to the core group.

The core group members should be committed to working together and sharing the various responsibilities and the work to be done.

Throughout the process, the core group must be guided by the principles of effective planning – in particular, that it should be inclusive and participatory.

Box 2 – Ensuring real participation and involvement

Participation of all stakeholders is very important, but it can be difficult. If you are not sure about why you are planning, you may abandon it when differences of opinion or challenges to your normal way of thinking may make you uncomfortable.

It is most important that domestic workers and their leaders decide on the directions of their organization. Outside supporters and resource persons can give advice and guidance, but should not be involved in decision-making, for example, they should not have voting rights.

Participation also takes extra time and resources, so you have to discuss and decide who should be involved and in what way. Different stakeholders can contribute to successful planning in different ways:

- Domestic workers can provide information and opinions in meetings or through a survey.
- Domestic worker members and organizers can collect information needed to make decisions.
- Domestic worker leaders can analyze what the information means, decide what to do, why, and how, and write it down in a plan for the members.
- Domestic workers can give thoughts and contribute to important decisions made by the core group.
- Domestic workers and leaders need to listen and consult with each other.
- Everybody can agree to give time or money to help developing and realizing the plan.

Remember that participation and involvement create the basis for ongoing learning on how to make the change happen. This learning will help everyone take responsibility for solving problems. Practice makes perfect.

Source: *An approach to planning*, Education and Training Unit, Johannesburg, South Africa, <http://www.etu.org.za/toolbox/docs/building/webplan2.html>.

6. How do you plan for success?

One thing is certain: there is no magic way to succeed. The planning process does not need to be too difficult. There is no right or wrong way to plan. The most important thing is to look at the available choices and decide what offers the best match with your organization's values, principles, and resources. Your plan must have clear answers to the following questions:

- What do you want to achieve? Why? Is this goal in line with your mission and vision?
- What are your objectives to reach your goal?
- Is your information credible and evidence-based?
- What are the specific activities and actions you need to do to achieve your objectives and outcomes?
- Who should be the targets and agents for change?
- Who should you be working with? Building a network of support should be a key part of your plan to help get your organization through good times and hard times.
- What are your actual resources: human, financial, material? What else will you need? How will you get this?
- How can you get supporters and donors to help you in achieving your identified goal? How will you avoid being “donor-driven”?
- How will you check and measure your progress and the effects of your efforts? What are the things that show this?
- What monitoring information do you need and how will you collect it?
- How will you learn from what you have done to improve your future actions?

7. What are the basic parts of effective planning?

Thinking about the above, you are now ready to plan. What are the basic parts of a successful plan? These are:

- The analysis of your organization's condition.
- The vision and goal of your organization.
- The objectives and outcomes you set to achieve the goals.
- The strategies – based on a check of your resources and the priorities you set – for achieving these objectives, usually over a long period of time.
- The outputs, activities, inputs and indicators identified for each strategy.
- The work plan and time table for implementation.
- Monitoring and evaluation.

8. Analysis of your organization

The real start of planning is taking a close look at where you are now. Are you happy with the way things are going? Is this where you meant to be when you started your organization? How far have you gone in doing the things you set out to do? How are you fulfilling your organization's mission? What have you done well? What could you have done better? Are you growing slowly but surely, or are you not moving forward and losing members? Why? Only through this self-examination can you know the problems and start planning what needs to be done and how to make it happen. A basic tool for this exercise, used by organizations of every size and type, is the SWOT analysis tool (see A1.5 and Tool T1.1). SWOT can be useful also for personal planning.

Box 3 – The SWOT analysis tool

The set-up of the SWOT analysis is easy, as it looks at positive and negative things from an internal and external (inside and outside the organization) view under four headings:

- **Strengths** are positive things in your organization.
- **Weaknesses** are negative things in your organization.
- **Opportunities** are positive things outside your organization.
- **Threats** are negative things outside your organization.

The key to doing a SWOT analysis is to think about ways to make the most of the positive things and reduce the effect of the negative ones. When you are writing your plan, brainstorm about ways to use your strengths, take advantage of opportunities, and overcome weaknesses and threats.

See T1.1 for more information.

9. Vision and goals, objectives and outcomes

Write your vision statement and set your goal based on what you know about your condition now and the problems and issues you have identified. What do you want to change? What do you want to achieve? Is your goal consistent with your purpose in life or, in the case of your organization, with its core values and mission as stated in its constitution?

Your vision statement and goals must be inspirational, memorable, clear, and concise. It must communicate what you are working to achieve, make your members ready to take action, and convince others to support your organization.

Box 4 – Key words and their meanings

Often, people confuse goals with objectives, because both words describe what they want to achieve. For example, when a person says “My goal is to lose weight” or “My objective is to lose weight” or “I plan to lose two kilos in three months” everyone understands what this means. However, in planning, these words have different meanings:

- A vision or goal is a statement of something big and important that you are aiming for in the future. The vision or goal of a domestic workers' organization is what their members want their organization to achieve and do in the future. It is the long-term result of your plan. It answers questions such as: “Where do you want to be in five to ten years?” For example: “By 2022, the organization will have 200,000 members who are firmly committed to and actively involved in promoting and defending the rights of domestic workers.” In the IDWF five-year strategic plan, the term “overall objective” is used instead of “goal” or “vision”. It reads: “By 2020, a strong, democratic, and united domestic and household workers' global organization will be contributing to the protection and advancement of the rights of its 670,000 members, and the rights of domestic and household workers everywhere.”
- An objective is a specific and measurable achievement that will help you towards reaching your goal. Setting objectives will answer the question “How can you make it happen?” The IDWF strategic plan refers to this as an “immediate objective”. It reads: “By 2020, 670,000 domestic and household workers (including migrant domestic and household workers) represented by 80 affiliates in at least 60 countries are organized to increase their power to affect the decisions that affect their lives, are actively contributing to the strength of their workers' organizations, are engaging with the work of the IDWF, and taking ownership of the federation.”
- An outcome is the change that you want to see in people or in a situation, that results from the achievement of the objective. The IDWF strategic plan contains five outcomes to specify its immediate objective. Its second outcome on education and training reads: “By 2020, 950 domestic worker leaders will have the resources and training necessary to deliver training programmes to a total of 20,000 affiliate members in designated locations with effective education and training in thematic areas such as (but not limited to) gender issues; trade union strengthening; vocational training; political education; leadership development; and other capacity building projects (tailored to the needs of affiliates).”

Setting objectives is a very important step in planning for success. Good objectives will help you and your organization in setting priorities and deciding and designing activities and forms of action. The SMART technique, which has been successfully used by many organizations around the world (adapting it according to need) is helpful when setting objectives.

Box 5 – The SMART planning tool and checklist

The SMART tool is helpful when identifying your objectives, strategies or tasks. It helps you check whether each of these is:

- **Specific?**
- **Measurable?**
- **Achievable?**
- **Relevant and Realistic?**
- **Time-bound and Timely?**

See T1.2 for more information.

Using the above as a guide, set as many objectives and outcomes as you think are needed to reach your identified goal. Then, go through your list and prioritize. What is most important? What is most urgent? What do you need to do first? What will have the most impact? Prioritizing your objectives and looking at your resources and abilities honestly and realistically will help you in deciding what to do to meet these objectives.

10. Strategies

With your goal and objectives identified, you are ready to do some strategic thinking. A strategy is a summary statement of “What you want to do (objectives), for whom (targets), with whom (main actors), and how”. A strategy is a set of practical ideas on how to make the best use of your resources to achieve your objectives. It is a way of saying how you will get things done. It is less specific than a work plan, and answers the question “How do we get there from here?”

Based on a careful check of your resources and priorities, decide on the strategy or strategies you will use to reach your objectives. Setting clear strategies gives long-term direction to the actions and decisions of your organization. A common method for to strategic thinking is the SWOT analysis (see Box 4 and T1.1 for more information).

Box 6 – A good strategy:

- Shows the main path without pointing only to a particular narrow way to do things.
- Uses the resources, assets, and opportunities that you have now, including people’s willingness to act, or a tradition of self-help and being proud of the organization. It also welcomes new opportunities such as new public recognition of domestic work and the rights of domestic workers.
- Reduces resistance and problems. It brings friends and deters opponents.
- Reaches those affected. To address the issue or problem, it connects the action with those who it should help. For example, if the objective is to increase membership of migrant domestic workers by 20 per cent, do the strategies provide for production of information material in their languages?

Source: *Developing Successful Strategies: Planning to win*, Community Toolbox, University of Kansas, USA, <http://ctb.ku.edu/en/>.

Assessing resources

It is very important that you check realistically the resources you have – people, money, expertise, and skills – to start your plan. When checking resources, many people think of money and equipment. Money can be a great help in getting things done, but other assets such as the skills, experience, commitment, and enthusiasm of your members are equally, if not more, important in achieving your objectives and your goal. So, too, are your contacts and good working relationships within your communities, and with the NGOs and public authorities. Remember that although you may not have enough resources now, there are many possible other resources.

11. Outputs, activities, inputs and indicators

During the planning process, these should be clearly identified for each strategy (and thus, objective) as they form the basis for implementation.

- **Outputs** are the results or the practical products or services resulting from the activities that help to achieve your outcomes and objectives.
- **Activities** are the specific actions that you plan to do for a determined period of time (often, annually). These are usually prioritized and grouped in a work plan or plan of work. Activities lead to realizing outputs that must be accomplished to achieve a stated objective.

- **Inputs** are the things that you need to have – people, money, skills, equipment – to carry out the activities, produce the outputs and achieve your objectives and goals. before starting your work plan.
- **Indicators** measure whether you are on track in undertaking activities, producing outputs, and reaching your objectives, outcomes, and longer-term goals, vision, and mission. Discuss and agree upon specific success indicators to help monitoring and evaluation.

12. Implementation

Organizations sometimes miss the very important process of setting goals and objectives, and go immediately to planning activities and actions. There are a number of reasons for this: lack of time, the need to respond to immediate problems, unexpected donations, or not having a clear plan. But it is important that you follow the planning process so that you do not end up going the wrong way, wasting your time and your often limited resources.

When you are clear and confident about what you want and how to make it happen (see Points 10 and 11 above), the last step of the planning process for many organizations and people is to make a work plan setting out the activities in a timeline, dividing the work that needs to be done, and allocating money and resources wisely. Tool 1.5 provides a format for making a work plan.

13. Monitoring and evaluation

The aims of both monitoring and evaluation are similar: to review what has been done and get information to help you make decisions, improve performance, and achieve planned results.

Monitoring is an ongoing process to assess progress, identify difficulties, check whether there are problems, and if yes, take remedial action. Monitoring is concerned with ensuring that inputs, through activities, are transformed into outputs. Are you doing the things you said you would do? Are you making progress in achieving the results you wanted? Monitoring is checking your activities and actions to see how effective your strategies are in reaching your objectives, thus bringing you closer to your goal. Regular monitoring will make it easier for you to decide if you need to change your plan.

Evaluation is a structured process to assess the progress made towards the achievement of your objectives, outcomes and goals, and the impact and effects of your work. It is a key tool for enhancing the implementation of ongoing work, and for improving the preparation and planning of a new plan of action. An evaluation helps you decide whether your work is successful in meeting your objectives and goals, and to think about lessons learned and good practices for the future. End-of-plan evaluation lets you judge its success, repeat and expand activities that worked and that you can improve, and let go of those that did not.

Box 7 – Reasons to do an evaluation

- To decide whether your plan achieved its goals, and how well.
- To understand how the plan worked, or why it may not have worked.
- To check how sustainable and meaningful the plan was for your members and key stakeholders, and your organization as whole.
- To tell decision-makers how to build on or improve your plan.

Evaluation is not only showing success; it is also **learning why things did not work**. Identifying and learning from mistakes are very important parts of evaluation. Evaluation is not finding out about everything, but **finding the things that matter**.

Source: *A short guide to monitoring and evaluation*, Community Engagement Evaluation Toolbox, National Centre for Sustainability and Swinburne University of Technology, Melbourne, January 2011, www.evaluationtoolbox.net.au.

14. What next?

1. When you have completed all the basic parts, write your plan for success. This should contain clear answers to the questions: What? Why? How? Who? When?

Box 8 – Suggested outline of your plan for success

A short introduction: Reasons for starting the planning process, and who made the decision to do it; the mandate of the core planning group; the basic principles. (Attach the information on the process itself – such as getting data, consultations, timetable, and members of the core group.)

1. A clear statement of your core values and mission (your constitution and statutes).
2. A short review and assessment of where you are: Key information (foundation, membership profile, coverage, and structure), the problems, successes, failures, and lessons learned.
3. Your vision statement.
4. Your goals or overall objectives in the long-term (say, five to ten years).
5. The objectives and outcomes you set to reach each goal.
6. The plan of action with the main strategies for achieving the objectives: outputs, activities, inputs and indicators. (Work plans with the activities, including targets, times, resources, and the people responsible for implementation, are usually worked out in detail by the responsible committees and teams.)
7. The method of monitoring and evaluating the implementation and success of your plan.

Sections 1–3 and 7 should be short and to the point. Sections 4–6 can be presented in a matrix for clarity and quick reference (see T1.4i and T1.4ii).

2. Review your process. Did you use the principles of effective planning? (See point 4.) Were the critical questions answered? (See point 6.)
3. Make sure that the plan does not become too long with too many words – or no one will read it. Make it short, concise, easily understood by all your members and key stakeholders, but exciting as well. Your aim is to get everyone on the same ship and sail smoothly towards your port of destination.
4. Give out the draft to the core planning group for changes and comments. Discuss, decide, make a final draft, and set a definite deadline for adopting the final version.
5. Send the final draft to the members of your national and regional leadership, group leaders, organizers, trainers, and key supporters and donors, inviting them to a workshop to discuss, finalize and agree on the plan. (See Tool T1.6: Communication matrix.) The domestic worker leaders and organizers are responsible for circulating the final draft to the members asking them for their inputs before the workshop.
6. Organize the one-day workshop. You may want to invite somebody to facilitate it. After a short introduction, go through the draft plan; get inputs; brainstorm and discuss; get an agreement on the major points. Everyone should feel that they own the organization's plan for success and will work hard to make it work.
7. Make the necessary changes. Give the plan to all your members and key stakeholders, and ask them to take action to reach your common vision.

15. Key points to remember

- Do not write your plan and then do little or nothing: it is your organization's guide to change and empowerment. Its success is in the hands of everyone: your members, leaders, and key partners.
- The plan is a document, but it is alive. The leadership should make sure that it starts, and make changes if needed, after discussion with the responsible people.
- Keep everyone informed and active. Review the plan on a regular basis (ideally, every four months) and report to everyone. Everyone should know how much has been done and how far you are from achieving your common goal. Take immediate action to solve problems and difficulties.
- A good way to keep your leaders and members active and informed is to include a short discussion about some part of your plan in every meeting of the leadership or committees. Is that part of the plan still important? Are the priorities identified still the most important?

Box 9 – The wisdom of elders

“Here delicious things, there delicious things. The monkey goes for them all and falls flat on its back.” (Prioritize.)

“A dog sitting on a warm verandah does not move despite hearing a roaring lion – and ends up dead.” (Don't be lazy or complacent: be alert and ready to take action at all times.)

Source: James, R., *How to do strategic planning (a guide for small and diaspora NGOs)*, Peer Learning Programme – Common Ground Initiative, <http://www.intrac.org/data/files/resources/729/Strategic-Planning-A-PLP-Toolkit-INTRAC.pdf>.

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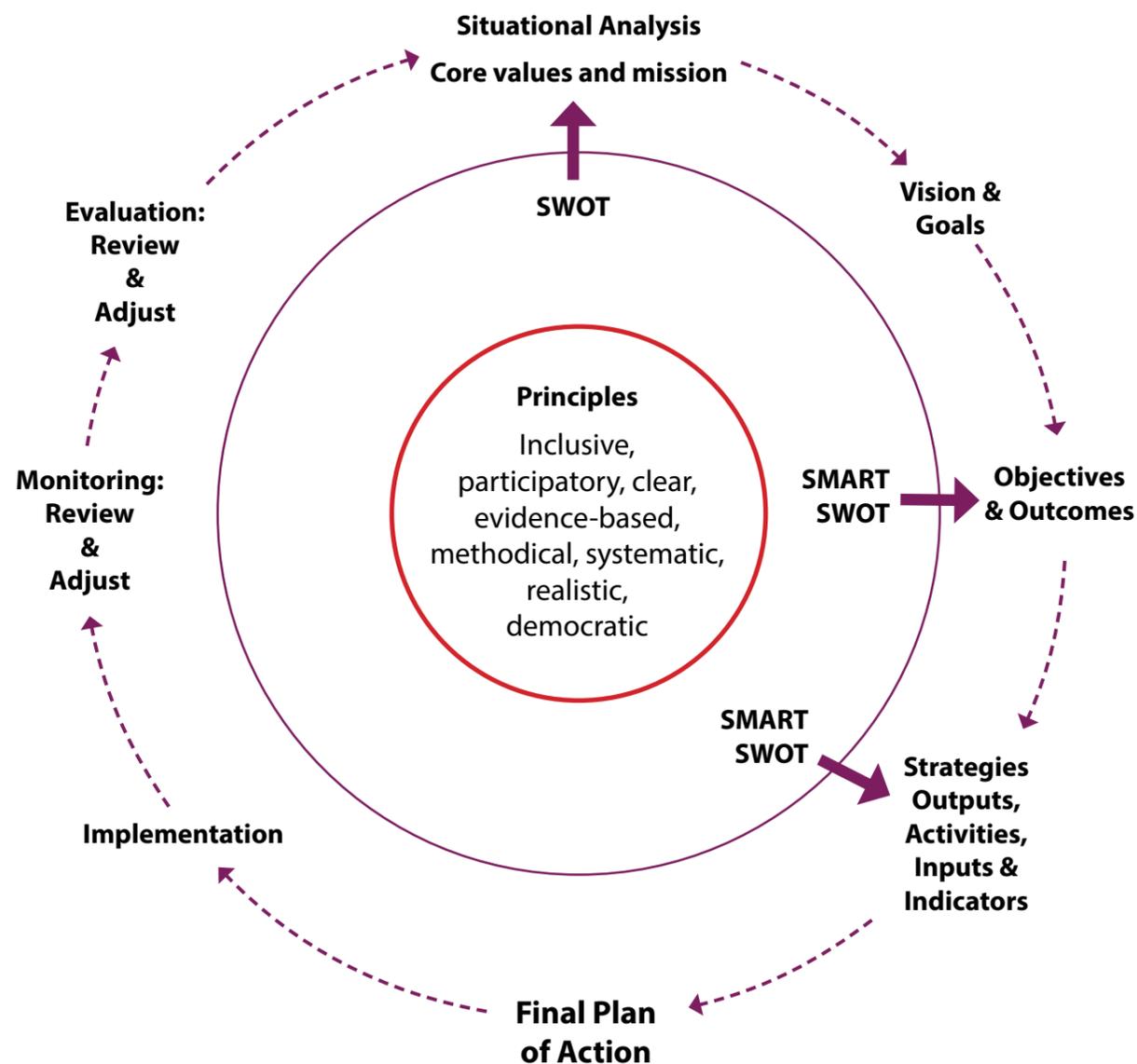
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H1.2 – The planning cycle



H1.3 – Developing an effective organizing campaign plan

1. Why organize?

Domestic workers around the world are organizing and taking control of their working lives, with courage and conviction. They have formed their organizations, found their voice, and speak out for their rights. In many countries, organizations and networks have started in various forms: self-help groups; neighbourhood or other associations; trade unions; cooperatives or other collectives. When migrant domestic workers organize they often group by nationality, ethnicity, or religion, and cooperate with the other domestic workers organizations. In some countries domestic workers organize from the local to the regional/provincial and national levels. Most domestic workers' unions and associations in the Asia-Pacific region are young organizations. Many started from 2000 onwards during the global campaign for international labour standards for domestic work and the rights of domestic workers. This resulted in the adoption in 2011 of ILO Convention No. 189 and Recommendation No. 201 on decent work for domestic workers.

Box 1 – Why do domestic workers organize?

Through organizing, domestic workers can:

- Come together to share problems and solutions.
- Build their organization (group, association, trade union, cooperative, network) around common issues to bargain and negotiate with employers, government, and local authorities for better labour and social protection.
- Publicize existing rights and work together to prevent abuse and exploitation.
- Start help lines and advice services for domestic workers in need.
- Campaign for better working conditions: decent wages and working hours, regular time off and holidays, and social protection with maternity protection, and better living conditions, specially for live-in domestic workers.
- Help develop savings and insurance schemes, and welfare services.

When domestic workers join an organization, union, network, association, cooperative or collective, they:

- Gain self-confidence, recognition and respect for their work.
- Know where to go for help when they have a problem at work.
- Have someone to speak for them if they feel they are being treated unfairly.
- Can meet with others to talk about common issues, and learn from each other.
- Work together to solve problems and improve their working conditions.
- Take part in choosing who will represent and speak for them with local authorities or government officials, employers' organizations, and the media.
- Get new skills through training activities.

A main part of organizing is that workers listen to, and inform each other, building trust and confidence in their collective ability to change their situation. Their participation in decision-making at all levels is very important because they are the organization. They are the ones who will bring social change for the better.

Source: *Decent work for domestic workers in Asia and the Pacific: A manual for trainers*; ILO-IDWF, Bangkok, 2012, www.ilo.org/wcmsp5/groups/public/---asia/---ro.../wcms_184194.pdf.

Organizing is the lifeblood of workers' organizations, whose force depends on their members. But, it is not easy to organize domestic workers, who face many problems in starting or joining organizations or associations. Because of their isolation and long working hours, many do not know of the organizations that can give them support, help, or a safe place to stay when they run away from bad employers. Some may know organizations but might be afraid to contact them for fear of upsetting their employer or losing their jobs. New arrivals or live-in domestic workers may not have access to a community outside the employer's home. Migrant women domestic workers face even more problems that stop them from joining organizations. This is especially true for migrant domestic workers without legal papers, who are afraid of being sent back to their own country. You need to plan your organizing work very well, so that you can reach out to domestic workers and get them to join – and stay in and contribute to – your organization.

Box 2 – Main reasons why we build membership-based organizations

- **Collective power:** Membership-based organizations let us build collective power by uniting people who share a common interest and want to work to make change together.
- **Democracy:** In membership-based organizations, members have a voice and a part in making decisions about the organization.
- **Sustainability:** Having members who pay membership fees can help the organization survive. Self-financing provides independence. In addition, having many members with a sense of ownership, knowledge, and leadership in the organization helps create ability and leadership.

Source: *Recommendation: Membership structure*, Domestic worker organizing toolbox, National Domestic Workers' Alliance (NDWA), USA, <https://organizing.domesticworkers.org/membership-structure>.

2. Key points about organizing

Before we go to the planning process, it is useful to write down key points about organizing and why you need to give it top priority:

- Organizing should be an ongoing activity of your organization, if it is to remain a strong voice for the defense and promotion of the rights and interests of domestic workers. Members bring skills and experience that they can use to help your organization. More members means that you can do more work as an organization.
- Organizing is about getting and keeping members. Organizations often get off to a good start and get many people to join, only to lose them after a few months. Having active members is very important to making your plans successful. When you find domestic workers, you should work hard to keep them happy and active in the organization. There is a natural process in organizations where:
 - Some of your friends and supporters will become members.
 - Some of your members will become committed activists.
 - Some of your activists will become leaders.
- If you want to keep increasing the number of activists and leaders for the future, you need programmes and activities to help them develop and build their capacity.
- Members and possible members want their organizations to be useful to them. This means organizing and campaigning on the issues that matter to domestic workers, and making sure that your organization works to solve their problems. It means, where possible, talking positively with employers.
- The more members you have, the more ideas and opinions are given and talked about. This leads to better decision-making.
- Communication is vital – members want to know what their organization is doing and why. They also want to feel that the organization listens to them and acts on their concerns. Communication between members is also important, particularly in sharing

problems and solutions. Your organization can help domestic workers keep in touch with each other.

- Organizing is **everybody's** business. All members should be organizing their domestic worker friends, relatives, neighbours, and acquaintances. At every chance, they should talk to them about their organization and the benefits of joining it, for them personally and for all domestic workers.

3. How do you plan a successful organizing campaign?

The planning process does not have to be difficult. However, your organizing campaign plan must give clear answers to the following questions:

- What do you want to achieve? Why? Is this goal in line with your mission, vision and goal?
- What are your objectives to reach your goal?
- Is your information based on evidence?
- What are the specific outputs, activities and inputs that you need to achieve your objectives and outcomes?
- Where are the areas of focus for the campaign? Why were these chosen?
- Who should be the targets (possible new members) and agents (organizers) for change? Who should you be working with?
- What are your actual resources: people, money, materials?
- What else will you need? How will you get this? How can you get supporters and donors to help you in achieving your identified goal? How will you avoid being “donor-driven”?
- How will you check and measure your progress, impact and effects? What will be the indicators?
- What monitoring information do you need and how will you collect it?
- How will you learn from what you have done to improve your future organizing campaigns?

4. Who does the planning?

Most domestic workers' organizations have an organizing committee for planning, supervising, and checking recruitment campaigns. The committee's members and jobs may be set out in the statutes or decided by the executive board. Members are often of leaders and organizers. This committee should form a central group to write your organizing campaign plan. It may appoint experienced organizers or leaders from the proposed recruitment areas to join the group. The central group members should be committed to working together and sharing the work. Throughout the process, they must be guided by the principles of effective planning – in particular that it should be inclusive and participatory (see Point 4 of H1.1).

5. What should your organizing campaign plan contain?

Your organizing campaign plan should have the following parts:

- The analysis of your membership.
- The vision statement.
- The goals of your organizing campaign plan.
- The objectives/outcomes you set to reach the goals.
- The strategies, based on a check your resources and the priorities you set, for reaching these objectives, usually over a long period of time.
- The outcomes, outputs, and indicators identified for each strategy.
 - The plan of action and activities and its timetable.
 - Monitoring and evaluation.

Box 3 – Important note!

- You must write your organizing campaign plan. It should state clearly the long- and short-term directions your organization wants to take to reach your campaign goal. This makes it easier for everyone – your leaders, members, partners, and supporters – to understand where you want to go and how you will get there. **The actual format of the plan is not important; write it down in a form you can use.**
- In planning your organizing campaign, you may not have to go through all the parts listed above. The constitution or statutes of your organization already sets out its values, mission, vision and goal(s). You should base your organizing campaign plan on these.
- If you have an organizational plan of action for a specific period of time, it should have the vision statement and goals, as well as the objectives, and strategies you want to follow in the coming years to achieve this vision. This plan probably has as a key objective or outcome about increasing your membership (with specific targets in the form of a specific number or percentage). You should think about all of these things when planning your organizing campaign.

6. Analysis of your membership

The real start of planning your organizational campaign is taking a close look at your membership. How many members do you have? What percentage are they of the total number of domestic workers in the geographical area you cover (national, regional/provincial, state)? Do you have enough information on your members? Are they paying their membership fees, and on time? Do they come to meetings of their sections, groups, or branches? Do they take part in your organization's key activities (bi-monthly meetings; training workshops or sessions; activities on 1 May, 16 June, and 8 March)? Is it easy to get them to demonstrations? Are you happy with their involvement in helping to strengthen your organization? Do they get a proper introduction to the organization and basic training on the rights of domestic workers? How successful were your previous membership campaigns? How are you achieving your organization's mission to organize domestic workers? What have you done well? What could you have done better? Are you growing slowly but surely, or are you not moving forward and losing members? Why? Through this self-examination you can see the problems, identify the challenges, and start planning what needs to be done and how to make it happen. A basic tool for this exercise is the SWOT analysis tool.

Box 4 – The SWOT analysis tool

The setup of the SWOT analysis is simple, as it examines positive and negative things from an internal and external perspective under four headings:

- **Strengths** are positive things in your organization.
- **Weaknesses** are negative things in your organization.
- **Opportunities** are positive things outside your organization.
- **Threats** are negative things outside your organization.

The key to doing a SWOT analysis is to think about ways to make the most of the positive things and reduce the effect of the negative ones. When you are writing your plan, brainstorm about ways to use your strengths, take advantage of opportunities, and overcome weaknesses and threats.

See T1.1 for more information.

Vision and goals, objectives and outcomes

Write your **vision statement** and set your **goal** based on what you know about your condition now and the problems and issues you have identified. What do you want to change? What do you want to achieve? Is your goal consistent with your purpose in life or, in the case of your organization, with its core values and mission as stated in its constitution?

Your vision statement and goals must be inspirational, memorable, clear, and concise. It must communicate what you are working to achieve, make your members ready to take action, and convince others to support your organization.

Box 5 – Key words and their meanings

Often, people confuse goals with objectives, because both words describe what they want to achieve. For example, when a person says “My goal is to lose weight” or “My objective is to lose weight” or “I plan to lose two kilos in three months” everyone understands what this means. However, in planning, these words have different meanings:

- A **vision or goal** is a statement of something big and important that you are aiming for in the future. The vision or goal of a domestic workers' organization is what their members want their organization to achieve and do in the future. It is the long-term result of your plan. It answers questions such as: “Where do you want to be in five to ten years?” For example: “By 2022, the organization will have 200,000 members who are firmly committed to and actively involved in promoting and defending the rights of domestic workers.” In the case of the IDWF five-year strategic plan, the term “overall objective” is used instead of “goal” or “vision”. It reads: “By 2020, a strong, democratic, and united domestic and household workers' global organization will be contributing to the protection and advancement of the rights of its 670,000 members, and the rights of domestic and household workers everywhere.”
- An **objective** is a specific and measurable achievement that will help you towards reaching your goal. Setting objectives will answer the question “How can you make it happen?” The IDWF strategic plan refers to this as an “immediate objective”. It reads: “By 2020, 670,000 domestic and household workers (including migrant domestic and household workers) represented by 80 affiliates in at least 60 countries are organized to increase their power to affect the decisions that affect their lives, are actively contributing to the strength of their workers' organizations, are engaging with the work of the IDWF, and taking ownership of the federation.”
- An **outcome** is the change that you want to see in people or in a situation, that results from the achievement of the objective. The IDWF strategic plan contains five outcomes to specify its immediate objective. The first outcome related to the development of the federation reads: “By 2020, the IDWF will have built and strengthened its organizational structure and operations to accommodate a membership of 670,000 domestic and household workers (an increase from 330,000 in 2015) represented by 80 affiliates in 60 countries.”

Setting objectives is a very important step in planning for the success of an organizing campaign. Good objectives will help you and your organization in setting priorities and deciding and designing activities and forms of action. The SMART technique, which has been successfully used by many organizations around the world (adapting it according to need) is helpful when setting objectives.

Box 6 – The SMART planning tool and checklist

The SMART tool is helpful when identifying your objectives, strategies or tasks. It helps you check whether each of these is:

- **Specific?**
- **Measurable?**
- **Achievable?**
- **Relevant and Realistic?**
- **Time-bound and Timely?**

See T1.2 for more information.

Using the above as a guide, set as many objectives as you can to reach your organizing goal. Then, go through your list and **prioritize**. What is most urgent? What do you need to do first? What will have the most effect? Prioritizing your objectives and checking your resources and abilities realistically will help you decide your plan of action to meet these objectives.

7. Strategies: Outputs, activities, inputs and indicators

With your goal and objectives identified, you are ready to do some strategic thinking. A strategy is a **summary statement of “What you want to do (objectives), for whom (targets), with whom (main actors), and how”**. A strategy is a set of practical ideas on how to make the best use of your resources to achieve your objectives. It is a way of saying how you will get things done. It is less specific than a work plan, and answers the question “How do we get there from here?”

During the planning process, identify clear outputs, activities, inputs and indicators for each strategy (and thus, objective) as they form the basis for implementation:

- **Outputs** are the results or the practical products or services resulting from the activities that help to achieve your outcomes and objectives.
- **Activities** are the specific actions that you plan to do for a determined period of time (often, annually). These are usually prioritized and grouped in a work plan or plan of work. Activities lead to realizing outputs that must be accomplished to achieve a stated objective.
- **Inputs** are the things that you need to have – people, money, skills, equipment – to carry out the activities, produce the outputs and achieve your objectives and goals. before starting your work plan.
- **Indicators** measure whether you are on track in undertaking activities, producing outputs, and reaching your objectives, outcomes, and longer-term goals, vision, and mission. Discuss and agree upon specific success indicators to help monitoring and evaluation.

8. Implementation

Organizations tend to skip the very important process of setting goals and objectives and to go immediately to planning activities and actions. Some reasons for this are lack of time, the need to respond to immediate problems, unexpected donations, or not having a clear plan. But it is important to follow the planning process so that you do not end up going the wrong way, wasting your time and your limited resources.

When you are clear and confident about what you want and how to make this happen, it will be easy for the organizing committee and the organizing teams to make a work plan that sets out the activities, establishes a realistic timetable, divides the work, and distributes funds and resources to guide implementation. See Tool 1.5 with an example work plan.

9. Monitoring and evaluation

The aims of both monitoring and evaluation are similar: to provide information to help you make decisions, improve performance, and achieve planned results:

- Monitoring is an ongoing process to assess progress, identify difficulties, check whether there are problems, and if yes, take remedial action. Monitoring is concerned with ensuring that inputs, through activities, are transformed into outputs.
- Evaluation is a structured process to assess the success of your organizing campaign plan in achieving your goals and objectives and to think about the lessons learned. End of plan evaluation lets you judge its success, repeat activities that worked and that you can improve, and let go of those that did not work.

10. What next?

Draft your organizing campaign plan. Below is a suggested outline:

1. A short introduction. Reasons for doing the planning process and who decided to do it; the mandate of the central planning group; the basic principles (attach the information on the process itself – getting information, consultations, timetable, and members of the central group).
2. A clear, brief statement of your core values and mission (refer to your constitution and statutes).
3. A short review and assessment of your membership: number, profile, coverage, structure; the problems and challenges; successes and failures; and lessons learned. Use graphs and tables.
4. Your campaign vision and goals in the long-term, say five to ten years.
5. The specific objectives you set to reach each goal; and the corresponding strategies, outputs, activities, inputs, and indicators. (Note: The work plan with activities, targets, completion dates, resources, and people responsible, can be worked out in detail by the organizing committee and organizing teams.)
6. The method of monitoring and evaluating the implementation and success of your plan, based on indicators you identified.

Sections 1–3 and 6 should be short and to the point. Sections 4–5 could be presented in a matrix for clarity and quick reference (see T1.7).

Make sure that the plan of action does not become too long, or no one will read it. Make it short, concise, and easily understood by all your members and key stakeholders, and exciting as well. Your aim is to get everyone’s commitment and support.

Give the draft to the central planning group for changes and comments. Set a definite deadline for finishing the plan. Send the final draft to the members of the organizing committee and the executive board for approval. **Everyone should feel that they own the organization campaign plan, and be ready to get it started.**

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H1.4 – The Five-Year (2016–2020) Strategic Plan of the IDWF

From 9 to 13 February 2015, the IDWF held a Strategic Planning Workshop in Hong Kong, China to define and refine objectives and activities for 2016–2020. It was attended by the president, vice-presidents, general secretary, regional coordinators (Asia-Pacific, Africa, Latin America, North America, and Europe), and key stakeholders. The workshop looked at lessons learned, the practical realities of the organization, its resources, and the large number of domestic and household workers not yet served by an organization of any kind. Based on these, the workshop looked at the priority needs in the coming years, and set a five-year (2016–2020) strategic plan. The plan was based on the IDWF core values and mission, as set out in its constitution.

The IDWF **vision, goal and overall objective** was formulated as follows:

“By 2020, a strong, democratic, and united domestic and household workers’ global organization will be contributing to the protection and advancement of the rights of its 670,000 members, and the rights of domestic and household workers everywhere.”

The IDWF **immediate objective** was defined as follows:

“By 2020, 670,000 domestic and household workers (including migrant domestic and household workers) represented by 80 affiliates in at least 60 countries are organized to increase their power to affect the decisions that affect their lives, are actively contributing to the strength of their workers’ organizations, are engaging with the work of the IDWF, and taking ownership of the federation through the following:

- participating in IDWF decision-making processes;
- participating in and leading strategic campaigns;
- providing capacity building for organizations and leaders;
- representing the IDWF publicly and in external communications;
- taking action in solidarity with other IDWF affiliates; and
- supporting others in the labour movement according to IDWF capacity.”

The IDWF’s immediate objective was further specified in five **outcomes** as follows.

“1. Federation development

By 2020, the IDWF will have built and strengthened its organizational structure and operations to accommodate a membership of 670,000 domestic and household workers (an increase from 330,000 in 2015) represented by 80 affiliates in 60 countries, ensuring:

- that domestic and household workers everywhere who want to organize have the support they need to do so;
- the creation or leveraging of resources necessary to maintain a high standard of relevant service to members;
- robust impact measurement;
- a global data base resource for domestic worker organizations and researchers;
- strong internal communications; and
- the creation and implementation of strategic multinational and global campaigns.

2. Education and training

By 2020, 950 domestic worker leaders will have the resources and training necessary to deliver training programmes to a total of 20,000 affiliate members in designated locations with effective education and training in thematic areas such as (but not limited to):

- gender issues;
- trade union strengthening;
- vocational training;
- political education;
- leadership development; and
- other capacity building projects (tailored to the needs of affiliates).

3. Campaigns and research

By 2020, 1,656 affiliate leaders in at least 40 countries will have the resources necessary to conduct thematic campaigns and actions, and the impact of these campaigns will have been deepened through the strategic deployment of expertise and research regarding significant issues related to domestic and household work. Thematic campaigns and/or research areas may include (but are not limited to):

- ratification of C189;
- gender-based workplace violence;
- migration;
- wages and minimum wage standards;
- child domestic work;
- forced labour/labour trafficking;
- home care work;
- discrimination; and
- external communications (education and culture change).

4. Migrant domestic workers

By 2020, 200,000 migrant domestic and household workers in 25 countries will have the support of IDWF affiliates in sending and/or receiving countries that will be actively organizing and advocating around the specific needs of migrant domestic and household workers, resulting in empowerment, self-determination, and improved working conditions.

5. International work

By 2020, 80 IDWF affiliates representing 670,000 domestic and household workers in 60 countries will be represented on an international level through increasing IDWF participation in global labour organizations, and through strategic partnerships with international networks of civil society organizations.”

In writing your organization’s plan, it will be useful to refer to the Five-Year Strategic Plan of the IDWF, your “mother” organization. For more information and assistance, contact the IDWF.

Source: IDWF, http://idwfed.org/en/resources/idwf-5-year-strategic-plan-2016-2020/@@display-file/attachment_1.



H1.5 – Case studies and good practices

1. Mission, vision, objectives and strategies of the NDWM, India

Background

The National Domestic Workers' Movement (NDWU) has been at the forefront of championing the rights of domestic workers, children in domestic work, and migrant domestic workers since 1985. Today it works in 17 states of India, with nearly 200,000 domestic workers in major cities, towns, and villages.

The NDWM encourages the empowerment of domestic workers through solidarity, participation, and leadership training. It works for the labour rights of domestic workers, seeking dignity and justice. While lobbying with government to pass comprehensive legislation for protecting their rights, it also creates strong public awareness to enable domestic workers to achieve a healthy recognition in society.

Mission and vision

The NDWM's mission statement is: We commit ourselves to promote and ensure the participation of domestic workers in their struggle for rights and justice. We empower domestic workers to fight against all forms of injustice and discrimination.

Its vision and goal is: To create a just society for all domestic workers, where they are treated with dignity and justice, their rights are upheld, their contribution recognized, and their voices heard. We also envision a society where child domestic work is completely abolished and children in work enjoy mainstream education and fuller childhood.

Objectives

- Promotion of decent work and safe working conditions for all domestic workers.
- Protection of domestic workers against violation of their rights.
- Capacity building and empowerment of domestic workers for participation in the struggle for justice.
- Promotion of decent social protection for domestic workers and migrant workers.
- Promotion of safe migration and trafficking prevention to counteract forced labour of women and children.
- Promotion of the Child Rights Movement (CRM) to advance empowerment and child participation in decision-making among child domestic workers.
- Crisis intervention and reintegration programmes for victims of abuse.
- Networking at local, national, and international levels for policy and legislative inclusion of domestic workers.

Programmes (strategies)

- Organizing and capacity building.
- Social security.
- Lobbying and campaigns for formulating legislations.
- Preventing trafficking and safeguarding the rights of migrant domestic workers.
- Childline (24x7 free phone) services
- Networking and collaboration.

Source: NDWM website, <http://ndwm.org/about-us/#1462453903842-0442ee9f-a667>.

2. Planning for successful organizing by KUDHEIHA, Kenya

The Kenya Union of Domestic, Hotel, Educational Institution, Hospital, and Allied Workers (KUDHEIHA) is a union that organizes domestic workers in Kenya. This case study describes how it planned and implemented a successful organizing drive.

Challenges facing workers (analysis of the situation)

There are some 1.8 million domestic workers in Kenya – about 5 per cent of the country's workers. Seventy-five per cent are women. Domestic workers in Kenya face some of the same challenges that domestic workers face in other parts of the world. The overwhelming majority are paid far below the minimum wage. Fewer than 10 per cent have formal contracts, and even fewer have access to health insurance or social security. Many face physical, verbal, and sexual abuse from their employers.

Base-building model (identifying goals, objectives, and strategies)

Like domestic workers everywhere, those who work as individuals in private homes present a particular challenge to organizing. In 2006, KUDHEIHA decided to take on these challenges and rebuild its domestic workers membership (goal). It developed a base-building model (objective) that overcame many of these challenges and helped it to build a large membership base in the industry. The model focused on building small groups of domestic workers, neighbourhood-by-neighbourhood (strategy).

Identifying specific strategies, preparing a plan of action, and implementing and monitoring it

KUDHEIHA decided to focus on Kenya's four largest cities, Nairobi, Kisumu, Mombasa, and Eldoret. It set up domestic workers' organizing committees in each city, holding elections to have the members elect the most committed domestic worker leaders to serve on these committees. This allowed the workers to choose a leader they respected and trusted to be effective in reaching other workers. Because they were doing the organizing work themselves, domestic workers felt more ownership over their union. The domestic worker-organizers committed to doing four things:

1. Outreach to domestic workers, raising awareness on all of the issues that affect them.
2. Recruit and mobilize new members.
3. Gather and disseminate important information to all stakeholders.
4. Build unity out of the diversity of the workers, who come from different places and live in different cities, building a national voice for domestic workers.

In other words, these worker-leaders committed to work as organizers whose main purpose was to reach out to and build the power of their fellow domestic workers. They went through annual training to learn about the issues affecting domestic workers, so they would have the information they needed to be strong worker-educators. And they received training on how to do effective outreach and on leadership development. Once they were trained, the union organized a series of outreach days when the committee members go door-to-door in their cities, knocking on the doors of employers' homes and talking to the domestic workers who work there, and encouraging them to join the union. Around 150 members were recruited in the first week.

After this first phase, the organizing committees decided to break the cities down into smaller, more manageable units (monitoring, assessment, adjustment of the plan). So, first they divided the cities into four sections, based on the directions of the compass: north, south, west, and east. Then they divided those sections down into sub-sections of 100 households, and they started to build worker committees for every 100 households. By breaking their organizing units down so small, they could move away from using more anonymous outreach methods like door-knocking, and started to build on the social networks that domestic workers had in the neighbourhoods where they worked. Domestic worker leaders talked to other domestic workers about the union as they walked their children to school. They reached workers through the local churches, and they worked with the teachers in the schools to reach other domestic workers in the neighbourhoods. They now have more than 70 local committees of workers around the country. And every committee elects its own leadership.

Reporting, assessment, evaluation

There were two key ways that the union grew in this period. First, they held weekly meetings so that workers would always know how to connect to the union. Every Sunday – when most domestic workers have a day off – KUDHEIHA held workers’ meetings for each unit of 100 households. The workers ran these meetings themselves, supported by the union staff. The meetings always included some kind of “social education” (like family planning) and some education about the domestic work industry and workers’ rights or how to negotiate an employment contract. The committees also included a financial aspect: workers pooled money, and each week a different worker received those funds to help her invest in something she needed like clothes for work, or a cow to produce milk. These regular meetings provided practical support for workers’ lives, and they helped to reduce the isolation that domestic workers face at work. The fact that they happened every week made it easy for workers to get involved.

Second, the members committed to bringing one new member to the meeting every week. That was the secret of KUDHEIHA’s organizing success: workers committing to develop relationships with other workers, one person at a time.

The neighbourhood committees are self-sustaining. Workers pay fees on a monthly basis; 50 per cent of the money stays with the local committee, and 50 per cent goes to the county-level branch. The national union gets enough money from its other sectors’ fees, so it does not have to depend on domestic workers’ fees. The members decide to spend the funds on whatever sector needs to survive and grow.

This model was incredibly effective, and the KUDHEIHA’s domestic workers’ base grew quickly from 20 to 22,000 members in six years. This gave them the power they needed to change government policy in a serious way.

Source: *Case study: Changing Our Membership Structure*, KUDHEIHA, Kenya, National Domestic Workers’ Alliance, USA, <https://docs.google.com/document/d/1VZZnLy0kSOEs5Ok1FwwVF2JBcIXfvWskBBxkdI8y-1Y/edit>

3. Fair employment contracts for domestic workers: Practicum project by the NDWT, Thailand

Background

At the conclusion of a Training for Trainers (TOT) Workshop on “Planning for Empowerment and Change” (Jakarta, 31 July to 3 August 2016), seven trainees participated in a follow-up, three-month Practicum as a “learning-by-doing” activity. The aim was to strengthen the skills and knowledge they had acquired at the TOT and to test:

- whether they could actually put what they have learned into practice;
- if what they did led to the desired result; and
- what needed to be changed or adapted to improve the activity.

Throughout the practicum period, the trainees were supported by mentors. In Thailand, the Network of Domestic Workers in Thailand (NDWT) carried out the practicum project: Fair employment contracts for domestic workers. The practicum plan was prepared by Malee Soblerk, following her participation at the TOT workshop in Jakarta in 2016. The plan, which was discussed with the core members of the NDWT, fell within the framework of the IDWF “My Fair Home” campaign, launched in Thailand on 19 June 2016.

Report on the practicum project

The goal and the objective of the project were as follows:

- **Goal:** To use the fair employment contract as a tool to achieve better protection for domestic workers. This is in pursuit of the mission of the NDWT, as stated in its statutes: “To advocate for laws and policies regarding labour rights and protection of domestic workers”.
- **Objective:** By the end of November 2016, 10 Thai members of the NDWT will have successfully negotiated at least 10 fair written contracts with their employers, and lessons will have been learned and shared within the organization from the experience.

Activity	Date	Outputs	Comments
1. Preparation: Presentation of project by Malee to NDWT leaders; identification of five members of the support team (ST); division of tasks; setting timetable.	September–October 2016	ST members appointed; objectives and procedures discussed and understood; timetable agreed.	Done through monthly leadership meeting, in small meetings, and via telephone. ST members initially apprehensive about the short time for implementation.
2. Special session for NDWT members on the importance of contracts; introduction by ST members; distribution of model contract to 30 domestic workers (DWs) who expressed interest.	October 2016	ST members explained the project in detail and responded to questions. The 145 NDWT members who attended the meeting gained knowledge about the “Fair Home” campaign and importance of fair contracts with employers. ST members were able to evaluate the readiness of 30 members to participate in the project.	Organized during the monthly meeting of the NDWT Savings Group.
3. Implementation phase. Preparing 12 members to negotiate with their employers: mentoring (contents of contract, laws, negotiation skills, role play); meeting with the practicum mentor and ST to assess progress, identify problems, and discuss possible solutions (first week of December).	November 2016–January 2017	Of the 30 DWs, 12 committed to the project (11 Thais and one migrant DW member from Myanmar). They were mentored by the ST members (according to proximity, and schedules). If necessary, mentors accompanied them to meet with their employers. Regular meetings between mentors and the mentees were held. ST members were in regular contact with each other for feedback, sharing, comparing notes, and to help each other work out problems. Updates on progress of the practicum plan were given to the NDWT leadership (at monthly meetings in November and December 2016).	Because of the difficulty in finding time for meetings and mentoring, it was decided in November by the ST and members involved, with the approval of the NDWT leadership, that the implementation period would be extended to end of January 2017. Despite the difficulties, individual mentoring was found to be beneficial, even if time-consuming. The mentees were able to ask questions and discuss specific problems and issues with their ST mentors, by phone, one-to-one, or in small group meetings.

Activity	Date	Outputs	Comments
4. Results		<p>Twelve contracts were negotiated successfully, three of which were drafted by the employers.</p> <p>All the employers were foreigners (a second domestic worker of one employer also benefitted from the Practicum project by having a contract).</p>	<p>The ST found that mentoring and building the sisters' confidence in themselves took a lot of their time from their regular work and family responsibilities.</p> <p>One big problem was the poor communication between the employers (who have little or no Thai, and the domestic workers, whose command of English is limited). This was overcome by having the model contract in the two languages, and an NDWT member whose English is good, to accompany the member and the ST mentor.</p>
5. Assessment and lessons learned: ST and 12 DWs share lessons learned with Network leadership and members; overall assessment of the practicum project.	January 2017 (meeting of leadership and ST members).	<p>The 12 DWs increased their knowledge about the rights of domestic workers, the laws (in particular the ministerial decree on domestic work), and acquired and improved their negotiation skills.</p> <p>The ST members found the mentoring experience extremely valuable and satisfying.</p> <p>All, especially the 12 DW members, increased their confidence in their ability to solve problems, and discuss and negotiate with employers, and acquired important skills: assertiveness, putting one's case across effectively; listening with an open mind to the other side; self-assessment.</p> <p>Key lessons learned</p> <p>Importance of team work and mutual support.</p> <p>Need to overcome fear and anxiety regarding employers; in most cases, they are open to discussion and negotiations.</p> <p>Self-awareness and confidence building must be a priority in the NDWT training programme, especially for new members.</p> <p>Training in effective negotiation skills must form part of the regular training programme.</p> <p>Publicize the success of the practicum project via the NDWT Facebook; this will encourage others to negotiate contracts with their employers.</p>	<p>Follow-up</p> <p>Based on the positive outcomes of this Practicum project and lessons learned, the NDWT is highlighting the "Fair Home" campaign in its current plan of action.</p>



GKS's rights and signature programme in action, Gurgaon, India
Photo credit: Gharelu Kaamgar Sangathan (GKS)

Tools

T1.1	The SWOT analysis tool
T1.1i	The SWOT analysis tool (example)
T1.2	The SMART planning tool and checklist
T1.2i	The SMART planning tool and checklist (example)
T1.3	Checklist for effective planning
T1.4	Outline of a plan of action for organizational development and success
T1.4i	Plan of action form (blank)
T1.4ii	Plan of action form (example)
T1.5	Work plan form
T1.6	Communication matrix
T1.7	Organizing campaign plan form

Source: Soblerk, Malee, *Report on the practicum project: Fair employment contracts for domestic workers*, Network of Domestic Workers in Thailand (NDWT), IDWF, March 2017.



Tool T1.1

The SWOT analysis tool

A word about words

A few planning tools and techniques in this manual may be difficult to translate, as these are acronyms of English words. Perhaps SWOT and SMART – which are among the most widely-used planning terms – have equivalents in your language. If not, find a symbol or translate the words in the acronym, and combine the first letters together (and if the acronym makes sense, so much the better).

The SWOT analysis is one of the most basic tools for effective planning, and is used by organizations of every size and type. SWOT can also be useful for personal planning.

The set-up of the SWOT analysis is quite simple, as it looks at positive and negative things from an internal and external (inside and outside) perspective under four headings. See the attached example SWOT analysis form T1.1i.

- **Strengths** are positive things **inside** your organization. Examples might include a highly-respected leader, a talented group of young members or volunteers, committed leaders, or a healthy financial situation.
- **Weaknesses** are negative things **inside** your organization. Examples might include not enough money; not enough interest among members; inexperienced leaders; dependency on others (volunteers or organizations); a poor system of communication; or a poor member record system.
- **Opportunities** are positive things **outside** your organization. Examples might include a growing recognition among employers and the general public of the value of domestic work; good working relationships with public authorities, trade unions, and relevant NGOs; your organization's reputation within the community; or new progressive laws and regulations on domestic work, for example ensuring the right to organize for domestic workers.
- **Threats** are negative things **outside** your organization. Examples might include less funding from regular sponsors and donors; a sudden downturn in the local or national economy; cuts in public spending for social security and health; or national and/or local governments not interested in protecting domestic workers.

The key to doing a SWOT analysis is to think about ways to **maximize the positive things and minimize the negative ones**. When you are writing your plan, think about ways to use your strengths, overcome your weaknesses, take advantage of existing opportunities, and overcome the threats you have identified.

A SWOT exercise can be a waste of time if it is not done correctly. Here are some tips to help avoid some common mistakes and make your SWOT more useful.

- Before you start doing a SWOT analysis of a situation or objective in a group, have every group member complete the SWOT individually. You will get more ideas and it will make the group exercise and discussion easier.
- **Avoid generalities.** As with any feedback, do not get into the habit of making sweeping generalizations. For example, do not just say that your organization has a great communication system. Instead, find out and say why this is so: "The leaders keep everyone informed of important developments and progress towards our goal through the newsletter and social media."
- **Identify and be specific about the reasons for your strengths and weaknesses.** Do not just accept every comment at face value. For example, if a weakness is late delivery of your newsletter, look carefully at the reasons why. Could it be that the printing house does not give your newsletter priority over other jobs? Or, are the people who write or translate the articles meeting their deadlines? Examine the root of each strength or weakness. This will help you identify what you need to develop further or do without delay in order to move forward in reaching your goals or objectives.
- **Discuss differences and inconsistencies.** The simple titles of the four boxes let participants interpret each term differently and how it applies to your organization. This can lead to disagreements about whether something is a weakness or an opportunity. These are not bad discussions to have because they will let you examine what is important to your organization and how best to use resources.
- **Use SWOT to move forward.** The most important part of the SWOT analysis actually begins when you are finished. After comparing all of the strengths, weaknesses, opportunities, and threats, use the analysis to help you plan effectively. You can plan better on how to make the most of what you do well, and work to turn around your failures after completing a SWOT analysis. This applies to both organizational and personal planning to achieve a goal or objective.

Source: Arneal, L., *Why most SWOT analyses stink and how you can make SWOT work for you*, Non-Profit Hub, <http://nonprofit-hub.org/nonprofit-marketing-plan/why-most-swot-analyses-stink-2/>.



Tool T1.1i

SWOT analysis tool (example)

Goal for the SWOT analysis: By 2025, the NDWU is recognized as the leading organization of domestic workers in the country.

<p>What are the INTERNAL STRENGTHS (positive things) of the NDWU? What will work in the NDWU favour?</p> <ol style="list-style-type: none"> 1. Since it started in 2011, membership of NDWU has steadily grown and is now 100,000, representing 5 per cent of the estimated number of domestic workers (DWs) in the country (2 million). It is the larger of the two domestic workers' organizations in the country. 2. Most (90 per cent) of the 20 leaders are committed, trained, and confident, able to put forward the problems and concerns of their members and domestic workers, to the authorities, the media, and the public. 3. Ninety per cent of members pay their fees, and 80 per cent attend their section meeting (every two months). 4. The NDWU savings cooperative is operating well; covers 90 per cent of members. 	<p>What are the INTERNAL WEAKNESSES of the NDWU? What will be the obstacles to success for the NDWU?</p> <ol style="list-style-type: none"> 1. The majority of members work in the capital city and the suburbs. 2. Many members (around 20 per cent) are "passive" (they pay fees, but it is difficult to get them to meetings and events, except for social events). 3. A few leaders (around 10 per cent) are starting to feel tired from the many activities they have to organize or attend. Slow development of second-tier leaders to take over. 4. NDWU does many things and has difficulty prioritizing. 5. It still has to depend on outside funding for activities and half of its administrative costs.
<p>What are the EXTERNAL OPPORTUNITIES (positive things) of the NDWU? What will work in the NDWU favour?</p> <ol style="list-style-type: none"> 1. National law on domestic work now being discussed in parliament after years of lobbying and campaigning. 2. Strong alliances and networks with other domestic workers' organizations in the country and joint campaigns with trade unions, women's and human rights organizations. 3. A recent survey has shown that the NDWU's weekly radio programme on a major national station is one of the most popular in the country. 4. Around 500 employers have subscribed to the "Fair Home" campaign. 	<p>What are the EXTERNAL THREATS to the NDWU? What will be the obstacles to success for the NDWU?</p> <ol style="list-style-type: none"> 1. Conservative politicians not sympathetic to workers' causes may win a majority in parliament in the next national election (in six months). 2. Support and help from funding agencies is falling because of the economic crises and political developments in donor countries. 3. Media and public interest is moving away from domestic workers to other groups in society. 4. The majority of employers do not want to recognize the rights of domestic workers.



Tool T1.2

The SMART planning tool and checklist

A word about words

A few planning tools and techniques in this manual may be difficult to translate, as these are acronyms of English words. Perhaps SWOT and SMART – which are among the most widely-used planning terms – have equivalents in your language. If not, find a symbol or translate the words in the acronym, and combine the first letters together (and if the acronym makes sense, so much the better).

The SMART planning tool is especially helpful when identifying objectives, strategies or tasks of organizations. It can also be used in personal planning to check whether you have really thought through your goal and the steps you plan to take to reach it. SMART stands for:

- **Specific?**
- **Measurable?**
- **Achievable?**
- **Relevant and Realistic?**
- **Time-bound and Timely?**

Points to look into and questions to ask are as follows:

- **Specific:** Is your objective exact? Avoid setting unclear objectives; be as precise as possible. You will know your objective is specific enough by asking these questions:
 - Does everyone who is involved or interested understand it?
 - Are the targets of your objective clearly identified?
- **Measurable:** Be clear how you will know when you have achieved your objective. In a way, this is the most important thing. You will only know that you have achieved your objective when there is evidence.
 - How will you record your success?
 - Using numbers, dates, and times is one way to show clear objectives.
- **Achievable:** There is no good reason to start something if you know you cannot finish, or if you cannot tell if or when you have finished it. Setting impossible objectives will only end in disappointment. Make your objective challenging, but realistic.
 - Can you measure its success?
 - Have others done it successfully (before you, or somewhere else)?
 - Do you have information and evidence to show that the objective will improve things?
 - Do you have the necessary resources, or at least a realistic chance of getting these?
 - Is it achievable, even with opposition or resistance?



South Asia Domestic Workers Training for Trainers' Workshop, Sri Lanka
Photo credit: IDWF

- **Relevant and Realistic:** Think about how relevant your objective is to the overall goal. **An objective may be achievable, but not realistic.** Realistic is about people, time, money, opportunity.
 - Who is going to do it?
 - Do you have – or can you get - the skills to do it?
 - Is there enough money? Will you be able to get the money or other resources needed to achieve the objective?
 - Will the objective get a lot of support? Does everyone in your organization and your key partners care about the objective enough to take action?
- **Time-bound and Timely:** Set a time and deadlines for completing your objective; otherwise, it is not measurable. Even if you have to review this as you progress, it will help to keep you motivated.
 - Does the objective have a clear time limit that is realistic?
 - Is the objective pursued at the right time and done by the time it needs to be done?

Adapted from *The SMART Matrix – Quality in Healthcare*, American Society for Quality (ASQ), <http://asq.org/healthcare-use/why-quality/smart-matrix.html>.



Tool T1.2i

SMART planning tool and checklist (example)

Objective	Specific	Measurable	Achievable	Realistic and Relevant	Time-bound and Timely
Recruit 50 new members in San Pablo and Margarita districts of Makati.	Yes, based on a survey identifying these two areas where at least 300 potential members work; and five organizers are located there.	Yes, the organizing committee will check with the organizing team every month; table prepared for easy progress report.	Yes, organizers are trained and ready to go. San Pablo has a sympathetic homeowners' association. Some employers in Margarita identified as potential supporters.	Yes, small sum of money set aside in the budget for organizers – snacks, drinks and transport. Key potential members have been identified. No major holiday during the recruitment period. Possible two-month extension provided for. The objective is highly relevant to the aims of the NDWU – “Article 2.1: To establish a nationwide organization that will represent domestic workers’ rights and interests”.	In four months. To be completed before and results announced at the annual domestic workers’ Conference in six months.



Tool T1.3

Checklist for effective planning

1. What do you want to achieve? Why? Is your goal in line with your mission?
2. What are your objectives to reach your goal?
3. Is your information credible and evidenced-based?
4. What are the specific outputs, activities, inputs and indicators to achieve your objectives and goal?
5. Who are the targets for change? Who are the agents for change?
6. Who will you be working with? Building a network of support should be a key part of your plan of action to help your organization through good times and difficult times.
7. What are your actual resources (people, money, materials, contacts)?
8. What other things will you need? How will you get them? How can you get supporters and donors to help you in achieving your goal? How will you avoid being “donor-driven”?
9. How will you check your progress, impact and effects? How will you measure success?
10. What monitoring information do you need, and how will you collect it?
11. How will you learn from what you have done to improve your future actions?



Tool T1.4

Outline of a plan of action for organizational development and success

Name of organization: _____

Time for the plan: _____ number of years (from 20xx to 20xx)

1. **Brief introduction.** Reasons for starting the planning process and who made the decision; the mandate for the central planning group, including basic principles. Details, such as the process agreed upon (internal, external consultations); the timetable; the list of members of the central planning group, can be annexed.
2. Clear, brief statement of your **core values and mission** (refer to your constitution or statutes).
3. Short review and assessment of **your situation now**. Membership; geographical area covered; achievements; problems; challenges; lessons learned.
4. Statement of **vision/goal**.
5. **Plan of action** form (see the attached T1.4i and T1.4ii sample forms):
 - Objectives/outcomes.
 - Strategies.
 - Outputs.
 - Activities.
 - Inputs.
 - Indicators.
6. **Monitoring and evaluation** methods to regularly measure progress and success.



Tool T1.4i

Plan of action form (blank)

The x-year plan (20xx-20xx) for organizational development and success of the (name of organization):

Statement of vision and goal

Note: For every objective, identify the strategies/outcomes. For every strategy/outcome, identify the outputs. For every output, identify the main activities. For every activity, identify the inputs. Set indicators at all relevant levels.

Objectives/ Outcomes	Strategies	Outputs	Activities	Inputs	Indicators



Tool T1.4ii

Plan of action form (example)

The Five-Year Plan (2017-2022) for Organizational Development and Success of the National Domestic Workers Union (NDWU) of the Republic of Atlantis

Statement of vision and goal

Expansion of membership and influence of the NDWU

Note: For every objective, identify the strategies/outcomes. For every strategy/outcome, identify the outputs. For every output, identify the main activities. For every activity, identify the inputs. Set indicators at all relevant levels.

Objectives/outcomes	Strategies	Outputs	Activities	Inputs	Indicators
1. By 2022, 10,000 new members join the NDWU at the average rate of 2,000 every year.	1.1. 25 organizing teams (OTs) carry out membership campaigns in identified areas.	1.1.a. Membership campaign plan designed, agreed, and started. 1.1.b. Setting up of 25 OTs made up of new organizers assigned to specified areas with existing organizers.	1.1.a: Set up a central and local organizing committees. Committees make draft campaign plans and consult with all. Approval of campaign plan at annual Congress. 1.1.b: Selecting OTs and recruitment areas. Refresher training for OTs on how to recruit. OTs carry out recruitment drives two Sundays per month. 1.1.c: Local committees mentor OTs. Local committees report to central committee every two months. Central committee helps solve problems.	For Output 1.1.a. activities: Time of committee members to draft the campaign plans. Money for transportation and printing the campaign plan. For Output 1.1.b. activities: Experienced organizers to provide refresher training. Travel allowances and refreshments at the training. Travel allowances for recruitment drives, as needed. For Output 1.1.c. activities: Possible phone, meeting or travel costs. Time to write, read and follow-up on reports.	1.1.a. In the first year, 2,000 new members; 2,000 in the second year; 2,000 in the third year; 2,000 in the fourth year; and 2,000 in the fifth year. (Information in Annual Report.) 1.1.b. New organizers form 25 teams, each mentored and supervised by two experienced organizers (list of team members and mentors; regular progress reports to the organizing committee). 1.1.c. Quarterly progress reports of the organizing committee to national leadership (in meeting agenda; reports). 1.2.a. Every year, 200 of the trained new organizers actively engage in recruiting new members during two Sundays every month.
1.2. Training of 1,000 new organizers by the existing organizers, and mentoring.		1.2.a. 300 new organizers trained every year in 20 training courses.	1.2.a: Planning, designing and budgeting the training courses. Finding good trainers and a donor. Selecting new organizers for the training. Conducting and reporting on the training.	Resource persons to develop, plan, budget, conduct and report on the training. Donors to fund the training. Travel and meeting costs during the training.	

Objectives/outcomes	Strategies	Outputs	Activities	Inputs	Indicators
2. The 100,000 members remain strongly committed to the organization and actively take part in strengthening its influence and image in society.	2.1. Motivating members to engage and expand NDWW activities and influence.	2.1. a. Small team set up to check communication system within the organization, looking at ways to improve it to meet the needs of members and increase cooperation and solidarity.	For Output 2.1.a: Small team analyzes internal communication through telephone and social media surveys with members and leaders. Team makes a report with recommendations to strengthen communication, and a draft communication strategy for adoption by the annual congress.	For Output 2.1.a activities: Time of team members to design, implement, conduct and analyze the surveys with help of a computer expert. Time of team members to write the report and draft a communication strategy.	2.1 a. Small planning team presents report and recommendations to leadership by the first quarter of the first year, for consideration and implementation. 2.1 a. At least two-thirds of the members participate in and bring along other DWs to activities on 1 May, 16 June, and 8 March.
		2.1. b. Branch and section leaders are chosen, trained, and developed, and the mentoring scheme strengthened.	For Output 2.1.b: Selecting new branch and section leaders, and new mentors. Leadership training for new leaders and mentors. Matching new leaders with mentors.	For Output 2.1.b activities: Resource persons to provide develop, plan, budget, conduct and report on the training. Donors to fund the training. Travel and meeting costs during the training.	2.1 b. At least 40 more members are taking up responsibilities in the structure and running for leadership positions by 2018, and another 40 by 2020.



Tool T1.5

Work plan form (blank)

Note: This is the most flexible part of your plan. It is the part that you will use to help stay focused, keep you from having too much to think about, and make sure that you stay on track with your objectives and goals. This template may be helpful to keep checking the actions and activities you planned in order to reach the outputs and outcomes you want. It will help to separate things into manageable parts so that you can get started with your plan without delay. There may be some things you do not know yet. That is not a problem. Just think about when you will know and what you will do to find out. Plan to “re-plan.” Once you know more, you can plan more. Come back to this work plan at least every few months to check on your progress. Add more columns and rows as you need.

Work plan of (name of organization)

Year 1 First quarter Dates	Objectives	Outputs and activities	Start date/end date	Resources (money, people, time, materials)
to				
Year 1 Second quarter Dates				
to				

Communication Matrix – Name of organization

What do you want to communicate?	Who do you want to communicate with?	How do you want to communicate? Formats	How do you want to communicate? Channels
Your plan for success	All members, staff, advisers, and volunteers. Key supporters and donors.	Full text with cover letter. Summary and key points.	Distribution by group and committee leaders (preferably at briefing meetings); by e-mail and Facebook (restricted). By mail or e-mail and Facebook (public); on your website.
Division of work as decided by the executive council or board	Council or board members, committee leaders.	Planning matrix; plan of action; programme and schedule of activities; clear indication of responsible people.	By e-mail, followed by phone calls for reminders.



Tool T1.7

Organizing campaign plan form (blank)

Name of your organization: _____

Duration of plan: xx years (20xx-20xx): _____

Vision statement and goal _____

Indicators	
Inputs	
Activities	
Outputs	
Strategies	
Objectives	



IDWF-ILO-PROMOTE-Jala PRT Regional Training for Trainers of Domestic Workers: Plan for Empowerment and Change, Indonesia
Photo credit: IDWF

Module 2 – Domestic workers: Planning for empowerment and change at the personal level



Domestic workers and the Women's Committee of the IUF International Trade Union Federation campaigning for decent work for domestic workers, Burkina Faso
Photo credit: Assétou Traoré-Dabiré

Guide page

What is this module about?

Module 2 is focused on planning at the personal level, taking into account your many jobs in the family, at work, and in your organization. The activities and handouts are intended to help you get a clearer picture into the key issues and challenges facing you. This is important. Only if you have enough knowledge and understanding of these can you plan effectively for empowerment and change at the personal level.



Aims

After completing this module – individually or in a group – you are expected to:

- have a better understanding of the key issues and challenges facing you in your many jobs; and
- have developed or improved your planning skills to help you reach your personal goals.



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Timetable for Module 2

ACTIVITY	AIMS	TIME
A2.1: How do you plan? What is planning?	<ul style="list-style-type: none"> To look at the way you plan. To know what is planning for personal empowerment and change. 	60 minutes
A2.2: Who are you? What are your core values?	<ul style="list-style-type: none"> To understand the importance of knowing yourself. To know your personal core values and their importance to your plan for personal empowerment and change. 	145 minutes
A2.3: Examining your attitudes about yourself, your work, and your organization.	<ul style="list-style-type: none"> To examine your own attitudes about domestic work and domestic workers. To understand how attitudes, views, stereotypes, tradition, and culture in society affect how you feel about yourself, your work, and your organization. 	60 minutes
A2.4: The basics of planning for empowerment and change at the personal level.	<ul style="list-style-type: none"> To know the basic parts of effective planning for empowerment and change at the personal level. 	60 minutes
A2.5: Where are you now? Analysis of your personal situation.	<ul style="list-style-type: none"> To look at your situation now. To find out what you want to improve or change in your life. 	125 minutes
A2.6: Setting your personal goals, objectives, outputs, inputs, and indicators.	<ul style="list-style-type: none"> To learn how to identify goals, objectives, outputs, inputs, and indicators. 	150 minutes
A2.7: My organization and I: A personal assessment.	<ul style="list-style-type: none"> To review how much I know my organization. To look at how I see my organization and my role in it. To understand the importance of organizing. 	120 minutes
A2.8: Effective planning for better participation in your domestic workers' organization.	<ul style="list-style-type: none"> To write an effective plan to improve your participation in your organization. 	120 minutes
A2.9: First things first: Prioritizing and using time effectively.	<ul style="list-style-type: none"> To find out how we can prioritize, manage time, and work with each other. 	60 minutes
TOTAL		900 minutes or 15 hours , divided into 2.5 days



Jamaica Household Workers' Union having a celebration for International Domestic Workers Day on June 16, Jamaica
Photo credit: Shirley Pryce

Activities

A2.1	How do you plan? What is planning?
A2.2	Who are you? What are your core values?
A2.3	Examining your attitudes about yourself, your work and your organization
A2.4	The basics of planning for empowerment and change at the personal level
A2.5	Where are you now? Analysis of your personal situation
A2.6	Setting your personal goals, objectives, outputs, inputs and indicators
A2.7	My organization and I: A personal assessment
A2.8	Effective planning for better participation in your domestic workers' organization
A2.9	First things first: Prioritizing and using time effectively



The democratically elected National Domestic Workers' Council, KUDHEIHA, Kenya
Photo credit: IDWF

Activity A2.1 How do you plan? What is planning?

Aims	To look at the way you plan. To understand what is planning for personal empowerment and change.
Time	60 minutes

Handouts

- H2.1: Effective planning for empowerment and change at the personal level.
- Activity handout 1: List of cases for individual exercise.
- Activity handout 2: Form: How do you plan? (blank)
- Activity handout 3: Form: How do you plan? (example)

Materials

- The trainer photocopies the activity handouts, one for each participant before the start of the session.



Process

- Individual exercise; brainstorming.

Step 1 – Individual exercise 60 minutes

1. The trainer explains the goal and process of the activity, and tells the participants that this is not a test, but a way for them to share experiences. The trainer distributes Activity handouts 1 and 2, reads out the list of cases for the individual exercise (Activity handout 1), and explains the blank form (Activity handout 2), giving examples from Activity handout 3 to make sure everything is clear.
2. The trainer tells participants to choose one of the cases which they experienced personally from the list or choose another case that they experienced as they wish.
3. Each participant thinks back on what she or he did, step by step, and completes the blank form.

Step 2 – Brainstorming 40 minutes

4. The trainer asks, by show of hands, who was successful, somewhat successful, and not successful, then asks one or two participants from each category to present their forms.
5. Participants comment on the presentations, relating these to their own experiences.
6. The trainer asks participants to explain what “planning” means to them, notes the key words on a board or flip chart, and summarizes the key ideas.
7. The trainer asks participants to agree on a common definition of “planning”. How does the definition compare to point 1 of the key messages below? If it is similar, the wording does not matter. Display the common definition on the board.
8. The trainer sums up and thanks the participants.

KEY MESSAGES

- Planning is the process of thinking about and organizing the actions needed to reach a goal and objectives: something we want to achieve, happen, or have.
- Planning is a constant activity in our lives. We all plan, every day, any time, anywhere, individually or as a part of a group. We plan to get something done, or undone; to get or get rid of something. We plan to go somewhere, change our destination, and plan again. Sometimes, things go to plan; sometimes, only partly; and sometimes not at all. This is why we should learn and use skills in effective planning, to achieve big goals for ourselves and for our organizations.
- A plan is like a map. When following a plan, you can see how much progress you have made and how far you are from your goal. Knowing where you are helps you to make good decisions on what direction to take and changes to make, if needed.



Note for Trainers

- * This activity can serve as an “ice-breaker” and an introduction to a training workshop or sessions on effective planning for personal empowerment and change.
- * Read the form with the participants before the exercise and give examples.
- * Information provided by the participants can help to start the brainstorming in the next session.



A2.1: Activity handout 1

List of cases for individual exercise

1. Applying for a job in a house in another town or city.
2. Applying for a job as a domestic worker abroad.
3. Organizing a birthday party for 30 children.
4. Buying an apartment or a house.
5. Learning a new skill (for example, a language, paralegal training, cooking a special dish, or caring for children or the elderly).
6. Negotiating with your employer to improve your working and living conditions (for example, a salary increase, weekly rest, annual holidays, working hours, accommodation, health and safety).
7. Going on a trip.
8. Budgeting monthly expenses.



A2.1: Activity handout 2

Form: How do you plan? (blank)

Case: _____

Expected outcome(s)/result(s): _____

Were you successful? Yes: No: Somewhat:

Why? _____

What did you achieve?

What specific actions or steps did you take to achieve your expected result or outcome?	List your a) strong points b) weak points	What could you have done better? How? Why?
1.	a) b)	
2.	a) b)	
3.	a) b)	



A2.1: Activity handout 3

Form: How do you plan? (example)

Case: *Negotiating with my employer for a weekly day-off.*

Expected outcome(s)/result(s) *One day off per week*

Were you successful? Yes: No: Somewhat:

Why?

It was the first time I spoke to my employer about improving my working conditions.

What did you achieve (result or outcome)

- a) *I got two days off per month at the same salary.*
- b) *My employer agreed to give me a weekly day-off, but decreased my salary (by 5 per cent)*
- c) *I overcame my fear and was able to talk about other issues such as decreasing my daily working time from 10 to eight hours (we agreed to nine hours).*

What specific actions or steps did you take to achieve your expected result or outcome?	List your a) strong points b) weak points	What could you have done better? How? Why?
<i>1. I asked my domestic worker friends whether they had a weekly day off and what their working and living conditions were, to compare my situation with theirs.</i>	<i>a) I was able to persuade two people to give me information. b) I could not persuade any others to tell me anything.</i>	<i>I could have prepared better by getting information from other domestic workers (DVs), family members or neighbours.</i>
<i>2. I observed my employer's mood to decide on the best time to talk with her (on her day off, after the children had left for school).</i>	<i>a) This was a good idea, as she was friendly when I asked to talk with her.</i>	
<i>3. I explained to my employer why I was entitled to a weekly day off.</i>	<i>a) I was able to give the reasons for my request (I have been working for three years without a regular weekly day off; most DVs in the area have a weekly day off, and better working conditions). b) I was very nervous and it was difficult to argue against her.</i>	<i>I could have got more information by talking to more experienced women in my organization, and asking their advice. I could have made other arguments (how family members and their friends say my work is good). I could have role-played with a trainer or leader of my organization.</i>

Activity A2.2 Who are you? What are your core values?

Aims	To understand the importance of knowing yourself. To know your personal core values and their importance to your plan for personal empowerment and change.
Time	145 minutes

Handouts

- H2.1: Effective planning for empowerment and change at the personal level.
- Activity handout: My personal core values

Materials

- For the first exercise in step 1: coloured cards or post-its, or half of A4 sheets (three per participant).
- For second exercise in step 4: five post-its, coloured cards, or half of A4 sheets (five per participant).
- Board or wall to stick or pin paper; pens and marker pens.
- Trainer copies the Activity handout, one for each participant.



Process

- Individual reflection; sharing; brainstorming; individual exercise; general discussion.

Step 1 – Individual reflection 15 minutes

1. The trainer explains the aim and process of the activity, and underlines the importance of knowing ourselves, who we are, our personal core values, our strengths and weaknesses, to plan for personal success. After all, we have sole responsibility for our future; we alone are our own agents for change.
2. The trainer gives out three coloured cards or post-it notes or half A4 sheets to participants, and asks them to write down **one word or make a drawing** describing or depicting themselves.

Step 2 – Sharing 30 minutes

3. Participants share and stick their comments on the board or wall. The trainer groups these by common ideas under two main headings: Role/Status-oriented and Value-oriented.
4. The trainer discusses the responses with the participants: Role/Status-oriented (for example – student, wife, daughter, domestic worker, Catholic, Muslim, migrant) or value-oriented (for example – affectionate, shy, caring, loving, free, generous, independent). The trainer asks how many are status-oriented, value-oriented, or both, and then explains that neither is better than the other and that up to 30 or 40 years ago, most people defined themselves in terms of their roles, jobs, positions.
5. What can participants conclude from this exercise?
6. In summing-up, the trainer underlines that each of us is a total of many identities; some of us give more attention to our role or status, while others to values. There may be times when it is the other way around, depending on circumstances. What is important is that we know – and value – who we are.

Step 3 – Brainstorming 30 minutes

7. The trainer asks participants to brainstorm on “personal core values”. What are these? Give examples. Why is it important for us to identify them when we plan for empowerment and change? The trainer notes key words on the board or flip chart, and tries to get agreement on the meaning of “personal core values” and why identifying these is important when we set our goals in life. The trainer writes the common definition of “personal core values” on the board.

Step 4 – Individual exercise 30 minutes

8. The trainer gives each participant a copy of the Activity handout about core values, and five post-its or cards or sheets of paper.
9. The trainer asks participants to:
 - a. Take a few minutes to think about their personal core values, as defined on the board.
 - b. Make a list of all personal core values.
 - c. Go through the list and group those that are similar or closely related, find a word or phrase for the group, and write this on the attached form. If necessary, fill in the second column. Putting them in order of importance (third column) may help to decide the five top core values.
 - d. Choose from the form the five core values that are the most important, and write down one core value per post-it or card or sheet of paper.
 - e. In deciding the five top core values, each participant must answer the following questions:
 - What values are most important to my life; those that matter most to me?
 - What values represent my main way of being; those that define me?
 - What values are essential to supporting my inner self; those that decide my behaviour and actions?
 - Are the five I have chosen consistent with who I am (not the values of others I admire)?

Step 5 – General discussion 40 minutes

10. One participant pins the post-its or cards on the board or wall, with enough space in between, and explains why these are her or his top core values. Others do the same, pinning their post-its or cards under the groups started, or making new groups, as needed.
11. The trainer asks participants to comment and share their views, then sums up the activity, thanks the participants, and gives the key messages on page 143.

KEY MESSAGES

- Core values represent your “heart and soul”. They are what you think is most important, what you believe in, what you stand for. They guide your behaviour, provide you with a personal code of conduct. Core values are what give us purpose.
- Just as organizations have values, people do too. Most people have five to seven core values that define who they are at their core.
- Each person’s values are unique to that person; if two people happen to pick the same value word, such as “integrity”, each will show it differently in actions and language.
- Understanding our values helps us better understand ourselves and why we may act or react in the way that we do. For example, if someone does not value one of your values, it can result in feelings of hurt; you would likely feel upset if your value of “integrity” was not valued by someone else. Similarly, if you make a decision that goes against one of your values, this may lead you to feel uneasy or unsettled about the decision, because you are not being true to yourself.
- The goals and objectives of your personal plan for empowerment and change must be in line with your core values. If not, you will not be motivated, as these have little or no relevance to what you think is most important, and what gives you purpose in life. As Mahatma Gandhi said: “Your beliefs become your thoughts. Your thoughts become your words. Your words become your actions. Your actions become your habits. Your habits become your values. Your values become your destiny.”



Notes for trainers

- * This exercise, which can also serve as an “ice-breaker”, will give you an insight into the personalities of the participants. This can be useful in helping them to speak freely during the next sessions.
- * One debate you can start is why women tend to be more value-oriented than men, and how education, socialization, culture and tradition influence how we define ourselves.
- * When discussing personal core values, you may wish to refer to ideas that came up during the first exercise.
- * Collect the personal core values forms and go through them for reference in later activities. Return the forms to the participants to keep as a personal checklist.
- * If you are conducting the workshop in your language, be sure to find a phrase for “personal core values” that has the same meaning as in English (see key messages above).

8. Groups assign moderators and reporters.
9. Group members think about each statement and decide whether they, as a group, agree or disagree with it. The reporters note key points of the discussion.

Option 2 – Step 2 – Reporting and general discussion 30 minutes

10. The trainer reads the first statement on the board. Each reporter gives the group's opinion and a brief explanation. The trainer summarizes the groups' responses. The participants then decide if they – as a whole – agree or not with the statement. The trainer writes on the flip chart or board what most participants think, then repeats the process for each of the statements that follow. At the end of the reporting, the trainer asks participants to give their opinions on how attitudes, views, stereotyping, tradition, and culture affect the way domestic workers and domestic work are seen by domestic workers themselves, their families, communities, and society. Can these be changed? How? The trainer sums up and ends the session by underlining the key messages.



KEY MESSAGES

- Gender-based discrimination and traditional views such as “domestic work is women’s work”, “domestic work is easy work, so there is no need to give domestic workers proper pay” are deeply believed in many societies. People often think that domestic work has little value and is a low status job; they have prejudices against domestic workers and treat them without respect. Some domestic workers internalize such ideas, and then have little self-confidence and self-esteem.
- The low value given to domestic work is also related to the fact that domestic workers often come from historically disadvantaged communities such as minority ethnic groups, indigenous peoples, and low-caste, low-income rural and urban groups. In fact, domestic work is often one of the few employment choices open to women from these communities. Many are also migrants, either within their own countries or internationally, and are victims of prejudices that turn them into “second-class citizens”.
- Societies and labour markets can not function properly if domestic work is not undertaken. The value of domestic work has been confirmed at the international level with the adoption of ILO Convention No. 189 and Recommendation No. 201 which state that domestic workers should be given equal rights and treatment as other workers. Public awareness-raising campaigns on the valuable work done by domestic workers for families and society, and programmes that give them confidence and empower them to have control over their own lives are necessary to bring about change.

Source: *Decent work for domestic workers in Asia and the Pacific: Manual for trainers*, ILO-IDWF, Bangkok, 2012.



Notes for trainers

- * This is a good activity to start a workshop or to give energy to participants after a lunch break.
- * Feel free to write statements relevant to the realities in your country or organization.
- * Encourage an honest discussion, with participants giving examples and sharing experiences.
- * Take note of the most controversial statements and keep these for further thought and discussion.



A2.3: Activity handout

Sample statements

Choose the statements that are most suitable for your participants. You can also write new statements.

The number of statements discussed will depend on the available time:

1. Domestic work may be hard work, but it does not need skills, training, or education.
2. Domestic workers should be paid less than factory or office workers because their work does not need much skill or a high level of education or training.
3. Most domestic workers are treated like family members by their employers.
4. Domestic workers, especially migrants from rural areas or from other countries, should be thankful that they can still find jobs as domestic workers.
5. Domestic workers do not need to be paid overtime because they have a lot of time to relax, in between work, during the day.
6. Most employers do not know that their domestic workers have rights under the law.
7. Women make the best domestic workers because they are “natural” houseworkers and carers.
8. Domestic work is degrading.
9. Domestic workers should organize to protect and promote their human and labour rights.
10. In general, domestic workers are better off living with their employers because their living conditions are better than in their own homes.
11. Doing domestic work is safe for women and children because they are protected by their employers.
12. Domestic workers and their supporters must give priority to raising the awareness of society and changing attitudes and behaviour about domestic work and domestic workers.
13. Domestic workers face discrimination because of their gender, class, caste, ethnicity, race, and religion.
14. Children below the age of 18 should not do domestic work.



The first annual meeting of IMECE Domestic Workers Union, Turkey
Photo credit: IMECE

Activity A2.4 The basics of planning for empowerment and change at the personal level

Aim	To know the basic parts of effective planning for empowerment and change at the personal level.
Time	60 minutes

Handouts

- H2.1: Effective planning for empowerment and change at the personal level.

Materials

- Flipcharts or computer and screen for slide presentation.

Process

- Introduction and general discussion.
 1. The trainer introduces the basic parts of effective planning for empowerment and change at the personal level with flip charts or slides.

2. The trainer explains each part and invites participants to ask questions and seek clear answers.
3. The trainer concludes by saying that further sessions will discuss each of the steps in more detail.

KEY MESSAGES

The basics of workable plans for empowerment and change at the personal level, step by step, are:

1. **Analyze your situation now:** The real start of planning is taking a close look at where you are now. Are you happy with the way things are going? Is this where you want to be at this time in your life? What have you done well? What could you have done better? Only by doing this self-examination can you find the problems, know the challenges, and start thinking and planning what needs to change and how to make it happen.
2. **Identify what needs to be done.** What do you want to achieve? Make this your goal and decide when you want it to happen.
3. **Break down the big goal into clear smaller ones (objectives); prioritize.** This step-by-step process is very important so that you are not overwhelmed by the big goal, but can clearly measure the progress you are making towards reaching it.
4. **Identify the specific actions** that you need to take to reach your objectives. What do you expect to be the results of your actions. By when do you expect these results?
5. **Review your resources and abilities** realistically and honestly. What do you need to carry out your activities and actions (money, skills, expertise)? Are these available? If not, can you get them from other sources (family, friends, your employer, your domestic workers' organization, NGOs)?
6. **Make a timeline for your plan;** is it realistic?
7. **Decide how you check progress** (check regularly, at least once a month); make adjustments to your plan, as needed.
8. **Put your plan down in writing** and start your plan, stick to the timeline as much as possible.
9. **Finish** it on the day you set in your plan. **Evaluate** where your plan was successful. Identify where your plan was not successful and why. Learn from your experience and keep planning for bigger and smaller goals.



Note for trainers

- * This activity introduces the basic parts of effective planning for empowerment and change at the personal level. Some participants may have done Module 1 of the manual or a planning exercise in their organization. Planning at the personal level is simpler than planning at the organizational level. However, the main parts, steps, and tools are common to both.

Activity A2.5 Where are you now? Analysis of your personal situation

Aims	To look at your situation now. To find out what you want to improve or change in your life.
Time	125 minutes

Handouts

- H2.1: Effective planning for empowerment and change at the personal level.
- H2.2: Some tips on how to get control of your life.
- Activity handout: Where are you now? A self-analysis form.

Materials

- The trainer copies the Activity handout, one for each participant.

Process

- Introduction; individual exercise; sharing; and general discussion.

Step 1 – Introduction and general discussion 45 minutes

1. The trainer explains the aim and process of the activity, and why the real start of personal planning is taking a close look at yourself (A2.2) and where you are now. This self-examination can show the problems and identify the challenges you are facing. Are you happy with the way things are going? Is this how you saw your life when you were young? How far are you in achieving what you want to do or be? What have you done well? What could you have done better? Are you growing as a person with your core values the same as before, or are you getting demotivated and leaving things to fate? The trainer asks volunteers to share their views and experiences, assuring everyone that everything said will not be told to anyone else outside the room.

Step 2 – Individual exercise 40 minutes

2. The trainer gives out the self-analysis form, and reads through it with the participants. Participants may add categories to the list.
3. Each participant completes the form and answers the four questions.

Step 3 – Sharing and general discussion 40 minutes

4. Given the personal nature of the exercise, the trainer asks those who are comfortable doing so to share their findings, then asks participants what they think of the exercise. Did it help them identify the things they need to do? The trainer asks them to keep the completed form, and bring it to the next training activity which is about setting their personal goals and objectives.

Notes for trainers

- * When conducting the session in your language, be sure to find the right words or phrases for the 10 categories or areas in the self-analysis form.
- * This is an important activity. Give participants as much time as they need to think about and analyze their situation now.



A2.5: Activity handout

Where are you now? A self-analysis form

On a scale of 1 to 10 (1 = not achieved or could be better; 10 = fully achieved and very happy), rate each of the categories below, as they are now in your life. Write comments you want to make in the third column.

Area of focus	Rating 1-10	Comments
1. Social and leisure: Going out with friends and family; dancing; singing; playing or watching sports; parties; hobbies (like reading, music, painting, collecting things); travelling; visiting parks, museums and galleries, etc.		
2. Personal growth and development: Improving the quality of your life; trying to be a better person; learning new things; enjoying new experiences; getting more self-confident; being forward-looking; improving decision-making skills, etc.		
3. Physical health and well-being: Taking care of your body, including getting enough sleep, eating healthily, exercising, limiting alcohol, avoiding cigarettes and other drugs, and having regular health check-ups, etc.		
4. Mental health and well-being: Having emotional, psychological, and social well-being (how we think, feel and act); dealing with stress; enjoying your relationship with others; having a positive attitude; being comfortable with yourself; sure of your values, beliefs, religion or value system.		
5. Relationships (family and friends): Having warm feelings and respecting each other; developing relationships through face-to-face contact and e-mails, phone and internet; looking for ways to help them or make them feel better; not taking them for granted; listening to and supporting them in times of need.		
6. Dating, marriage or partner: Finding somebody whom you can love and trust; having a stable, loving relationship; keeping your identity; respecting each other; facing challenges and growing together, etc.		
7. Wealth: Having financial stability, money in the bank, no debts, material possessions.		

Area of focus	Rating 1-10	Comments
8. Job and career satisfaction: Being happy at work; having good working conditions and fair pay; seeing possibilities for growth; enjoying good relations with employer and co-workers; having realistic expectations.		
9. Outlook in life and attitude: Being positive, optimistic, and enthusiastic about work and life; ability to deal with the unexpected and to welcome changes.		
10. Membership and participation in my domestic workers' organization or other group or organization: Believing in and committing to the values and mission of the organization; becoming an active member; being a strong or potential leader; learning all the time; developing your self-confidence and self-esteem; improving your understanding about work and life; making more friends.		
Total		

Scoring

- 85-100 Very happy
- 70-84 Happy
- 50-69 Contented/satisfied
- Below 50 Could be better

1. What area did you rate the highest? _____
Why? _____
2. What area did you rate the lowest? _____
Why? _____
3. In which areas do you want to make changes? _____
Why? _____
4. Does your total score confirm your general feeling about your life now? Yes No
Explain your answer: _____

Adapted from: *Your Smartest Goals*, <http://www.smart-goals-guide.com/support-files/smartest-goals-life-assessment-sheet.pdf>

Activity A2.6 Setting your personal goals, objectives, outputs, inputs and indicators

Aim	To learn how to identify goals, objectives, outputs, inputs, and indicators.
Time	150 minutes

Handouts

- H2.1: Effective planning for empowerment and change at the personal level.
- Activity handout 1: The SMART tool.
- Activity handout 2: My personal goal (blank).
- Activity handout 3: My personal goal (example).

Materials

- Flip chart, board or computer and screen for slide presentation.
- Paper and pens.

Process

- Introduction and discussion; individual exercise; sharing and discussion.

Step 1 – Introduction and discussion 60 minutes

1. The trainer explains the aim and process of the activity.
2. Using a flip chart or a slide presentation, the trainer explains the main steps in successful personal planning: Identifying your goals and setting objectives, outputs, inputs, and indicators to reach your goals. The trainer gives some examples of each concept and asks participants to give other examples.

KEY MESSAGES

- **A goal** is something big and important that you are aiming for in the future. It is the long-term result of your plan. Your goal answers the question "What do you want?"
- **An objective** is a specific and measurable achievement that will help you towards your goal. For example, if your goal is to have a working knowledge of a new language, say Thai, in one year, you break it into smaller goals (objectives) that you can measure. These may be: a) to register for class by (month and year) at a school; b) to pass the monthly tests and the final exams; c) to help the information desk at the next congress of your organization (in 12 months).
- **Outputs** are the results of the **activities** that you do to achieve your objectives, and move towards your goal. For example, for your objective a) above, an output is that you are registered for classes at a language school. For this you need to visit Thai-language schools, choose the one you think best, and get all papers and documents for registration. For objective b), outputs can include: attendance and active participation in all classes; and review sessions held with classmates and friends before the tests and final exams.

continued >>>



- **Inputs** are the things you need to have to be able to carry out the activities and produce the results that will lead to achieving your objectives and goal. Examples of inputs are: money and people (like a good teacher) and materials (like a grammar book and dictionary).
- **Indicators** measure whether you are making progress: Do you have the inputs? Have you done the activities? Have you produced your outputs? Have you reached your objectives and your goal? For example: for output a) you have registered and have your registration receipt; for b) you have successfully passed the monthly tests and the final exams; and c) you are able to help congress delegates by giving them information in Thai.

3. The trainer gives a brief introduction of the SMART planning tool and checklist (Activity handout 1) which is a useful tool for setting goals and objectives, and shows how to use the tool. Participants ask questions and give comments.

Step 2 – Individual exercise 45 minutes

4. The trainer gives out the personal goal worksheet (blank and example) and the SMART tool to everyone.
5. The trainer reads through these with the participants to make sure that they feel confident using them.
6. The trainer gives the participants the following instructions:
 - a. Think about the areas of focus you want to address from your self-analysis form (A2.5: Activity handout).
 - b. List all the things you want to achieve or to happen in your personal life in the next three to five years **under these areas**. List them by order of importance. What do you want the most?
 - c. Number 1 on your list is your goal. Is this goal closely related to your personal core values? Will achieving it bring the changes in your life that you want? Complete “My personal goal worksheet” (blank), using the SMART tool. You must not forget your goal. If you have time, ask the trainer for a second worksheet for your Number 2 priority goal. Avoid setting too many goals.

Step 3 – Sharing and discussion 45 minutes

7. The trainer starts by asking participants how they found the exercise. Was it easy to do? What difficulties did they have? Was the SMART tool useful? The trainer then asks five or six participants to present their goal sheets, and asks others to comment on the contents. The trainer asks participants to keep their personal goal sheets for the next training activities.
8. The trainer sums up the activity, thanks the participants, and reviews the key messages above.



Notes for trainers

- * Divide this activity into two sessions; the first consisting of Step 1, and the second, steps 2 and 3.
- * Make sure the participants understand the SMART tool and are comfortable using it before going to Step 2.



A2.6: Activity handout 1

The SMART tool

The SMART tool is widely used in planning as a checklist to find out whether your goal and objectives are:

- **Specific?**
- **Measurable?**
- **Achievable?**
- **Relevant and Realistic?**
- **Time-bound and Timely?**

Questions to ask and points to remember are:

- **Specific:** Is your objective exact? Avoid setting unclear objectives; be as precise as possible.
- **Measurable:** Be clear how you will know when you have achieved your objective. In a way, this is the most important thing. You will only know that you have achieved your objective, when there is evidence. How will you measure your success? Using numbers, dates, and times is one way to show clear objectives.
- **Achievable:** There is no good reason to start something you know you cannot finish, or if you cannot tell if or when you have finished it. Setting impossible objectives will only end in disappointment. Make your objective challenging, but realistic. Can you achieve it? Have others done it successfully? Do you have information and evidence to show that the objective or goal will improve your situation? Do you have the necessary resources, or at least a realistic chance of getting these? Is it achievable, even when problems or difficulties occur?
- **Realistic and Relevant:** A goal or an objective may be achievable, but not realistic. Realistic is about human resources, time, money, contacts and opportunity. Do you have – or can you get – the skills to do it? Are there enough funds? Will you be able to get enough money, people to help you or other resources to achieve the goal or objective? Think about how relevant your goal or objective is to your personal core values. Are the changes you want to make in your life or work based on an analysis of your situation now?
- **Time-bound and Timely:** Set a time and deadlines for completing your objective; otherwise, it is not measurable. Even if you have to make changes as you progress, this will help to keep you motivated. Can you reach your objectives and goal in the time you have set for yourself? Is your timetable realistic?



A2.6: Activity handout 2

My personal goal worksheet (blank)

Name: _____ Date: _____

Category or area for change: _____

1. This is what I want to achieve:

Goal: By 20xx _____

2. These are my main objectives, outputs, inputs, indicators and timetable to achieve my goal:

Objective	Outputs (with main activities)	Indicators	By when
1.			
2.			
3.			

3. Use the SMART tool and check: Is your plan:

- **S**pecific?
- **M**easurable?
- **A**chievable?
- **R**elevant and **R**ealistic?
- **T**ime-bound and **T**imely?

You must answer "yes" to all these questions. Change section 2 if needed, in order to do so.

4. Achievements

When I have achieved my goal, I will:



A2.6: Activity handout 3

My personal goal worksheet (example)

Name: Chandra

Date: November 2017

Category or area for change: Personal growth and development.

1. This is what I want to achieve:

Goal: By 2018, I will have a working knowledge of the Thai language by attending a one-year basic Thai language course, which will give me new opportunities and help my personal growth and development.

2. These are my **main** objectives, outputs, inputs, indicators and timetable to achieve my goal:

Objective	Outputs (with main activities)	Indicators	By when
1. To meet the conditions for enrollment at a good school.	1a. Find out, compare, and decide on a school convenient to my needs (evening or weekend classes).	1a. Learned how to get good information from various places (friends, NGOs, Internet, and school visits). Chose the school and registered. Registration receipt and student ID in hand.	1a. Mid-December 2017.
	1b. Get the money for fees, transport, school fees. Got a small loan from my sister.	1b. Checked savings. Made a budget. Receipts of quarterly fees.	1b. End of Dec. 2017; fee payments, Jan., Apr., July, Oct. 2018.
	1c. Ask my employer for paid educational leave from January 2018, when classes start.	1c. Have more confidence to negotiate with my employer. Agreement reached for paid time off on Saturday afternoons.	1c. November 2017.
2. To do everything to make sure that I can speak and understand Thai by the end of the course.	2a. Attend regularly and participate actively in all classes.	2a. Passed all monthly tests and final exams. Got a diploma for successfully passing the one-year course.	2a. From January 2018 to December 2018.
	2b. Practice speaking Thai with friends and members of my organization.	2b. More knowledge and growing confidence. Able to help at the information desk at the congress; number of delegates helped.	2b. January to December 2018 and onwards.
	2c. Listen to and watch Thai radio and TV.	2c. Able to understand and confirm understanding with Thai friends.	2c. January to December 2018 and onwards.

3. Use the SMART tool and check: Is your plan:

- Specific?
- Measurable?
- Achievable?
- Relevant and Realistic?
- Time-bound and Timely?

You must answer "yes" to all these questions. Change section 2 if needed, in order to do so.

4. Achievements

When I have achieved my goal, I will:

- *I will feel proud having a certificate showing that I have completed the one-year course in basic Thai run by the NGO Promote.*
- *I will feel confident talking with my employer and Thai friends.*
- *I will be able to bargain with market sellers.*
- *I will understand what is on the radio and TV.*
- *I will be able to translate for my migrant sisters.*
- *I will have more opportunities to find a better-paying job with my Thai-language skills.*

Activity A2.7 My organization and I: A personal assessment

Aims	To review how much I know my organization. To look at how I see my organization and my role in it. To understand the importance of organizing.
Time	120 minutes

 **Handouts**

- Activity handout 1: Questionnaire 1: How much do I know about my organization.
- Activity handout 2: Questionnaire 2: My organization and I: A personal assessment.

 **Materials**

- The trainer copies the two Activity handouts, one each for each participant.
- For Step 2, the trainer prepares cards or half A4 sheets (nine cards per participant, three each for questions 20–22 in Questionnaire 2); the trainer writes the key words for questions 20-22 in Questionnaire 2 on a board or a flip chart (the questions need not be repeated in full).

 **Process**

- Individual exercises; sharing; general discussion.

Step 1 – Individual exercise, sharing, general discussion 45 minutes

1. The trainer explains the aim and process of the activity.
2. The trainer distributes the first Questionnaire (Activity handout 1), explains it and asks participants to complete it by jotting down answers in key words in column 2 in 15 to 20 minutes.
3. The trainer starts the sharing session by asking the participants to give their opinions on the questionnaire. Was it easy to give the answers? If not, why? How can they find the information? Do members of an organization need to know the answers to these questions? Why?
4. The trainer sums up the discussion by stating the importance of understanding one's organization – its core values, mission, goals and objectives, means of getting things done, and function. It gives members a clearer sense of purpose to take an active part in reaching the goals of their organization.

Step 2 – Individual exercise; sharing; general discussion 75 minutes

5. The trainer distributes Questionnaire 2, "My organization and I: A personal assessment" (Activity handout 2), and gives participants 30 minutes to complete the answers.
6. The trainer reads through Part 1 of the questionnaire, noting the answers on the board.
7. The trainers asks: What can the participants learn from the answers? How many can say that they are active members? Passive members? How many want to be leaders?
8. The trainer asks participants to write the answers for question 20 on the three cards and number them in order of priority. The trainer asks one participant to come forwards, and pin or stick their cards or papers for question 20 on a board or flip charts, starting three groups. Others follow, pinning theirs under the appropriate groups, or starting new ones. The trainer sums up the main things participants like about their organizations.

9. The trainer follows the same procedure for answering questions 21 and 22.
10. After the groups of ideas are formed for question 22, participants agree on the three main problems and challenges faced by members and leaders of domestic workers' organizations that need to be worked on.
11. The trainer thanks the participants and ends the activity by giving the key messages.

KEY MESSAGES

The truth about organizing

- Organizing is the lifeblood of your domestic workers' organization. Its value and effectiveness, its force, depends on you, its members. Remember that change comes from power; power comes from organizing.
- Organizing should be an ongoing activity if your organization is to stay a strong and viable voice for the defense and promotion of the rights and interests of domestic workers. Members bring skills and experience that they can use to help the organization. More members mean that you can do more work as an organization.
- Organizing is **recruiting and retaining – getting and keeping** – members. Organizations often get off to a good start and recruit many people, only to lose them after a few months. Having active members is very important to implementing your plans successfully.
- There is a natural process in organizations where:
 - a. some of your friends and supporters will become members.
 - b. some of your members will become committed activists.
 - c. some of your activists will become leaders.
- If you want to keep getting more activists and leaders for the future, you need programmes and activities to develop them.
- Members and potential members want their organizations to be relevant to them. This means organizing and campaigning on the issues that matter to domestic workers, and creating a sense that your organization reflects their concerns. It means, where possible, talking positively with employers.
- The more members you have, the more ideas and opinions are given and discussed. This leads to better decision-making.
- Communication is vital. Members want to know what their organization is doing and why. They also want to feel that the organization listens to them and acts on their concerns. Communication between members is also important, particularly in sharing problems and solutions. Your organization can help domestic workers keep in touch with each other.
- Organizing is **everybody's** business. All members should be organizing their domestic worker friends and relatives. At every opportunity, you should talk to them about your organization and the benefits of joining it, for them personally and for all domestic workers.

Source: Recruiting members and keeping them active, Building an organization: A Toolbox, ETU, South Africa, <http://www.etu.org.za/toolbox/docs/building/recruiting.htm>.



Notes for trainers

- * Suggest that the participants keep their questionnaires. They should review them in a few months' time to check on their progress.
- * It will be interesting to see how the responses to Questionnaire 2 relate to those of the first four questions in Questionnaire 1.



A2.7: Activity handout 1

Questionnaire 1: How much do I know about my organization?

Name of my organization: _____

1. What are the key characteristics and core values of my organization.	
2. What is the mission of my organization. (What does it do?)	
3. What my organization offers its members.	
4. What my organization offers to domestic workers in general.	
5. What my organization offers to the community and society.	
6. Total number of members (approximate): Nationals: Migrants:	
7. Geographical coverage (national, state-wide, provincial/ regional, local).	
8. How my organization functions. (Who makes decisions? How? Who is responsible for doing these? How?) Describe.	
9. Who are the key partners of my organization.	
10. How does my organization communicate with its members and key partners.	
11. How my organization informs the authorities and the public about its views and activities.	



A2.7: Activity handout 2

Questionnaire 2: My organization and I: A personal assessment

Name: _____

Organization: _____

1. How long have you been a member?
Since _____ or number of years/months _____
2. How long have you been a domestic worker?
Since _____ or number of years/months _____
3. Are you a migrant (from another country) Yes No

Statements	Yes	No	Some-what	Comments
Part 1				
1. I joined the organization because I believe in what it believes and what it wants to do.				
2. My organization is achieving its mission to defend and promote the rights of domestic workers.				
3. I learned of my rights and responsibilities as a member through: <ol style="list-style-type: none"> a) an introduction session or training activity for new members; b) reading the constitution or statutes of the organization, Facebook site, newsletters, etc. 				
4. I am an elected leader (on the local, provincial or national committee, another committee or the Executive Board).				
5. I regularly go to the meetings of the committee or the Executive Board.				
6. I have responsibilities in the organization. (If yes, indicate in the last column).				
7. I pay my membership fees regularly.				
8. Most of the time, I attend the activities of the organization (1 May, 6 June, 8 March, conferences, marches, demonstrations, workshops, etc.)				
9. Most of the time, I take part in social and welfare events of my organization (health check-up days, savings cooperative meetings, etc.)				
10. I consider myself a committed and active member of my organization.				

Statements	Yes	No	Some-what	Comments
Part 1				
11. I am proud of being a member of my organization.				
12. I have recruited new members to join the organization (indicate how many in the last column).				
13. My organization looks after the well-being of its members.				
14. Through my membership in the organization, I have learned about the rights of domestic workers.				
15. I am happy with the services given by my organization to its members.				
17. I am happy with the services given by my organization to domestic workers, in general.				
18. I am happy with the level of my work for, and involvement in, my organization.				
19. I would like to be a leader of my organization.				

Part 2	
Write answers (key words) on the form and on cards; use one card per answer, and put the number of priority (1, 2 or 3) with the answer.	
20. What I like most about my organization.	1. 2. 3.
21. The best ways to promote active participation of members in building a strong domestic workers' organization.	1. 2. 3.
22. The three main challenges or problems I face as a member or leader of my organization. (See your responses to Part 1 of the questionnaire.)	1. 2. 3.

Activity A2.8 Effective planning for better participation in your domestic workers' organization

Aim	To write an effective plan to improve your participation in your organization.
Time	120 minutes

Handouts

- H2.1: Effective planning for empowerment and change at the personal level.
- SMART tool (A2.6: Activity handout 1).
- Your completed Questionnaire 2: My organization and I: A personal assessment (A2.7: Activity handout 2).
- Activity handout: My personal goal: Improving my participation in my organization.

Materials

- The trainer copies the Activity handout, one for each participant.

Process

- Individual exercise; sharing; general discussion.

Step 1 – Individual exercise 60 minutes

1. The trainer explains the aim and process of the activity.
2. The trainer gives out “My personal goal: Improving my participation in my organization” (Activity handout) and the SMART tool, then read through these with the participants to make sure that they feel confident using them.
3. The trainer gives the participants the following instructions:
 - a. Think about the conclusions of Activity A2.7 and review your answers to the questionnaire “My organization and I”. Focus on your answer to question 22.
 - b. What are the three main challenges or problems you face as a member or leader of your organization?
 - c. Choose one of the problems and make this your personal goal. Is this related to one of your personal core values and to a value of your organization? Will achieving it bring the improvement you want in your participation, and will it help your organization, as well?
 - d. Set the specific objectives, outputs, inputs, and indicators to achieve this goal, using the SMART tool.
 - e. Complete the activity handout: “My personal goal: Improving my participation in my domestic workers’ organization”.

Step 2 – Sharing and general discussion 60 minutes

4. The trainer starts by asking participants how they found the exercise. Was it easy to do? What difficulties did they have? Was the SMART checklist useful? The trainer asks four or five participants to present their goal sheets, and asks others to comment on these.
5. The trainer sums up the discussion and thanks the participants for their hard work.



A2.8: Activity handout

My personal goal: Improving my participation in my organization

Name: _____ Date: _____

1. Goal:

This is what I want to achieve: _____

By: _____

2. My objectives, outputs, activities, inputs and indicators are:

Objective	Outputs, main activities and inputs	Indicators

3. Use the SMART tool and check: Is your plan:
- **S**pecific?
 - **M**easurable?
 - **A**chievable?
 - **R**elevant and **R**ealistic?
 - **T**ime-bound and **T**imely?

You must answer "yes" to all these questions. Change section 2 if needed, in order to do so.

4. Achievements

When I have achieved my goal, I will:

Activity A2.9 First things first: Prioritizing and using time effectively

Aim	To find out how we can prioritize, manage time, and work with each other.
Time	60 minutes

Handouts

- H2.1: Effective planning for empowerment and change at the personal level.
- H2.2: Some tips on how to get control of your life and manage your time.
- H2.3 Provisions on working time in ILO Convention No. 189, and Recommendation No. 201 on decent work for domestic workers.
- Activity handout: List of group tasks with points.

Materials

- Trainer can modify the list of tasks as appropriate, and makes copies of the activity handout, one for each participant.

Process

- Group work and general discussion.

Step 1 – Group work 30 minutes

1. The trainer explains the aim of the activity.
2. The trainer divides the participants into groups of five to eight.
3. The trainer gives each group the list of tasks and points (Activity handout) and gives the following instructions:
 - a. Every task has an assigned number of points.
 - b. Each group should do as many tasks in the list as possible within 10 minutes.
 - c. At the end of the activity, the groups check the tasks finished and add up the points.

Step 2 – General discussion 30 minutes

4. Each group announces its total, which is noted on the board.
5. The trainer starts the discussion, asking the participants:
 - a. How did the teams decide what tasks to do?
 - b. Were certain tasks joined together to get more points and save time?
 - c. Did everyone in the group participate? Was there a group discussion?
 - d. What lessons can be learned from this activity?
 - e. The trainer thanks everyone, sums up the discussion (see part 2 of the Notes to trainers), and distributes the relevant handouts, one for each participant.



Notes for trainers

- * This activity can be a useful “energizer” for an after-lunch session. Feel free to adapt the tasks, depending on the size of the venue, mobility of participants, and time available. Make sure to indicate the corresponding points for each task.
- * Here are some points for the summing up:
 - Most groups’ decisions will be based on the time a task will take, the level of difficulty, and its value (points gained). This is how we often prioritize our tasks and manage our time – by choosing the high-gain, low-effort tasks over the low-gain, high-effort tasks. However, in real life, high-effort tasks – though they take longer – may be more important than others. So, the criteria for setting priorities may be different.
 - Joining tasks together is a good way to save time and improve results (gain points). For example, for the name-card task, teams get bonus points if they use team nicknames.
 - If participants are comfortable with each other, they are more likely to do something a bit risky or daring like singing a song together. Group “dynamics” are important when prioritizing tasks. We are more likely to stay within our comfort zone – especially if we are working in a team. However, team work with other people can bring new and valuable ideas, and experiences into a group.
 - Building friendships and going to other groups for help is a good way to increase your group’s gains, and may be helpful to both you and the people you go to for help. Learn to help each other.
 - Time is often scarce but a very important resource for domestic workers. You need to set aside time for your personal empowerment and development.



A2.9: Activity handout

List of group tasks with points

Tasks for groups	Points	Bonus points
1. Run one lap around the room.	5	
2. Create something for the Trainer to wear (eg. hat, scarf, tie). Bonus points if she or he actually wears it.	10	5
3. Find out something unique about each person on the team.	5	
4. Sing a song together (at least 1 minute).	15	
5. Make a paper airplane and throw from one end of the room to the other (5 points if it reaches only half-way).	5-10	
6. Get the signatures of everyone in the room on a single sheet of paper.	5	
7. Count the number of siblings (sisters and brothers) of the members of your group and note down the total. Bonus points if you get another group to do the same.	15	10
8. Assign a nickname to each member of the team.	5	
9. Make a tower out of materials owned by your group.	10	
10. Create name cards for each group member to wear. Bonus points if you use their nicknames.	5	5
11. Convince a member of another group to join you.	20	
12. Give your group a name. Bonus point if you come up with a slogan.	10	10
13. Re-create for one minute the sounds of the forest with the sounds of your voices.	10	
14. List what your group wants out of the workshop.	10	
15. Form a line and dance around the room. Bonus if you get three or more people to join.	5	15
TOTAL (including bonus points):		

Adapted from: *Time management activities*, Energize learning! <http://blog.trainerswarehouse.com/time-management-activities/>.



IDWF/FES Capacity Building Workshop for Migrant Domestic Workers, Africa
Photo credit: IDWF

Handouts

H2.1	Effective planning for empowerment and change at the personal level
H2.2	Some tips on how to get control of your life and manage your time
H2.3	Provisions on working time in ILO Convention No. 189, and Recommendation No. 201 on decent work for domestic workers



H2.1 – Effective planning for empowerment and change at the personal level

Take a few minutes to think about what you did today.

- Did you wake up on time? Was this because you set your alarm, or are you one of those lucky people with a built-in alarm?
- Did you do your normal routine without any problems: Doing your daily exercises? Making your family's breakfast? Taking your regular turn in the bathroom, and dressing? Were you able to say goodbye to everyone?
- Did you get your usual bus or train or motorcycle taxi on time?
- Did you arrive on time for work (or for this workshop)?

If everything went smoothly and you are ready for the day, calm and confident, you have managed your time well, and congratulations.

If you are still hot and uncomfortable from running all over the place (only to be late) – and have forgotten to bring or do something important – you need to sit down, think about your time “mismanagement”, and about planning your time and your life in general.

This one small example may not seem very important. But if this happens often in your life, you may run into trouble, including losing your job or, worse, becoming sick because of stress. What if it had been a day in which you planned to do something important– such as having an interview for a new job? Or, being on time for an appointment with your employer to talk about your working conditions? Or, registering for a place on a skills training course?

It is a fact that many women are always busy, working in their jobs and also taking care of their own homes and families – juggling their responsibilities in their jobs and for their families, relatives, friends, and communities. Many women forget to set aside time for themselves.

A woman's work is never done....

The United Nation's report, “The World's Women 2015”, confirms what is already common knowledge – that women everywhere work longer hours than men.

The report shows that in developing countries, women typically spend three hours more per day than men on unpaid work such as household chores and caring for children and elderly relatives.

Although domestic workers are paid for this type of work, studies and research on their working hours show that these are excessively long. Many work without breaks, days off, or holidays. Those who live with their employers are often considered “on call” to work for their employer 24 hours a day.

Source: Hutt, R., Do women work longer hours than men? In the World Economic Forum, 2 November 2015, <https://www.weforum.org/agenda/2015/11/do-women-work-longer-hours-than-men/>.

It is no surprise that many domestic workers see little value in planning their lives and managing their time, over which they have limited control. But, planning does have benefits for domestic workers. A plan can develop your vision for the future. It can help you see opportunities, build a healthier, more balanced life despite the difficulties. It can prepare you for retirement. Without a plan, you think too much about your immediate day-to-day tasks and are more likely to be unprepared when bad or unexpected things happen.

When you plan and use your time wisely, new opportunities open, and your life becomes easier. You are no longer running, hot, uncomfortable, and so tired. You are more relaxed and can cope better with stress and unexpected changes. You then start seeing life in a different way – a more hopeful one.

It is not difficult to plan for your future. It is in your hands. The activities, tools, and handouts in this module will help you manage your time in your daily life and work towards achieving your bigger goals. So, let's start.

1. What is planning?

Planning is a process of thinking about and organizing the actions needed to reach a goal or an objective: something we want to achieve, happen, or have.

We have big goals, such as getting a well-paid job, giving a good education to our children, getting elected to our organization's general council, getting good and fair working conditions, buying a house, going on holiday, running a marathon, or learning a language. Whether these things stay as dreams or become real very much depends on our planning. We also have smaller goals, such as following a short training course to improve a skill, losing or gaining weight in the New Year, learning to cook a special dish, or organizing a birthday party. We do some planning for these, as well. We do a bit of planning every day to organize our normal activities, such as our family's weekly shopping, the jobs in our employers' house, and getting to work on time. In a way, life is always about planning. Sometimes, things go to plan, sometimes only partly, and sometimes not at all. This is why we need to learn and use skills in effective planning: to reach the big goals we set for ourselves and our organizations. **Success does not just happen; it is planned for.**

2. What is effective planning and why should you do it?

Effective planning:

- a. is thinking about, and organizing, the actions you must take to reach the goal and objectives you have identified;
- b. is based on good, reliable information, evidence, and experience;
- c. identifies honestly your strengths and weaknesses;
- d. looks at the resources you have now;
- e. takes it as true that life is full of uncertainty, and considers what to do if these things happen; anything can happen to help or stop the progress in achieving your goals – for example, natural or man-made disasters, a positive or negative event in the family or community, a change in government policies or laws, or the arrival or departure of key people or groups;
- f. sets a realistic time-table and identifies what needs to be done by whom and how; and
- g. regularly checks progress and decides whether any changes need to be made in the specific actions and steps to be taken to reach the goal and objectives.

In brief, **effective planning is planning for success**. This may sound difficult, and it can be at times, but it can be a rewarding and positive experience in many ways. What it needs is commitment and time. It will not work if you think it will be a waste of time or if you are quite happy with the way things are in your life and work. If – regrettably – you believe things will never get better, you will not be inclined to consider making any changes or improvements to it. Many people do not want “to rock the boat” – to call for change, or say what they really think – because they are afraid or suspicious of change or, worse, of facing reality.

3. How do you make a successful plan for personal empowerment and change?

Let's start, step-by-step, with the basics of workable plans:

- The real start of planning is taking a close look at where you are now. Are you happy with the way things are going? Is this where you want to be at this time in your life and work? What have you done well? What could you have done better? Only by doing this self-analysis can you know the problems, identify the challenges, and start thinking and planning what needs to change and how to make it happen.
- Find out what needs to be done. What do you want to achieve? Make this your goal and decide by when you can realize it.
- Break down the big goal into clear smaller ones (objectives); prioritize. This step-by-step process is very important so that you do not dream too much about the big goal, but can clearly check the smaller goals and the progress you are making towards reaching it.
- Identify the specific outputs that you need to produce to achieve your objectives. Outputs are the practical results of the actions and activities that you need to do to achieve your objectives. Set your outputs in very concrete ways and with a time line so that you can measure success.
- Review your inputs, that is, your resources and abilities realistically and honestly. What do you need to carry out your activities and actions (money, skills, expertise)? Are these available? If not, can you get them from other places (family, friends, your employer, your organization, an NGO)?
- Make a timeline for your plan; is it realistic?
- Decide what are your measurements of success (indicators) along the way: how will you check whether you are making progress (check regularly, at least once a month); make adjustments to your plan, as needed.
- Put your plan in writing (see the A2.6 Activity handouts 2 and 3) and start implementing your plan as soon as possible.
- Try to finish on the day you set in your plan. Evaluate your progress. Think about where your plan was successful. Identify where your plan was not successful, and why. Learn from your experience and keep planning for bigger – and smaller – goals.

Box 1 – Explanation of key terms for personal planning

Core values represent your “heart and soul”. They are what you believe is most important in life, what you stand for. They guide your behaviour, provide you with a personal code of conduct. Your goals and objectives must match your core values.

A **goal** is something big and important that you are aiming for in the future. It is the long-term result of your plan. Your goal answers the question: “What do you want?”

An **objective** is a specific and measurable achievement that will help you towards reaching your goal. Objectives (also known as outcomes) are the changes that happen as a result of your outputs.

Outputs are the things that you will produce to achieve your objectives. Outputs are the results of your activities. Inputs are the resources needed to achieve your objectives (money, people, time, skills, expertise, etc.) Inputs are the things you need to achieve your objectives (people, money, time, skills, expertise, etc.)

Indicators measure whether you are on target in getting your inputs, doing activities, producing outputs, and reaching your objectives and longer-term goal.

Monitoring is the ongoing process to assess progress, identify difficulties, check whether there are problems, and if yes, take remedial action. Monitoring is concerned with ensuring that inputs, through activities, are transformed into outputs.

Evaluation is the process to assess the success of your plan in meeting your objectives, and goal, and to think about the lessons learned. End-of-plan evaluation lets you know your success, and whether to repeat actions that worked or that you can improve, and let go of those that did not work.

4. The SMART tool: A tool to help you make your plan for successful personal empowerment and change

The SMART tool is helpful when setting your goal and objectives, as it helps you to prioritize: What is the most important? What needs to be done first? Prioritizing your goals and objectives, and checking your resources and abilities honestly and realistically will help you in deciding what to do to reach them.

Box 2 – The SMART tool

The SMART tool is widely used in planning as a checklist to find out whether your goal and objectives are:

- Specific?
- Measurable?
- Achievable?
- Relevant and Realistic?
- Time-bound and Timely?

Questions to ask and points to remember are:

- **Specific:** Is your objective exact? Avoid setting unclear objectives; be as precise as possible.
- **Measurable:** Be clear how you will know when you have achieved your objective. In a way, this is the most important thing. You will only know that you have achieved your objective, when there is evidence. How will you measure your success? Using numbers, dates, and times is one way to show clear objectives.
- **Achievable:** There is no good reason to start something you know you cannot finish, or if you cannot tell if or when you have finished it. Setting impossible objectives will only end in disappointment. Make your objective challenging, but realistic. Can you achieve it? Have others done it successfully? Do you have information and evidence to show that the objective or goal will improve your situation? Do you have the necessary resources, or at least a realistic chance of getting these? Is it achievable, even when problems or difficulties occur?
- **Realistic and Relevant:** A goal or an objective may be achievable, but not realistic. Realistic is about human resources, time, money, contacts and opportunity. Do you have – or can you get – the skills to do it? Are there enough funds? Will you be able to get enough money, people to help you or other resources to achieve the goal or objective? Think about how relevant your goal or objective is to your personal core values. Are the changes you want to make in your life or work based on an analysis of your situation now?
- **Time-bound and Timely:** Set a time and deadlines for completing your objective; otherwise, it is not measurable. Even if you have to make changes as you progress, this will help to keep you motivated. Can you reach your objectives and goal in the time you have set for yourself? Is your timetable realistic?

Key points to remember

- Make your plan simple and flexible.
- Be realistic, but be daring, too. Aim high and have confidence in yourself. Do not be discouraged by occasional failures or problems. No plan is perfect.
- When you have made your plan, start to implement it right a way. Do not forget about it and leave it to gather dust. It is your guide for your empowerment, development and change. Its success is in your hands. It is up to you only as nobody else will do it for you.
- Your plan is a living document that you should review regularly and, if necessary, adjust. In so doing, you will not lose sight of your goal.
- You may want to discuss your plan with a few people close to you and whom you trust, to give you useful input and advice.

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H2.2 – Some tips on how to get control of your life and manage your time

The majority of domestic workers do not know that they have rights like any other workers, and that these are universally recognized in Convention No. 189 and Recommendation No. 201 on decent work for domestic workers. In an increasing number of countries, too, there are national laws protecting these rights. Domestic workers should know these rights. This is a first step to gaining control over their lives. As members of domestic workers' organizations tell your friends and other domestic workers to promote and protect these rights, and bring these to the attention of your employers.

Many domestic workers, particularly those living in their employers' homes, feel little control over their lives, because they are too busy to think and plan. Often, they are on call all day and, in some cases, at night as well. Time is an important resource for domestic workers, and they need to set aside time to plan their lives.

Box 1 – Working times of domestic workers

Working hours of domestic workers around the world are among the longest and most unpredictable. Forty hours per week is the current international consensus on acceptable working hours, as set out in the ILO Forty-Hour Convention, 1935 (No. 47). Although the eight-hour working day is now an internationally accepted legal norm, domestic workers are often not covered by this standard. National laws that set normal hours of work should extend equally to domestic workers, although this is not yet the case in many countries.

See also H2.3 Provisions on working time in ILO Convention No. 189, and Recommendation No. 201 on decent work for domestic workers.

Other ways for domestic workers to take better control of their lives are:

- **Work out a manageable routine with your employer.** Agree on a realistic work programme with priority tasks and breaks. Schedule your work around when you have the most energy. When you are most productive, plan to do the hardest jobs, and schedule the easier ones for the hours when you are less energetic, like after lunch, or the last hour you spend at work.
- **Plan your day.** Every morning – or every night – make a plan for the day. Decide on, and write down, the tasks you need to do and what you want to do in your break times (like a call to your family or to a friend). Make a “to-do” list and check off every item and see how good it feels to finish every task.
- **Carve out “alone time”.** You may think that time for yourself should be the first to go when you set out to plan your day or your week. However, that time should be just as valuable to you as your time with your friends or your family. Alone time will help you get some perspective and give you the energy you need for your next job or thing you want to do. Make sure you get to spend at least one hour all alone each week; wake up earlier to get that alone time if you need to. Do not let a friend make you feel guilty about not going out if you need some time to yourself. Develop the ability to know what you really want to do.
- **Get enough sleep.** For you to stay healthy and work properly, you need at least seven to eight hours of sleep, without interruption, and some people need more hours of sleep. Live-in domestic workers should ensure that there is agreement on this with their employers. Go to bed around the same time every night, and wake up around the same time every morning so that your body gets used to your sleep patterns.

- **Take a break every 90 minutes (one and a half hours).** The human body is not designed to work non-stop for eight or ten hours, however much some employers want this to happen. Almost anyone will need a break after working for 90 minutes straight. Have a snack, call a friend, exercise, or just rest your eyes for at least 10 minutes. Do whatever you have to do to recover and get back into your work. Taking breaks will actually help you finish your tasks faster. Take a short nap if you need to.
- **Have at least one day off per week.** Good rest periods are as important for domestic workers as they are for any other workers. Rest time makes a big difference to a workers' mental and physical health, and work performance. The allocation of rest periods is an important part of working time systems. The ILO Domestic Workers' Convention No. 189 specifically calls for a period of weekly rest of at least 24 consecutive hours (Article 10.2).
- **Eat healthy meals.** Whether or not your employer gives you meals, be sure that your meals are nutritious and energizing, and that you eat sitting down and at ease, for at least 30 minutes. You may be too busy to eat a full meal, or think that you are too busy, but you have to make eating a priority. The ILO Domestic Workers Recommendation 201 says: “When provided, accommodation and food should include, taking into account national conditions ... (d) meals of good quality and sufficient quantity, adapted to the extent reasonable to the cultural and religious requirements, if any, of the domestic worker concerned.”
- **Make time for fun.** You must plan fun into your schedule. You will not feel at all in control of your life and your time if you do not have some time to rest from all the hard work you are doing. Having fun is not a luxury; it should be an important part of your routine. Plan a day in the park or the mall with friends and family, or an outing with your organization. Do whatever you want during your fun time, as long as it helps you relax and stops you completely from thinking about work and problems.
- **Avoid multi-tasking.** You may think that doing many things at the same time is a great way to get your work done faster and to make the most of your time. The truth is that doing this – multi-tasking – will actually make all of your work take longer. The quality of your work will also go down – and accidents may happen – because you will not be able to fully focus on any one task. Think about it: Are you really doing that great a job if you are cooking at the same time as ironing and looking after a young child? This is where making a “to-do” list is very useful. Do the jobs one at a time or in combination (e.g. do the ironing when the baby is sleeping) instead of trying to do too many things at the same time and ending up stressed and not in control of everything.
- **Do not overcommit yourself.** You may feel like you are struggling to get control of your time and your life because you have promised to do too many jobs: working 10 hours a day, five days a week, doing the household chores for your family, taking on responsibilities in your women's group, organizing a friend's birthday party. Think about the things that really matter to you and that you are doing for yourself, not because you have to for somebody else. You cannot just stop everything because you do not feel like doing it – but see what you can cut out of your schedule. Before you do something, ask yourself, “How would I feel if this were suddenly cancelled?” If the answer is “very happy,” then why do it?
- **Get organized.** Getting organized can help you feel much more in control of how you spend your hours. Having a planner, a calendar, pens, and a clean notebook where you can make your “to-do” lists can help you feel more in control of your life. You may think that you work better without a plan and that you can always find something when you need it, but having an organized room, cupboards, bag, or purse can help stop stress. You will not waste time looking for things, because you will know exactly where everything is. You may think that you do not have the time to go through everything in your room, or to organize your drawers or closets, but in the long run, this will save you hours and hours of time.

Box 2 – Try to get into good habits

- **Always make time for exercise.** It is easy to forget about exercise – and sleep – when you are in the middle of a busy week. However, exercising is great for your mind and body, and it will give you energy and make you feel more able to do everything you need to do. Drop the temptation to say you are “too busy” to exercise this week, and see what you can cut out instead of exercise. See how much room you can make for improving your body and mind.
- **Minimize your distractions.** If you really want to make the most of your time, put away your phone, stop chatting or texting with friends at work, and set aside time for personal communication. Do not check your favourite social media all the time; set aside 15-30 minutes every day when you can check it, post updates, and see what your friends are doing.
- **Eliminate procrastination.** Do not keep delaying important tasks, while you are busy with many not so important ones. This happens with all of us from time to time. Yet, what makes a big difference for your success is your ability to know this bad habit and stop it before it steals your opportunities, damages your work, or destroys your relationships.
- **Make your life easier: Be more selfish.** Stop doing things because your family or best friend or co-worker or neighbour really wants you to do them. Do them because it is what you want to do – not what they want you to do. Decide yourself before you decide to do something for anyone else, and make sure you do not “overbook” yourself just to make someone else happy. It is important to learn to say “no” to people and to stop feeling guilty about it. If you say “yes” to everyone else, you will always be saying “no” to yourself.

Adapted from: *How to do anything*, <http://www.wikihow.com/Get-Control-of-Your-Time-and-Your-Life>.



H2.3 – Provisions on working time in ILO Convention No. 189, and Recommendation No. 201 on decent work for domestic workers

Domestic Workers’ Convention, 2011 (No. 189)

Article 10

1. Each Member shall take measures towards ensuring equal treatment between domestic workers and workers generally in relation to normal hours of work, overtime compensation, periods of daily and weekly rest and paid annual leave in accordance with national laws, regulations or collective agreements, taking into account the special characteristics of domestic work.
2. Weekly rest shall be at least 24 consecutive hours.
3. Periods during which domestic workers are not free to dispose of their time as they please and remain at the disposal of the household in order to respond to possible calls shall be regarded as hours of work to the extent determined by national laws, regulations or collective agreements, or any other means consistent with national practice

Domestic Workers’ Recommendation, 2011 (No. 201)

Article 5

(2) When regulating the working and living conditions of domestic workers, Members should give special attention to the needs of domestic workers who are under the age of 18 and above the minimum age of employment as defined by national laws and regulations, and take measures to protect them, including by: (a) strictly limiting their hours of work to ensure adequate time for rest, education and training, leisure activities and family contacts; (b) prohibiting night work.

Article 8

(1) Hours of work, including overtime and periods of standby consistent with Article 10 (3) of the Convention, should be accurately recorded, and this information should be freely accessible to the domestic worker.

(2) Members should consider developing practical guidance in this respect, in consultation with the most representative organizations of employers and workers and, where they exist, with organizations representative of domestic workers and those representative of employers of domestic workers.

Article 9

(1) With respect to periods during which domestic workers are not free to dispose of their time as they please and remain at the disposal of the household in order to respond to possible calls (standby or on-call periods), Members, to the extent determined by national laws, regulations or collective agreements, should regulate: (a) the maximum number of hours per week, month or year that a domestic worker may be required to be on standby, and the ways they might be measured; (b) the compensatory rest period to which a domestic worker is entitled if the normal period of rest is interrupted by standby; and (c) the rate at which standby hours should be remunerated.

(2) With regard to domestic workers whose normal duties are performed at night, and taking into account the constraints of night work, Members should consider measures comparable to those specified in subparagraph 9 (1).



Following the adoption of international labour standards on decent work for domestic workers in 2011 and the establishment of the IDWF in 2013, increasing numbers of domestic workers have been organizing in many countries. This publication “Planning for success: A manual for domestic workers and their organizations” aims to share planning know-how and tools with domestic workers. It contains two modules:

- Module 1 is about successful planning in domestic workers’ organizations and how to develop a successful organizing campaign plan.
- Module 2 is about planning for personal empowerment and change so domestic workers can realize their own goals in life and at work.



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Planning for Success:

a **Manual** for domestic workers
and their organizations



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