

### ↘ Introduction

There is a growing recognition in and outside the trade union movement of the important role that trade unions play in development worldwide. This realisation also brings with it the moral duty to continuously improve the quality and effectiveness of its development work. ITUC has responded to this need by working at three levels:

- building an enabling environment for trade unions through lobby and advocacy,
- monitoring the work of governmental, bilateral, multilateral and other development actors,
- strengthening trade unions in becoming more effective development actors.

“Not rocket science, but a simple tool to have a frank and open dialogue between partners”

TUDEP pilot user, 2011

The **Trade Union Development Effectiveness Profile Tool (TUDEP)** is a direct follow up of the [Trade Union Developed Effectiveness Principles](#), which were adopted by the General Council of ITUC in February 2011. TUDEP is the result of an in-house development process in 2011, through a temporary working group of the [Trade Union Development Cooperation Network](#) (TUDCN). It is important to stress that it was not imposed by any outside actor or donor.

The tool is meant to be a learning tool to support trade union development actors worldwide to reflect about their current development work, and especially in relation to the Trade Union Development Effectiveness Principles.

It starts from the finding that many of the values and principles that we bring into our development work are often implicit. Experience learns that partnerships can become more in-depth and learning-oriented if also some of these more intangible issues are discussed once in a while.

TUDEP is designed as a self-assessment tool that can be used by individual TU actors (supporting or receiving partners), or in a collective process of review and reflection. It is

aimed to be used in a proactive and interactive way, as part of a process of on-going learning and improvement.

The tool can be used in all project phases, for example during programme design, programme implementation, and/or during monitoring and evaluation activities.

The **main objectives** of the TUDEP tool are to contribute to the improvement of the effectiveness and quality of the development cooperation work of the trade union partners by:

- Helping partners to reflect about their working practices, and the principles and values that underpin their work;
- Facilitating the monitoring/evaluation of the progress of the use of the principles and guidelines on TU development effectiveness.

“TUDEP helped us to discuss more sensitive issues in our partnership.”

TUDEP pilot user, October 2011



## What is TUDEP ?

TUDEP is a simple Excel document with a list of 52 statements that need be scored, and a number of worksheets that automatically analyse the results from the scoring. The 52 statements are based on the eight [Trade Union Development Effectiveness Principles](#), and they all refer to what we could describe as good trade union development practices. By scoring the statements, trade unions can self-assess how they are currently doing regarding the eight development principles. With the help of simple visuals, the tool helps to link the 52 statements with the eight principles, and in this way, identifies areas for improvement. TUDEP can be used in groups, i.e. to assess the quality of the partnership between supporting and receiving partners, or by an individual trade unions to assess their own work.

When scoring the statements, the following issues should be taken into account:

- **All the statements should be scored!** If you find that one of the statements is not relevant in your situation you should score 'not at all'. This will of course show up in the analysis phase, and should be taken into account when reviewing the findings.
- The statements describe an ideal situation (good development practice), against which the current practice can be benchmarked. The idea is therefore not to score the statements on the basis of what you think your organisation should do, rather to score the current practice.
- The scoring is not meant to be a definitive value judgement, but only serves as an input for a dialogue on important elements of the partnership.

“When we discussed the findings with our partners, we found that we had quite a different appreciation about the partnership. Some of things we thought were problematic, they didn't find important, and the other way around.”

TUDEP pilot user, October 2011



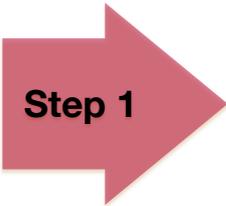
## How to use TUDEP ?

These are some general issues that you might want to consider when using the TUDEP tool in your own partnerships. Firstly, TUDEP is meant to be (a small part) of a larger process of working towards more effective development work. The tool will therefore be most effective if it is used in a broader process of reflection and learning, between various TU development actors. In particular, it is advisable to give a short initial overview on both the process and contents of the 'Trade Union Principles and Guidelines on Development Effectiveness'. This is useful in order to put the TUDEP in a wider context, as well as, in order to facilitate the understanding of the individual questions.

Secondly, the tool can be used in any of stages of the programme life cycle (from design, planning, implementation, and monitoring & evaluation). And thirdly, it will probably be most useful if TUDEP is used to look at specific development programmes, rather than the overall development practice of a TU actor. Underneath we propose two different ways that the tool can be used:

### As part of a group reflection process

It 'takes two (or more) to tango' in development work. TUDEP can be used to look at a partnership between one or more supporting and receiving partners. These are some the steps that can be followed.



## Step 1

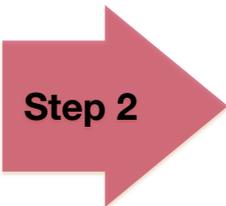
### Preparation phase: *Building on existing programme activities*

- Sit down with your programme partners in the context of an existing meeting or event
- Introduce the idea of reviewing together development programmes in the light of Trade Union Principles and Guidelines
- Reflect about when and how this process can be done that it builds on existing reflection, learning and planning moments so that the outcomes are most likely to be used afterwards.

#### Facilitation tip

Make sure that the group is aware what this process is about. Explain that it is not a test of the eight Principles, but rather an opportunity to exchange views on important dimensions of the partnership.

Lecturing about the Principles will probably not work. Rather gently pull people out of their comfort zones by asking them to score the statements first for a specific case. Reference can be made to the text of the Principles in case of difficulties in understanding the questions.



## Step 2

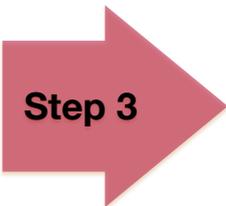
### Starting-up: *Getting the objectives and the process right*

- Introduce all the stakeholders to the aim of this process and how the results will be used.
- Consider asking the participants to first complete the scoring individually to avoid having only the appreciation of vocal/powerful members.
- The representatives of the receiving partner sit together in group and go through the various statements and score them in group. The supporting partner representatives do the same thing but in a separate group.

#### Facilitation tip

Try to create an open atmosphere, stressing that there are no good or bad answers, that it is unlikely that the partnership will be strong in all areas and that opinions about the partnership might vary.

Explain again that if a statement is perceived not to be relevant in this context, the person should score 'not at all'



## Step 3

### Analysis and reflection: *Using the results*

- The results of both exercises are brought together. If the results are entered in different sheets in the Excel tool, then the last sheet compares the results graphically.
- In this phase, we can look at both similarities and differences in the scoring. Also the absolute scores of principles can be analysed. It might be useful to also use the sheets with the graphs that link individual statements with the principles.
- From this analysis, the partners identify certain areas that they want to work on in the future.
- A small and simple action plan is developed, outlining clearly what steps will be taken and whose responsibility it is to follow up. It's also useful to think about how and when the principles will be reviewed next time.

#### Facilitation tip

Make sure that you take sufficient time to discuss the results. For example, if everybody scores that everything is perfect, you might want to wonder why that is the case. Are we very honest about our partnership?

#### Facilitation tip

When planning on the way forward, rather go for small but tangible steps/activities, rather than to make ambitious plans. Many of the bad practices are there for a reason. Try to understand how small improvements can be made.

Make sure that you also agree when you will follow-up on what you agreed on.

### Individual reflection within one organisation

If you want to use the tool to look at the development practice of your own organisation, without involving

other partners you can follow the same steps as described above, but only have TUDEP completed by people working within your own organisation.



## How does the TUDEP excel form work ?

TUDEP tool is an excel document with a number of sheets connected by formulas.

Your and your partner organisation should **fill in the questionnaire separately** and then **introduce the answers to one excel document** (in Questionnaire 1 and 2).

### → Questionnaire

This is the main sheet of the TUDEP tool. Here is where you introduce your answers which are further analysed and visualised in other sheets.

- **Fill in the blue fields.** *Organisation's details* and *Comments* fields are optional, but make sure you score all statements. If you find that one of the statements is not relevant in your situation you should check the 'Not at all' box.
- You score the statements by putting any symbol (e.g. "x") in a box next to it. Tick only one box per statement. If you check more boxes, the system will automatically take into consideration the lowest of the ticket boxes.
- After you have scored all the statements you can see the analysis of your answers in **following sheets** that you can see at the bottom of the excel document.

### → Analysis sheet

This sheet gives you the analysis of your answers divided by the Principles that the statements refer to.

- For each statement you evaluated in the Questionnaire you get from 0.5 to 2.5 points. Each of the statements referred to one or more of the principles. You can see exactly which statement refers to which Principle in the *Explanation sheet*.
- For each of the eight Principles you can score maximum 20 points. The score is shown in the "Total" box under each Principle. **The higher the score, the higher is your organisation's compliance with the respective Principle.**
- You can also see your "Average Score" which refers to the average total score on a Principle and the "Average II" which is the average score on a statement.

### → Organisational profile

This plot visualises the alignment of your organisation with the Trade Union Development Effectiveness Principles. You can see from the profile where your organisations strengths and weaknesses lie.

- The closer the coloured area is to the different corners of the octagon, the more compliant your organisation is with the respective Principle.
- A small coloured field means a low compliance with the Principles in general. If the coloured field fills in the whole or almost the whole octagon, your organisation's development practices are close to perfect in terms of the Trade Union Development Effectiveness Principles. Congratulations!

### → Detailed charts

The sheet visualises answers to particular statements, divided by Principle they refer to.

### → Explanation sheet

Here you can see the link between the Principles and the particular statements.

- Statements are grouped by the Principle they refer to. Some of the statements refer to more than one principle.
- Statements marked in blue refer additionally to the issue of **monitoring and evaluation**.
- Statements marked in red refer additionally to the issue of **capacity development**.

### → Questionnaire 2, Analysis sheet 2, Detailed charts 2

When you use the TUDEP tool with **your partner organisation**, each of the organisations can fill in the questionnaire separately and the answers can be compared by introducing your partner's answers to the Questionnaire 2.

### → Compar Org prof 1 vs 2 and Compar detail 1-2

These sheets give you the visual comparison of the answers in both questionnaires. Here you can see how the perception of your cooperation differs between the partner organisations and which fields you can focus on while working on improving the partnership.



## Questions and Feedback

TUDEP was piloted extensively last autumn in different contexts and in different regions of the world to make sure that the tool is relevant, user-friendly, and culturally appropriate. While TUDEP was elaborated by and for trade unions, it can be used for reflection and inspiration by other development actors as well. Still, the tool is a work in progress and the TUDCN team welcomes any suggestions for improvement as well as a general feedback on its implementation.

We are particularly interested in your feedback on:

- Your motivations to use the TUDEP tool,
- Your experience in using the TUDEP tool: individually or together with your partner organisations,
- The accessibility of the TUDEP tool and the supporting Manual,
- The application of the TUDEP tool's results in your organisation: if and how the results are or will be used.

If you have any questions or feedback, please do not hesitate to contact us!



## Download the tool

- *Trade Union Principles and Guidelines on Development Effectiveness* ([English](#) / [Spanish](#) / [French](#))
- *TUDEP tool* ([English](#) / [Spanish](#) / [French](#))



## About us

**Trade Union Development Cooperation Network** is an initiative of ITUC that brings together affiliated trade union organisations, the solidarity support organisations (SSO), the representatives of the ITUC regional organisations and the Global Union Federations (GUFs). The network's objective is to bring the trade union perspective into the international development policy debates and improve the coordination and effectiveness of trade union development cooperation activities.

The work of the network focuses on advocacy and capacity building activities which include organizing conferences and seminars as well as issuing publications: a regular newsletter *Trade Union Focus on Development and Development Papers* series which include policy statements and research projects of TUDCN.

TUDEP has been created in frame of the **Open Forum process on CSO Development Effectiveness**. The methodology behind the tool was supported by the **HIVA institute of the Catholic University of Leuven**.



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