

TOOLBOX: **BUILDING A** **MOVEMENT** **MINDSET**



INTRODUCTION

In a rapidly changing world where transformative change is more essential than ever, Civil Society Organizations (CSOs) find themselves at the forefront of advocating for social progress and justice. To truly drive systemic change, CSOs are increasingly recognizing the power of aligning with social movements. This shift requires more than just collaboration – it demands a fundamental transformation in mindset.

The concept of a "movement mindset" embodies the ethos of collective action, grassroots empowerment, and shared values. It encompasses the understanding that social movements are dynamic forces that drive change from the ground up, and CSOs have a unique role in supporting and amplifying their impact. Building a movement mindset within CSOs is not only about fostering partnerships but also about adopting the principles and dynamics that propel social movements forward.

In this toolkit guide, we delve into the core elements of cultivating a movement mindset within CSOs. We explore the "why" behind this transformation, highlighting the profound impact it can have on achieving lasting change. We dive into the "what" – the principles, values, and strategies that define a movement mindset. We discuss the "who" – the stakeholders involved and the collective effort required to make this shift possible. Lastly, we delve into the "how," offering practical steps that CSOs can take to authentically engage with and support social movements.

This toolkit guide is not just about theoretical concepts; it's a roadmap for action. It is designed to empower CSOs to adapt their organisational culture, practices, and strategies to better align with the ideals of social movements. By embracing a movement mindset, CSOs can become genuine allies, catalysts for change, and driving forces behind the collective pursuit of a more just, equitable, and transformative world.

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TOOL 1:

MOTIVATION AND GOALS FOR A MOVEMENT MINDSET

First thing to get into before initiating movement engagement and support is to understand your organisation's motivation, ambition, goals and potential actions to start the work to support movements.

WHY

To create a collective understanding and basis of the motivation to work with movements, agree on the strategic direction of this transition to ensure long term commitment and sustainability and start planning how to get there.

WHAT

A simple exercise with key questions that leads you to a set of internal and external goals and actions for the transition work to support movements.

WHO

Leadership group with key staff involved in implementation and with knowledge on movements.

HOW

This exercise will take a minimum of 2 hours. Do it collaboratively while taking notes. The 2 first steps are done together while step 3 is done at a later stage to reflect and reassess your goals and actions.

STEP 1

What is your experience as a CSO working with movements? *If you have any previous experience with movement support talk briefly on who and how and what was the outcome of the collaboration.*

Briefly describe what you know in the context of social movements in your specific context. *(what are current issues and themes that movements or groups work with and how do they work with them, what are the general potentials and barriers for them to function (legislative, political, civic, financial) . This area will be covered more deeply if you use the tool “context analysis for social movements”.*

Imagine a potential movement collaboration and support set up. *Go through two examples of movement engagement and support. Think of a movement that you know of either in your context or another context. What type of support do you imagine that your organisation could have provided this movement and how could that contribute to the work and potential success of the movement? Get inspired by the list of movement support possibilities in the Building a Movement Mindset on page 11.*

What is the background and motivation for you to want to work (more) with movements?

What is your overall ambition to engage with movements? *Imagine your organisation in 10 years: what is different because of the work with movements?*

What do you need to learn more about? Who has more experience than you? What type of support could you need from them?

What is your 1 year/3 year plan with the movement work? *Set internal goals that are related to transitioning your organisation into a movement mindset. Set external goals that are related to the actual movement engagement and support. Where do you hope to be in 1 and 3 years' time? Make goals SMART (specific, measurable, achievable, relevant, timebound) e.g. updating financial guidelines to include movements, having leadership team sign off on priorities, establishing a relationship with 3 regional movements (who, when, where, how), etc.*

In 1 year, we will (set minimum 3 internal and external goals):

In 3 years, we will (set minimum 3 internal and external goals):

What could be barriers or challenges to succeed with this transition into a movement mindset? *How will you mitigate these? What can help you do that? Would an external influence nudge the organisation towards it or would that create more resistance? Use your knowledge of the context to your advantage.*

STEP 2

For each of your goals use this simple template for setting key actions that will enable you to reach your goal.

ACTIONS	GOALS
(Describe what actions, when, how, towards whom and done by whom. Most goals will need multiple actions before achieving)	(State and describe the goal)
INTERNAL	
EXTERNAL	

STEP 3

After 6 months and after 12 months use these questions below to reassess your ambition and goals.

Assess the goals that you have set for the movement transition work. *Identify key steps and tangible actions (3 internal and 3 external) taken that have moved the movement transition forward in achieving the targets that you set. Assess the progress on the one year goals you have set when completing Step 1 of this tool. Can your organisation reach these goals in the next 6 months? What are the barriers against it, if any, and how can you overcome those barriers?*

If you were to view the organisation from the outside how would you assess its movement mindset and ability to work with and support movements? *Take into account both the level of buy-in on different levels in the organisation, knowledge overall on organising and movement building, how systems are fit to work with movements and how you in practice actually supports movements).*

What is most important to change, do more of or adjust in your internal transition work to build a movement mindset and in your actual collaborating with movements. *Reassess and potentially change goals and targets. What are key goals and targets for the next 12 months.*



Photo by Ehimetalor Akhere Unuabona on Unsplash

TOOL 2:

CONTEXT ANALYSIS ON SOCIAL MOVEMENT

This context analysis on social movement aims to strengthen and deepen your understanding of social movements in your specific context both historically and temporarily with a focus on potentials and barriers for movements to exist and succeed in achieving the change they are working for. Additionally it aims to map out key examples of successful collaboration between CSO or other external civic actors and social movements and the potentials and barriers that exist in such a collaboration.

WHY

Get a (deeper) understanding of the nature of social movements both historically and currently in your specific context.

WHAT

An in-depth context analysis on social movements and the environment of movements in a specific regional or national context both historically and currently

WHO

This analysis can be done in two ways:

On your own in the leadership or implementation team with input from movement representatives.

By engaging an external consultant with background and experience with movements and experience in analysis, research and communication.

Whether you do it yourselves or hire a consultant, it is key to infuse your organisation with external input - you need to know more than you did before the analysis.

HOW

Desk research on historical movements and conversations and interviews with current movement representatives and activists as well as with CSO representatives with experience working with movements.

Explore and dive into the questions one by one.

CONTEXT QUESTION	ANSWER	FURTHER KNOWLEDGE OR KEY DOCUMENTS
<i>How would you define movements in your context?</i>		
<i>What are key issues, themes and tendencies of movements historically in your context?</i>		
<i>Who are key social movements or groups currently and what are the issues they work with and their methods to do so?</i>		
<i>Describe the political context that social movements work in today.</i>		
<i>Describe the legislative and civic space for social movements today.</i>		
<i>List the opportunities that exist for movements in your context.</i>		
<i>What similarities and differences are in the opportunities you see and those highlighted by the activists?</i>		
<i>List the limitations or barriers that exist for movements in the current environment.</i>		
<i>What similarities and differences are there in the barriers you see and those outlined by the activists?</i>		
<i>What are previous successful experiences of collaboration between social movement and CSO or other civil space actors?</i>		
<i>List the key opportunities for movement collaboration with CSOs and other external actors.</i>		
<i>List the main barriers for movement collaboration with CSOs and other external actors.</i>		
<i>What are key recommendations for movement collaboration based on this context analysis?</i>		

TOOL 3:

STRATEGIC ANALYSIS AND SCOPING MOVEMENTS

Social movements can look very differently from context to context (what they work with, how, what methods they use ect.). Exploring and understanding what movements and groups to engage with can take time and this is a two way process. A potential collaboration has to be a fit for your organisation and it has to fit the needs of the movement that you consider engaging. Maybe you already work with some movements or are in conversation with movements on collaboration. This tool can support your internal scoping of movements as it dives into the nature of specific movements.

Next step after this are direct movement conversations to establish relations that can lead to support based on a movement cycle analysis.

WHY

To inform the selection of what movements/ groups and what issues to engage with.

WHAT

An exercise that explores the nature of the movements and the issues they work with.

WHO

Leadership and/or implementation team.

HOW

Explore one movement or group at a time using the strategic scoping questions. Use it to explore and analyse movements you already know but also use it to look beyond and into new movements and groups that already exist or look to be gaining momentum or strength.

(We have an extended version of this tool if you are interested)

1 Who are the people in the movement?

It is important to explore who is constituting the movement or group. In our work we want to ensure that the group/movement is constituted by people that themselves are affected by the issue they are organising around.

Explore and dive into the questions one by one.

To what extent is the group / movement constituted by the people who are affected by the issue they are organising around?

NOT AT ALL <input type="checkbox"/>	NOT SIGNIFICANTLY <input type="checkbox"/>	SIGNIFICANTLY <input type="checkbox"/>	VERY SIGNIFICANTLY <input type="checkbox"/>
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Complementary information:

To what extent is the group / movement you are planning to work with acting in solidarity with the people affected by the issue/problem identified? (Example: A group of young people are supporting local farmer communities addressing deforestation and land grabbing in their areas)

NOT AT ALL <input type="checkbox"/>	NOT SIGNIFICANTLY <input type="checkbox"/>	SIGNIFICANTLY <input type="checkbox"/>	VERY SIGNIFICANTLY <input type="checkbox"/>
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Complementary information:

2 What is the potential reach of the cause they work with?

It is important to explore who is constituting the movement or group. In our work we want to ensure that the cause is important beyond a smaller group and there is potential for growth.

Explore these questions:

How possible is it to get communities and allies to support the cause and demands?

If we support this group / movement (with organising and campaigning) and they succeed, how likely is it that their win will impact a group or agenda that is bigger than their group/movement? E.g. we support a group of local tea farmers and their win doesn't just benefit them but impacts all tea farmers or all workers in their community, or all farmers regionally/nationally.

VERY LIKELY <input type="checkbox"/>	LIKELY <input type="checkbox"/>	NOT VERY LIKELY <input type="checkbox"/>	UNSURE <input type="checkbox"/>
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Complementary information:

3 Where is the movement now?

We want to understand where the movement is now and what the movement could need. Use this to get an understanding of where the movement might be in their movement cycle.

Explore these questions:

Does the movement already have experience with organising and movement building?

Does the movement have experience with mobilising (demonstrations, rallies, petitioning, online actions, creative actions)?

Does the movement have a form of structure and leadership that you can engage with?

Does the movement already have a defined campaign strategy and the resources and the right people to succeed with that?

Does the movement already have wins behind them?

Yes, very much	Yes, some	Little	Not yet
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Complementary information:

4 Window of Opportunity and Trigger Events?

Use these definitions to understand whether the group/ movement is facing a significant phase in their organising.

A window of opportunity is a visible and tangible momentum (event and occasion like elections, passing of a new law) that can be used as leverage to organise, mobilise and advocate for change.

A trigger event is a moment of social activity that suddenly changes the political landscape and attracts public attention.

Explore these questions:

Is there and if so, what is the window of opportunity coming up and how can this be utilised by the group / movement to organise, mobilise and potentially achieve some desirable outcome?

Is there a recent trigger event in society that the group / movement is organising and mobilising on the basis of?

Is there a strong mobilisation from other groups in society that this group could engage with to make a larger alliance, coalition and movement?

TOOL 4:

SWOT ON ORGANISATIONAL MOVEMENT MINDSET

WHY

To map your organisational readiness to work with movement and understand what changes would be needed to enable this work.

WHAT

This tool explores and investigates your readiness to work with movements by doing a simple SWOT with focus on different areas of internal culture and structure.

WHO

Leadership and implementation team or with an external consultant.

HOW

Explore the SWOT with the key areas of culture, people and structure in mind. The key areas are described below.

Working with movements is different from traditional program work as movements often have a more fluid and unstructured form.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

Fill out the strengths, weaknesses, opportunities and threats when it comes to your organisation's readiness to work with movements.

Consider these areas in your mapping:

How ready are your organisation and your leadership team to initiate and collaborate with movements that are inherently political, fluid in their structure, and most likely aim for structural changes?

How ready are the people in your organisation to initiate and collaborate with movements e.g. program team, finance team, MEL team (what is their knowledge and previous experiences with this?)

How ready are your structures and systems to initiate and collaborate with movements e.g. program design systems, financial systems, M&E systems?

TOOL 5:

MOVEMENT CYCLE SUPPORT ANALYSIS

A social movement undergoes various phases based on what is happening in society, the power it holds, and what its members are prioritising and trying to achieve. The movement cycle phases that movements go through are: **Enduring Crisis, Uprising, Peak, Contraction, Evolution** and **New Normal**. The life cycle of a movement might repeat itself several times before a movement dissolves or fades away. It's important to note that the type and extent of support needed can vary based on the specific circumstances of each movement and its goals. Movements may also move back and forth between these phases or experience them in a different order depending on external factors and internal dynamics. Therefore, flexibility and adaptability in providing support are key considerations.

WHY

Get an understanding of the nature and type of support that social movements potentially need at each stage of the movement cycle.

WHAT

An analysis on social movement support needs and the environment of movements in a specific regional or national context both currently and historically.

WHO

This analysis can be done by consulting with the social movement's leadership team.

HOW

Meetings, conversations and interviews with movement leaders and activists (current and historically) as well as with CSO representatives with experience working with movements.

Below is a suggestion for a social movement cycle analysis template with examples based on our years of experience in working with and supporting social movements in various regions and contexts across the globe.

MOVEMENT CYCLE PHASE	DESCRIPTION	POSSIBLE SUPPORT NEEDED
ENDURING CRISIS	<ul style="list-style-type: none"> - Birth of the movement due to societal crisis. - Lack of organisation and leadership within the movement - Widespread oppression and frustration - Need for meeting space, capacity building, opportunity awareness 	<ul style="list-style-type: none"> - Infrastructure building and space for meetings. - Member upskilling. - Political education. - Creation of a "trigger event" or "window of opportunity" for mobilisation.
UPRISING	<ul style="list-style-type: none"> - Trigger events sparks public anger and action. - Mobilisation in large numbers. - Need for clear identity and direction. - Rapid growth. - Need for action funds 	<ul style="list-style-type: none"> - Solidify group culture. - Training in movement building and organising - Develop strategic direction. - Organise mass actions. - Absorption mechanisms for growth. - Security skills. - Access to small action funds
PEAK	<ul style="list-style-type: none"> - Movement recognized as a powerful catalyst for change. - Demand for radical transformative changes. - Negotiation with power holders. - Need for action and emergency funds 	<ul style="list-style-type: none"> - Maintain core message and values. - Leverage power and media attention. - Negotiation skills - Timing of negotiations. - Access to action/emergency funds
CONTRACTION	<ul style="list-style-type: none"> - Backlash, threats, arrests, internal conflicts - Member burnout and departures. - Analysis and self-care needed. - Need for emergency funds and recuperation opportunities 	<ul style="list-style-type: none"> - Analyse successes and failures. - Strengthen core team. - Nurture local self-organisation. - Address conflicts healthily. - Celebrate successes and mourn losses. - Practise self-care, community care, healing - Reflection on path forward - Space for reflection, analysis, and recuperation
EVOLUTION	<ul style="list-style-type: none"> - Rebuilding and formulating new strategies. - Emergence of new leaders. - Attracting and training new members. - Strengthening movement culture. 	<ul style="list-style-type: none"> - Encourage new leaders. - Training in organising and leadership. - Prepare for new opportunities. - Plan new strategy - Generational change - step up, step down
NEW NORMAL	<ul style="list-style-type: none"> - New version of the old status quo with (policy) changes. - New allies and public understanding. - Building a resilient infrastructure. - Eager to mobilise and recruit. 	<ul style="list-style-type: none"> - Utilise new opportunities. - Continue building infrastructure and upskilling members - Mobilise for grander victories. - Recognize and create trigger events.

TOOL 6:

RISK ASSESSMENT MITIGATION AND CONTINGENCY

WHY

This risk analysis tool serves as a critical framework for CSOs that are considering or actively engaged in collaboration with social movements.

WHAT

The risk analysis tool is a structured document that provides a systematic approach to: Identify Risks, Assess Risks, Develop Mitigation Strategies, Plan Response Actions, and Facilitate Communication.

WHO

Leadership, staff and social movement leaders.

HOW

Through a structured approach to better understand, manage, and mitigate risks associated with collaboration with social movements.



Photo by Chris Fuller on Unsplash

RISK CATEGORY	POTENTIAL RISK	IMPACT (low, medium, high)	LIKELIHOOD (low, medium, high)	MITIGATION STRATEGIES	RESPONSE ACTIONS
Operational Risks	<p>Inadequate resources for collaboration.</p> <p>Lack of clear roles and responsibilities</p> <p>Challenges in coordinating actions and communication</p> <p>Movement work priority level not clear to staff</p>			<p>Secure additional funding and resources</p> <p>Develop a clear MoU or agreement with the social movement</p> <p>Establish effective communication channels</p> <p>Develop a clear strategy and goal making with leadership and implementing staff</p>	<p>If resources are insufficient, explore partnerships or phased activities</p> <p>Regularly review and update roles and responsibilities</p> <p>Develop a dedicated coordination team or role</p> <p>Ensure buy in from staff at all levels through collaborative workshops</p>
Reputational Risks	<p>Inadequate resources for collaboration.</p> <p>Lack of clear roles and responsibilities</p> <p>Challenges in coordinating actions and communication</p> <p>Movement work priority level not clear to staff</p>			<p>Secure additional funding and resources</p> <p>Develop a clear MoU or agreement with the social movement</p> <p>Establish effective communication channels</p> <p>Develop a clear strategy and goal making with leadership and implementing staff</p>	<p>If resources are insufficient, explore partnerships or phased activities</p> <p>Regularly review and update roles and responsibilities</p> <p>Develop a dedicated coordination team or role</p> <p>Ensure buy in from staff at all levels through collaborative workshops</p>
Legal and Regulatory Risks	<p>Association with controversial or political social movements</p> <p>Negative media coverage impacting the organisations image</p> <p>Challenges in implementing delegating power to movements</p>			<p>Conduct due diligence on the social movement</p> <p>Develop a proactive media engagement plan</p> <p>Select social movements based on aligned strategic objectives and make MOUs or ToRs with clear roles and responsibilities</p>	<p>Communicate the organisations values and mission clearly to mitigate misperceptions</p> <p>Engage with media to provide accurate information and counter negative narratives</p> <p>Engage staff in conversation on how movement work is different to working with volunteers</p>
Security Risks	<p>Threats, harassments, or violence staff or social movement members</p> <p>Protests, marches and demonstrations</p>			<p>Implement security measure to protect staff and social movement members</p> <p>Develop safety protocols and crisis plans</p>	<p>Work with staff and social movement leaders to ensure safety for everyone</p> <p>Provide training and resources for members participating in such actions</p>
Funding Risks	<p>Loss of funding from donors concerned about the organisations involvement with social movements</p>			<p>Diversify funding sources and engage with donors transparently</p>	<p>Communicate the organisations mission and the importance of its involvement with social movement to donors</p>
SHEA and Safeguarding Risks	<p>Non existing or unimplemented policies and overly bureaucratic and prolonged CSO procedures increasing existing vulnerability of the movement</p> <p>Inadequate facilities or communication practices increase discrimination of already oppressed groups</p>			<p>Review existing policies including Safeguarding, ensure they are fit for purpose, and the staff are familiar and have the time and mandate to implement them</p> <p>Conduct due diligence and context analysis on the social movement and their struggle and levels/aspects of their vulnerability. Conduct a thorough safeguarding assessment.</p> <p>Conduct a thorough safeguarding assessment (See tool XX)</p>	<p>Perform safeguarding protocol efficiently and address gaps in the provision</p> <p>Update facilities and capacity strengthen staff to support the movement in question, ensure swift safeguarding procedure</p> <p>Ensure swift safeguarding procedure and address revealed gaps</p>

ACTIONAID UGANDA AND 2018 UN OCCUPATION

For several years ActionAid Uganda had been keeping an eye on the unfolding situation in Amuru. Amuru residents had been subjected to numerous arsons, attacks, and forced displacement by the government of Uganda, especially by its armed forces — and by civilian groups that had received weapons from the state.

For generations, the farmers and hunters of Amuru District had been trying to protect their land from foreign investors who allegedly wanted to explore oil drilling, develop high-end sports hunting resorts, or carry out agribusiness and set up sugarcane plantations. The government had been courting a handful of investors and violently forcing people off of their ancestral lands to show them that the land was vacant and available for purchase from the state.



Amuru residents carried out several confrontational nonviolent actions, some of which forced government ministers and the president himself out of Amuru. ActionAid Uganda had not directly supported these actions, but would call attention to them afterward by convening cultural and political leaders to discuss the conflict whenever the actions garnered attention. ActionAid Uganda would commission reports on the Amuru situation with relative safety. Arrests and threats would only be carried out by Amuru organisers and activists who had no legal or financial support to rely on.

In 2018, ActionAid's leadership agreed to send a delegation to meet with Amuru residents to discuss raising the stakes. It was agreed that over 200 adults and children would occupy the UN office in Gulu, calling upon the body to advocate to the government of Uganda for an end to the violent abuse and land grabbing being perpetrated by the Museveni administration — a request falling clearly within the UN mandate.

The UN failed to respect this request, resulting in a one-month occupation of their office premises. During this time, ActionAid Uganda nimbly responded to threats and obstacles. When food supply ran low, they offered transportation for members of the National Land Defense League around the country to send their food contributions to the occupiers. ActionAid Uganda even cautioned other CSOs not to speak on behalf of the occupiers, who were more than capable of representing themselves in the media. ActionAid Uganda called in additional international solidarity, and rather than taking total credit for the monumental occupation — as other CSOs attempted to do — they supported its organisers from the background with humility and solidarity. When a few occupiers snuck away from the occupation to lobby Parliament seven hours away in Kampala, ActionAid Uganda supported them proudly, arranging meetings with leaders and escorting them with branded vehicles, even when the president himself had a direct interest in stealing Amuru's land. 2018 offered fresh opportunities for ActionAid Uganda to elevate its risk appetite and demonstrate sincere solidarity to a movement led by survivors of land grabbing and forced evictions.

TOOL 7:

SAFEGUARDING AS CULTURE

This safeguarding tool aims to guide Civil Society Organizations (CSOs) in developing a movement mindset to effectively engage with and support social movements. By understanding the importance of safety, security, and psychosocial support, CSOs can work collaboratively with social movements to drive systemic change while upholding ethical standards. It is important to note that this tool should be adapted and customised based on the specific needs and context of each movement.

WHY

To assess your organisation's readiness to work collaboratively with social movements to create meaningful and sustainable change while nurturing a culture of safety, respect, and empowerment.

WHAT

This tool reviews your organisation's strengths in preventing and responding to safeguarding concerns as well as identifies areas which may need further strengthening for collaboration with social movements.

WHO

Leadership, staff, and volunteers. This shift in culture involves everyone from top-level decision-makers to those directly engaging with movement leaders and activists.

HOW

Conduct a capacity self-assessment with key social movement safeguarding areas in mind. The key areas are listed below.

1. Code of conduct
2. Personal Safety and Security
3. Safety and Security of members of the Movement
4. Psychosocial Support for Movement Leaders and Key Organizers

Photo by Natasha Mulder

The self-assessment asks you to consider 19 statements in three categories:

Diagnosis.

What is needed.

Mechanisms in place.

For each of those statements, consider how your organisation performs currently and then score that performance from 1 (we have a clear need for increased capacity) to 4 (we have a high level of capacity). Try to gather input from as many of your colleagues across the organisation as you can. To get the most benefit from this assessment, you'll need to be honest about your performance. You can use the provided template for the self-assessment.

4 HIGH LEVEL	3 MODERATE LEVEL IN PLACE	2 BASIC LEVEL IN PLACE	1 CLEAR NEED FOR INCREASED CAPACITY	EVIDENCE / JUSTIFICATION FOR SCORING
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Steps for completing and using the self-assessment:

- 1) Nominate several staff from your organisation to complete the self-assessment.
- 2) Consider the evidence and justification before you agree on a score. Please provide examples of the evidence / justification for the scoring and be ready to share that evidence.
- 3) Assign a rating for each of the listed criteria.
- 4) Look at the results and decide on your organisational priorities for capacity strengthening. Note those priorities at the bottom of the form under the heading, "Our priorities for capacity strengthening".
- 5) Agree on a safeguarding capacity strengthening action plan with the leadership.
- 6) Review the changes your organisation has made.

This safeguarding tool aims to guide Civil Society Organizations (CSOs) in developing a movement mindset to effectively engage with and support social movements. By understanding the importance of safety, security, and psychosocial support, CSOs can work collaboratively with social movements to drive systemic change while upholding ethical standards. It is important to note that this tool should be adapted and customised based on the specific needs and context of each movement.

STANDARD	4 HIGH LEVEL	3 MODERATE LEVEL IN PLACE	2 BASIC LEVEL IN PLACE	1 CLEAR NEED FOR INCREASED CAPACITY	EVIDENCE / JUSTIFICATION FOR SCORING
DIAGNOSIS					
Understanding Risk 1) The organisation maintains a register of safeguarding risks and mitigation measures, including programme risks and organisational risks. 2) Risk levels reflect the context in which the organisation is working and the patterns of harm and abuse being experienced in that context.					
Safeguarding standards, strategy and policies 3) The organisation has a code of conduct that emphasises respectful behaviour, inclusivity, and zero tolerance for harassment, exploitation, and discrimination. 4) The organisation has strategy, policies and procedures in place which reflect its commitment to working with and supporting social movements and other informal groups. 5) Strategy, policy and procedures refer to particularly vulnerable groups (such as ethnic, sexual, gender, religious, class or other minorities) 6) Procedures are simple, with clear mandates and short timeframes within which they must be resolved					
WHAT IS NEEDED?					
Training and communication on policies and procedures 7) The organisation has a safeguarding policy and code of conduct which it regularly communicates. Staff, volunteers, partners and communities understand and use these tools.					

STANDARD	4 HIGH LEVEL	3 MODERATE LEVEL IN PLACE	2 BASIC LEVEL IN PLACE	1 CLEAR NEED FOR INCREASED CAPACITY	EVIDENCE / JUSTIFICATION FOR SCORING
WHAT IS NEEDED?					
Culture and leadership 8) The organisation fosters a culture of transparent communication with movement leaders, activists and key organisers. 9) The organisation regularly check in with movement leaders, activists and key organisers to address concerns, challenges, and successes.					
Safety and Security 10) The organisation works closely with movement leaders, activists and key organisers to identify and address threats faced by movement participants. 11) The organisation has established secure communication channels and data protection measures accordingly. 12) The organisation collaborates with the movement leaders, activists and key organisers to develop safety protocols for movement members involved in on-ground and online activities.					
MECHANISMS IN PLACE					
Safe programs 13) The organisation has established mechanisms for providing emotional support to movement leaders, activists and key organisers. 14) The organisation collaborates with mental health professionals to offer accessible psychosocial resources to movement leaders, activists and key organisers. 15) The organisation continuously assesses potential risks and vulnerabilities associated with social movement engagement in different contexts.					

STANDARD	4 HIGH LEVEL	3 MODERATE LEVEL IN PLACE	2 BASIC LEVEL IN PLACE	1 CLEAR NEED FOR INCREASED CAPACITY	EVIDENCE / JUSTIFICATION FOR SCORING
Monitor and Evaluate Safe-guarding Measures 16) The organisation has established monitoring mechanisms to assess the effectiveness of safeguarding measures. 17) The organisation encourages feedback from movement members, activists and key organisers to continuously improve practices. The policies and procedures are updated based on the outcome of the conducted monitoring and evaluation					
Safe House 18) The organisation considers the types of activities the social movement is engaged in, i.e protests, demonstrations, or other high-risk actions 19) The organisation assesses the legal and political environment. Are there restrictions on freedom of assembly or expression that could put movement members at risk?					

Look at the results and decide on your organisational priorities. Our priorities for safeguarding capacity strengthening to develop a movement mindset to effectively engage with and support social movements are:

PRIORITY 1

PRIORITY 2

PRIORITY 3

PRIORITY 4

TOOL 8:

FINANCIAL GUIDELINES FOR SOCIAL MOVEMENT PARTNERSHIP

Assessment and vetting of social movement partners

The partnership selection process should be tailored to align with the specific characteristics of desired social movement partners. It is imperative to conduct a robust analysis and assessment of both the potential partners and the context.

Once a social movement is identified thorough due diligence is essential prior to establishing a formal partnership. It is crucial to conduct comprehensive assessments, including verifying the absence of partners on relevant terror lists. Organisations should also maintain continuous vigilance regarding partners' commitment to the principles of nonviolence. A comprehensive risk analysis and mitigation plan should be established.

Ideally all social movements considered as partners are vetted by a partner operating in the local context.

Partnership financial setup

Social Movements are informal groups that are not always able to comply with normal financial requirements or organisational setup and therefore alternative forms of verification are established to maintain the high administrative standards required when receiving development aid. The type of partnership established depends on the legal status of the social movement. However, a guiding principle is that all funding going to the movement should undergo an independent audit. Who will hold the funds and undergo this audit depends on the legal status of the social movement. It should be noted that although supporting formalised social movements is easier from a financial point of view of the CSO, movements should not necessarily strive or be encouraged to formalise as this might jeopardise their legitimacy in the eyes of the community.

- 1 Registered Social Movement:** A Partnership Agreement (or Memorandum of Understanding/ MoU) is developed. Same requirements for financial monitoring as with other organisations but compliance and performance audit adjusted to the size and setup of the social movement. Funds go directly to the movement.
- 2 Unregistered Social Movement:** A Terms of Reference (ToR) is developed with a trusted person representing the social movement. Identification documents are needed for that person. Either the organisation supporting, or an implementing partner will hold the funds.

The Partnership Agreement/ToR should include the following:

- Guidance on financial reporting including donor specific financial guidelines.
- A context specific risk analysis and mitigation plan.
- Reference to donor specific financial guidelines and principles.
- An anti-corruption clause.

Payments and financial documentation for unregistered social movements

There are different ways to transfer funds to unregistered social movements. The ongoing transfer of funds should always be conditional on the partner living up to the requirements described in the Partnership Agreement/ToR, including regular updating of the narrative reporting e.g., with reflection logs or other forms of documentation, and ongoing dialogue with the partner about the status of the program. The following ways of transfer can be applied:

Advance: The funds can be transferred to an individual who will use the funds to pay for their expenses. The organisations should place their own risk ceiling.

Claim: An individual can pay out of pocket for an expense and the organisation will then reimburse the funds afterwards.

Direct: Organisation or local partner will pay expenses directly on behalf of the social movement.

Irrespective of the mode of transfer the following financial documentation should be obtained:

As for all other partners, social movement partners should be required to document the use of the funds in the form of receipts. To aid partners in contexts where this might be challenging the organisation can develop an expense voucher that can easily be filed in.

In the rare exception that receipts are not possible a sworn statement by the person in charge of the funds should be made. In the statement, the amount and the purpose of the use of funds should be written. The signatory must write his/her name in capital letters as well as sign. Attached to the sworn statement must be an ID documentation for the signatory (passport or social ID). This should be verified by the project manager of the funds.

Participants lists are used as documentation for attendance[AS2] , but exceptions should be made if required for practical or security reasons.

- o Practical reasons can be larger mobilisations where it is impossible to have all participants to sign lists. In this case alternative documentation in the form of photos and video documentation could be accepted. When possible, the representatives from the organisation or partner organisation can be invited to attend to observe the event.
- o Security reasons can be if participants don't feel safe having their names on open lists. In these situations, a Beneficiaries Code Approach should be used to maintain documentation compliance while protecting the human rights defenders. Beneficiaries will be registering attendance with a code and beneficiaries' identities associated with the code will be kept safely stored by the partnering organisation.

In addition to financial audits, donors may also require a compliance and performance audit. Social movements would very often not be able to meet these requirements. Depending on the organisations it can be accepted that there will be non-compliance in these areas, but if the partnership with a specific social movement extends over a longer period, the social movement should start moving towards a higher level of compliance and organisational capacity strengthening.

TOOL 9:

TRACKING MOVEMENT SUPPORT AND IMPACT

This tracking tool provides a structured framework for CSOs to monitor and assess their support to social movements across different phases. It helps track the support provided, measure impact, and identify areas for improvement, ultimately contributing to effective collaboration and achieving systemic and durable change in solidarity with social movements. CSOs can adapt this tool to suit the specific context and needs of their partnership with each movement.

WHY

To track the effectiveness and efficiency of your organisation's support to social movements.

WHAT

This tool explores and investigates the impact of the support that your organisation offers to social movements.

WHO

Leadership, implementation team and social movement leaders/activists.

HOW

Explore the support provided to social movements by mapping it to outcomes/impacts achieved by social movements/activists as a result of the support provided by your organisation.

OUTCOME TITLE (Please insert the title or overall theme of your outcome. Make sure it is understandable and does not contain acronyms)	OUTCOME DESCRIPTION (Tips: The observable change in the behaviour, relationships, activities or actions of a social actor (person, group, organisation, community) influenced by the activities of the movement/activist. That is: Who changed what (what did they do differently), when and where?	SUPPORT PROVIDED TO MOVEMENTS (Tips: How did your organisation contribute to the outcome? What was it that your organisation, key staff, volunteers did that contributed to the outcome? Please be as specific as possible - e.g. what specific/related activities, resource or training you implemented that contributed to achieve it etc.	SIGNIFICANCE OF OUTCOME (Why is this outcome important? Please provide contextual information indicating why this outcome is significant (For example, if it is something that happened for the first time, or if it is an important step in a larger change process, or if key stakeholders benefited, or it created a sustainable change...)



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