

# ROMACTED

*Promoting good governance  
and Roma empowerment  
at local level*

## HANDBOOK

A manual for development of  
local resources, joint action and  
empowerment of Roma communities



**Promoting good governance and Roma empowerment at local level**

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and Roma empowerment  
at local level*

# A MANUAL FOR DEVELOPMENT OF LOCAL RESOURCES, JOINT ACTION AND EMPOWERMENT OF ROMA COMMUNITIES

## **ROMACTED Programme**

Promoting Good Governance and  
Roma Empowerment at Local Level

**A European Union and  
Council of Europe  
Joint Programme**

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## Foreword

The ROMACTED handbook is prepared to assist local authorities in improving the lives of disadvantaged Roma citizens, through capacity building and effective participation of the relevant stakeholders in local plans and projects. The content contains key methodological principles of the Joint European Union and Council of Europe ROMACTED Programme, and experiences of the implementation of such principles in the Western Balkans and Turkey.

The programme is funded by the Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR) and implemented by the Council of Europe's Roma and Travellers Team and the Office of the Directorate General of Programmes in Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, Serbia, Turkey, and Kosovo\*<sup>1</sup>.

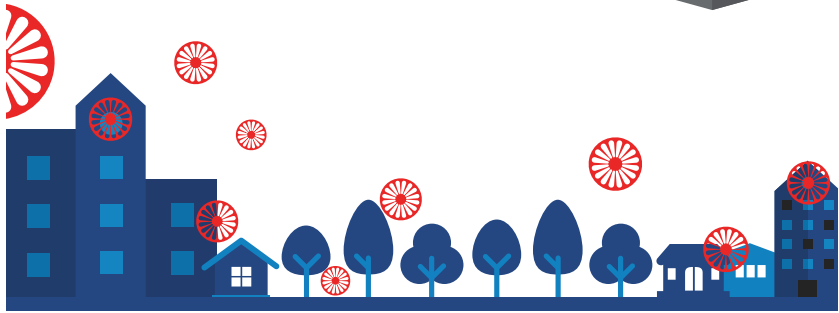
ROMACTED results from the experience of the ROMED<sup>2</sup> and ROMACT<sup>3</sup> programmes. It reflects upon the adaptation of these methodologies and activities for each beneficiary and selected location in order to fit the policy cycle, the dynamics and reality of each municipality, therefore making the existing policies and practices more effective and inclusive.

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- 1 \*This designation is without prejudice to positions on status and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence.
  - 2 More about ROMED Programme, available at: [www.coe-romed.org](http://www.coe-romed.org);
  - 3 More about ROMACT Programme, available at: [www.coe-romact.org](http://www.coe-romact.org).

## List of Abbreviations

ACT	Activities
CAG	Community Action Group
CoE	Council of Europe
CSO	Civil Society Organisation
EC	European Commission
EU	European Union
IPA	Instrument for Pre-Accession
IWG	Institutional Working Group
JAP	Joint Action Plan
LAP	Local Action Plan
MoU	Memorandum of Understanding
MTG	Municipal Taskforce Group
VET	Vocational Education and Training





# Promoting good governance and Roma empowerment at local level

## What does it mean in practice?

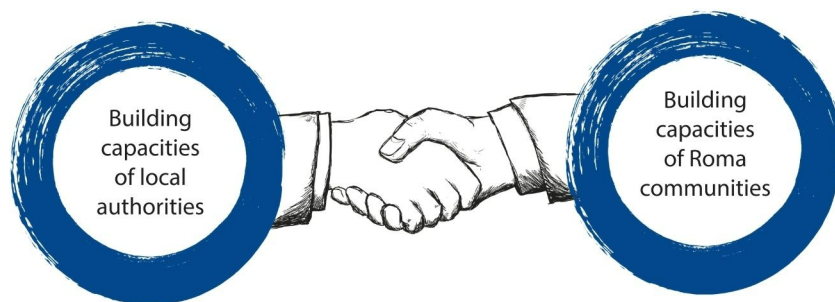
The local level is of critical importance for the effective implementation of policies and programmes for Roma inclusion. This is the level where exclusion is most visible, and where practical steps for inclusion are needed. A major challenge for effective implementation of Roma Inclusion policies adopted at European and national level is the considerable gap in understanding, capacities and political commitment at municipal level. For Roma Inclusion policies to be included in the local agenda and budgets, it is of the utmost importance that local administration and institutions increase their engagement and commitment, and further develop their capacities. However, practicing good governance and local democracy will also depend on the investment in the capacity of vulnerable Roma communities to be active participants and equal partners in the process, rather than passive recipients and targets of paternalistic interventions which may reconfirm dependency and exclusion.

ROMACTED is a response to the recognised need for a more systematic approach in stimulating the processes of community change and engagement of local stakeholders in constructive dialogue. The programme invests in a multi annual process involving different stakeholders at the local level.

**The programme is designed to build up political will and sustained policy engagement of local authorities, to enhance democratic local governance, develop capacity and stimulate the empowerment of local Roma communities in order for them to contribute to the design, implementation and monitoring of plans and projects concerning them.**


**By counting on a participatory working cycle, involving members of the Roma community and staff and decision-makers from public institutions, the ROMACTED Programme intends to:**

- strengthen political will and support local development through capacity-building of local authorities and encourage participation of Roma citizens in local plans and projects;
- empower (prepare/train, skill building) Roma citizens on an individual level (assisting people to practice their basic rights and to expand their capacities and skills), as well as on the community level (assisting people to get organised to voice their interests around community problem-solving);
- improve and expand the institutions' commitment, capacities, knowledge and skills in working for Roma inclusion, putting into practice the concepts of good governance.



Developing and enhancing mechanisms of communication, cooperation and joint action

There is a need to combine efforts when providing technical assistance at the local level to build up political will and sustained policy engagement, enhancing democratic participation and empowerment of local Roma communities, as well as when designing and implementing projects and accessing domestic and external funds.



During the process of action on developing local resources, the implementation of ROMACTED principles directly contribute to enhancement of:

- **Communication and social dialogue;**
- **Training** – of all local stakeholders involved in the processes, procedures, modes of action, competences;
- **Mechanisms for participatory involvement of citizens** – formal meetings, informative meetings, planning meetings, meetings to amend or to supplement local strategies.

## HOW TO USE THIS HANDBOOK

The handbook is organised in a step-by-step manner. It is advisable to go through all the steps in order to have a clear idea of the overall ROMACTED process. In some cases, it might happen that some steps are ran in parallel due to specificity and initial maturity of the context. Therefore, there is no “one size fits all” approach.

All steps are divided according to their specific activities, which are expected to be achieved during a certain timeframe. However, the proposed method would need to be adapted to the specific reality each municipality faces.

To better understand the overall ROMACTED approach, we strongly recommend you read:

- ROMED 2 Guidelines and Resources for National and Local Facilitators<sup>4</sup>;
- Experiencing ROMED, A legacy for improved participation of Roma communities<sup>5</sup>;
- ROMACT Handbook, A manual for Mayors, Local Administrations and Roma wanting to improve the living conditions of disadvantaged Roma<sup>6</sup>.

Complementary reading with important methodological contribution could be found in ROMED Trainers Handbook<sup>7</sup>.

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4 Available at: <https://bit.ly/2j5RXjG>;

5 Available at: <https://bit.ly/2oxu1dU>;

6 Available at: <https://bit.ly/2C56mIn>;

7 Available at: <https://bit.ly/220scS3>;

## HOW TO INITIATE THE ROMACTED PROCESS

Before any type of action takes place, it is essential to build a structure that will be responsible for the implementation of the action in targeted locations. Such a structure will require establishing a support team, which usually (but not exclusively) consists of:

- A non-governmental or any other organisation<sup>8</sup> to provide operational and logistical support;
- Focal point (who can be part of the aforementioned organisation);
- Project assistant/s (responsible for finance, reporting, planning, organising, etc.);
- A team of selected facilitators<sup>9</sup> responsible for establishing direct contact with the final beneficiaries from the local community and municipal authorities;
- A team of selected experts whose primary responsibility is to provide expertise, support and education in the priority areas that were defined through the initial baseline survey or through the interaction with the final beneficiaries of the programme.

The final composition of a team is entirely context-based.


The first few months prior to the implementation of the methodological steps are crucial for setting up the right tone with all stakeholders. The messages that an implementer wants to pass on should be in line with sustainability of action at the local level - the level of both the Roma communities and local authorities. There are several things to keep in mind:

**Capacity building in the local context is a process.** It aims at bringing together and connecting all stakeholders, establishing a communication system and motivating them to cooperate. It is neither a short-term nor a one-time activity, but rather an investment in long-lasting changes that can result in real and sustainable improvements within local communities.

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8 Unlike in other ROMACTED beneficiaries, the support organisation in Turkey is the Union of Municipalities of Turkey, which holds a status of a public entity with administrative and financial autonomy.

9 In several cases the process entailed inclusion or activation of mediators' network in the local communities. In the ROMACTED Programme the mediators, previously trained under the ROMED1 Programme, were an exceptional resource for mobilisation of the Roma communities (example of Bosnia and Herzegovina).



**Working closely with marginalised communities** requires deep understanding of their position and developing ways to appropriately tackle the causes of marginalisation. These are always inter-related and require actions based on an integrated approach. Therefore, instead of running several isolated activities, a well-thought out set of actions and activities must be developed together to make a positive impact.

**Involvement of community members is crucial for the empowerment process.** Without direct participation of disadvantaged groups, the needs assessments will be neither reliable nor acceptable to those that are targeted by this action. However, to avoid stigmatisation of Roma and buttress the social cohesion, it is also necessary to include non-Roma in the process, in order to develop interaction between the two parties.

The question of **sustainability** is always crucial when implementing similar actions. While processes could run at a fervent pace when funding is ensured, the structures may not be able to continue working when the financial aspect is no longer in place. For that reason, it is important to start building towards sustainability from the earliest phase of action. In the best possible scenario, the authorities<sup>10</sup> (central or local) will recognise the value of the methodology and will either include the costs of its future implementation in the general budget or build new tools based on the experience acquired through the previous implementation.

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10 The Portuguese government committed to financially support the 3rd edition of ROMED in the period 2019-2020. The Commitment letter was signed between the State Secretary for Citizenship and Equality and Letras Nómadas Aidc (Support organisation).

## STAKEHOLDERS SUPPORT AND SYNERGY BUILDING

Embarking on the initiation process requires support from various stakeholders at local level: local Roma communities, different municipal services, schools, employment office, etc.

**Initiation of the process from local authorities is important for:**

- building commitment towards the empowerment process for Roma communities;
- bettering the life of mainstream society by helping the enhancement of well-being in marginalised communities;
- developing capacity of local administrations that the mainstream population can benefit from;
- generating ownership and sustainability.



**Moreover, the implementation also requires cooperation with central authorities because:**

- a signature of Memorandum of Understanding/ Cooperation<sup>11</sup> with a national body/ministry responsible for implementation of the Roma strategy is needed;
- cooperation with other line ministries, considering the needs identified in the Roma communities and within local administration. In practice, these ministries are included as key actors in the Roma strategies. Since the programme operates at local level, in some cases it was essential to involve the Ministry of Local Self-Government;
- up-scaling the action to other municipalities through the funds provided by the state;



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11 The final title of the Memorandum depends on the political situation of the beneficiary/country and agreement with the institution that will be signatory to such a document. In Serbia the document was called Protocol of Cooperation.

- the process also benefits from the involvement of key donors, particularly the international donors<sup>12</sup> that are already running activities/project at local level.

**The involvement of external donors/partners will be important for:**

- reinforcing the overall action by exchanging good practices and human capital;
- opening possibilities for funding of initiatives and projects, which are based on the identified needs in the communities;
- opening possibilities for the up-scaling of the methodology to other localities;
- assisting stakeholders in making the most of already developed structures from other programmes/projects.



Building synergies is at the heart of the process. It is essential to target the past and on-going initiatives and think about developing a common ground that could reinforce the implementation of the action through ROMACTED. One of the essential values of this methodology is that it avoids building parallel structures but using existing ones instead.

## HOW TO WORK WITH MARGINALISED COMMUNITIES

### INVOLVE THE ROMA

The best approach to use when helping the most vulnerable groups is to directly involve them in the implementation. Following the experience of the ROMED and ROMACT Programmes, the participation of Roma increases the feeling of ownership and commitment to the process. However, the involvement of non-Roma is also crucial because it fosters cooperation of mutual interests and avoids stigmatisation of Roma.

Priority should be given to integrating Roma who experience poor living conditions. The inclusion strategy should also benefit non-Roma who face

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<sup>12</sup> In majority of the countries/beneficiaries, the synergies are established with the Regional Cooperation Council (Roma Integration 2020), UNDP (ReLOaD Programme), GIZ, OSF, etc, as well as with different embassies. It has to be noted that the European Union Delegations are an important link in the process at the level of the countries/beneficiaries, as they are a direct communicator of the European Union.

similar disadvantages. This will help counter negative perceptions according to which Roma receive more than their share of public resources.

During the six months before the actual implementation of the methodological steps, it is important to build knowledge about the targeted localities and the Roma communities that reside in these localities. Conducting a baseline survey in each location will enhance the understanding of the shortcomings that municipalities and communities face. It will also help tailor the strategy to provide answers to specific local needs.

The indicators of this baseline survey should reflect the demography of communities, education level, employment, health and housing. The analyses of the obtained indicators will help tailor the strategy to answer local needs.

## **SUSTAINIBILITY OF ACTION**

### **WHAT HAPPENS AFTER THE FUNDING STOPS?**

Once the action is implemented, its effects should not disappear. The emphasis should be put on several points in this regard:

- fostering ownership over the process from local institutions and Roma;
- lobbying for higher representation of community members (i.e. mediators; Roma coordinators) within institutions;
- establishing permanent mechanisms for communication with the citizens through the structures that will be established throughout the programme;
- working on the strategic visibility of the action (visibility/donor events);
- building synergies with different stakeholders and targeting funds to sustain the action and up-scale it to more identified priorities;
- up-scaling the action to central and/or local level: ensuring that the authorities recognise the importance of the action and provide resources for its sustainability in the long-term.

Sustainability can only be ensured if the country-beneficiary or local administration recognises the benefits of the process; the benefits to not just solve community problems, but also improve the welfare of the mainstream population and therefore encourage further implementation of the methodology. Another aspect of ensuring sustainability is to build the capacities of the communities themselves, so they have a clear picture of the steps they need to undertake to achieve the goals and priorities set. This in turn may lead





to other donors recognising the significance of the process and assume the future funding for implementation of the methodology.

However, it must be noted that the ROMACTED methodology is not a fixed tool but a flexible one that can be adapted to different situations and contexts. The adaptability of the methodological components, according to the needs of the end-beneficiaries, helps achieve the final goals in a more efficient manner, ensuring the processes sustainability in the long run.

## **THINK OF POTENTIAL RISKS**

There is a long list of risks that can jeopardise the process. Some of the risks will be easily managed, while some could bring about insecurities. Political crises, in particular, can happen unexpectedly and disrupt a beneficiary's access to all main processes. Even though little can be done in these circumstances, it is still important to keep them in mind.

Unstable political situations at the central level easily impact the local level and can affect the overall action in targeted localities. Electoral cycles often bring with them a high level of uncertainty and potential power-shifts that will not always be beneficial for the programme. However, this could be also an opportunity to influence the new local actors to embrace the process and put more resources into its realisation.

Working with Roma communities is a sensitive matter, with highly marginalised communities showing higher levels of resistance. This is due to a vast number of past or on-going projects that have probably resulted in community members feeling used and/or deceived. You will often find that community members ask for something in return for their presence at Community Action Group meetings.

Reluctance of the local-level stakeholders to join the process is another risk that can come across during the implementation. If the political will is lacking in a certain municipality, it is important to understand the causes and either search for another locality or tailor your action according to the identified circumstances. Often the authorities fail to see the higher impact of the action and how it can positively affect the life of the mainstream society.





## ROMACTED METHODOLOGY

### FOUR STEPS

Before putting the content of the handbook into practice, consider the following:

- The ROMACTED process at local level consists of **four STEPS** (based on the ROMACT methodology): each STEP involves key activities (**ACTs**);
- These **STEPS**, and the related **ACTs**, are strongly interlinked: the ROMACTED process should be seen as a coherent whole rather than the implementation of isolated actions;
- For the ROMACTED process to lead to successful results, all ACTs must be implemented in each of the targeted municipalities;
- Implementing the entire ROMACTED process requires minimum **20 months**. Please note that this is a minimum duration for the process. Depending on the circumstances in different countries, the process may require an even longer period of implementation. Overall, it is estimated that the process can take between **20-24 months**.

## ROMACTED TIMELINE

month	
STEP 1 Preparing the process	ACT 1 Understanding the need to act
	ACT 2 Appointing Coordinator (LA)
	ACT 3 Mapping stakeholders
	ACT 4 Setting up Institutional Working Group and Municipal Taskforce Group
	ACT 5 Supporting CAG setup
	ACT 6 Training for members of the Roma community
	ACT 7 Assessment of the situation of the community and the opportunities
STEP 2 Assessing needs and prioritising	ACT 8 Deciding on where to intervene
	ACT 9 Assessing municipality's capacities
	ACT 10 Community Needs Assessment
	ACT 11 Drafting Community Priorities List
STEP 3 Adopting a Joint Action Plan	ACT 12 Developing & adopting Joint Action Plan for Roma inclusion
	ACT 13 Implementing short/medium term actions
	ACT 14 Integrating/mainstreaming Roma issues in the Local Development Plans and Strategy
	ACT 15 Preparing concrete actions
STEP 4 Funding and Project implementation	ACT 16 Funding actions
	ACT 17 Implementing actions
	ACT 18 Monitoring & evaluating
Explaining the ROMACTED process to the public	
Building capacity of local authorities & Roma (support to develop the CAGs)	





# PREPARING THE PROCESS

## ACT 1 - ACT 7

- **ACT 1-4 related to local municipal administration: getting local authorities committed to include their Roma population**
- **ACT 5-7 related to Roma communities: getting Roma population mobilised (run in parallel with the process in the municipality)**

At the very beginning it is necessary to explain that this step requires formalisation of relations with the two target groups of the programme – municipal administration and local Roma community/-ies.

In some cases, the support teams first established the Community Action Groups (CAG) and then set up the Institutional Working Groups (IWG). It is necessary to highlight that the starting point of the process depends primarily on the context in which the programme is being implemented. Therefore, preparation of the process can often differ from one municipality to another, even within the same country/beneficiary.

The ROMACTED Programme prioritises the establishment of an integrative approach in solving problems of marginalised groups with the focus on Roma population. This integrative approach means involvement of all stakeholders and the creation of initiatives and actions through different mechanisms or forms.

## **ACT 1** Understanding the need to act

### **First contact with the municipal representatives (Setting up meetings, presenting the programme, setting goals)**

This activity mostly concerns the scenario when the process is initiated by a **local organisation**.

The ROMACTED Programme is a long-term process and requires the establishment of constructive communication from the very beginning. The first contact with the local authorities often determines if the cooperation is going to be fruitful or not.


#### **Some tips:**

- Prepare in advance. Find out about all the details, roles and responsibilities of the municipal staff, previous engagement (or lack thereof) and activities regarding Roma-related issues. This will provide a useful perspective when presenting the programme before the stakeholders;
- Bear in mind that persons in the highest positions of some municipalities do not want to deal with these topics, as other municipal staff are usually delegated for that purpose. However, in order to show respect towards hierarchy, the initial communication has to be addressed to the highest management;
- Prepare an appropriate letter. The 'tone' is very important in this step. Present the programme as a scenario in which both parties benefit and win with just a little compromise. The ROMACTED Programme promotes that principle – both parties are ready to compromise and work together, and thus benefit from it.

#### **The letter should have the following components:**

- ✓ brief explanation of the programme, including the benefits and opportunities it could generate;
- ✓ some of the key issues in the Roma community;
- ✓ request a meeting to present the method and principles of the ROMACTED Programme and formalise future institutional cooperation.





**At the first meeting with local authorities, it is important to take into consideration additional needs that will be important for formalising cooperation:**

- Possibility to use the resources of the municipality to hold meetings, such as the conference room, refreshments, printing of materials for the meetings, etc. (you might need to incorporate some of these aspects into your MoU with the municipality);
- Explore the political, professional motivation and propensities to work. This is good to know so you can realistically plan your activities at least until you increase the level of motivation and willingness through your educational or some other activities.

### Preparing the Memorandum of Understanding (MoU)

The MoU stipulates the requirements of each stakeholder directly involved in the process. In the current ROMACTED Programme<sup>13</sup>, the document foresees the signature of the representatives of the local authorities and the body responsible for monitoring of the Roma strategy. However, the composition of the MoU depends on the specific beneficiary or municipality where it is being implemented.

The decision to implement the ROMACTED process in the municipality is formalised through a written decision of the mayor, or of the local council<sup>14</sup>.

To prepare the content of the document, please refer to the T1 template: Memorandum of Understanding.

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13 In the ROMACTED Programme (2017-2020), the MoU were organised as a tripartite agreement between the Council of Europe, the Ministry/Body responsible for the monitoring and implementation of the Roma strategy and representatives of the local authorities. There are several cases where this document was signed only between the CoE and local authorities (Bosnia and Herzegovina and Kosovo\*), or between the CoE and the implementing partner (Turkey).

14 In some beneficiaries it might be mandatory for such decisions to pass the vote in the local councils in order to be officially formalised. In other cases, this was made as a sole decision of the support team in order to ease the process at later stage. This was especially the case in Albania in early 2018, when the Support team participated in the Councils' sessions in seven municipalities in order to extend the awareness to the local administration and elected representatives to endorse the Local Action Plan for Roma Integration and commit funds in the 4th step of ROMACTED methodology.


## Launching event and signing a Memorandum of Understanding

The launching event is organised to formalise institutional cooperation with the local authorities who will be involved throughout the course of the programme. Furthermore, the event itself is also an opportunity to promote activities and additionally encourage participation in the process.

When organising such events (which can take the form of a formal session, conference or a roundtable discussion) during the implementation of the ROMACTED Programme, special attention has to be paid to the following:

- **Time** – while thinking about choosing a symbolic and important date, it is perhaps more important to consider the availability of the key and leading municipality representatives (city/municipal mayor);
- **Invitees** – all important stakeholders such as leading Roma men and women, representatives of national institutions, donors, media, and local stakeholders need to be included.
- In turn, all invitees must recognise the benefit of being present at the event, whether they are directly or indirectly participating in the implementation. They should also understand the benefits of using existing resources and structures, as well as the potential creation of synergies, aimed at ensuring sustainability of the process;
- **Agenda and mayors/local representatives** – mayors/local representatives will not be able to stay throughout the duration of the conference. Therefore, their involvement should be foreseen earlier in the agenda;
- **Roma representation in the agenda** – in practice of organising programme kick-off conferences within the current ROMACTED Programme, Roma representatives were in most cases either panel moderators or key-note speakers;
- **Media promotion and visibility activities** before and after the event have the role of informing the public about the process that is about to start and will contribute to attractiveness of the event itself.

**To facilitate the preparation of an event, please consult with the T2 Event planning template.**



After the official launching of the programme at the beneficiary level, other small-scale launching events can also take place at the municipal level. These activities could take various forms: round-table discussions, wider-audience presentations, cultural or any other joint activities involving both the Roma community and local authorities.

## Workshop on the Participatory Local Strategic Planning

The workshops are organised either prior or after the launching event. These serve to provide training on ROMACTED methodology to the end-users of the programme: Roma and local administration. Thus, in most cases, the participants are potential Community Action Group members and delegated contact points by the mayor.

**The first workshop has several important objectives:**

**For facilitators:**

- Presenting ROMACTED;
- Encouraging active participation;
- Presenting the way to identify issues and design joint initiatives.

**For representatives<sup>15</sup> of Roma communities and representatives<sup>16</sup> of municipal authorities:**

- Reaching a common understanding of the ROMACTED methodology;
- Explaining the steps in ROMACTED implementation;
- Developing a draft of a joint annual work plan.

*In some beneficiaries, having only Roma youth present (without the participation of older Roma leadership) proved to be a wise move, as then the young people had enough self-confidence to be more active, and to exchange views and opinions.*

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15 You should identify potential Community Action Group members during the initial meetings with the community. They will be invited to the workshop.

16 Contact persons appointed by the city/municipal mayor were at the previous workshops often found amongst the representatives of municipal authorities. Of course, other members of the local administration can attend the workshops if it is so decided at the workshop planning stage.

The purpose of organising additional workshops is to provide more concrete steps in the implementation (detailed planning and directing actions towards joint objectives) and to establish networks among the local stakeholders from other localities.

## **ACT 2** Appointing a Coordinator

At the beginning of the process the city/municipal mayor appoints a person who will be the ROMACTED Programme's contact point and who will be expected to:

- Conduct timely communication with the ROMACTED support team in line with preparation and implementation of activities;
- Establish a Municipal Taskforce Group within the municipality;
- Organise workshops that will be led by a facilitator and/or the focal point;
- Contribute to the organisation and facilitation of the joint meetings (Municipal Taskforce Group meetings) between the Community Action Group and the Institutional Working Group;
- Monitor commitment of the Municipal Taskforce Group against previously reached agreements, actions, etc.;
- Ensure coordination with the facilitator when the implementation of agreed actions requires the participation and contribution of the Community Action Groups or members of the Roma community;
- Provide timely information to the city/municipal mayor or to other decision-makers about the progress of programme implementation and make sure that the requested decisions were taken into consideration or submitted to the local council or other institutions.

This appointment is formalised by the city/municipal mayor in a written form.

**To initiate this activity, please refer to T3 template for appointing a coordinator.**

In some cases, the Director of the Social Services or the EU Local Focal Point (coordinating all EU-funded programmes at local level) could serve as the local coordinator.

It would be advisable that the coordinator is at a higher hierarchical level in the local administration rather than solely a local social inclusion specialist as it might reflect the speed of the implementation in the forthcoming steps.

The specialist could serve as the backstopping person.



### ACT 3 Mapping stakeholders

Mapping stakeholders at all levels will be beneficial for the entire duration of the programme. It will pave the way for building local structures and establishing synergies with local organisations, their projects/programmes and other relevant bodies at beneficiary and international level.

This activity is of particular importance prior to the phase when the implementer will present the programme to all parties that could benefit from the action.

From STEP1 onwards, the list of stakeholders (partners) are regularly updated by the local facilitators. In practice, this involves a **Stakeholders Map**, which is a table including the names of each organisation, its responsibilities and staff contact details.

**In order to complete this activity, please refer to T4 template: Stakeholders Map.**



## ACT 4 Setting up the Institutional Working Group and Municipal Taskforce Group

### What is the Institutional Working Group (IWG)?

The IWG is a group that consists of representatives of concerned municipal departments and other local institutions.

The composition of the IWG differs from case to case. Previous experience shows that the following services are essential stakeholders as they are directly focused on work with the Roma population:


- Centre for social work
- Pre-school and School institutions
- Police
- Employment bureaus
- Local directorates (housing and civil registration)
- Employment and Vocational education and training (VET) offices
- Representatives of culture institutions
- Health institution
- Any other relevant service in the municipality



The consideration and inclusion of the aforementioned services in the IWG might help the process of finding concrete solutions for urgent local problems throughout other steps.

***Important: Selection of municipal services/departments and other important stakeholders depends on the local self-government setup and on the defined priorities in the local Roma communities.***

Throughout the ROMACTED implementation, having formal appointment by the mayor and approval by the local councils appeared to be a better option for establishing the Institutional Working Group. The participation in ROMACTED activities thus becomes “property and responsibility” of the institutions and not



just an expression of their good will. However, it is important to demonstrate flexibility, and estimate whether the formalisation of participation will become an overcomplicated bureaucratic process.

**An example of the IWG membership formalisation document for the attention of the local council is provided in T5 Template.**

### Organising the first working meeting (IWG)

The organisation of the first IWG meeting<sup>17</sup> is an opportunity to finally motivate all participants to contribute to the future work. It is important to take enough time to plan the meeting, as this is an investment in long-term cooperation and action.

#### Before the meeting:

- Delegated contact person convenes the meeting with the IWG members;
- Define the topic of the meeting;
- Define time and venue of the meeting, taking into consideration the real possibility of having all invitees present;
- Prepare materials (i.e. banners and other promotional ROMACTED materials, agenda, list of participants, etc).

#### During the meeting:

Here is a proposal of what the agenda for a ROMACTED meeting could look like:

- Introductory remarks about the programme and the goals of the meeting and future meetings;
- Discussion about current situation, initiatives, plans or strategies;
- Discussion about the capacities of the stakeholders to respond to the community needs;
- Defining the conclusions;
- Participatory planning of future actions (timeline, monitoring, etc).

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17 In the process of establishing IWGs, the Support teams organised round-tables with potential IWG members to present the programme and discuss method of works.

**These meetings are a forum to discuss capacities of the IWG: what kind of training they need (e.g. local budgeting, intercultural training session, project proposal writing, etc.).**

The IWG group meets at least once per month. While the process progresses in STEPs, the intensity of the meetings reduces because the main focus is put on the work of the Municipal Taskforce Group.

### Setting up Municipal Taskforce Group

The Municipal Taskforce Group gathers the IWG and the CAG representatives and sets the ground for joint cooperation and constructive dialog between the two structures.

In some cases, the establishment of the IWG was either directly followed by the setting up of a Municipal Taskforce Group or it did not take place at all. This usually happens when the beneficiaries already had some experience<sup>18</sup> in implementing similar methodologies and where only setting up the MTG group made more sense. In contrast, in situations where the beneficiaries have little or no experience it is advised to postpone this activity to STEP 3, when the IWG and the CAG have established a routine of working independently.

Further information on the structure of the Municipal Taskforce Group appears later in the Handbook.

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18 In Bosnia and Herzegovina, the setting up of the IWGs has little sense since the Municipal Taskforce Groups which were established in the framework of the ROMED2 Programme remained active.



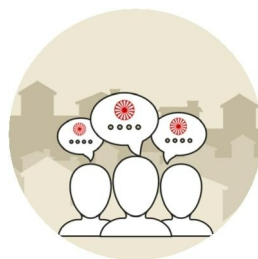
## ACT 5 Supporting CAG setup

### WHAT IS THE COMMUNITY ACTION GROUP?

The CAG is a group working within the local Roma community. It basically consists of representatives of Roma community who want to actively contribute to improving the quality of life of Roma population.

### CHARACTERISTICS OF THE CAG<sup>19</sup>:

- **Local:** CAG members must belong to the local Roma community;
- **Diverse:** CAG members should be men and women of various ages, representing a good sample of the whole community;
- **Team-centred:** All CAG members are equal and should decide together on who will represent them in meetings with the public authorities. There should be no hierarchy in the CAG<sup>20</sup>;
- **Democratic:** Decisions are made in a democratic way, if possible through consensus, after hearing all the opinions expressed within the CAG;
- **Open:** Anyone can join or leave the CAG at any time. However, maintaining a core number of people who commit to follow the process within the CAG is essential;
- **Focused on community progress:** The core aim of the CAG is to improve the wellbeing of the entire community, not just its members;
- **Transparent:** The decisions, actions and achievements of the CAG are communicated to other members of the community;
- **Constructive:** The CAG should seek to formulate constructive proposals for change, taking into account the responsibilities, competences and resources needed for their implementation;



19 The 10 characteristics of the CAG are explained in detail in ROMED2 Guidelines and Resources for National and Local Facilitators (page 51), accessible at: <https://bit.ly/2j5RXjG>. The 11<sup>th</sup> characteristic is included in the ROMACTED Handbook as a lesson learned from the local interventions;

20 Leadership is inevitable in group processes, but rotating leadership could be applied. This is the case in one of the municipalities in Albania, and this process empowers more than a single individual.

- **Based on human rights principles:** All activities of the CAG should be guided by the principle of equality of rights;
- **Recognised:** The CAG needs to be recognised as a partner by the local authority;
- **Gender sensitive:** It is essential for the productivity of the group and identification of the relevant scope of action.

## WHO SHOULD BE A CAG MEMBER?

Individuals or groups interested in being active actors of change and action in their community

There are different categories of Roma men and women within the Roma community who might be interested in participating in the CAG. The group is open to everyone and should not be exclusive. Positive experiences show that it is important to include Roma youth and women in the CAG, since these categories are the most vulnerable and often have low levels of participation.

Representatives of the Roma Civil Society Organisations (CSOs)

This could be an exceptionally sensitive question. By including CSO representatives, the CAG dynamic risks being hijacked by the agenda of the CSO leaders. On the other hand, if these representatives are not invited to join, you may find that they negatively influence the participation of the community members. Therefore, it is important to reach an understanding of what CAG aims to achieve, underlining that it rests on principles of equality and values experience of everyone.

## The basic conditions for participation in the group are:

- Commitment of Roma men and women and regular attendance at meetings;
- Proactive approach (the discussions within the group should go beyond listing often unsolvable problems and emphasise the need for analysing, identifying, and proposing constructive solutions to the priorities). Previous experience has shown that there is no use in bringing together people who lack this proactive attitude, as the meetings then just become an exercise in identify everything that is wrong without generating any constructive solution;
- Readiness to participate in concrete initiatives and actions within their Roma community.

### Mobilisation

The process of **mobilisation** is carried out to identify key individuals within the Roma community who are interested in active participation in the local initiatives. In practice, this often means raising motivation among individuals and groups. Therefore, it is desirable that the mediators, prominent individuals or members of the team, who are working in the Roma community, are good motivators and initiators.

*Before starting the work in a community, it should be highlighted that participation of citizens in development and implementation of initiatives represents a significant level of democracy building.*

## WHAT DOES THE CAG DO – BASIC WORKING PRINCIPLES OF THE CAG?

### CAG is a group that:

- Mobilises local communities to participate in local initiatives;
- Collects information about the situation within the Roma community;
- Collects information about the needs within the Roma community;
- Collects information on current events, urgent problems and topics that should be the focus of all local stakeholders;
- Proposes initiatives, actions and the types of actions;
- Participates in the implementation of activities and initiatives for the welfare of Roma communities;

- Carries out educational activities within the community on different aspects of participation and activism;
- Feeds information to, and cooperates with, the MTG group.

*The CAG is not a group that solves individual problems, but rather brings together Roma men and women to identify problems, propose solutions and take part in the implementation of local initiatives aimed at tackling these problems.*

## WHERE TO HOLD CAG MEETINGS?

The best places to hold these meetings is within the Roma community. Possible places are:

- Premises of the territorial communities, cultural centres or some other premises owned by the local community;
- Premises of a non-governmental organisation.

If this is not feasible, then other recognisable places within the community should be considered.

In a significant number of cases, the CAG formalisation could not happen at the first meeting. This is very often witnessed in places with extremely marginalised communities. Thus, it is necessary to show persistence and a high level of sensitivity during these meetings.


## ACT 6 Trainings for members of the Roma community

After having organised several meetings in the community, the process generates a group of core CAG members. Considering the need to support the group in its evolution, as well as to maintain motivation and build confidence in the ability of CAG members to act together, it is advisable to follow the process of CAG trainings which are explained in the **ROMED2 Guidelines and Resources for National and Local Facilitators**<sup>21</sup>.

Sometimes, Roma community representatives have certain capacities, but require the assistance of external actors to adequately utilise those capacities and direct them towards the realisation of priorities. Thus, facilitators play an

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<sup>21</sup> Available at: <https://bit.ly/2j5RXjG>



important role in covering specific topics<sup>22</sup>. Their role is to strengthen group cohesion and to help the realisation of personal abilities and responsibilities towards the community.

Training sessions are essential for the group's development and are organised with the purpose of addressing concrete issues that affect the life of community members and are considered important by the group. The need to work effectively as a group and to acquire knowledge and skills results from the work on the concrete issues.

## **ACT 7** Assessment of the situation of the community and the opportunities

Before starting with the in-depth community assessment, it is important to identify specific issues to focus on. This requires an **understanding of the Roma community** that the programme targets, such as structural issues and the level of marginalisation faced.

This activity relies mostly on the **ROMED2<sup>23</sup> philosophy** of putting the Roma community at the heart of the process. This emphasis on direct communication with community members contributes to the awareness of their rights and the way in which they can be practiced, creating an understanding that collective demands based on community needs, rather than individual needs can be more successful. This perspective is a critical part of the inclusion process itself.

These kinds of meetings are moderated by facilitators and a focal point. This process is of paramount importance, because it provides information about short and long-term priorities that will later be presented to the IWG members, and further discussed at the joint meetings of the IWG and CAG/Municipal Taskforce Group.

Analysing the community needs assessment, negotiating these at the Municipal Taskforce Group meetings, drafting a Joint Action Plan and a Local Action Plan, as well as including these in the Local Development Plan of the municipality will help identify priorities that will provide the backbone to further steps in the process. Furthermore, the understanding and awareness of priorities will help the advocacy for funding with donors and programmes you have previously identified for synergy building.

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22 Significant work was done on Roma community empowerment through the ROMED programme. More on the curricula and method of work with CAGs is available in ROMED Trainers Handbook, available at <https://bit.ly/2HXVERG>.

23 Available at: <https://bit.ly/2oxu1dU>

At the later steps, working on the identified priorities will often require engagement of experts, who will work on developing community empowerment through different training sessions and seminars.



Not everything is included in formal statistics of an institution; many life stories and problems with which Roma men and women in the settlements live through are simply invisible.

It might be because at the time research was conducted, the Roma population was not informed about the process or was not sufficiently educated to take part in it. If information is limited, then there will be insufficient or inadequate programmes and local strategies developed.

It is therefore important to continuously collect information through meetings, field visits and through collaboration with activists within the Roma communities. Some topics may become relevant due to a crisis and it is important to have a developed communication system in place, providing timely information which allows for immediate joint action with the established groups.

# ASSESSING NEEDS AND PRIORITISING



## ACT 8- ACT 11

The ROMACTED process assists local authorities in identifying the root causes of marginalisation of the local Roma community and assesses what needs to be done to address them. This process, which is carried out in partnership with the CAG, feeds into the Local Action Plan.

### **ACT 8** Deciding on where to intervene

Few words have been already dedicated to the baseline survey in the municipality. Before the process is launched, it needs to be decided - based on objective information - which neighbourhoods will be targeted.

Considering that Roma settlements are often scattered, it could become challenging to choose a single neighbourhood to apply the process. Therefore, the analysis should consider all neighbourhoods within the municipal territory. In some cases, several community groups are formed in a municipality to have equal representation of all settlements at the joint meetings with local authorities. It is essential to bear in mind that not all settlements face common shortcomings, even if they are located within a common municipality.

#### **The information collected is about:**

**Demography** (total population; population at risk of poverty; estimated Roma population; composition of Roma communities; etc.);

**Education** (number of children living in the municipality; attendance in pre-school and elementary school; drop-out rates, etc.);

**Employment** (employment rate of Roma men and women; number of Roma benefitting from welfare; etc);

**Housing and utilities** (the average size of Roma households; illegal housing; etc.);

**Health** (number of families registered with a family doctor; outreach of the medical services; etc.);

**Other** (number of people who left the municipality; number of undocumented people; etc.).

This can be prepared using the T6 ROMACTED Baseline survey template.

## **ACT 9** Assessing the capacity of the municipality

Besides the demographical composition of the municipality, here are some examples of additional research that could be conducted with the aim of collecting information that will give a real account of the steps that should be undertaken:

**Political context** (level of commitment from the authorities; Roma representation in the local council; participation of the municipality in other programmes/projects; etc);

**Funding** (capacity and eligibility of the municipality to apply to different funding schemes);

**Strategic documents** with regards to Roma inclusion (local action plans, municipal decisions and regulations, capital investment plans etc.)

This information will give a clearer picture about the needs of local administrations in adequately responding to the needs of the community. The concrete needs will be discussed during the IWG meetings, but it is of crucial importance to know what kind of priorities could be faced later on.

This activity can be prepared using the **T7 ROMACTED Municipality capacity assessment template**.

## **ACT 10** Carrying out the Community Needs Assessment

The facilitator plays an important role in this activity. They assist the CAG members in elaborating the previously identified priorities without taking over the process. The Community Needs Assessment should lay out the characteristics of the Roma community, its needs, resources and demands. This activity does not only require the assessment of needs, but also identification of barriers that prevent the communities from accessing resources to meet those needs.

For example: Low school attendance of Roma pupils might be due to the lack of public transport in the outskirts of the municipality where Roma settlements are



located. Thus, the CAG could formulate a need to have regular public transport to these localities.

In some beneficiaries, the needs assessment requires the inclusion of other community participatory tools. Some of these tools could be:

- Community Fair accompanied with a large participation of Roma community members;
- Problem tree as a method of mapping out core problems, along with their causes and effects;

Additionally, it is important to make use of secondary data, if available, from local institutions (facilitators collected data from several directorates in the municipality and other local institutions such as the Regional Education Directorate, Employment Office or official data through specific reporting systems).

**This activity can be prepared using the T8 ROMACTED Community Needs Assessment template.**



## ACT 11 Drafting the Community Priorities List

This activity directly follows the previous one. After the needs and barriers have been identified, the facilitator assists the CAG in drafting the Community Priorities List, which consists of a list of concrete actions requested by the community. If needed, the facilitator provides training to the CAG on how to translate identified needs and barriers into a list of priorities.

Translating the Community Needs Assessment into a Community Priorities List is done in three stages:



### STAGE 1

The **CAG** takes stock of the Community Needs Assessment and prioritises these needs: which needs are most important to the community, what potential actions could address these needs, and then selection and prioritisation of the actions to be applied.



### STAGE 2

The **CAG** reviews options and trade-offs: which approaches, and actions are best suited to deal with the identified problems. There are often various options available to meet the same need, and several actions can be integrated to address a combination of needs and barriers.



### STAGE 3

The **CAG** drafts the Community Priorities List, which details what should be done, underlining the means and actors of the action.

During the process, special attention should be paid to the priorities strictly linked to one individual and/or community leader and political parties influencing a priority with the purpose of generating votes.

# ADOPTING A JOINT ACTION PLAN



## ACT 12-15

### ACT 12 Developing and adopting a Joint Action Plan for Roma inclusion

The formation of the **Municipal Taskforce Group (MTG)** usually takes place early in STEP 3. The previous step was used to establish and strengthen the **IWG** and the **CAG**, so that the members of both structures can sit together, discuss needs and priorities, and proceed to the drafting and adoption of the Joint Action Plan (JAP). However, as mentioned previously; the formation of the MTG group can also take place in STEP 1<sup>24</sup>, in localities where similar methodology has been implemented before.

The basis of the ROMACTED methodology is to improve communication between the local administration and Roma community so that earlier identified priorities in the community can be more easily attained. The principles of participatory planning that were presented in previous programmes, such as **ROMED2** and **ROMACT**, are ideal “tools” for development of concrete initiatives and actions.

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24 In Bosnia and Herzegovina and North Macedonia, the formation of MTG groups has taken place earlier in the process. In BiH, most of the groups remained in place after the ROMED2 Programme and thus there was no need to form IWGs. In Support team from North Macedonia went step-by-step and formed the IWGs before establishing MTG groups.

Below there are potential topics that each of these two groups discuss separately:

**IWG:**

- Local strategies
- Projects
- Approach to solving certain urgent problems

**CAG:**

- Presenting Community priorities List
- What approaches are proposed by the Roma community to solve certain problems
- Presenting small-scale initiatives

The meeting should have a clear agenda and the room setting should favour equal dialog between the CAG and the IWG members.

In some cases, this first meeting was used to draw up a **joint annual work plan** of the two groups so that the municipality and all other stakeholders would assume responsibility for the implementation of that action plan.

The following particularities should be presented in the annual action plan:

- ✓ Number of joint meetings that will be organised;
- ✓ Number of initiatives that will be planned and implemented;
- ✓ Other projects and initiatives that will be realised within the municipality;
- ✓ Activities to improve or draft new local strategies or public policies.

The Municipal Taskforce Group drafts the **Joint Action Plan** based on the Community Priorities List and the **Municipality Capacity Assessment** and will include three kinds of concrete actions:

- **Short-term actions**, which can be implemented by the Roma community itself;
- **Short and medium-term actions**, which can be implemented by the municipality using resources from its ordinary budget;

- **Longer term activities**<sup>25</sup>, which will need to be included in the (mainstream) Local Development Plan of the municipality and might require domestic or EU funding.

When the set of actions is decided, the plan also needs to encompass the potentials barriers and list key-persons, resources, responsibilities and a timeframe for implementing these actions.



**Once the Joint Plan of Action is agreed by the Municipal Taskforce Group, it is submitted to approval by the mayor and/or the local council**<sup>26</sup>.

#### **To recap:**

- Discussing the problems (not only listing them, but rather a process of deciding on actions);
- Selecting priorities for action (with realistically available resources);
- Discussing efficient mode of action (feasible, attainable, etc);
- Planning human and financial resources;
- Drafting an action plan and time schedule (when, where, by when...)

25 It is important that CAG members are already prepared in this step and to articulate the priority actions they have previously identified, as the IWG representatives might wish to discard some activities for unavailability of resources or other factors. In some cases, it is essential that meetings on integration of the action plan in the budgeting process, annual and mid-term planning are anticipated at the MTG meetings, since in some cases municipalities decide on a three-year term about the ceilings of local programmes' expenditures.

26 In some beneficiaries, the submission of the LAP for Council's approval could be an overcomplicated process and could pose additional obstacles to the process.

## **ACT 13** Implementing short and medium-term actions

Actions, which do not require funding or can be implemented using existing resources, can be implemented by the Roma community itself (for example, cleaning roads, clearing a space for a playground) or by the municipality with its existing resources (for example, adding a bus stop near the Roma neighbourhood; removing kindergarten attendance fees for the poorest families).

The implementation of these small-scale initiatives gives substantial visibility to the ROMACTED process and its first tangible results. It impacts the motivation among the community members and demonstrates that positive change can occur if there is joint action.

## **ACT 14** Integrating Roma issues in the Local Development Plan / Strategy

When the **Joint Action Plan** or revised Action Plan for Roma integration is adopted by the mayor and the local council, its content needs to be further integrated into the **Local Development Plan of the municipality**. In many areas local authorities already adopt plans and/or strategies for Roma inclusion, as well as plans for the local development in general.

Thus, the role of the Municipal Taskforce Group is to find a way of integrating actions from the **Joint Action Plan** into the **Local Development Plan** of the municipality. In most cases the plan adopted by MTG contains more specific proposals and could be seen as a contribution towards implementing more general previous commitments.

As it was mentioned before, it is essential to avoid creating parallel strategies/structures for the Roma community, which would remain isolated from the mainstream plans of the respective municipality.

## ACT 15 Preparing concrete actions

The municipality is responsible for translating the content of the Joint Action Plan, including elements of the Local Development Plan, into the **concrete actions**.

Preparing an action is not a simple technical task, especially when it has an impact on people's lives. When the municipal administration is preparing an action, it is essential that the CAG is consulted to ensure that the action responds to the needs identified earlier in the process. Once the consensus is reached between the municipality and the CAG, the detailed terms of reference can be finalised.

**The facilitator and/or focal point also play an important role in this activity by moderating the discussion between the municipal administration and the CAG.**

All the presented steps are a means of formalising the **principles of participation in the decision-making processes**. Citizens can use two mechanisms offered to us by the participatory democracy:

- Developing actions, initiatives and projects;
- Participation in the processes of designing local strategies and public policies.

Both mechanisms require time and lobbying. It is recommended to spend at least one year of action in developing joint initiatives. The stakeholders will get to know each other during that year, and will develop good and positive relations and cooperation. Only then could we start the second mechanism through different lobbying processes and that is development of long-term strategies and initiatives.





# FUNDING AND PROJECT IMPLEMENTATION

Step

04

## ACT 16-18

The last step of the ROMACTED methodology is carried out through the deployment and creation of resources for funding of projects and initiatives, their implementation, establishment of cooperation with other donors and synchronisation with existing projects.

The assessment of the municipal capacities and resources was described in the previous activities, allowing for the ability to plan or to ensure the funds for implementation of initiatives and projects that are jointly planned based on the needs of Roma community. Generally speaking, the majority of countries have several sources of funding related to the local level:

- Funds of the municipality
- Funds of the central government
- EU IPA (Instrument for Pre-Accession Assistance) funds
- Funds of other donors/ organisations
- Funds from the solidarity actions

**The ROMACTED Programme foresees additional support in the form of experts who can provide assistance in project proposal writing and fundraising through different activities at the local level.**

## ACT 16 Funding actions

Many actions included in the Joint Action Plan agreed by the Municipal Taskforce Group will be implemented using local resources. However, some (longer-term) actions and projects, in particular those included in the (mainstream) Local Development Plan, will require external funding - National or EU IPA funding.

Unfortunately, municipalities often lack the capacity and knowledge to access EU funds and to use them properly. Accessing and using IPA funding can be a multi-faceted challenge as the municipality needs:

- to be aware of the National Roma Integration Strategy;
- to be informed of calls for proposals published by national authorities;
- to match calls with actions included in the Local Development Plan;
- to know how to apply for funding;
- to fulfil the administrative requirements linked to the funding;
- to be able to implement the actions which eventually receive funding.

The **facilitator** assists the municipality in being informed about funding opportunities and in identifying experts, but he/she must also keep the CAG informed of planned applications and their content.

## **ACT 17** Implementing actions

The implementation of actions to which the CAG has contributed is a significant moment in the ROMACTED process.

It is important that the municipality:

- continues – with the assistance of the facilitator - to inform the CAG about the implementation of the actions;
- involves the whole Roma community in the implementation of the actions. Involving the Roma community could mean inviting them to commit time to the action, informing them on how to benefit and how to use the new services offered to them, etc.

## **ACT 18** Monitoring and evaluating the implementation of actions with the CAG

Once actions are financed and launched, it is essential to monitor and assess progress in their implementation. It will help the municipal administration



and the CAG to identify problems in the implementation and thus make the necessary changes to the design of the action.

For each action, the concerned municipal department or institution and the CAG need to decide what will be monitored and how, who will be in charge of collecting the information, and who will be informed.

Including the CAG in all these activities allows future beneficiaries of the new services to understand how actions implemented can lead to a better situation and highlights the immediate improvements being produced. Furthermore, the involvement of the CAG can lead to higher accountability and ownership by the Roma community.

## List of Templates:

**T1 template: Memorandum of Understanding**

**T2 template: Event planning**

**T3 template: Appointing a coordinator**

**T4 template: Stakeholders Map**

**T5 template: Formalisation of membership in the Institutional Working Group**

**T6 template: Baseline survey**

**T7 template: Municipality Capacity Assessment**

**T8 template: Community Needs Assessment**

The templates are available for download within »Resources« section of the ROMACTED website:

<http://coe-romacted.org/resources>.

You can also access the website by scanning the QR code below with your smartphone.



Our website is mobile friendly.

A QR reader application is needed to detect the QR code.

You can download a QR reader application to your smartphone through a mobile application store.

















# ROMA ACTED

*Promoting good governance  
and Roma empowerment  
at local level*

EN

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