

Manual for operational impact and assessment coaching

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# 1. Introduction

In the spring of 2023, the Finnish National Youth Council Allianssi, Sivis Study Centre and the Youth Work Centre of Expertise Kentauri jointly implemented impact coaching for organisational operators. The coaching was carried out as part of the "Evaluation and monitoring of the activities of youth organisations in the Nordics - what could be learned among the Nordic countries?" project, which has been implemented in 2021–2023 with funding from the Nordic Council of Ministers.

One of the objectives of the Finnish National Youth Council Allianssi and the Youth Work Centre of Expertise Kentauri in general is to increase the competence in impact of the youth sector, that is, the ability of the operators in the field to measure, assess and communicate the impact of their own work. Thus, impact coaching was an excellent fit for the basic tasks of both organisations. For this reason, it was easy to start developing the concept. Project funding has enabled the development work, but it has been clear from the beginning that it is not "just a project", but long-term development work, to which project funding has provided the initial incentive.

In this manual, you will find the starting points and objectives of the impact coaching. The manual describes the process as a whole, and it allows the impact coaching to be carried out, for example, by an umbrella organisation for member organisations. We hope that the model would make it easier to increase expertise related to impacting and its assessment in the Finnish and Nordic youth organisation sector.

Wishing you impactful reading moments,

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# 2. What is impact coaching?

Impact coaching arose from the identified need to develop the assessment expertise of youth sector organisations. In 2022, a study was carried out as part of the "Evaluation and monitoring of the activities of youth organisations in the Nordics - what could be learned among the Nordic countries?" project, which identified the challenges of the organisation sector in developing impact assessment. According to the report, the organisations recognise the importance and need for assessment both from the perspective of the development of the organisation and from the perspective of societal impact. However, organisations do not have enough time to carry out assessment and create plans. Assessment is often trampled on by more acute work tasks. One of the starting points of the impact coaching has been the desire to provide the participants with the time and place to develop the assessment of their own organisation. The aim has been to stop for a moment and thereby find the time to carry out the assessment.

On the other hand, organisations may not always have sufficient expertise to assess their own activities. The need for competence development has been noticed, for example, in the operations of the Sivis Study Centre, where organisations have long been trained in impacting and assessment.

We identified four different perspectives related to the need to increase impact competence:

- 1. Social point of view: is the important work we do visible, is it sufficiently appreciated and is it useful to society?
- 2. Financier's point of view: is the work we do cost-effective and does it produce results that are worth financing?
- 3. Perspective of one's own work: are we doing the right things, is there demand for what we do and will our actions lead to the desired results?
- 4. Young person's point of view: what does the young person get from the activity, does the activity increase the well-being of young people?

We wanted to implement the coaching by setting an example, so that the participants were openly told how the effectiveness and successfulness of this coaching is assessed. Objectives were defined for the coaching and communicated to the participants at different stages.

The objectives of the impact coaching were defined as follows:

- The participant is able to set goals and indicators for the operations of their own organisation
- 2. The participant is able to build an assessment process for their own organisation
- 3. The participant is able to describe and communicate the impact of their own activities
- 4. The participant is able to utilise assessment skills in funding applications
- 5. The participant is able to select and use concrete tools to carry out and develop the assessment of their organisation

In addition, initial and final surveys were carried out in the coaching, which were used to map the competence level of the participants. Feedback was also actively requested after the activities. More information on these surveys will be provided later in this manual.

Already at the initial stage, it was stated that the organisation should receive concrete help and benefits from the coaching in order to be able to develop their own organisation. An assessment plan was identified as a tool for developing the organisation's daily operations, and the coaching was built around developing the plan. This was also influenced by the fact that hardly any assessment plans have been made in the organisation sector. The assessment plan was provided a broad framework, and different existing models were presented to the participants. However, each participating organisation had the freedom to implement the plan in the desired format and to target it in the way they wanted. In this way, it was possible to take into account the differences between the organisations and the different starting points in the assessment work.

# 3. Implementation of coaching

# Coaching schedule



# Application process and selection of participants

The application process for the pilot coaching was carried out in early 2023. In January–February, participants filled out an application asking them to assess the current state of their organisation on a scale of 1–4 (1 = strongly disagree, 2 = partially disagree, 3 = partially agree, 4 = fully agree) through three statements:

- We are good at setting goals and finding indicators.
- We manage the planning, coordination and management of assessment well.
- We know how to communicate the impacts of our operations.

In addition, the participants were asked to briefly answer the questions "Why do you want to be part of the programme?" and "Why would it benefit your organisation to be part of the programme?" The applicants were also asked to state how many people from their organisation would participate in the coaching if they were selected. The participation of two people was recommended in the call for applications.

Despite the short application period, 22 applications were received. Of these, ten organisations were selected. The maximum number of ten had already been agreed upon earlier, so that the coaching could be carried out in high quality, and so that the coaches could also provide organisation-specific support.

The selection of participants emphasised the national nature of the organisations, the scope of operations and the starting level. Organisations that had not yet carried out assessment were not selected for the pilot round.

The applicants were informed of the schedules of joint coaching events already at the application stage and told that the coaching requires a commitment to the schedule, such as to the coaching days organised in Helsinki and Tampere. This kind of coaching is a significant resourcing for the organisation. We believe that the provision of schedules already at the application stage influenced how well the selected participants committed to the coaching.

# First coaching day

The first coaching day was organised as an on-site, all-day event. Remote participation was not possible. This forced the participants to stop for a day and really concentrate on the topics of the coaching.

### Two objectives were set for the day:

- The participant is able to set goals and indicators for the operations of their own organisation
- The participant is able to build an assessment process for their own organisation

#### Structure and contents of the day:

| 9.30 a.m.–10 a.m.   | Morning coffee and breakfast with informal discussion   |
|---------------------|---|
| 10 a.m.–10.30 a.m.  | Introduction round where everyone tells who they are and where they come from, as well as what they want from the coaching. Introducing the organisers and the coaches' backgrounds. Going through the programme of the day and the principles of a safe space. |
| 10.30 a.m.–11 a.m.  | Joint discussion on what impacting is, why the coaching is organised and what terms we use.  Presentation of the coaching package: objectives,  |
| 11 a.m.–12 p.m.     | Lecture section: Objectives and metrics: what they are, how objectives are defined and how they can be measured.  |
| 12 p.m.–1 p.m.      | Lunch break   |
| 1 p.m2.20 p.m.      | Presentation of the assessment process and the assessment plan  |
| 2.20 p.m.–2.30 p.m. | Coffee break  |
| 2.30 p.m.–3 p.m.    | Setting the participants' own goals, general discussion about coaching and answers to questions as well as collecting feedback on the first coaching day.   |

During the day, the participants were also reminded of confidentiality, one of the coaching's guiding principles. Matters discussed in the coaching could be discussed at a general level, but not on an individual- or organisation-specific level. It was also noted that the assessment plans created by the organisations during the coaching were intended only for the group in question to see.

During the day, the participants filled out a start-up survey, in which the aim was to map the participants' impact competence at the beginning of the coaching. The participants answered 11 questions evaluating their own competence on a scale of "I have no competence / have very little competence", "I have some competence", "I have decent competence", "I am very competent" and "I do not know."

#### The evaluation areas of the survey were:

- 1. Impacting as a social phenomenon
- 2. Concepts of impacting
- 3. Setting goals
- 4. Selection and use of meters
- 5. Managing impact work
- 6. Communication about impacting
- 7. Collecting assessment data
- 8. Analysis of assessment data
- 9. Utilisation of assessment data
- 10. Assessment coordination and management
- 11. Systematic assessment

Already after the first day, it was found that the coaching will respond to the existing need in a meaningful way. The participants were active, and there were no major differences in the starting level of the organisations. The participants expressed a desire for a networking event, which was realised in the form of an after-work event organised in connection with the last coaching day.

# Online meeting

The online meeting was carried out as a two-hour remote meeting approximately halfway through the coaching.

#### The objectives of the online meeting were:

- The participant is able to describe and communicate the impact of their own activities
- The participant is able to utilise assessment skills in funding applications

### Structure and content of the online meeting:

| 1 p.m1.15 p.m.         | Start and icebreaker, presentation of the event's programme  |
|------------------------|--|
| 1.15 p.m.–2.05<br>p.m. | Lecture and discussion: Communication about impacting  Introduction  Small group discussions: Which of your activities / results could be communicated more?  Recap of group discussions |
| 2.05 p.m2.10 p.m.      | Break  |
| 2.10 p.m2.50 p.m.      | Lecture: Assessment in funding applications  |
| 2.50 p.m.–3 p.m.       | Closing words and going through the next steps of coaching   |

Feedback on the online meeting was collected during the event using Zoom's survey tool. Participants were asked to respond to two statements: "I got new information" and "I can use the information I got in my work" on a scale of "a lot", "some" and "not at all".

### **Q&A** session

The Q&A session of the coaching was carried out as an online session during the daytime. The session was a voluntary part of the coaching, but even so, participants from four different organisations attended. In addition, two coaches were present to discuss and facilitate the event. The topics of the session's discussion had not been agreed in advance, and there was plenty of time for asking questions and discussing matters together.

The discussion went smoothly, and the topics were brought up by the participants themselves. We discussed, for example, data analysis and heard about the development work of one of the participating organisations.

From the coaches' point of view, the Q&A session was easy to implement and arrange. In practice, this did not require preparation in advance, apart from creating a link to the video call and providing information, but still offered participants the opportunity to ask questions and hear the experiences of others.

# Individual coaching

Individual coaching for organisations was carried out over a period of three weeks. Each coach had three or four organisations with whom a two-hour slot for discussions was booked. In practice, the discussions took 1–2 hours, depending on the situation of the organisation. In practice, the participating organisations were at very different stages in the development of the assessment, some at the very beginning and some at a more advanced stage. This was also evident in the individual coaching sessions.

The coaches read the version of the assessment plan in advance and highlighted points that needed refinements, extension, changes, etc. Attention was paid to the following:

- Are the objectives, measures and indicators outlined correctly?
- Is the process fully described?
- Are responsibilities defined in concrete terms?
- Has the plan been limited to fit the coaching?

The aim of the coaching was to highlight both the successes of the organisation and their areas of development. In addition, the aim was to ensure that the organisation had concrete next steps to develop a plan for the next stage of coaching.

If the participating organisation so wanted or had advanced well in making the plan, the individual coaching sessions could also discuss certain questions and consider the challenges related to assessment on a more general level instead of carefully reviewing the assessment plan.

The individual coaching sessions received good feedback from the participants, and it was found that it is worth keeping them as part of the coaching in the future. Individual coaching takes up quite a lot of resources for both coaches and participants, but on the other hand, the benefits are great. The coaches were able to prepare more for some meetings, less for others, depending on the situation of the participants. On the other hand, the discussions could meander from the assessment plan to the development of operations and, for example, to funding applications.

### Peer feedback

As part of the coaching, the participating organisations worked on their own organisation's assessment plan and commented on the plans of the other participants. Guidance on creating the assessment plan was provided on the first coaching day.

Schedule of working on the assessment plan:

- Returning the first version by email to the coach 3 March
- Individual coaching sessions in weeks 11–13 (2 hrs / organisation)
- Returning the second version to the Slack platform 21 April
- Commenting on the assessment plan of another organisation on the Slack platform by 28 April
- Returning the third (and final) version to the Slack platform 5 May
- Presentation of the organisation's own assessment plan and reflection on what has been learned in the coaching day in Tampere on 25 May

The timetable for peer feedback and working on the organisation's own assessment plan was tight, which was acknowledged already at the planning stage of the coaching.

# Last coaching day

The closing day was arranged as an on-site coaching day.

### The goals for the last coaching day were:

- The participant can communicate about the assessment work of their own organisation
- The participant is able to reflect on the assessment work of their own organisation and to consider its development independently

#### Structure and contents of the last day:

| 9.30 a.m.–10 a.m.       | Morning coffee  |
|-------------------------|---|
| 10 a.m.–10.15 a.m.      | Joint start, introductions once again and the day's programme   |
| 10.15 a.m.–12 p.m.      | Presentations of the organisation's assessments plans, 15 minutes per organisation  |
| 11.30 a.m12.30<br>p.m.  | Lunch   |
| 12.30 p.m.–1.45<br>p.m. | Presentation continue   |
| 1.30 p.m.–1.45 p.m      | Coffee break  |
| 2.30 p.m3 p.m.          | Oral reflection on the coaching as a whole, answering the coaching feedback survey and the competence development survey (cf. first day survey) |

At the end of the last coaching day, an informal after-work event was organised for those who wanted to attend, and a location was announced where the discussion could be continued. There was no organised programme. More than half of the participants attended this informal meeting.

# **Evaluation of the coaching**

The evaluation of the coaching was carried out in the following ways:

- On the first day of coaching:
  - Start-up survey for the participants: how they feel about their own impact competence at the beginning of the coaching (multiple choice survey, more information about the questions in section 3)
  - First day feedback inquiry, electronic survey at the end of the day. The
    questions concerned practical arrangements and the participants'
    experience of the usefulness of the topics covered during the day.

- Zoom polls at the end of the online meeting. Two questions: 1) I learned new information during the event 2) I can use the new information in my own work
- On the last day of coaching:
  - Closing survey for the participants to illustrate the development of competence at the end of the coaching, same survey as on the first day
  - Feedback survey on the coaching as a whole, providing feedback on the last coaching day, coaching in general, individual coaching, peer feedback and the processing of the assessment plan
  - Reflection discussion of the participants on the success of the coaching and the development of their own skills
- Coaches' meeting, reflection on the coaching package

# 4. Resourcing

### Personnel resources

### **Participating organisations**

It was requested that two people from the participating organisations would attend the coaching. This was aimed at increasing peer learning, sharing of information and enabling organisations to start their development work efficiently. The participating organisations considered this a good solution. The participation of two people meant that there were more perspectives, that there was more peer pressure in the development work and that things spread more widely within the organisation.

The participants attended the on-site events for two full working days. In addition, there was an online lecture (2 hours), individual coaching (1–2 hours) and an optional Q&A session (1 hour). In total, these took about three working days per participant, that is, six working days per organisation. In addition, writing the application, making the assessment plan and giving peer feedback took the participants' time.

### **Organisers**

The work time spent by the coaches (3 persons) was divided as follows:

- Planning meeting: two working days
- Implementation of coaching (working with the participants): four working days
- Coaches' summary meeting: one working day
- Other working time during the coaching (incl. coaches' meetings, readings of plans, preparation for lectures, making of slides, etc.):
  - three working days from two coaches
  - four working days from one coach (incl. communication to participants and overall coordination)

In total, the impact coaching took about two weeks of working time per coach from the organising organisations. The working time spent can be considered reasonable in relation to the importance of coaching and the verified increase in competence.

It is also noteworthy that this time was spent on creating a coaching pilot. The next round will require less working time.

### Coaches' competence

Implementing impact coaching with this model requires skills related to assessment and impacting from the coaches. All three coaches had their own experience of working in the organisational sector, and all were familiar with impact assessment either through their previous jobs or as part of their studies. The coaches also had experience in organising events and training as well as facilitating events, both live and online.

One of the coaches was responsible for all communication and coordination of the coaching. The centralisation of communication was perceived as a very functional solution in the coach team, and the communication was also praised by the participants.

### **Financial resources**

In the pilot coaching, rental premises owned partly by external parties were used, which entailed costs. In addition, the planning meeting was held over two days, which entailed travel and accommodation costs. The participants were offered morning and afternoon coffee during the on-site coaching days, but they had to pay for lunch themselves.

Working time spent on coaching has not been counted towards financial resources, although it certainly constitutes a financial resource.

The participation fee for the coaching was EUR 100 per organisation. The purpose of the payment was, above all, to commit the participants to the coaching programme, rather than to cover the costs.

Both free and paid tools were used as IT resources. A free version of the Slack chat platform and Google tools were used in the coaching. The paid tools included Webropol and Zoom, which were already used by the organising organisations, so no additional costs were incurred for the use of these.

The coaching can be carried out with very different financial resources. The pilot project had a little more funding available than usual. On the other hand, in the future, the implementation of coaching does not require, for example, an equally extensive planning meeting. On the other hand, it was considered good that enough time was reserved for the coaches' meetings and that the meetings (a total of three days) focused only on the planning and conceptualisation of impact coaching. Although this caused costs, it was a financially sensible solution from the point of view of the use of working time.

# Communication to participants during coaching

Three different channels were used for communication: e-mail. Slack and Drive.

All instructions and information about the coaching process were sent to the participants via e-mail. The aim was to centralise the e-mails in such a way that one message was always compiled as comprehensively as possible with information about upcoming appointments and tasks, so that the number of e-mails would remain reasonable.

The Slack platform was used by the participants to share their own materials, have peer-to-peer discussions and comment on the assessment plans. Channels were created in Slack for peer feedback where the discussions took place. The coaches had access to all channels. At the end of the coaching, the coaches sent short feedback on the coaching through Slack to the participants they had been coaching.

All the coaching material was collected in the shared Drive folder, which included the coaches' slideshows, additional materials and the participants' final day presentation materials.

# 5. Reflection on the pilot

# Competence of the participants

The participants filled out the competency questionnaire with the same questions both at the beginning and at the end of the coaching. Scale of 1–4.

In the initial survey, the participants rated as their best skills

- setting goals (2.7)
- collecting assessment data (2.6)
- impacting as a social phenomenon (2.5)

The following points were evaluated as the weakest skills:

- selection and use of meters (2.2)
- managing impact work (2.2)
- communication about impacting (2.2)
- assessment coordination and management (2.2)

Based on the assessment of the closing survey, it can be observed that the participants felt that their own competence had increased at all points to be evaluated.

In the final survey, the participants still rated as their best skills

- setting goals (3.3)
- collecting assessment data (3.2)
- impacting as a social phenomenon (3.1)

Competence in managing impact work was the weakest point (2.8), but even there, competence had increased during the coaching.

Some of the participants found it difficult to evaluate their own competence. In the initial survey, one participant wondered whether it was actually a matter of competence or a matter of what one spends their working time for and what activities one focuses on. In the closing survey, many participants stated that it was difficult to assess their own competence immediately after the coaching.

"It is very difficult to assess one's own competence, earlier and especially now, when it seems that the ideas have just started to flow."

It takes time to digest the content of the coaching, as well as to put things into practice, so the increase in one's own competence may only be seen later.

The participants also noted that, as there may still be a lot of development in terms of the themes of impacting and assessment, it is not possible to state that one's own skills are excellent at this point, even if the skills increased a lot with the coaching.

"There has been a lot of new information and its implementation will, of course, take its time, but there were good tips about what to focus on and what kind of training is needed in the future with the operators in the sector."

# What was successful? These points should be adhered to in the following coaching sessions:

- The application process was a significant factor in the strong commitment of the participants, so it is worth holding on to.
- There was enough coaching content. There is no point in fitting in more content in the coaching. There are differences in the participants' starting levels, which should be taken into account when building the coaching content.
- The coaching schedule worked well, even though it was a little tight. It helped that the participants were aware of the schedules from the very beginning. They already knew at the application stage what they were committing to and what would happen at which stage. If the coaching had continued beyond the spring season to autumn, the coaching structure could have easily suffered.
- Good communication was the key to success.
- The on-site days worked well and were enjoyed by the participants. The length of the coaching days (from 10 a.m. to 3 p.m.) was functional and also made it possible to travel to another location during the same day.
- The division of work between the coaches was clear, which made the work
  easier. It was also good that entire days were set aside for planning, which
  we felt were more effective than numerous shorter planning meetings.

# What needs development? The following points could be considered in the future:

- The content volume of the first day was huge. This could also be divided into two on-site days, which would, of course, increase the number of on-site days and thus the costs.
- The content of the coaching was considered good, but more help was needed to analyse the information. In the future, it could be considered whether the coaching programme could be supplemented, for example, with coaching webinars open to everyone, etc.
- Slack worked well as a communication channel. However, there was very little discussion among the participants. In the future, it could be considered whether there would be an even greater need for such sharing and how it could be supported and facilitated.
- The participant feedback revealed that there could be more talk about the working time required by the coaching. In addition to the schedules, in the future it is also good to discuss the fact that making an assessment plan for one's organisation and giving peer feedback also requires time, and that the participants themselves must schedule this in their own calendar.
- Individual coaching was generally considered a good and functional model. In
  the future, it is good to explain in more detail that the organisation's own
  preparation for the meeting will increase the benefits of the meeting. For
  example, the participants could send their questions to their own coach in
  advance.
- Peer feedback was also considered good. Some of the participants wished that the feedback could have been given verbally. In the future, it is therefore a good idea to encourage the participants so that, if they so wish, they can jointly agree, for example, on giving each other feedback in an online meeting. In addition, some participants wished that the feedback had been given in groups of three organisations. In this way, everyone would have received two feedbacks, but on the other hand, this would also increase the work of the participating organisations.

# 6. Conclusion

The coaching on the operations' impact and its assessment can be considered a successful concept by all indicators, and the development will be continued in the organising organisations after the pilot phase. The next coaching will start in autumn 2023. The implementation of the coaching has taken time, but it has been an effective way to increase competence and assessment in organisations. This kind of coaching concept is well suited for the basic activities of an umbrella organisation, a centre of expertise and a study centre. Using a similar concept, coaching can also be organised on other themes.

We would like to thank all the organisers of the coaching as well as the organisations who participated in the pilot coaching!

# **About this publication**

# Manual for operational impact and assessment coaching

How was competence within the organisations increased in four months?

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TemaNord 2023:535

ISBN 978-92-893-7673-0 (PDF) ISBN 978-92-893-7674-7 (ONLINE) http://dx.doi.org/10.6027/temanord2023-535

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Cover photo: Marissa Grootes / Unsplash

Published: 11/10/2023

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