****

**EAPN Strategic Plan 2015-2018**

**Third Draft, 19 June 2015**

**Contents**

1. Background 3

2. EAPN Mission Statement 4

3. The difference between a Strategic Plan and an Operational Plan 5

4. EAPN Strategic Objectives 2015-2018 6

5. EAPN Strategic Plan 2015-2018 7

6. Monitoring 8

ANNEX 1. Second draft of the EAPN Strategic Plan 2015-2018 including Outcome Indicators 9

# 1. Background

In 2014, the three-year Strategic Plan of the European Anti-Poverty Network (EAPN) came to an end. Towards the end of its implementation period, EAPN was facing several new internal and external challenges and decided to conduct an external evaluation which – among other areas – focused on the achievement and adequacy of the mission, goals and objectives set out in the EAPN Strategic Plan 2012-2014.

The evaluation detected significant discrepancies in opinions expressed by EAPN Members, especially with regards to the achievement of EAPN’s mission and goals set out in the Strategic Plan. It was therefore concluded that an objective assessment of EAPN’s performance in implementing its strategy was not feasible due to a lack of clarity of the set goals and objectives. Furthermore, disagreements on the effectiveness of EAPN’s work appeared to be causing frustration among its members. Nevertheless, large agreement was reached on the adequacy of wording of EAPN’s mission statement.

In view of the planned drafting of the new Strategic Plan 2015-2018, the evaluation made the following recommendations:

* Clearly distinguish between EAPN’s mission statement and goals.
* Consider replacing the current term “goal” with “objective” or “strategic objective” which expresses a measurable result and is considered a more appropriate term for a Strategic Plan of 3-4 years.
* Formulate EAPN objectives in a clearer language, ensuring that they express a tangible target and/or result that all members agree on, understand and are able to follow/work for.
* Establish indicators in the future Strategic Plan so that the objectives can be measurable and the results can be demonstrated.

Based on these findings, EAPN decided to design a new Strategic Plan which should take into account the suggested new items for the period of 2015-2018. At the same time, the new Strategic Plan should follow the same guiding principles which were set out in the previous Strategic Plan and have therefore remained the same[[1]](#footnote-1).

The methodology used for the drafting of the EAPN Strategic Plan 2015-2018 included (i) literature research; (ii) the incorporation of feedback received on previous draft versions of the Strategic Plan, (iii) the incorporation of feedback received at the EAPN ExCo workshop in March 2015, (iv) a questionnaire that was sent to members about the second raft version. Regarding literature, the following documentation was taken into account:

* EAPN External Evaluation 2014
* A review of the EAPN Strategic Plan 2012-2014
* The Membership Assessment and Support System (MASS) including its 4 Pillars
* Documentation from a strategic planning workshop held at an EAPN ExCo in 2014
* Other relevant documentation provided by EAPN (e.g. periodic questionnaires, EAPN Work Programmes etc.).

The concept of the new Strategic Plan 2015-2018 should be understood as a **tool for guiding and monitoring EAPN’s progress towards the strategic objectives the network has set itself for 2018**. The introduction and monitoring of specific indicators not only provides useful information for management decisions but also allows for the presentation of results that demonstrate the added value of EAPN’s activities – both internally and externally (if desired).

# 2. EAPN Mission Statement

**Vision:**

The European Anti-Poverty Network (EAPN) is working for a democratic and social Europe, free of poverty and social exclusion.

**Mission:**

* To promote and enhance the effectiveness of actions against poverty and social exclusion;
* To help shape social policies and design action programmes;
* To lobby for and with people and groups experiencing poverty and social exclusion.

**Values:**

* EAPN believes that poverty and social exclusion are a violation of fundamental human rights and thus a failure to respect human dignity.
* EAPN believes that poverty and social exclusion arise from complex and multidimensional processes that cannot be dealt with in isolation or on the margins.
* EAPN believes that people living in poverty and social exclusion have the right to participate in society and to have their views and experiences listened to and acted on.
* EAPN believes in gender equality, respect for cultural, religious and language diversity and non-discrimination.
* EAPN believes in the organisation of our work in a democratic and transparent way, which respects the different specific tasks and views of the different bodies and members that make up the Network.
* EAPN believes in seeking to work in partnership with other relevant actors sharing a common vision including actors within: state authorities, public sector bodies, European Union Institutions and with trade unions, academics and employers, other NGOs and movements.
* EAPN believes in the independence of Non-Governmental Organisations (NGOs) and that public authorities have a responsibility to create and adhere to frameworks which support civil dialogue and respect NGO autonomy.
* EAPN believes in the possibility to achieve a fairer sharing of wealth, opportunities and resources.

**Key Messages**

* Participation of people experiencing poverty is key to understanding and addressing the causes of poverty and social exclusion.
* Realising social inclusion is part of the solution to Europe’s crisis.
* The fight against poverty is everyone’s responsibility and must be mainstreamed across all policies.
* More equal societies are better for everyone - A society that works for the prevention of poverty and social exclusion is an economically richer society that can allocate its financial resources in sustainable development and social cohesion, without spending its resources in trying to counteract the outcomes of poverty and social exclusion.
* The fight against poverty in Europe and the fight against poverty globally is part of the same struggle.

# 3. The difference between a Strategic Plan and an Operational Plan

In view of some of the comments received during the 3 revision phases of the EAPN Strategic Plan, it may be useful to highlight the linkages and differences between the strategic and operational part of EAPN’s work: The **Strategic Plan defines the overall goals** EAPN would like to achieve through its work within the next four years; at the same time, it **sets the direction for all EAPN’s activities.** The two main elements of the Strategic Plan are 1) Strategic Objectives and 2) Expected Outcomes.

Operational planning is usually done on a periodic basis (annually, biannually etc.) and consists of designing and aligning actions to the specific Expected Outcomes of the Strategic Plan. Or in other words: *Which actions are needed in order to achieve this outcome?* And *how can EAPN contribute to this objective?*

To summarise, EAPN’s actions and activities are part of operational planning, while **Expected Outcomes and Strategic Objectives form part of the Strategic Plan**.

**Figure 1. Linkages between operational and strategic planning**

|  |  |
| --- | --- |
| **Strategic (three years)** | **Operational (annually)** |

Therefore, EAPN plans and performs several actions with the aim of achieving a specific result; this is the Expected Outcomeof EAPN’s actions. The **Expected Outcomes are usually changes of a current situation that are necessary to progress towards one specific Strategic Objective**.

# 4. EAPN Strategic Objectives 2015-2018

EAPN is a network of independent, local grassroots groups, regional, regional, national organisations and European organisations that fight poverty and social exclusion – including its causes – and promote social inclusion in Europe. EAPN’s mission is to **shape policies that result in a reduction of the rate of people at risk of poverty or social exclusion in Europe**. EAPN’s vision is a Europe without poverty and social exclusion. As a network of civil society organisations fighting poverty and promoting social inclusion, EAPN believes that the values enshrined in its Mission Statement[[2]](#footnote-2) form the basis for achieving this result, which is in line with the current Europe 2020 Strategy and is therefore monitored on a regular basis[[3]](#footnote-3).

In view of the setbacks in the fight against poverty and social exclusion during the first half of the Europe 2020 Strategy[[4]](#footnote-4), EAPN believes that a more democratic policy approach is needed so that more effective policies to fight poverty and social exclusion are put in place. The policy process – including all its phases – must be more open and more participatory in order to revert the current trends and to fight the causes and reduce the consequences of poverty and social exclusion in Europe. Hence, EAPN in all its capacities and mandates **works towards substantially reducing poverty and social exclusion by the end of this strategic planning period (2015-2018)**.

Although EAPN is aware of the fact that there are a variety of external factors that the network is unable to influence, it has set itself four Strategic Objectives which will structure its work and are considered essential to achieve this result during the set time frame. The first Strategic Objective (SO) focuses on the *empowerment of people with experience of poverty and social exclusion*. The second SO addresses the *policy-making process* while the third SO aims at improving the *monitoring of policy implementation*. The fourth SO defines *how EAPN would like to strengthen its role as a civil society organisation* by position itselfinternally and externally.

More precisely, the four Strategic Objectives of EAPN are:

**SO 1:** More people with experience of poverty and social exclusion are actively promoting social and human rights (3 Expected Outcomes).

**SO 2:** The EU and national policies provide more adequate conditions for and solutions to fight poverty and social exclusion as well as its causes throughout Europe (3 Expected Outcomes).

**SO 3:** The implementation of any policies and their positive or negative impact on poverty and social exclusion are monitored more effectively throughout Europe at all levels (4 Expected Outcomes).

**SO 4:** EAPN is a more effective member-driven organisation that has increased its recognition as a key civil society actor fighting poverty, social exclusion and inequalities (4 Expected Outcomes).

The next chapter describes the Expected Outcomes EAPN would like to achieve through its actions until 2018. Each Expected Outcome corresponds to one of the 4 Strategic Objectives. Once EAPN has decided on the final version of the Strategic Plan 2015-2018, the network will start aligning its activities towards the new Strategic Plan. The annual operational work plan will contribute to this process.

# 5. EAPN Strategic Plan 2015-2018

**Strategic Objective (SO) 1:** **More people with experience of poverty and social exclusion are actively promoting social and human rights.**

**Expected Outcome (EO) 1.1**.: People with experience of poverty and social exclusion are more aware of their rights.

**EO 1.2**.: People with experience of poverty and social exclusion are more empowered to actively engage in the policy making and monitoring processes.

**EO 1.3**.: EAPN is a network that facilitates the active participation of people with experience of poverty and social exclusion in the policy-making and monitoring process.

**SO 2: The EU and national policies provide more adequate conditions for and solutions to fight poverty and social exclusion as well as its causes throughout Europe.**

**EO 2.1**.: More policies serve social and inclusive societies in Europe.

**EO 2.2**.: Policy makers have a better understanding of the causes of different dimensions of poverty and social exclusion in Europe and are willing to convey these messages.

**EO 2.3**.: The policy-making process concerning all EU and national policies is more transparent and democratic involving the active participation of stakeholders.

**SO 3: The implementation of any policies and their positive or negative impact on poverty and social exclusion are monitored more effectively throughout Europe at all levels.**

**EO 3.1**.: The implementation of policies and their impact on poverty and social exclusion are monitored more effectively.

**EO 3.2**.: Financial allocations and expenditure of EU and national funds that aim to reduce poverty and social exclusion are monitored more efficiently.

**EO 3.3**.: If a negative impact of any current policy can be observed, policy makers make the necessary adjustments in order to mitigate a further deterioration of poverty and social exclusion (“adjustment of negative policy”).

**EO 3.4**.: If a policy that has the potential of reducing poverty and social exclusion is not being implemented as planned, the implementing bodies (public authorities, institutions etc.) make the necessary efforts to achieve its intended positive impact (“adjustment of positive policy”).

**SO 4: EAPN is a more effective member-driven organisation that has increased its recognition as a key civil society actor fighting poverty, social exclusion and inequalities.**

**EO 4.1**.: EAPN operates more effectively as a network of members.

**EO 4.2**.: EAPN receives higher public recognition as key player in subjects related to the fight against poverty, social exclusion and inequalities.

**EO 4.3**.: More policy makers recognise EAPN’s expertise in the fight against poverty, social exclusion and inequality

**EO 4.4**.: The impact of EAPN’s advocacy efforts is increased by the synergies created through strategic coalitions with other civil society actors and/or strategic partners.

# 6. Monitoring

On the basis of the recommendations of the external evaluation of 2014 (see Background), the design process of this Strategic Plan originally included the establishment of indicators that would allow to measure progress towards any targets that could have been set for the expected outcomes. However, reaching agreements on the alignment of EAPN’s strategy for the period of 2015 to 2018 proved to be more complex than foreseen: Strategic Objectives and Expected Outcomes underwent various revisions to include suggestions received during the design process and no agreement on indicators was reached.

Despite the absence of indicators, the new Strategic Plan includes a clear definition of objectives and outputs that EAPN as a network would like to reach by 2018. These definitions are all comparative and indicate the areas in which EAPN wishes to see an improvement in the next four years; it order to contribute to these improvements, the network is committed to aligning its actions and activities with this strategy.

There are two possible options to monitor progress and achievement of the strategy:

1. EAPN could introduce Outcome Indicators (including targets and baselines) at a later stage. These indicators could be qualitative and quantitative and come from internal or external sources. Some suggestions for indicators could be inspired by the indicators proposed in the first draft of the Strategic Plan (see Annex 1).
2. EAPN could conduct a baseline survey (among its members and/or external stakeholders) to establish 2015 baseline values. The method could be an opinion poll.
3. It is proposed that the EXCO following the GA will take up the issue of monitoring based on a decision by the GA.

# ANNEX 1. Second draft of the EAPN Strategic Plan 2015-2018 including Outcome Indicators

The first and second draft of this Strategic Plan had included several proposals for indicators to measure progress towards expected outcomes. However, due to the mentioned changes in wordings most indicators from the original draft Strategic Plan are not valid anymore. Nevertheless, they have been annexed to this paper in order to document the work already done to develop such indicators; they may also serve as reference for establishing similar indicators in the future.

Previous draft versions of the Strategic Plan also included the following definitions if new items:

* **Strategic Objective**:
	+ is an overall goal EAPN wants to achieve through its actions
	+ is the result of several Expected Outcomes
* **Expected Outcome:**
	+ is a situation that needs to change in order to achieve a specific Strategic Objective
	+ is the expected result of one or several actions[[5]](#footnote-5)
* **Outcome Indicator:**
	+ is a value that measures an Expected Outcome
	+ can be qualitative & quantitative:
		- Qualitative: existence (yes/no), level (high, medium, low)
		- Quantitative: number, percentage, ratio, etc.
	+ requires the following:
		- Data source: *Where and how can the data be obtained?*
		- Target: *What is a tangible target that can be achieved for this indicator within the given time period?*
			* An indicator may include different targets (e.g. value per year; value by 2018; value at EU level; value at national level etc.).
			* The **targets set in the EAPN Strategic Plan refer to the European EAPN Network**. Data on some targets require information and cooperation from EAPN members at national and European level.
			* Monitoring responsibility: *Who is in charge of collecting the data for this indicator?*

| **STATEGIC OBJECTIVE 1: EAPN empowers people with experience of poverty and social exclusion are actiely promoting social and human rights.** |
| --- |
| **Expected Outcome (EO)** | **Outcome indicator (OI)** | Data source | Target (and baseline) | Monitoring responsibility |
| **EO 1.1. People with experience of poverty and social exclusion are more aware of their rights.** | **OI 1.1.1.** Number of people with experience of poverty and social exclusion who participate in EAPN activities that inform them about their rights. | Attendance lists of activities at EU level (e.g. PEP delegates) | EAPN to set realistic target/year at EU level | EAPN Secretariat |
| **OI 1.1.2.** Number of EAPN products (e.g. events, activities, publications etc.) focused on informing people with experience of poverty and social exclusion about their rights and how to claim and access them. | Documentation of EAPN products | EAPN to set realistic target/year at EU level | EAPN Secretariat |
| **OI 1.1.3.** Number of times the public and private media (print/online newspaper, social media, TV, radio, web magazines, blogs etc.) references EAPN when reporting about social and human rights (“outreach”). | Press clippings;Social media mentions (twitter, facebook etc.);EAPN to set realistic sources that can be measured (e.g. what is already being monitored) | EAPN to set realistic target/year | EAPN Secretariat (communications) |
| **EO 1.2. People with experience of poverty and social exclusion are more empowered to actively engage in the policy-making and monitoring process.** | **OI 1.2.1.** Number of people with experience of poverty and social exclusion who participate in EU events to which EAPN is invited. | Attendance lists of activities at EU level (e.g. PEP delegates, Annual Convention of the European platform against poverty and social exclusion) |  |  |
| **OI 1.2.2.** Number of people with experience of poverty and social exclusion who participate in formal EU consultations to which EAPN is invited. | Attendance lists of formal consultation to which EAPN is invited. | EAPN to set realistic target/year | EAPN Secretariat |
| **OI 1.2.3.** Number of formal EU consultations to which EAPN is invited, where people with experience of poverty and social exclusion participate. | Attendance lists of formal consultation to which EAPN is invited. | EAPN to set realistic target/year | EAPN Secretariat |
| **OI 1.2.4.** Percentage of EAPN publications in which people with experience of poverty participated in the formulation of EAPN positions (e.g. proposals, observations on policy impacts etc.). | EAPN policy proposalsEAPN monitoring reports*Method: questionnaire (e.g. when asking for policy proposals, ask if people with experience of poverty and social exclusion have participated in their formulation).* | EAPN to set realistic target/year | EAPN Secretariat;EAPN National Networks |
| **EO 1.3. EAPN is a platform that facilitates a forum for people with experience of poverty and social exclusion to actively participate in the policy-making and monitoring process.** | **OI 1.3.1.** Representation of people with experience of poverty and social exclusion participating in EAPN at key strategic (e.g. governance bodies) and operating levels (e.g. workshops, activities, task forces) (EAPN to define concrete formulation of other levels where a representation can be measured/estimated): yes/no. | Attendance and membership lists | Yes | EAPN Secretariat |
| **OI 1.3.2.** EAPN governance structures (i.e. ExCo, Bureau) are adequate to respond to the needs and conditions of people with experience of poverty and social exclusion who would like to participate in the EU policy-making and monitoring process: yes, no | Opinion poll asking members*Method: questionnaire* | Yes (>75% responding “yes”) | EAPN Secretariat; EAPN National Networks;EAPN governing bodies |
| **OI 1.3.3.** People with experience of poverty and social exclusion recognise EAPN as a network that promotes active citizenship as well as social and human rights: yes, no. | Opinion poll*Method: questionnaire/interview* | Yes (>75% responding “yes”) | EAPN Secretariat;EAPN Members |

| **STATEGIC OBJECTIVE 2: The EU and national policy frameworks provide more adequate conditions for and solutions to fight poverty and social exclusion as well as its causes throughout Europe.** |
| --- |
| **Expected Outcome (EO)** | **Outcome indicator (OI)** | Data source | Target (and baseline) | Monitoring responsibility |
| **EO 2.1. All policies serve more social and sustainable societies in Europe.** | **OI 2.1.1.** Level of adequacy of EU policies that correctly address the outlined (causes of) problems by providing social and sustainable solutions: high, medium, low; | Evaluation of EU policy documents addressing all Member States: AGS, EC Recommendations, EU directives;*Method: questionnaire* *(e.g. EAPN CSR questionnaire)* | To be set after baseline has been defined (e.g. through questionnaire). | EUISG;EAPN European Organisations |
| **OI 2.1.2.** Level of adequacy of national policies that correctly address the outlined (causes of) problems by providing social and sustainable solutions: high, medium, low; | Evaluation of NRPs;Evaluation of National policies, legislation, programmes, action plans;*Method: questionnaire* *(e.g. EAPN NRP questionnaire)* | To be set after baseline has been defined (e.g. through questionnaire). | EUISG;EAPN National Networks |
| **OI 2.1.3.** Level of adequacy of allocated resources that allow for the implementation of the proposed measures (if these are considered adequate): high, medium, low; | Evaluation of draft budgetary plans submitted by Member States (October);Evaluation of EC opinion on national draft budgetary plans (November);Evaluation of EU funds (esp. ESIF) allocated to adequate national policy measures (e.g. Operational Programmes);Evaluation of actual expenditure of planned national budgets;*Method: questionnaire or desk review of key documents* | To be set after baseline has been defined (e.g. through questionnaire). | EUISG;EAPN National Networks |
| **EO 2.2. Policy makers have a better understanding of all dimensions of the current causes of poverty and social exclusion in Europe and are willing to convey these messages.** | **OI 2.2.1.** Number of policy makers who take up EAPN’s ideas, reflect them in their speeches, political programmes etc. | All relevant material that documents that a policy maker (person/party/institution etc.) has taken up EAPN’s ideas (EU level), without necessarily referencing EAPN as a source.*Method: filing of relevant documentation categorised by policy maker/institution etc.* | EAPN to select target (suggestion: include separate targets for different policy makers at EU level (e.g. X persons in institution Y; Z MEPs etc.) | EAPN Secretariat (with the assistance of communication department) |
| **OI 2.2.2.** Degree to which the causes of poverty are mentioned (presented adequately) in key policy documents: high, medium low | Evaluation of EU policy documents addressing all Member States: AGS, EC Recommendations, EU directives;*Method: analysis of documents* | To be set after baseline has been defined (e.g. through questionnaire). | EUISG;EAPN European Organisations |
| Evaluation of policy documents concerning specific Member States: Country Reports, CSRs, national policies*Method: questionnaires (asking NNs about % of take-up of recommendations in country-specific EU policy documents)* | To be set after baseline has been defined (e.g. through questionnaire). | EAPN Secretariat; EAPN National Networks |
| **EO 2.3. The policy-making process concerning all EU and national policies is more transparent and democratic.**  | **OI 2.3.1.** Degree to which policy proposals made by CSOs (made by EAPN and other CSOs) are taken up in policies: high, medium, low | Evaluation of EU policy documents addressing all Member States: AGS, EC Recommendations, EU directives;*Method: questionnaire* | To be set after baseline has been defined (e.g. through questionnaire). | EUISG;EAPN European Organisations |
| Evaluation of policy documents concerning specific Member States: Country Reports, CSRs, national policies*Method: questionnaire* | To be set after baseline has been defined (e.g. through questionnaire). | EUISG;EAPN National Networks |
| **OI 2.3.2.** Level of importance of civil dialogue in inclusion strategies and key policies: high, medium, low. | Opinion poll of EAPN member organisations*Method: questionnaire (e.g. asking if CSOs have been invited to submit proposals, revise draft documents etc.)* | To be set after baseline has been defined (e.g. through questionnaire). | EAPN Secretariat;EAPN Member Organisations (EU & national) |

| **STATEGIC OBJECTIVE 3: The implementation of any policies and their positive or negative impact on poverty and social exclusion is monitored more effectively throughout Europe at all levels.** |
| --- |
| **Outcome** | **Outcome indicator** | Data source | Target (and baseline) | Monitoring responsibility |
| **EO 3.1.** EAPN increases its relevance as a key actor in monitoring the implementation of policies and their impact on poverty and social exclusion. | **OI 3.1.1.** Number of relevant monitoring bodies and evaluation processes in which members of EAPN are represented or consulted. | Documentation confirming EAPN membership in monitoring body.*Method: via e-mail or questionnaire* | EAPN representation in ESF monitoring bodies in X countries. | EAPN Secretariat;EAPN members |
| **OI 3.1.2.** Number of published EAPN reports (or chapters as part of reports) that monitor/evaluate the impact of policies that are currently being implemented. | EC recommendations;EU directives;AGS from previous year*Method: desk research* | 1 monitoring report/chapter on implementation of EU-level policies/year (target: next AGS in Nov) | EUISG;EAPN European Organisations |
| Evaluation of CSRs;Evaluation of NRPs;Evaluation of national budgets;Evaluation of national policies that have a positive or negative impact on poverty and social exclusion in each country;*Method: questionnaire, desk research* | X monitoring reports on implementation of CSRs. E.g. Are Member States taking up CSRs (in their NRPs, national policies, national budget plans etc.)?; If they are, what positive and negative impacts can be observed?; If the Member States are not implementing recommendations, are there any CSRs that would have a positive impact if they were implemented? Are sufficient funds allocated to the planned measures? (target: Country Reports in Feb, CSRs in May, EC opinion on national budgets in Nov) | EUISG;EAPN National Networks |
| **EO 3.2.** Financial allocations and expenditure of EU and national funds that aim to reduce poverty and social exclusion are monitored efficiently. | **OI 3.2.1.** Mean average percentage share of ESF funds allocated to the fight against poverty and social exclusion. | Operational Programmes (esp. ESF);Partnership Agreements;*Method: desk research* | 20% | EUISG;EAPN National Networks |
| **OI 3.2.2.** EU-coverage of mechanisms that monitor the under-spending of ESF funds allocated to the fight against poverty and social exclusion: percentage of EU countries | Operational Programmes Annual Reports (report on funds that have been invested on Thematic Objective 9)*Method: desk research* (e.g. in your country, are there mechanisms that monitor the under-spending of ESF funds?) | X% of EU Member States | EUISG;EAPN National Networks |
| **OI 3.2.3.** European coverage of mechanisms that monitor the actual expenditure of national governments’ plans that aim to reduce poverty and social exclusion in a particular country (e.g. minimum income, social protection etc.): percentage of European countries | Opinion poll of EAPN national members*Method: questionnaire* (e.g. in your country, are there mechanisms that monitor the expenditure of national governments’ plans?) | X% of European countries | EAPN Secretariat;EAPN National Networks |
| **EO 3.3.** If a negative impact of any current policy can be observed, policy makers make the necessary adjustments in order to mitigate a further deterioration of poverty and social exclusion (“negative policy adjustment”). | **OI 3.3.1.** Level of adequacy of policy adjustments (e.g. change legislation, new programmes, additional budget allocation etc.) made with the intention to reduce a negative impact on poverty and social exclusion: high, medium, low | Opinion poll of EAPN member organisations*Method: questionnaire (e.g. asking if the adjustments were adequate to prevent an increase in poverty and social exclusion)* | To be set after baseline has been defined (e.g. through questionnaire). Possible: different targets at EU and national level. | EAPN Secretariat;EAPN members |
| **EO 3.4.** If a policy that has the potential of reducing poverty and social exclusion is not being implemented as planned, the implementing bodies (public authorities, institutions etc.) make the necessary efforts to achieve its intended positive impact (“positive policy adjustment”). | **OI 3.4.1.** Compliance level of the implementation of relevant policies (i.e. those with a potential to reduce poverty and social exclusion) with policy plans (e.g. planned services actually provided, expenditure of planned budget, number of planned beneficiaries reached, adaption of EC recommendations to national programmes/actions plans etc.): high, medium, low | EC recommendations;EU directives;Opinion poll of EAPN member organisations*Method: questionnaire (e.g. asking for implementation of relevant EC recommendations such as Investing in Children, Active inclusion etc.; asking for the effective implementation of relevant national policies that intend to reduce poverty and social exclusion)* | To be set after baseline has been defined (e.g. through questionnaire).  | EAPN Secretariat;EAPN Members |

| **STATEGIC OBJECTIVE 4: EAPN is a member-driven organisation that is recognised as a key civil society actor fighting poverty, social exclusion and inequalities.** |
| --- |
| **Outcome** | **Outcome indicator** | Data source | Target (and baseline) | Monitoring responsibility |
| **EO 4.1.** EAPN members have an improved/high (NOTE: formulation depends on target and baseline value) level of interaction and better support each other. | **OI 4.1.1.** Felt level of cooperation between EAPN Members: high, medium, low. | Opinion poll*Method: questionnaire* | To be set after initial evaluation of current level; possibly differentiate between EOs and NNs | EAPN Secretariat;EAPN Members |
| **OI 4.1.2.** Existence of effective mechanisms of interaction between members: yes/no | Opinion poll*Method: questionnaire* | Set realistic target | EAPN Secretariat;EAPN Members |
| **EO 4.2.** EAPN receives higher public recognition as key player in subjects related to poverty, social exclusion and inequalities.  | **OI 4.2.1.** Number of references to EAPN publications in media. | Press clippings*Method: material collection* | Set realistic target/year | EAPN Secretariat (communication) |
| **OI 4.2.2.** Number of website visits | Web statistics | Set realistic target/year | EAPN Secretariat (communication) |
| **OI 4.2.3.** Number of twitter followers | Twitter | Set realistic target/year | EAPN Secretariat (communication) |
| **EO 4.3.** More policy makers recognise EAPN’s expertise in the area of poverty, social exclusion and inequality | **OI 4.3.1.** Number of EU-level events EAPN is invited to actively participate (e.g. presentations, speeches, hearings). | Invitation letters/mails | Set baseline based on previous years; | EAPN Secretariat |
| **OI 4.3.2.** Number of policy-making institutions which invite EAPN to consultation processes. | Invitation letters/mails | Set baseline based on previous years; for target consider expansion to other instiutions (see external evaluation) | EAPN Secretariat |
| **EO 4.4.** The impact of EAPN’s advocacy efforts is increased by the synergies created through strategic coalitions with other civil society actors and/or strategic partners. | **OI 4.4.1.** Key coalitions in which EAPN participates are established and/or continue to work (e.g. EU Semester Alliance etc.): yes, no | Internal observation | Yes (by 2018?) | EUISG |
| **OI 4.4.2.** EAPN members consider EAPN’s engagement with other actors, NGOs, social movements, trade unions, academics, research institutions as a fruitful cooperation: yes/no | Opinion poll EAPN members*Method: questionnaire* | Set realistic target; consider distinguishing between European and national level (e.g. pilot countries) | EUISG;EAPN Members;EAPN coalition pilot countries |
| **OI 4.4.3.** EAPN’s strategic partners consider their coalition with EAPN as a fruitful cooperation: yes, no  | Opinion poll coalition partners*Method: questionnaire* | Set realistic target; consider distinguishing between European and national level (e.g. pilot countries) | EUISG;EAPN’s coalition partners |
| **OI 4.4.4.** EAPN is able to promote its policy messages through established coalitions: yes, no | Opinion poll EAPN members*Method: questionnaire* |  | EUISG;EAPN members;EAPN coalition pilot countries |
| **EO 4.5.** EAPN has adequate resources to ensure active membership engagement. | **OI 4.5.1.** Level of minimum core funding needed to support members’ engagement and to fund a Secretariat. | Grant agreements, contracts;Financial planning tools*Method: financial planning (e.g. income & expenditure forecast)* | Set realistic target/year | EAPN Secretariat (Finance department);Director |
| **OI 4.5.2.** Number of funding sources through which EAPN can support membership engagement and a Secretariat. | Grant agreements, contracts | Set realistic target (e.g. a total number or list specific institutions/donors etc.) | EAPN Secretariat (Finance department);Director |
| **OI 4.5.3.** Existence of an EAPN fundraising strategy that includes a contingency plan for funding alternatives in order to guarantee the minim core funding level (see target OI 4.5.1.).: yes/no | Content of relevant document (i.e. fundraising strategy) | yes | EAPN Secretariat (Finance department);Director |

1. See chapter 2: EAPN Mission Statement [↑](#footnote-ref-1)
2. See Annex I [↑](#footnote-ref-2)
3. The EU DG Eurostat (<http://ec.europa.eu/eurostat/>) annually publishes statistics on people at risk of poverty or social exclusion, most notably the AROPE ([http://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:At\_risk\_of\_poverty\_or\_social\_exclusion\_(AROPE)](http://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary%3AAt_risk_of_poverty_or_social_exclusion_%28AROPE%29)) [↑](#footnote-ref-3)
4. In 2010, the EU and its Member States set themselves the goal (i.e. Europe 2020 Strategy) to lift 20 million people out of poverty and social exclusion. However, instead of decreasing, the number of people at risk of poverty and social exclusion rose from 117 million in 2010 (EU-27) to 123 million in 2013 (EU-28). In terms of shares of population, the AROPE rose from 23.6 % in 2010 to 24.5 % in 2013. [↑](#footnote-ref-4)
5. Note: Actions are not part of the Strategic Plan, as they concern operational planning. [↑](#footnote-ref-5)