

**Caribbean Natural Resources Institute (CANARI)**

**Report of Training Workshop  
Organisational Development for Sustainable Development Professionals**

**Module 2  
26<sup>th</sup> – 30<sup>th</sup> September 2005  
Flamboyant Hotel, St. George's, Grenada**

The Caribbean Natural Resources Institute (CANARI) held the second 5 day module of the training workshop “*Organisational Development for Sustainable Development Professionals*” in Grenada from Monday 26<sup>th</sup> to Friday 30<sup>th</sup> September 2005. The first module was held in Trinidad from Monday 25<sup>th</sup> to Friday 29<sup>th</sup> April 2005

The need for this training was identified through CANARI’s experience in implementing a HIVOS-EC funded project: “*Improved governance through civil society involvement in natural resource management in the Caribbean.*” This reinforced other CANARI findings that there is a continuing need for capacity building in NGOs and CBOs in the Caribbean, even in organisations identified as lead change agents.

For the 2005 CANARI annual “flagship” training workshop, it was therefore decided to focus on organisational development. The workshop comprised two 5-day training modules designed to address the need to build capacity in key areas of organisational development, such as strategic planning, financial management, change management, and project management. The design of the workshop drew on recent work of the Institute in assessing capacity and developing effective institutional arrangements, as well as on the research conducted as part of the project “*Improving governance through civil society involvement in natural resource management in the Caribbean*” funded by the European Commission with support from the Humanist Institute for Co-operation with Developing Countries (Hivos) based in the Netherlands.

Organisations were invited to send two participants, ideally a Board and a staff member. The rationale for this was two-fold: firstly that it is difficult for a single individual to effect change within an organisation and, secondly, that a number of formerly-strong civil society organisations had experienced or were experiencing crises as a result of the departure of a key manager.

The main challenge in designing the workshop was to provide participants with practical methods and tools that they could apply in the development of their own organisations while at the same time encouraging them to engage in participatory processes for organisational development which would necessarily require the involvement of all members of the organisation. Consequently, an important focus of the workshop was on the role of the participants as change agents.

To allow for the practical application and testing of learning from Module 1 within participants’ organisations, the workshop was designed as two modules, with the

second being delivered six months after the first. Module 2 therefore encompassed feedback on the application of the tools and discussion of challenges and lessons learnt, and focused on the priority capacity building areas identified by participants during Module 1.

Sarah McIntosh (Managing Partner) and Nicole Leotaud (Staff Partner) facilitated the workshop. Polin Sankar-Persad (Programme Assistant) provided logistical support. Module 2 focused on topics identified by the participants in Module 1 to be priority needs for their organisations. Other topics identified by participants (e.g. financial management, public relations, networking) will be addressed by CANARI through other interventions. The topics selected for Module 2 were:

- Leadership, succession planning, team building
- Board development and management
- Volunteer management
- Project cycle management

### **Funding**

Full or partial scholarships for attending the workshop were awarded to the participants through the Hivos-EC project and the Commonwealth Foundation.

### **Participants**

Sixteen participants representing nine civil society organisations from the insular Caribbean attended the second module of the workshop. Two organisations were only represented by one person. Seven new participants who had not attended the first module took part in the second module. They took the place of seven participants who attended the first module but could not attend the second module (due to unavailability and transfer out of the organisation). One of the new participants represented an organisation, Agency for Rural Transformation from Grenada (ART), which had not been represented at the first module. No-one from the Anguilla National Trust (ANT) was able to attend the second module.

The full list of participants and their organisations is attached as Appendix 1. The organisations participating were:

1. Agency for Rural Transformation (ART) – Grenada
2. Environmental Awareness Group (EAG) – Antigua
3. Gilbert Agricultural and Rural Development Centre (GARD) – Barbuda
4. Jamaica Conservation & Development Trust (JCDDT) – Jamaica
5. Nature Seekers (NS) – Trinidad
6. Negril Coral Reef Preservation Society (NCRPS) – Jamaica
7. Nevis Historical and Conservation Society (NHCS) - Nevis
8. St. Christopher Heritage Society (SCHS) – St. Kitts
9. Talvern Water Catchment Group (TWCG) – St. Lucia

Steve Bass from the Mac Arthur Foundation observed on the last day of the workshop.

## **Objectives**

The overall workshop objectives were:

- To introduce participants to methods and tools for leading a process of organisational development in a participatory manner.
- To enable participants to start applying the methods and tools in the development of their organisations.
- To introduce and model facilitation and participatory processes which participants could use in their organisations.
- To foster networking between participants and exchange of experiences and approaches.

## **Key Outcomes**

- Module 2 of the workshop was again highly successful in engaging participants in a participatory process of analysing tools and approaches for organisational development and in modelling a range of facilitation techniques. The participatory facilitation style was again strongly commended in the participants' evaluations and some participants indicated that they would be modelling the facilitation style and workshop content in capacity building they would lead for their organisations.
- Module 2 continued to build on networking and sharing of experiences among participant organisations. After Module 1 evidence of participants' continued networking was seen, for example through joint strategic planning conducted between NHCS and SCHS and GARD asking NHCS to offer technical assistance in their strategic planning.
- In the feedback session at the start of Module 2 there was strong evidence of the significant impact the training in Module 1 had had on the participants and how they were able to apply it to effecting development in their organisations over the six months interim period.
- During Module 2 participants shared their skills and knowledge with each other through the formal sessions as well as the informal afternoon 'clinics'. Such opportunities for sharing were highly valued by the participants.
- Participants expressed their strong satisfaction with the quality and relevance of the training provided by CANARI and called for a continuation and expansion of CANARI's training.

## **Methods**

The workshop was highly interactive with extensive sharing of participants' experiences and knowledge. A wide variety of facilitation techniques was used – whole group

discussion, brainstorming, nominal group technique, small group work, pair work, individual reflection, panel discussion, guided facilitation, short lecture, round robin. Each day, different participants volunteered for the role of rapporteur, chair and 'listener' and their feedback is included in this report. In addition, optional afternoon 'clinics' were scheduled after the formal sessions, where participants volunteered to play the role of chair, 'doctors' and 'patients' in informal discussions on key issues in organisational development.

## **Sessions**

The workshop agenda distributed to the participants is attached as Appendix 2. Handouts are attached in Appendix 3. Slide presentations are attached as Appendix 4.

The sessions and optional clinics covered were:

Session 1: Welcome, introductions, Module 1 feedback, participant expectations

Session 2: Overview of course & allocation of tasks

Session 3: Leadership: qualities of an effective leader

Session 4: Leadership in the Caribbean NGO context

Session 5: Succession planning

Session 6: Benefits and qualities of an effective team

**"Clinic" – Strategic planning**

Session 7: Team development and team building

Session 8: Board roles & responsibilities

Session 9: Board development

Session 10: Volunteers and what motivates them

Session 11: Volunteer planning and management

**Session 12: Field trip & group dinner**

Session 13: Introduction to Project Cycle Management and What is a project

Session 14: The project cycle

Session 15: Introduction to project identification

Session 16: Problem inventory

Session 17: Problem analysis

Session 18: Objective analysis & analysis of strategies

**"Clinic" – Leadership, succession planning, Board development**

Session 19: Analysis of strategies

Session 20: Introduction to project planning & implementation tools

Session 21: Introduction to Logical Framework Analysis

Session 22: Developing Logframes

Session 23: Other planning tools

Session 24: Responsibilities & the project team

**"Clinic" – Project cycle management**

Session 25: Evaluation & Monitoring at the project, programme and strategic plan levels

Session 26: Identification of other organisational development needs

Session 27: Workshop evaluation & close

An overview of each session is given below.

**Session 1: Welcome, introductions, Module 1 feedback, participants expectations – Sarah McIntosh**

***Reflections from participants on implementation of learning from Module 1:***

Participants from Module 1 were asked what they had been able to apply from Module 1 over past six months and were there any significant changes in their organisation in last six months. New participants (who did not attend Module 1) were asked what information had been transferred to them about Module 1 and have they observed any impact of the training on the organisation. Each participant's response is summarised below. In general the responses revealed the participants had been able to apply learning about change in organisations and their role as a change agent in catalysing and facilitating this change. Several organisations had also engaged in strategic planning and were making specific efforts to make this process participatory. Networking and continued communication with each other was also evidenced.

Lornette Hanley (NHCS):

She worked with her staff of 6 to get their perspectives on change – how do they fit into and feel about the organisation and what would they like to see for the organisation in 5 years time. She discussed the **issue of change** with the Board. Current challenges for the organisation are marketing and financial support.

John Guilbert (NHCS):

He put an article about the Module 1 training in NHCS's newsletter. The Society is currently evolving into a National Trust. They are engaged in a process of participatory strategic planning from August to December 2005 **in partnership** with SCHS to develop a mission, vision and programmes. This is being **led by an independent facilitator** (Pat Charles). They are also looking at draft legislation and staff perceptions.

Donna Fray (JCDDT):

JCDDT is focusing on change management – looking at issues with the staff and financial support. A staff meeting was held to discuss issues and changes. A Board meeting was held to develop actions. Two changes that are being developed are a proposal for a supervisor for the Rangers and mechanisms to enhance communications with field staff. Donna opined that **once the space was created a collective solution was developed**.

Susan Otuokon (JCDDT):

Susan felt that participation in Module 1 gave the two representatives an opportunity to step away from their daily tasks and reflect, communicate and plan together. They **worked as change agents and were motivated to implement plans**. A new office (museum, library, and park headquarters) was established and a new project begun.

Elsa Hemmings (NCRPS):

In August a new Board was elected at the AGM. Elsa was not sure what information was transferred from Module 1 participants to other Board members and the staff. She emphasised the important lesson of **having a mix of staff and Board at the training to facilitate transfer of lessons to the organisation.**

Sandra Ferguson (ART):

She did not attend Module 1 but felt that the need for **strategic planning is a burning issue** for her organisation.

Dyana Joseph (TWCG):

Since Module 1, she conducted a **survey** of non-active members and drafted a Constitution. She also developed a new group (youth group).

Auguste Gaspard (TWCG):

He did not attend Module 1 but identified key issues for Talvern as securing community buy in and support, stimulating inactive members, reorganising the group, finding resources, and developing a strategic plan. TWCG had drafted an annual workplan and done some training of members and outreach to land owners and farmers. Key lessons identified were the **need for resources for the organisation, securing buy in from stakeholders and managing continuous change.**

Suzan Lackhan (NS):

She did not attend Module 1 but noted the continued **implementation of NS's strategic plan** through financial planning (annual budget & fundraising) and building partnerships with stakeholders (via member projects e.g. reforestation programme managed by NS).

Richard Villafana (NS):

He did not attend Module 1 but noted the **transfer of learning** via the NS "family".

Junior Prosper(EAG):

He did not attend Module 1 but was briefed. EAG is now working on a budget, accounting procedures, financial audit, member meetings, newsletter, media outreach, advocacy on protected areas and species, reviewing their strategic plan, Board training and drafting a Constitution. Currently they have staff but no Executive Director and this is a major issue. Other issues that need to be addressed are the development of funding proposals, a member database (of expertise/ skills that EAG can draw on), and a business plan. Key lessons are the **importance of managing change and transition periods as the organisation develops, developing leadership, and clarifying Board roles.**

Brian Cooper (EAG):

He did not attend Module 1. He noted that EAG has been in a process of strategic planning since 2001. The focus of staff is on funded projects around membership, advocacy, and awareness. Board involvement is decreasing due to low availability. He identified lessons on **how to move a plan forward and implement actions, Board capacity and tensions around organisational structure and development.**

John Mussington (GARD):

John noted that GARD is at a **crossroads in a change process**. It is currently involved in a participatory strategic planning process where the Board has been engaged in “dreaming” or visioning (which he said is both exciting and tedious) and involving members and other stakeholders.

Roberta Williams (GARD):

She noted that GARD was in a **participatory strategic planning process** facilitated by a volunteer local consultant. She had looked at EAG’s strategic planning process as a guide. Roberta said that GARD conducted a survey of stakeholder perceptions, a “dreaming” exercise to develop a new vision, a “reality” check to do an evaluation and look at needs and the impact/challenges of partnerships, a development of core values, and looking at **development of an endowment fund** (which John Guilbert of NHCS facilitated).

Jacqueline Armony (SCHS):

Jacqui noted that SCHS was engaged in a strategic planning with NHCS as part of a four year evolution to a National Trust. The strategic plan looks at fundability, credibility and sustainability. A proactive transition plan is being developed for financial management, developing a “brand” or public image, securing buy-in from membership and the public, and developing new legislation and the consultative process. **Lessons she emphasised were on strategic alliances and managing the transition from an advocacy organisation towards one focused on partnerships.**

Helen Douglas (SCHS):

Helen is from the Rotary Club in St. Kitts, which is a key SCHS **partner** providing financial support and volunteers.

### ***Overview of CANARI’s strategic planning activities:***

A brief overview was given of the partnership structure and mission of CANARI and the strategic planning process in which the organisation was engaged. Focus groups had been held, a study of the impact of a long term project on policy was conducted, surveys on CANARI’s communications and publications were done, and reflections of current and previous staff and Partners were solicited. These reviews will be synthesised and shared. A strategic planning session was scheduled for October 1<sup>st</sup> 2005 with a representation of key stakeholders from government, funders and non-governmental organisations (NGOs).

## **Session 2: Overview of course and allocation of tasks – Nicole Leotaud**

Participants noted that they expected to cover topics such as:

- Leadership
- Board development
- Managing projects
- Networking & sharing
- Managing change
- Conflict resolution

The objectives for Module 2 were given as:

- To assess the qualities of and build capacity for leadership of sustainable development NGOs in the Caribbean
- To identify the respective roles and responsibilities of Board, staff and volunteers within Caribbean sustainable development NGOs
- To examine methods of enhancing organisational sustainability (succession planning, team building, Board and volunteer development)
- To build participants' capacity in project management
- To foster networking between participants and exchange of experiences and approaches
- To build a body of case study material on organisational development which is drawn from and relevant to the insular Caribbean

It was noted that these topics were chosen from the list identified at the end of Module 1 and separate workshops would be developed to deal with financial management and other topics. The workshop agenda (see Appendix 2) was reviewed and participants volunteered to fill the roles of chair, rapporteur and “listener” for each day and “doctors” and “patients” for the afternoon clinics.

## **Session 3: Leadership - Qualities of an effective leader – Sarah Mc Intosh**

### ***Who are leaders:***

Participants were asked to individually list three leaders. Examples shared with the group were:

- SCHS in St Kitts (organisation)
- Principal of school (male)
- President of Rotary Club (female)
- Robert Bradshaw (female)
- Carol James (female)
- Dennis Sammy (male)
- Eugenia Charles (female)



Participants felt this was a challenging task, and they could not all immediately come up with three leaders. All of those identified were from the region. The facilitator asked what the challenge in identifying leaders was and participants reflected on what qualities looked for in leaders with prompting questions such as:

- Do leaders include individuals and organisations?
- Are leaders able to effect positive change for society?
- Are leaders mainly men or women?
- Are leaders only “big shots”?
- Are leaders only “good” leaders? What is meant by a “good leader”?
- Are there differences between leaders and managers? And if so, what?

**Qualities of an effective leader:**

Participants worked in small groups to list and discuss the qualities of an effective leader and reflect on whether there are differences between leaders & managers.

Participants shared that they felt that the qualities of an effective leader should be:

- Inspirational and motivational
- Able to effect changes / paradigm shift
- Able to command respect
- Impartial
- Honest
- Have a clear vision of goals & objectives or be able to formulate a clear vision
- Open minded / flexible
- Able to delegate & share responsibilities and identify an ideal support system
- Able to build consensus around shared ideas
- Able to resolve conflicts
- Solution oriented and follow through to work towards vision
- Decisive – not be afraid to make decisions
- A team-builder – able to formulate a team to implement the vision
- Resolute (brave, courageous)
- Willing to listen and involve others in decision-making
- Empowering others
- Able to recognise the need for evaluation
- Willing to put in place corrective measures
- Operating at a policy level
- Willing to take risks
- Strong mentally – focused & firm
- Self-motivated
- Leading by example
- Fair
- A good communicator (empathy)
- Prepared to take on responsibility
- Looking at the bigger picture
- Able to recognise when he/she is wrong
- Able to give recognition when it is due
- Accountable and transparent
- Visible
- Decisive and focused
- Ethical
- Credible
- A harmoniser
- A change agent
- In good health
- An enabler and teacher
- Knowledgeable



*Fig 1: Lornette Hanley (NHCS) presents her group’s discussion on qualities of an effective leader*

**Differences between a leader & a manager:**

Participants felt there is a lot of overlap between leaders and managers and noted that in NGOs there may be one person fulfilling both roles (which is a challenge of small organisations), and that it is importance to have a balance of qualities (i.e. there is a need to balance vision with implementation). Participants recognised that managers must have many of the qualities of a leader but there was debate over whether someone can be a leader without being a manager and vice versa. Participants felt that a leader may need to have a manager (or those skills as well) to ensure implementation of the vision. The differences highlighted by participants are listed in Table 1.

Table 1: Differences between a leader and a manager

<b>Leader</b>	<b>Manager</b>
Broad focus	Specific focus
Visionary	Implementor
Opportunity oriented	Constraint aware
Influence & motivate	Delegate
Able to take ideas and go	Execute - oversees day to day operations
Involved in formulation of policies	Follow set policies
Risk taker	Not always willing to operate out of a set framework
Enabler	Doer
Delegates	Coordinator
Accountable	Responsible (to do the action)
	Appraise/evaluate
Visible	“Behind the scenes”

Conceptualises	Action oriented
Philosophical	Technical skills
Process oriented	Structural oriented
Focus on ideas/concepts	Resource investigator
	Operations oriented
	Needs organisational, time management and administrative skills
	Identifies the best resources to get the job done
	Responsible for implementing activities to achieve the vision

It was noted that there is a fuzzy distinction between leaders and managers and someone may have both sets of qualities but the distinction is useful to consider when identifying roles and responsibilities (for example for job descriptions or organisational needs assessments).

Participants were asked to spend ten minutes individually reflecting on the following questions (see Handout 3(a) in Appendix 3):

1. Do you regard yourself as a leader within your organisation?
  - If so, what do you regard as your leadership style and strengths?
  - If not, what prevents you from seeing yourself/acting as a leader? Do you see yourself as a manager?
2. Who else do you regard as a leader and/or as having strong leadership potential within your organisation?
3. Where in the governance structure are your leaders (e.g. staff, Board, volunteer, external advisor, donor)?

Some participants opted to share some of their reflections, which were given as:

- It is important to know your strengths and weaknesses and how to build a team with the collection of desirable qualities (which may need very different people).
- It is a concern that NGOs have one prominent leader associated with the organisation – the “maximum leader” syndrome.
- The issue of how to balance very strong personalities needs to be considered.
- The role of the environment in which a person operates is key – it can bring out strengths. A leader can’t operate in a vacuum, but needs an enabling institutional context.
- There is a need to institutionalise and build a culture that accepts and promotes change of leadership as a positive thing.

Participants were then asked to work in pairs to discuss for their organisation the following questions (see handout 3(a) in Appendix 3):

1. Has the need for leaders/leadership skills been specifically identified within your organisation and how does this impact on recruitment of staff, Board members or volunteers?

2. Does your organisation have a hierarchical structure, a team-based structure or some combination of the two? (give examples)
3. Are there any factors at organisational, national or regional level which either facilitate or hinder the development of the type of leadership skills which sustainable development NGOs require?

Participants analysed who were leaders or potential leaders in their own organisation as illustrated in Table 2 below. There was a strong trend that the Boards are providing some leadership, in some cases in conjunction with staff and in some cases it is only potential leadership. Many Boards are quite heavily dependent on staff for leadership, in particular on the Executive Director (ED). This is an important issue for succession planning. Some use a team approach so no one leader can be distinguished.

Table 2: Leaders in participants' organisations

<b>Organisation</b>	<b>Board</b>	<b>Staff</b>	<b>Members</b>	<b>Others</b>
JCDT	√	√		
NHCS	-	-		
NCRPS	√	√?		
ART	√	√		
TWCG			√	
NS	√	Manager		
EAG	√			√
GARD	√	√		
SCHS	√	√	√	

It was noted that having identified existing and potential leaders in our organisations, it needs to be considered whether we are creating opportunities for people to develop into leaders or recognising leadership skills in people.

The facilitator noted that there are various theories of leadership (see Handout 3(b) in Appendix 3) to read and reflect on later but that recent trends focused on increasingly participatory and team-based approaches.

#### **Session 4: Leadership in the Caribbean NGO context – Sarah Mc Intosh**

It was emphasised that the operating context in the Caribbean (as well as influences from outside the Caribbean) impact on the development of leaders. Participants engaged in a whole group discussion on the factors in Caribbean culture that constrain or support the development of leaders. This highlighted general issues as well as issues specific to gender and the education system as shown in Table 3.

Table 3: Issues in the Caribbean affecting the development of leaders

General issues	<ul style="list-style-type: none"> <li>• Maximum leader norm is changing</li> <li>• Dragging people back who are becoming successful</li> <li>• Cooperation / group work not instilled at an early age</li> </ul>
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	<ul style="list-style-type: none"> <li>• Successful groups are “taken over” (politics)</li> <li>• Lack of conflict management skills</li> <li>• Entrenched styles of leadership</li> <li>• External agencies pushing participation</li> <li>• Leadership in young not encouraged</li> <li>• “Chief” society</li> <li>• Impact of decline of volunteerism</li> <li>• Systems hinder participatory style (e.g. political cycles)</li> <li>• Unrealistic donor time frames</li> <li>• Struggle (e.g. trade unions) influence leadership style</li> <li>• Grassroots leadership does exist – may not be recognized</li> <li>• Aspiration to material success</li> </ul>
Gender issues	<ul style="list-style-type: none"> <li>• There is a perception that leaders are mostly men (e.g. politically)</li> <li>• But, there are many women leaders for example in business, environmental/development organisations, school principals</li> <li>• In tertiary education women dominating</li> <li>• At all levels of education women are achieving</li> <li>• There is a male “macho” style versus consensual leadership</li> </ul>
Education system	<ul style="list-style-type: none"> <li>• Schools are not promoting qualities such as entrepreneurship</li> <li>• Doesn’t promote independent thinking</li> <li>• Focus on <u>academic</u> cream and potential material success</li> <li>• Autocratic role models (politicians, teachers)</li> </ul>

Participants identified what promotes leadership as:

- NGOs
- Struggle
- Crisis
- Openness to ideas
- Debate (e.g. T&T)
- Opportunities

### **Session 5: Succession planning – Sarah Mc Intosh**

A CANARI report “*Governance and civil society participation in natural resource management in the Caribbean: Study of Partner Organisations*” (March 2004) that had been distributed to participants in Module 1 noted that an organisational concern is the **lack of succession planning at the level of both board and staff**. The need to bring on new board members as part of the process of renewing management and governance remains overlooked by most.

Participants opined that successor leaders are generally not in place in their organisations. Some solutions to this problem were listed as to:

- Make the position attractive

- Have finances to support the position. This may need to be made a priority for the organisation, and may need to be negotiated with the ED that part of their responsibility is to raise money for their position and to secure the financial sustainability of the organisation.
- Identify & look for or develop key skills - core skills versus skills that can be developed and emphasising the importance of willingness and ability to learn.
- Groom potential successors

Three case studies were reviewed of how succession planning was conducted for CANARI, Nature Seekers and the YMCA (Trinidad). It was noted that none of the organisations represented had formal or informal succession plans in place. Common factors of succession planning were that:

- It is planned
- It is based on a consensual decision
- There is some flexibility to accommodate outgoing and ingoing leader needs
- There is an overlap period
- There is an emphasis on skills of the new leader rather than gaps left by the old leader's departure

Some strategies for succession planning are to:

- Encourage existing leaders to delegate authority and responsibility
- Adopt team-based programme and project management including team leaders who are not always the most senior person
- Identify possible successors, within and outside the organisation
- Institute staff, board and volunteer development strategies
- Identify the leadership qualities you need when hiring
- Document the organisation's policies and procedures to ease succession
- Cross-train and use a team approach to build skills

It was noted that the NGO leaders participating in the workshop all came from very varied backgrounds and an important issue in shaping new NGO leaders is the passion, values, commitment and dedication that needs to be brought to the job and how these can be developed in succession planning. Other points to consider in finding and developing new leaders were:

- Will a new style of leadership and/or management skills be necessary to achieve future strategic objectives?
- Where might the leaders of the future come from?
- What will be the impacts of a new style of leadership on the organisation as a whole?
- Are expectations of any single leader reasonable?
- Is team leadership an option - combining leaders at several levels (board, staff, volunteer)? If so, how will roles and responsibilities be defined?

### **Session 6: Benefits and qualities of an effective team – Sarah Mc Intosh**

Participants played an energetic game in small groups where they linked hands randomly across a circle and then were tasked to try to unravel the circle without breaking their holds. This was a fun activity and in the debrief participants noted that it brought out several elements of team-work, for example the emergence of a leader to direct the task and the importance of communication and cooperation.

Participants then brainstormed qualities of a team as:

- A cohesive group
- With common objectives
- Having respect for differences, others opinions, etc.
- Sharing ideas and communicating
- Having mental agility
- Playing multiple roles
- Having trust
- Being willing to participate
- Being dependable

A definition of a team was given as “A team is a small number of people with complementary skills, who are committed to a common purpose, set of performance goals and approach, for which they hold themselves mutually accountable.”

A handout was given on qualities of teams and benefits of teams (see Handout 6 in Appendix 3) and participants were asked to reflect overnight on the concept of team roles.

### **Clinic: Strategic Planning**

The clinic was chaired by Brian Cooper (EAG) and John Guilbert (NHCS) served as the ‘doctor’. A summary of the key discussion points is given in Table 3.

Table 3: Clinic discussion summary

<b><i>Discussion point</i></b>	<b><i>Comments</i></b>
What is a strategic plan and why is it important?	A strategic plan is a road map for success. It enables partnerships, collaboration, and financing. It facilitates agreement on the organisation’s focus and goals, and helps to keep the organisation focused.
What time span should a strategic plan cover?	It depends – it can be several years (e.g. 2-10).
How long should be spent preparing a strategic plan?	It depends on resources available, complexity of the organisation, etc.
What is the difference between a goal and an objective?	Goal is qualitative and objective is quantitative. Also there is a difference of scale – goal is a higher-level objective.
What are the roles of Board	Both play a role in developing, implementing and

& staff?	evaluating progress against the strategic plan.
How successful are strategic plans?	They are as good as the plan. They also need to be <u>used</u> . It is the responsibility of the Executive Director and the Chairman of the Board to keep the organisation focused on the strategic plan. Buy-in is important. The plan must not be too specific, but should have fundamental goals and allow flexibility and adaptive management in operational plans.
Do you think NGOs need Boards?	It is important that the key roles/responsibilities be filled.
What is the difference between functions of a Board and an Executive?	Issues discussed included that NGO governance structures are imposed by government and laws of a country. Also, NGOs have different structures (sometimes informal) at early stages in their development. The example of NS was given, which initially had a village council / executive structure (with Treasurer, Public Relations, President, Vice President, and Secretary) and the changed to a Board structure, which allowed more flexibility.
How can a strategic plan be evaluated?	The plan needs to set measurable objectives & a timeline so that result can be compared against what was intended in the plan. Progress can be measured and the organisation can evaluate how successful it is.
Why should strategic planning be participatory?	It is important that strategic planning is participatory and involves stakeholders for buy-in. The process is important, not only the product. It is also critical that staff be involved in strategic planning, and this may be at different levels of intensity.

### **Day 1 Feedback from rapporteurs / listeners**

The day 1 rapporteur report (Jacquie Armony, SCHS) noted that the workshop had a good mix with new perspectives from new participants. She noted that the feedback from organisations on implementation of actions since Module 1 was very good and it was good that the course had been split into two modules. She noted that common qualities of leaders were given by all the groups and the cultural inhibitors to arriving at the kind of leaders that are aspired to were recognised. The clinic was thought-provoking and interactive. The physical exercise was fun and demonstrated the importance of the element of trust. She felt the workshop was highly interactive throughout Day 1.

### **Session 7: Team development and team building – Sarah Mc Intosh**



A short session was conducted focusing on building a base for other sessions on Board development, succession planning, and project teams.

Participants brainstormed that effective teams have:

- Commitment to common goals
- Clear objectives
- Interdependent collaborative working relationships
- Collective and individual responsibility for work to be done
- Open and honest communication
- Support and trust
- Willingness to encompass conflicting views
- Support for decisions reached by consensus
- Focus on process as well as results
- Appropriate leadership

The discussion following centered on the concept of a team as more about processes and principles and noted that specific features in terms of size and time may vary.

Participants discussed who has a team in their organisation, what is it, and does it have a clear leader. Teams identified were the Board, staff, event group, project teams, ED & Administrative Manager, programme teams, and rangers. It was noted that team leaders do not always have to be the leader of the organisation, for example teams focused on specialised task may have an “expert” leader. The whole organisation is a team with sub-teams and nested teams within the organisation. Teams are a good ground for testing and building leadership skills and capacity of organisation. As the organisation develops in capacity and accepts more responsibility, there are more opportunities for people to be leaders in different projects, and people become more responsible. New people coming into the organisation sometimes fit into existing team system, but they may alternatively disrupt existing teams and new dynamics will have to evolve.

Effective strategies in building teams (from the NS model) were identified as:

- Get information on skills and interest so can match with what needs to be done
- Build capacity
- Have teams of Leaders (complementary skills & built in succession)
- Identify and clarify roles
- Clarify expectations
- Limit / control new members into team
- Target people who have skills that need on the team and recruit them
- Motivate people to join the team & stay in the team
- COMMUNICATION
- Have a clear team leader
- Promote, recognise and give public thanks - problem solving and using initiative
- Address problems as they arise
- Avoid burnout

- Recognise needs and commitments of others
- Rotate team leaders – give responsibility to build leadership skills & succession

The stages of team development were reviewed - forming (exploration period), storming (issues of power, leadership and decision making), norming (sense of cohesiveness), and performing (effective team). It was noted that when new persons join or critical issues arise it can throw the process back to forming phase.

A critical point discussed was that a team is not only addressing the objectives of the team but also needs to meet the objectives and aspirations of individual members of the team. Part of leadership is creating spaces for individual aspirations and matching individual's interests with team needs and getting buy-in. However, it is important up-front to clearly identify specific skills, knowledge and interest that the team needs. The ability to work in teams is a core function needed in civil society – therefore this is a critical consideration in bringing people into the organisation.

Some of the characteristics, challenges and principles of team building and guidelines (groundrules) for effective team membership were reviewed.



*Fig 2: Participants work in their small group to analyse roles & responsibilities in their organisations.*

Participants worked in small groups (teams) for 20 minutes to address at least five of the tasks in the handout on roles & responsibilities in organisations (see Handout 7 in Appendix 3). It was noted that different organisations may assign tasks/roles differently and the discussion should emphasise where there are different arrangements. A summary of the findings is given in Table 4.

Table 4: Roles & responsibilities in participants' organisations

<b>Task</b>	<b>Role/responsibility</b>
Raise funds	Depends on type of fundraising (grant, administrative, in-kind). Often Executive Director (ED) & staff. Members input in NS.

	Subcommittee of Board. Volunteers for specific events.
Set strategic direction	In some cases ED & staff, vetted by Board. NS has participatory approach involving members & stakeholders. In some cases the Board is primary (with involvement of staff and members) but need support, coordination, motivation from staff.
Write project proposal	ED. Project manager. Members with skills or people with expertise within committees can be called on. CANARI conceptualises as a team, the drafting is done by one or a few people, the draft is circulated, and final input is sought from outside specialists. Some organisations seek assistance from government (e.g. Ministry of Community Development or Forestry). There is an issue of when to involve outsiders to build the organisation's capacity.
Send out notice for AGM	The Constitution dictates that this is the Secretary's responsibility but if there are administrative staff in the organisation they will assist.
Policy & procedures manual	Developed by ED & staff. May be brought back to Board for final approval. May involve specialists on Board or from outside.
Decide on level of staff salaries	Whole Board (may be with ED). ED (with Board input / approval). ED's salary is determined by the Board. There is a difference between the salary level being determined (by ED), but needs to be approved (by Board). In some cases of more developed organisations the Board only approves lump budget for salaries, and the detail of allocation is determined by staff (ED).
Appoint ED	By whole board. Members of NS. May have committee.
Arrange a press conference	This depends, anybody can arrange. Hosting/conducting the press conference is a higher level responsibility. An organisation may need groundrules/policies for this process (even for logistics) since it involves the organisation's image. An organisation may have specialised PR staff or committee.
Coordinate a fundraising event	This depends – it can be done by the Board, ED, staff, or a committee of members.
Donate money	By members, Board, and non-members. Note that northern NGOs have a strategy to have a key role of the Board as giving donations.
Draft the agenda for Board meetings	By the Chair/President/Secretary with the ED. Whole Board & members may input. May email members and ask what they want on the agenda.

Network with other NGOs	ED.
Sign cheques	This requires two 2 signatories –may have the ED, Chair/President, someone from the membership, someone from the Board, ED & Administrative Manager. This varies highly among organisations but is generally a mix between staff & Board. NS has three signatories and President and Secretary. Once the amount exceeds \$10,000 there are appointed members who must sign, the Manager cannot sign. This system is feasible because NS is a community-based organisation (CBO) and members are close. Whatever system is used it is important that it facilitate transparency & accountability.
Recruit new Board members	There is a high variation in who does this - a committee of 1, membership, Board / member committee. If there is a skill gap the Board can appoint and get ratification from the membership.
Present the financial report to the Board	Treasurer. ED. Secretary (playing Treasurer's role because there is no Treasurer). Auditors.
Represent the organisation at an international conference	Depends on the focus of the conference and balancing how it would benefit the individual and the organisation. The representative could be a member of the Board, staff, the ED, a member.
Appear on a TV show representing the organisation	Depends on the issues being discussed. It is usually the ED, the Chair, an education/public relations person, or a team approach is used to balance skills of different people.
Hire staff other than the ED	A panel – e.g. ED, administrative manager, members of Board. Chair of the Executive.
Examine monthly financial reports and ask questions	Finance committee of the Board (ED, administrative manager, Treasurer, Board members). Executive. Board. At member meetings – note that is it important to build members' capacity to understand financial reporting so that everyone can take joint responsibility.
Report to members at the AGM	Board officers. ED. Everyone feeds into annual report (e.g. project managers). Prepare the accounts for the auditor is done by financial staff and the Treasurer.

In summary, it was noted that the ED bears a heavy responsibility and is involved in all these tasks. The scope/level of the Board's involvement was highly variable. A key issue is clarifying roles and responsibilities of the Board.

## **Session 8: Board roles & responsibilities – Sarah Mc Intosh**

It was noted that an organisation's governance structure should be appropriate to the stage and culture of organisation but this session will examine some common roles and responsibilities of NGO Boards. Participants identified a Board's role as in:

- Being informed so that it can monitor & evaluate
- Advising
- Helping in design
- Planning (big picture & detailed)
- Monitoring & evaluation
- Inputting at the strategic level

Some key tasks of an NGO Board (analysed from northern NGOs) are to:

- Determine the organisation's **mission** and **set policies for its operation**, ensuring the provisions of the organisation's charter and the law are being followed
- Set the **organisation's overall program from year to year** and engage in **longer range planning** to establish its general course for the future
- Establish **fiscal policy and boundaries**, with **budgets** and **financial controls**
- Provide adequate resources for the activities of the organisation through **direct financial contributions and a commitment to fund raising**
- Select, evaluate, and if necessary terminate the appointment of the chief executive
- Develop and maintain a communication link to the wider community, promoting the work of the organisation.

What Board members don't do is to:

- Engage in the day-to-day operation of the organisation
- Hire staff other than the chief executive
- Make detailed project or programme decisions without consulting staff

It was noted that for NGOs in the Caribbean often staff are the drivers and the Board approves. Also, direct financial contributions from the Board don't happen in the Caribbean now.

The facilitator asked how participants' organisations currently recruit and involve Board members. Participants brainstormed and discussed strategies of different organisations as to:

- Identify specifically what the organisation needs – identify what gaps are in the Board (note key need for NGOs in fundraising) that need to be filled
- Identify the potential Board members skills & expertise
- Match people to needs
- "Sell" the benefits someone would get as a Board member

- Provide an orientation & build the capacity needed to be effective in the role as a Board member
- Be specific and be realistic about what time and effort is needed from the person!

A key point discussed was that as an organisation evolves and as its focus changes it may have different needs from the Board (e.g. change from adversarial advocacy role to one promoting partnerships).

### **Session 9: Board development – Sarah Mc Intosh**

Strategic Board development was introduced as a way for organisations to determine:

- What skills do they want their Board to possess (now and in the future)?
- Do these skills exist within the membership or does the organisation need to go further afield?
- What does the organisation offer to Board members in the way of reward?
- What does the organisation expect Board members to give?

Board members are generally expected to give their time, money, expertise, contacts and networks. The YMCA in Trinidad sets clear expectations that its Board is expected to “give, get, or get out”.

Commonly what organisations offer their Board members is:

- Fulfilment of personal objectives
- Opportunity to exercise skills
- Frequent recognition of inputs and contributions
- Opportunity to network
- Refreshments at meetings

Strategies for Board effectiveness include to:

- Establish close working relationship with executive director
- Focus on important and strategic decision making rather than minutiae
- Establish separate committees and empower them to conduct aspects of the Board’s responsibilities
- Institute annual Board evaluation
- Replace non-performing Board members

Specific strategies to increase the effectiveness of Board meetings include to:

- Orient new Board members before their first meeting
- Circulate minutes, financial and committee reports, and agenda well in advance
- Hold meetings at time and place that are convenient to the majority
- Start meetings on time even if some people are absent
- Focus on important and strategic decision making rather than minutiae such as matters arising
- Create an environment that encourages the participation of all

- Finish meetings at a reasonable time
- Have a meeting ‘evaluator’ give feedback at the end of each meeting

John Guilbert (NHCS) shared on NHCS’s process of Board development (see Session 9 NHCS – Board Effectiveness slides in Appendix 4). This was done by a volunteer external business consultant who assessed the strengths and weaknesses of NHCS’s Board and made recommendations on best practices, for example on the conduct of meetings, Board terms of reference, an executive handbook, orientation sessions (one-on-one) with the ED.

### **Session 10: Volunteers and what motivates them – Sarah Mc Intosh**

Participants brainstormed and discussed what a volunteer is and identified characteristics as:

- “free” help
- professionals “pro bono”
- not looking for remuneration
- donate skills or services
- pay to help
- costs – stipend, training, housing, transport
- usually short-term
- have compassion for a cause
- passion, willingness – contributes to NGO spirit
- 2 kinds – short term versus long-term (latter require greater investment but also have high expectations of them)
- 2 kinds – amateurs versus from an agency (latter are more difficult to manage)
- may come with “we have the answers”
- come to learn or experience
- person seeking to fulfil their own needs – self-serving
- important that transfer skills or knowledge to organisation
- need to be trained, but may not want to be trained
- may have conflicts
- need to belong
- mutual benefit (for volunteer and organisation) negotiated
- skills must be passed on
- don’t have to be accepted by organisation
- treat & manage like staff
- fill gaps in the organisation
- must have the right fit

It was emphasised that a rethinking of the volunteer relationship was needed to one where that recognises that the organisation must be the driver in the relationship /exchange.

The reasons why people volunteer was given as:

- To make a difference
- To find companionship
- To develop a community
- To learn new skills

- To exercise their creativity
- As a way of giving back
- For civic duty
- For personal satisfaction

Distinction was made between short-term and long-term volunteers, and also among professional, achievement-oriented, affiliation-oriented, power-oriented and long distance volunteers.

### **Session 11: Volunteer planning & management – Sarah Mc Intosh**

Volunteer planning and management was seen to be an integral part of human resource planning for the organisation, whether at strategic, operational, project or event levels. It was noted that volunteering contributes significantly to an organisation's "in-kind" contribution for projects so volunteer services needs to be assigned a dollar value in budgets and reports. The benefit of a volunteer needs to be weighed with the cost of managing the volunteer.

Participants worked in pairs for 35 minutes to develop a volunteer plan for their organisation by considering:

- What are the organisation's needs for volunteers?
- What skills are needed?
- How / where / when will the volunteers be recruited?
- Who will manage the volunteers?
- How will volunteers be motivated / rewarded?
- What resources (equipment, etc.) are needed to manage the volunteers?
- Does the organisation have volunteers or does it need to get them?

Some comments from participants after the activity were that:

- They realised that had an unwritten volunteer plan.
- The exercise gave them a chance to prioritise the organisation's needs.
- They identified core tasks for staff – then other tasks/needs that then can be done by volunteers.
- They needed to have the policy & legal context to support their programme and enable the organisation to bring in volunteers.
- The organisation needed to get the capacity to manage volunteers.
- The importance matching volunteers to tasks, and also "testing" before give large tasks because can get burnt.
- If don't have a need for volunteers at this time, when people offer the organisation can get their information for a later date, for example by using a form on skills and interests.
- Regarding volunteer training, it was noted that people are enthusiastic but may be alienated or intimidated by certain types of training and if requirements are put forward in an intimidating way. It is important to be tactful and sensitive, and take



care not to openly embarrass people but approach them on an individual basis and gradually train them.

- Volunteer training could take different forms (e.g. by pairing, ongoing mentoring, networking & training).
- Continuous motivation and giving value to people is critical.
- An organisation can build people's capacity and they become the most dedicated and hard-working and can empower them to such a degree that may move on and out of the organisation.
- An organisation should target community people and don't assume that they can fill out of form as literacy may be a problem. If this is not sensitively addressed the organisation can miss out on a valuable resource.
- Volunteer management need to include a focus on personal development (issues such as lack confidence, social problems) and this is a huge investment. The organisation needs to make choices and balance what is appropriate and feasible for the organisation.
- Traditional forms of volunteerism and community partnership and mutual support (e.g. *gayap*, *koudmeah*) seem to be declining in the Caribbean. Or possibly people are devoting their volunteer time to different types of activities. Costs (e.g. transport) of them volunteering may also be inhibitive.

### **Session 12: Field trip**

Participants were taken on an afternoon field trip to the capital of St. Georges and then along the coast and into the interior of the island to learn about some of the history and culture of Grenada, including stops at the National Museum, Fort George, and the Grand Etang National Park.



*Fig 3: Participants on a tour at Fort George*

**Day 2 Feedback from rapporteur / listener**

Feedback from Day 2 highlighted learning about Board roles and the potential development of different types of structures (non-members) of the Board. Lornette Hanley (NHCS) felt the day catalysed some personal “soul searching”, especially the succession planning session. She emphasised that when persons are funded for training there should be stipulations to ensure follow-up and implementation of learning as change in organisations is continuous and capacity building of the organisation needs to be ensured. She felt the CANARI training had an important catalytic effect.

The Day 2 rapporteur (John Mussington, GARD) noted that the field trip was relaxed and participants appreciated the opportunity to see Grenada and learn about its history. They enjoyed the awesome geography & topography of the island and Grand Etang, and felt sobered by the hurricane devastation still evident. Dinner provided an opportunity for light talks, jokes, and learning about NS.

**Session 13: Introduction to Project Cycle Management & What is a Project – Nicole Leotaud**

It was noted that developing and managing projects is operational level planning that flows out of strategic planning, which was covered in Module 1.

Participants were given a list of projects (see Handout 13 in Appendix 3) and asked to work in pairs to identify which of these were projects. Debriefing emphasised the difference among projects, activities and programmes and participants then identified some characteristics of each of these as shown in Table 5.

Table 5: Characteristics of projects, activities, programmes

<b><i>Projects</i></b>	<b><i>Activities</i></b>	<b><i>Programmes</i></b>
<ul style="list-style-type: none"> <li>• Have a defined life / end</li> <li>• Are comprised of different objectives, activities/steps, outputs</li> <li>• A project may be within another project</li> <li>• A project has several activities</li> </ul>	<ul style="list-style-type: none"> <li>• Activity / tasks / steps</li> <li>• Smaller than a project</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing</li> <li>• Repetitive</li> <li>• May have several projects within a programme</li> </ul>

A hierarchy was identified going from programme to project to activity to task.

A project was defined as “a unique activity with a definite beginning and end, undertaken to achieve a specific objective or set of objectives within defined constraints of time, resources and quality.

The characteristics of a project were given as being that it:

- Is non-routine and non-repetitive
- Can be separately planned, financed and managed
- Has specific start and end points
- Has specific objective(s)
- Has a given time frame, resource budget, and operates within certain constraints (human, financial, etc.)

It was noted that from the donor perspective, while some funding of programmes did take place, funding of projects was preferred because programmes are bureaucratic and ongoing. However, projects need to be shown as sustainability and fitting within the bigger context of a programme (possibly with other donors) with larger scale outcomes.

**Session 14: The project cycle – Nicole Leotaud**

It was noted that what is seen in a project is just “the tip of the iceberg” and there was a lot of planning and preparation before its implementation.

The analogy of cooking and serving a meal was used to illustrate the stages of a project to fill the problem of someone being hungry. Participants identified the activities that go into cooking and serving a meal and then these were matched with stages in the project cycle as shown in Table 6.

Table 6: Stages in the project of cooking a meal

<b>Activity</b>	<b>Stage</b>
Asking what do I want to eat	IDENTIFICATION
Asking what ingredients have Asking how much time have Deciding what skill have to cook	APPRAISAL
Asking what equipment is needed Asking how many people need to be fed	DESIGN
Preparing & cooking Serving Eating	IMPLEMENTATION
Asking how did it taste	EVALUATION
Washing up the dishes	CLOSURE

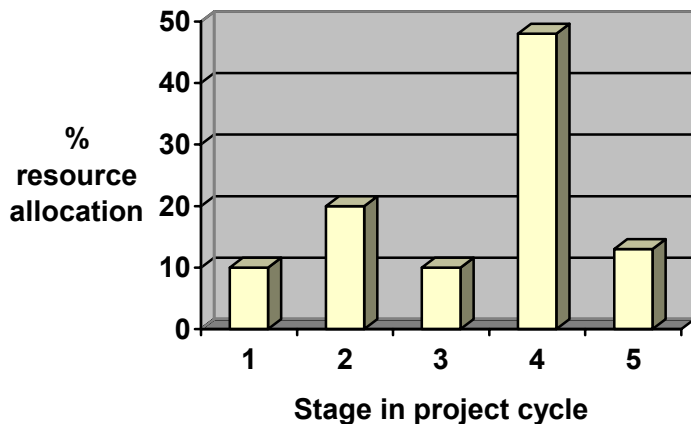
A handout was distributed (see Handout 14 in Appendix 3) that reviewed these stages in the project cycle and gave a definition of project cycle management as:

*“Project cycle management can be defined as: The planning, organising, directing, and controlling the organisational resources to achieve a relatively short-term and specific objective that has been established to address a specific problem, and evaluating whether this objective has been met.”*

Participants then worked in pairs to reflect on the relative allocation of resources (time, money, etc.) their organisations invest (not what they think should be invested) in each stage of the project cycle. Each pair was given 35 dots and asked to assign these to the different stages in the project proportionally to their degree of investment. They then stuck these dots into a prepared bar chart (see Figure 4 below). The relative allocations participants gave were then calculated as percentages as shown in Figure 5.



*Figure 4: Jacqueline Armony (SCHS) demonstrates the bar chart developed.*



<p>Stages in project cycle:          1 = Identification          2 = Planning, preparation, design          3 = Appraisal          4 = Implementation &amp; Monitoring          5 = Evaluation &amp; Closure</p>
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*Figure 5: Participants' allocation of resources to different stages in the project cycle*

This was a very revealing exercise and showed that the organisations devote most of their attention to the implementation stage and very little to identification, appraisal and evaluation & closure. While it was agreed that there is no absolute allocation, adequate resources need to be devoted to identification and preparation in order to design a project to effectively and efficiently address the problem and achieve the outcomes needed. Problems that can arise if a project is not well planned were identified as:

- Project overruns in time and budget
- Poor use of resources - inefficiencies
- Poor quality work
- Outputs not delivered
- Objectives not accomplished
- Goals not achieved

It also was noted in the discussion that donors don't fund the identification and planning stages and this limits the amount of resources that can be allocated. Administration and preparation costs need to be written into the project budget. JCDDT noted that they used to spend a long time on their initial plan but with experience over the years project planning became much easier.

The appraisal stage was seen to be a bigger picture evaluation of if the project was fitting into the organisation's mission and if buy-in from stakeholders could be secured. This stage can be done through feasibility or pre-feasibility studies and may be done by the donors.

It was noted that project planning is commonly done by only one or a few people but that a wider group should be involved to determine the most effective allocation of resources.

### **Session 15: Introduction to project identification – Nicole Leotaud**

The session was introduced by a role play conducted by four of the participants (Auguste Gaspard, Junior Prosper, Lornette Hanley and Suzan Lackhan) and the facilitator. The role play was of a meeting of an organisation where someone suggested a project to rear rabbits and discussion took place on whether stakeholders were in favour, whether a feasibility study should be conducted, if the project fit into the organisation's mission, if the project would address a real problem and what alternative projects could be conducted.

In debriefing the role play, participants discussed the issue of organisations 'creating' projects in response to funding opportunities. They felt that funders try to impose their perspective on what you need and the objectives of some projects are objectives set by 'outsiders' to the community or country. Although participants recognised that they could always opt out, they felt that it was hard to turn down funding opportunities. In some cases participants felt that 'outsiders' use local NGOs to develop a project but

switch to working with government instead and don't involve the NGO. The lack of clarity of objectives between the funder and the organisation was seen to be an issue hindering relations. Political influence was seen to be a factor in project identification and donor relations.

The importance of 'testing' projects to see if they fit within an organisation's mission was also raised. It was agreed that ideally an organisation should have projects identified out of its strategic planning to respond to funding opportunities as they arise. This would thus ensure that projects address real needs and fit within the mission of the organisation and allows the organisation to remain proactive and in control of its direction.

The importance of involving a wide range of stakeholders in identifying a project and making sure it is addressing a real need was discussed. Participants recognised that increasingly donors require stakeholder consultation or participatory processes to verify that a project is addressing a real need. Some of the reasons for involving stakeholders in project identification were given as to:

- Identify the parties that are key to the successful achievement of the vision
- Ensure that the organisation benefits from the input of relevant ideas, skills, knowledge (and funding) from as broad a base as possible
- Identify areas of potential conflict
- Reconcile parties that have different and perhaps conflicting interests
- Address community issues and concerns related to your vision and mission
- Build a wider sense of ownership

The importance of identifying a project to address a real need, testing it against an organisation's mission and involving stakeholders were identified as key elements in a process of project identification.

### **Session 16: Problem inventory – Nicole Leotaud**

The four steps in searching for project ideas to solve problems were listed as:

1. Inventory of problems
2. Problem analysis
3. Objective analysis
4. Analysis of alternative projects / strategies

The first step in the project identification is to conduct an inventory of problems. It was emphasised that a problem is an existing negative state (e.g. crop is infested with pests) and not the absence of a solution (e.g. no pesticides are available). Participants were divided into small groups and given a written case study on a fictional village called San Pedro (see Handout 16 in Appendix 3) and asked to identify and underline the problems.



*Figure 6: Group 3 identifies problems in the San Pedro case study.*

After the group work, each group in turn listed the problems they identified. Although not every group underlined the problems, there was agreement on what were the problems in the case study. However, some groups had started to analyse the causes and effects of the problems, which caused some confusion.

Participants identified various sources for evidence that problems are ‘real’ problems, for example interviews, surveys, and research.

### **Session 17: Problem analysis – Nicole Leotaud**

The session was introduced by noting that there are many problems in any one situation but these problems need to be analysed to determine what the project should focus on. Problem analysis attempts to establish cause-effect relationships among the identified problems. Problem analysis involves:

1. Defining the core problem(s)
2. Defining other problems and negative conditions that **cause** the core problem
3. Defining other core problems and negative conditions, **caused by** the core problem
4. Identifying relationships between all causes and effects
5. Presenting problems and relationships in a Problem Tree

Participants worked in pairs to identify which of the problems in Handout 17(a) are causes and which are effects. Arrows can be drawn from causal problems to effect problems and this is a useful process to help to identify root or core problems in a situation.

The small groups worked to analyse the list of problems for San Pedro generated in Session 16. It was suggested that they list each problem on a card and then physically move the cards around and see where arrows flowed between cards to identify relationships. Out of the three groups, two groups used this process and found it very useful. This activity generated a lot of good debate and disagreement within and among the small groups. Some differences in interpretation among the groups were noted.



*Figs 7 & 8: Participants arranged cards to help them in problem analysis.*

One key point raised was that there were information gaps and there was therefore a danger of hypothesising problem relationships without factual information. It was pointed out that in a real situation, information should be sought if such gaps were identified. Tools that can be used in this research include stakeholder identification and analysis, institutional mapping and analysis of political, economic, social, technological, legal and environmental (PESTLE) trends. Handout 17(b) (see Appendix 3) was distributed with a problem tree analysis of the case study for comparison with the participants' trees.

### **Session 18: Objective analysis & analysis of strategies – Nicole Leotaud**

It was noted that a problem (an existing negative state) can be turned into an objective for a project (a solution to the problem) by turning the negative statement (problem) into a positive statement (objective). Participants felt that every problem does have a solution, but these may not be feasible or achievable given various external constraints. They also noted that in real life people jump to conclusions about what are the solutions to problems but these conclusions should be analysed and validated.

It was noted that it is important to have 'SMART' objectives for projects so that they are focused and measurable. Characteristics of 'SMART' objectives were given as: specific, measurable, achievable, relevant / realistic, and time-bound. Participants worked collectively to 'SMARTen' an objective for the case study given as "To develop



an education programme for tour guides”. Participants ‘SMARTened’ this to be “To develop and hold 3 training workshops that are 2 days each for 20 tour guides to train them in time management, knowledge of flora & fauna and how to conduct a tour”.

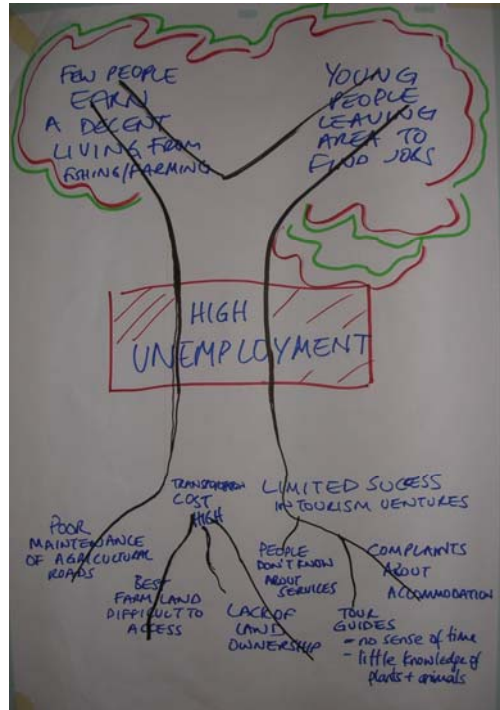
Participants debated how specific objectives should be and this was seen to depend on various factors including:

- Complexity of project
- Donor requirements
- Level at which you want to measure
- Need to match resources
- Determinants of success

It was noted that levels of specificity in the project goal and objectives varied and this would be examined in the sessions on logframes.



*Figures 9 & 10: Groups work on developing their problem trees.*



Figs 10 & 11: Susan Otoukon (JCDT) presenting the problem tree drawn by her group.



Figure 12: Brian Cooper (EAG) presents the problem tree for his group.

Participants worked in their small groups to create an objective tree (with a core objective) from their problem tree and to 'SMARTen' the core objective. The results are given in Table 7.

Table 7: 'SMART' objectives for the 3 groups

Group 1	Group 2	Group 3
Project – greater success in	Objective – to train San	Objective – to establish

<p>tourism-related businesses          Objective – to develop a project to focus on creating marketing, improving accommodations, and training tour guides in San Pedro over the next 3 months.</p>	<p>Pedro tour guides through two three-day workshops in time management and knowledge of flora and fauna by the next tourist season.          Strategies – Complete a stakeholder analysis, consultations, workshops</p>	<p>baseline information to guide property development (including land tenure, soils assessment, market feasibility and transportation assessments) over a period of 9 months (to improve the infrastructure of San Pedro) for the advancement of agricultural and other types of developments through collaboration with government and other stakeholders</p>
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An example of how a problem tree is turned into an objective tree with the core problem identified was given for the case study (see Handout 18 in Appendix 3).

**Clinic: Leadership, succession planning, Board development**

This session was to be chaired by John Guilbert. Participants held an informal discussion on the beach.

**Day 3 Feedback from rapporteur / listener**

In his “eavesdropper” report, John Guilbert (NHCS) said that he found the volunteer session very captivating and people seemed to enjoy the activity with volunteer planning, focusing on motivating and rewarding volunteers. He noted the after-lunch, lack of energy but the problem solving exercise successfully re-energised participants. He noted that the clinic broke down as people were tired and wanted to do it a different day.

**Session 19: Analysis of strategies – Nicole Leotaud**

The process of turning problems into objectives for the project was briefly recapped. This session focused on the process of analysing different possible strategies and choosing the most relevant and feasible for the project.

Some criteria for project selection were identified as:

- Availability and depth of resources (cost, time, capacity)
- Chance of success
- Benefits to priority groups

- Risks – e.g. political support, diverse funding base, vulnerability to natural disasters
- Sustainability
- Fit with other initiatives – complementarity
- Political support
- Social and environmental impact

Participants worked in their small groups to analyse the possible strategies identified in their San Pedro case study objective tree and choose one strategy to pursue using relevant criteria for their analysis. They were instructed to choose one of their organisations to hypothetically use as the project coordinator (i.e. assess against this organisation's mission, capacity, etc.). Additional context was given on a slide (see Session 19 slides in Appendix 4).

Three different approaches emerged but all had groups went through a formal or informal process of assessing options and ranking according to several criteria. Two groups chose tourism projects, one a pre-feasibility study.

It was emphasised that adequate information was needed to be able to assess strategies against the criteria. Some useful tools for strategy analysis were identified as being:

- Institutional & organisational capacity assessments
- Assessment of previous and concurrent projects (building blocks, synergies, duplication, lessons learned)
- Stakeholder analysis
- Institutional framework analysis

### **Session 20: Introduction to project planning & project implementation tools – Nicole Leotaud**

Project planning was noted as essential to ensure project success and a quote was given: *“If you fail to plan, plan to fail”*.

An interesting discussion proceeded around the issue of what was meant by a project failing. Roberta Williams (GARD) recounted her experience with an enterprise development project which had as its goal to develop 75 women-led businesses. It was found out during the project that the women targeted were facing numerous serious issues (e.g. abuse, homelessness) and GARD had brought in other agencies to assist. Eventually only two or three of the women started a business enterprise. In this sense the project could be determined to have failed. However, within that time tremendous personal development of the women was evident as they became empowered to get out of abusive relationships and started networking. Three or four years after the end of the project, some of the women came back saying that they were finally ready to start a business. This and other examples given by the participants drew out several valuable lessons that were discussed:

- Adaptive management in a project
- Thorough problem analysis
- **Short-term versus long-term evaluation success**
- Involving beneficiaries in needs analysis and project design

These lessons all offer strong support for project planning to ensure success.

### **Session 21: Introduction to Logical Framework Analysis – Nicole Leotaud**

There are several tools that are used in project planning and the logical framework approach is one of these tools and it is widely used by donor agencies. This is an analytical process to aid in structured and systematic planning, management, monitoring and evaluation of projects. The logframe approach is **more about process than product**. The product is the logframe, which gives a succinct summary of the key elements of the project.

Several of the participants had seen or been involved with using or writing a logframe. It was noted that this process should ideally involve several people in a team approach.

Handout 21(a) (see Appendix 3) was distributed and components of a logframe were reviewed:

1. **Goal:** Higher-level objective or long term impact of the project
2. **Purpose/Objective:** Measurable direct impact or effect / change that occurs as a result of the project
3. **Outputs:** Project results or deliverables (milestones)
4. **Activities:** Tasks to produce the outputs (chronological)
5. **Indicators:** Objectively verifiable measurements to measure achievement
6. **Means of verification:** Methods & sources of data for indicators
7. **Assumptions:** Events, conditions and decisions outside of the project's control and are necessary for success at each level. These need to be monitored and further risk analysis and management conducted. Assumptions are written as positive statements (e.g. there will be no hurricanes) and risks as negative statements (e.g. there might be a hurricane). Examples of assumptions relate to - actions of stakeholders, responses to project, changes in policies, and financing arrangements.

Cards were distributed with examples of each of these components and participants worked in pairs to match the examples with the component. The correct matches were verified as shown in Table 8 (see Session 21 Logframe analysis slides in Appendix 4).

Table 8: Matched examples of logframe components

<b>Component</b>	<b>Examples</b>
Goal	To promote livelihood opportunities in the agricultural sector in San Pedro.
Objective	To develop a three-year pilot organic farming project in San Pedro using the tungya system on private forested lands.
Activities	<ul style="list-style-type: none"> <li>• Lease 50 acres of private land to conduct mixed crop organic farming of food crops with trees.</li> <li>• Conduct three training workshops for farmers in organic farming methods.</li> <li>• Provide extension support to farmers for a period of 3 years.</li> </ul>
Indicators	<ul style="list-style-type: none"> <li>• 20 farmers trained in organic farming methods for food crops</li> <li>• 50 acres of land planted</li> </ul>
Means of verification	<ul style="list-style-type: none"> <li>• Training workshop list of participants.</li> <li>• Interviews with farmers and field visits to sites.</li> <li>• Records of sale of organic crops.</li> </ul>
Assumptions	<ul style="list-style-type: none"> <li>• Private lands available for mixed crop organic farming of food crops with tree crops.</li> <li>• Farmers interested in organic farming of food crops.</li> <li>• Market for organic crops is sustained.</li> <li>• Farmers and private landowners able to reach and sustain agreement for leasing land.</li> <li>• Hurricanes do not destroy crops.</li> </ul>

The basic table structure of the logframe was then reviewed (from Handout 21(b) see Appendix 3), and the horizontal and vertical logic explained as:

- Vertical logic: For each level, IF (activities) are achieved AND (assumptions) hold true THEN (outputs) will be achieved
- Horizontal logic: How will we verify success in achieving (activities)?

The process of constructing a logframe was then reviewed. Some participants did it at random, and some worked down the first column and then at random. Assumptions were often written from the bottom then up. It was emphasised that this is an iterative process.

Additional clarification and discussion on the elements of logframes were on:

- Goal is higher level objective
- Goal is outside total control of the project i.e. is something bigger than the project
- Goal is state of having achieved i.e. past tense is used
- Purpose/Objective is with an action verb

- Objectively Verifiable Indicators (OVIs) and Means of Verification (MOVs) serve the purpose of making you think about how you are going to test whether you have achieved what you set out to do – these are used in monitoring and evaluation
- Outcome answers who cares, what changes, the consequences of outputs

John Guilbert (NHCS) offered a ‘Six Pack’ process that is useful in constructing project plans which examine the six factors given in Table 9.

Table 9: The ‘Six Pack’

Concentration (Narrowing down)	Order (orderly)	Communication
Expansion	Freedom	Interaction

Inconsistency over terms used by different donors (e.g. project objective versus purpose, activities versus task) and slightly varying structures was noted, but the principal meaning and logical process is common.

Participants were given cards for a logframe puzzle for the San Pedro case study and they worked in small groups to reconstruct the logframe. They used tape to construct an outline frame for the table and then slotted each of the cards into one of the boxes in the table. This was an extended but very useful process, which highlighted the interrelationships existing among elements of the logframe. For the debriefing, each group examined the others’ table and gave comments. The importance of communication and working together as a team was clearly demonstrated during this exercise. The correct matches in the completed logframe for San Pedro were distributed in Handout 21(c) (see Appendix 3).



Figures 13, 14 & 15: Groups work on re-constructing their logframe “puzzle”.







Fig 16: The completed logframe “puzzle”.

**Session 22: Developing logframes – Nicole Leotaud**

Participants worked in their small groups to develop a logframe for their project. They were instructed to at least fill out the entire first column (goal, objective, outputs, and activities) and the row across for the objective. The logframes produced by the groups are shown in Tables 10 and 11.

Table 10: Group 1’s logframe

<b>Description</b>	<b>Indicator</b>	<b>MOV</b>	<b>Assumption</b>
Goal: livelihood opportunities in the tourism sector in San Pedro increased			
Objective: to develop a strategic plan over the next 3 months to (1) create a marketing plan (2) improved accommodation (3) training of tour guides in San	a 5 year strategic plan	a 5 year strategic plan, consultant contract	

Pedro.			
Outputs: a plan that addresses (1) creating a marketing plan (2) improving accommodation (3) training tour guides			
Activities: • Recruit consultant • Stakeholder meetings			

Table 11: Group 2's logframe

<b>Description</b>	<b>Indicator</b>	<b>MOV</b>	<b>Assumption</b>
Goal: livelihood opportunities in the tourism sector in San Pedro increased			Guides are available and willing to be trained
Objective: to train San Pedro tour guides in time management and knowledge of flora & fauna	15 certified guides	Copies of certificates, registration lists, trainer's report	Guide interest continues / is high
Knowledgeable guides working in ecotourism			
Activities: • Workshop in flora & fauna • Workshop in time management • Practicum			

The groups produced different logframes but with some common factors. Groups drafted components and then used an iterative process to refine all levels. Participants felt that the process was time-consuming and can be a bit tedious but was very useful in clarifying and developing consensus on elements of the project.

The advantages of logframes were identified as that they:

- Force thinking and re-thinking on the project (is this the project that is needed, what exactly is the project about)
- Help to clarify project objectives
- Increase the likelihood of project success
- Encourage examination of risks to the project
- Provide a useful summary of the project
- Can be used as a communication tool
- Facilitate a logical process of project planning
- Provide information for monitoring & evaluation
- Help reduce risks
- Provide an opportunity for team building
- Facilitate collective clarification on the project plan

- Provide a map to the successful destination
- Provide an opportunity to widen input
- Are a reference point
- Complement the story

A challenge of the logframe is that they are difficult and time consuming to develop, particularly for “tri-partie” projects with NGO, community, and government stakeholders. Steve Bass from the Mac Arthur Foundation noted that life should not be treated like a matrix, but it is a bowl of spaghetti with all the complexities and convoluted relationships, and similarly logframes are a useful summary but cannot represent the full story of the project.

Handout 22 on strengths and problems with the logframe approach (see Appendix 3) was distributed.

### **Session 23: Overview of Project Management Tools – Nicole Leotaud**

A brief overview of some other project management tools was given, including work plans, timelines, budgets, and responsibility matrices.

#### **Clinic: Project cycle management**

The clinic was chaired by Jacquie Armony (SCHS) and Brian Cooper (EAG) acted as the ‘doctor’.

The process of project identification was discussed and it was noted that there is a never ending process of projects leading to other projects. Ideas come out of the evaluation of a project and additional problems are identified. These must be analysed and prioritised. Sometimes other project opportunities arise, but the organisation needs to assess if these will fulfil the organisation’s mission and also if it has the capacity to do the project.

A second issue discussed was around project sustainability. It was agreed that a project must have sustainable impacts or outcomes. Various types of sustainability were distinguished: (1) is the project self-sustaining (e.g. can it generate revenue to support a programme into the future; (2) sustainable impacts or outcomes (which is donor-demanded) which is concerned that everything achieved does not collapse and is there something that is going to be of lasting value; and (3) sustainability in terms of building the capacity of organisations (this may be unexpected outcomes of projects).

Passion is a key factor that donors look for in NGOs. Often it is assumed what donors want and NGOs have created perceptions of donors that are not necessarily true. Communication and negotiation with donors and relationship building is vital.

The need for more networking among NGOs to share information on funding opportunities was also identified. There is a role for a regional organisation in this (e.g. Caribbean Conservation Association (CCA)). It is also important to coordinate among regional organisations to maximise collaboration and coordination and minimise duplication and ensure all priorities for the region are addressed.

Additional issues discussed where how to move from strategic plan to project planning and the importance of budgeting an organisation's time towards networking and project development.

#### **Day 4 Feedback from rapporteur / listener**

Auguste Gaspard (TWCG) reported on Day 4 that participants learn that an objective tree gives the solutions that are the flip side to the problems. He noted the sessions on how to choose a project by analysing alternatives. He opined that the logframe approach was an excellent way to get understanding. Issues of project sustainability, minimising risks, co-funders, keeping partisan politics out of projects & organisations, use of baseline data in monitoring, and sustainable impacts of projects beyond the end of project were emphasised. He noted that the clinic was a smaller group but was dynamic. He felt that the use of case study examples created cohesiveness, and recommended that two smaller clinics could possibly be run consecutively. He saw negotiation skills developed through group activities, where there was a good balance of teams and contribution. He saw the development of team skills through group work, when participants agreed to disagree, and there was good sharing of ideas. He felt this could be emulated back in participants' organisations.

#### **Session 24: Responsibilities and the project team – Nicole Leotaud**

Using a responsibility matrix to assign project responsibilities for various members of the project team was reviewed. This was felt to be a very useful tool and could be used to distinguish between persons responsible, those who are providing support and those who need to be informed. The various roles in an organisation of the Board, the Treasurer, administrative staff, general members, project managers and project workers were reviewed (see Handout 24(b) in Appendix 3).

#### **Session 25: Evaluation & monitoring at the project, programme and strategic plan levels – Nicole Leotaud**

Participants were asked to work in groups to define/agree on distinctions between monitoring, control, evaluation & closure. There was clear distinction made between these as summarised in Table 13.

Table 13: Participants' definitions of monitoring, control, evaluation & closure

Monitoring	<ul style="list-style-type: none"> <li>• Looking to see if doing what project says</li> <li>• Measure indicators</li> <li>• What strategy throughout</li> <li>• Continuous</li> <li>• Can be done by an outsider</li> <li>• Measure OUTPUTS</li> <li>• Assess / analyse</li> </ul> <p>Monitoring report (observations):</p> <ul style="list-style-type: none"> <li>• Report</li> <li>• Plan</li> <li>• Process</li> </ul> <p>Progress report:</p> <ul style="list-style-type: none"> <li>• Assess implications</li> <li>• Evaluation report</li> <li>• Status</li> </ul>
Evaluation	<ul style="list-style-type: none"> <li>• Looking to see if what project says makes sense, is having desired result/impact</li> <li>• OUTCOMES</li> <li>• Indicators</li> <li>• Status</li> <li>• Consequences</li> <li>• Assess implications of monitoring</li> <li>• Value judgement</li> <li>• Throughout stages</li> <li>• Milestones / deadlines</li> <li>• Done by an outsider</li> <li>• Implications</li> </ul>
Control	<ul style="list-style-type: none"> <li>• Take actions to ensure that project reaches where it set out to reach</li> <li>• Keep project on time and on track</li> <li>• Linked to monitoring &amp; evaluation</li> <li>• Done by the project team</li> </ul>
Closure	<ul style="list-style-type: none"> <li>• Wrap-up</li> <li>• End-of-project report – summary, lessons learned, recommendations</li> <li>• Stakeholders' evaluation</li> </ul>

Participants were then asked to work in their small groups to identify one project that did not go according to plan & identify: (1) why (2) what could have been done to get back on track (i.e. if you were brought in as an external consultant to evaluate that project, what recommendations would you make for if this project had to be done again).

Group 1: CREP project

1. What went wrong: This project was seen to have problems in its design (implementation & appraisal stage).
2. The recommendations made were that the project should have:
  - (a) Stuck with the initial project design
  - (b) Made the TOR & MOUs clearer
  - (c) Conducted a needs assessment at the start and built the capacity of organisations before implementation
  - (d) Ensured equity in terms of support from external advisors
  - (e) Allocated resources to do monitoring, control & evaluation throughout for adaptive management
  - (f) Met expectations (e.g. training for participatory monitoring)

Group 2: UNESCO project on revitalising performing arts as a tourism product

1. The design was seen to be faulty, with stakeholders not being involved from the start, no communication, donor decided what person would coordinate (NGO did not have a say), needed change coordinating country & agency after 6 months
2. Recommendations were that the project should have:
  - (a) Involved stakeholders in the design, needs assessment, etc.
  - (b) Used adaptive management for implementation to achieve tasks within budget & time and to maintain flexibility
  - (c) Provided a budget for team communication throughout the project
  - (d) Used an advisory committee

Group 3: OAS Poverty Reduction Fund project in Talvern to manage watershed for water security of the community

1. The problem with this project was that funds ran out (because assumptions were made that work would be done for free by the community) and so the objectives were not met. Lessons learnt in phase 1 were applied in phase 2 of the project (when another funder was brought in).
2. Recommendations made were that the project should have:
  - (a) Allocated adequate time to planning to clarify goal, objectives, and activities
  - (b) Conducted monitoring & evaluation at critical stages to pick up any cost overruns and to be able to put in control measures
  - (c) Managed conflicts between stakeholders & the project team

Common threads among the case studies analysed by the participants were identified as:

- Projects lacking a clear focus on a goal & objectives
- Inadequate stakeholder participation in project planning
- Inadequate capacity assessment
- Poor budgeting (especially for monitoring & evaluation)
- Inadequate monitoring
- Lack of evaluation at critical stages

Steve Bass from the Mac Arthur Foundation emphasised:

- The importance of having baseline data to be able to monitor progress

- The difference between outputs & impact (outcome)
- The use of participatory monitoring & evaluation (including in design)
- Look at outcomes to assess the scale of impact and what lessons can be learnt for other projects
- The closure stage when it is important for the project team to broadly communicate about the project

An example of a control point identification chart was reviewed (see Session 25 slides in Appendix 4) to see what could go wrong in terms of quality, cost and time and what adaptive management actions could be taken to address these.

### **Session 27: Workshop evaluation & close – Sarah Mc Intosh**

#### ***Verbal evaluations:***

Participants were asked to each share what they learnt from the workshop, what they gave to the workshop and how they felt after/about the workshop. Each of the responses is summarised below.

Junior Prosper (EAG) – He felt good. He had lots of real questions during the workshop and thanked participants for helping to address them. He enjoyed meeting the other participants. He felt that he can apply what he learnt back in his organisation, particularly project cycle management.

Auguste Gaspard (TWCG): He liked the interactive processes in the workshop, and felt that the group work was very good as it allows people to speak more freely (e.g. Junior who doesn't talk in big groups). He felt that the facilitators went too fast sometimes. He was taking back the idea of working together on a project proposal and what processes to use. He was happy that he came and shared his experience. He will find the materials distributed in the CD helpful and the handouts are useful to verify things that were covered too fast.

John Guilbert (NHCS): He felt that this workshop was evidence that CANARI is serious about training. He saw it as reinforcement of what he knows but is not always doing. He feels satisfied/full. He can use the training as a means of bridging a gap between what his Board is engaged in (Board development) and assistance with transitional strategic plan. He was happy to share his experience on the NHCS processes. He felt the workshop was too short.

Donna Fray (JCDT): She said that she wanted to come “as a sponge” and had learned a lot. She needed to step back and reflect, particularly in relation to leadership /management. The workshop gave her a chance to reflect on her personal qualities as a leader. She felt nervous at first but the group is inclusive and gave people a chance to participate. She felt she was a better team person as a result of her participation in the workshop.

Lornette Hanley (NHCS): She thanked CANARI, and felt that the training came at the right time as old courses have been task-oriented. These workshops are more orientated to preparing the people. It gave her an opportunity for reflection on other types of training. She admired how the facilitators complemented each other – they had different but complementary strengths and weaknesses. She felt scared because there was so much to be done. She gets so involved in managing and some leading that she doesn't have time for teaching and wants to address the issue of succession planning so that her assistant could take over. The team building was most enjoyable. She saw shared leadership in the group work. She felt that she had grown, and was more confident to take on the challenges ahead.

Suzan Lackhan (NS): She said that she had learned so many things and enjoyed interacting with so many different people with different backgrounds, countries, and personalities. She learnt that a logframe was not to be written and “put in a cabinet” and not used. She learnt that EDs can be frustrated with Boards. She learnt from John Guilbert how to incentivise a Board. She enjoyed the process used with small group work that facilitated contributions from everyone. She felt good about herself, it was a struggle to leave for five days and fulfil responsibilities back home expectations, but felt that she had benefited tremendously, and made a lot of good friends. She felt rejuvenated as a leader with the break from routine. She was happy to share a lot of her experiences, and make people laugh and feel comfortable. She will grow and continue to grow and said that the workshop was not painful and tedious but the participatory facilitation was what participants want.

Roberta Williams (GARD): She thanked CANARI for the training and said that she had been waiting for this type of course for a long time. She will be getting her Board to look at their roles. She liked the networking and facilitation style. She felt that bringing people together can't be replaced by email. She will be going back to her organisation with a lot of confidence. She was very glad that she could bring John Mussington (GARD Board member) as they can support each other with implementation.

John Mussington (GARD): He felt that the workshop was a very fruitful experience. He has a full life so has to think about taking off time but is glad that he came to get refreshed and see what happens in rest of region. As new Board member, he had doubts about the usefulness of his contribution. Module 1 built his sense that he could contribute, and after Module 2 he is very confident that he can use the tools and skills to apply in GARD. He also learned a lot from analysing how we delivered the workshop and can use those facilitation techniques. He contributed a lot to the workshop, for example his understanding of logframe building blocks. He recognised the wealth of professional knowledge in participants and felt that the workshop gave an opportunity to learn from each other. He observed people growing in confidence in their small groups and noted that everyone has something to contribute. He said that now participants are part of a family and can support each other.



Jacqueline Armony (SCHS): She felt the workshop was enriching, and the rich experience was attributable to the interactive style used. She learned to put things into the logframe rather than just doing by instinct. She was concerned about the next step: transference of what was learned (in terms of process and content) to Caribbean NGOs and wider society. She asked whether CANARI could facilitate building networks of NGOs to ensure greater sustainability.

Elsa Hemmings (NCRPS): She felt that she had learned a whole lot from other participants' experiences. She said that she sometimes feels isolated when things go and felt nervous at first but then grew comfortable. She committed to making sure that the NCRPS Board is well structured and that the strategic plan is done. She shared her experience (e.g. networking with Nevis about mooring buoys).

Richard Villafana (NS): He said that he didn't give a lot in terms of speaking but learned a lot and he can implement the learning to make NS stronger.

Susan Otuokon (JCDDT): She said that she was satisfied and had learned a lot. She enjoyed the exercises such as teambuilding, the use of handouts to guide individual reflection, the logframe and different techniques such as working groups. She felt able to use the tools examined. She commended the idea of bringing two people from each organisation and felt that this was the very best thing about these workshops. She liked the synthesis of the different people parts – leadership, teams, board, and volunteers – with the project management component. She will share with other team people in JCDDT things like the logframe to ensure better project development and build the organisation's capacity.

Helen Douglas (SCHS): She learned about project cycle management and had worked with the tools before but never really understood them. She said that she hopes to work alongside Jacquie and others in SCHS. He was glad that she had participated and formed friendships.

Brian Cooper (EAG): He agreed with many of the other comments made. He said that he had the same dilemma about leaving his job but felt that the time was worthwhile and he felt rejuvenated. He opined that the workshop showed that CANARI was serious about participatory development. He noted that there are two challenges: transferring the knowledge and the spirit. He will also apply the knowledge and processes back in his job with the government of Antigua.

Dyana Joseph (TWCG): She felt that she had learned a lot and took time to open up but shared in the team building and gave her experience. She hopes that other members of her organisation won't feel that she's just there to teach them but to share.

Sandra Ferguson (ART): She said that she was glad that she took the time to attend as it gave her a chance to step back, refresh, remind, and learn new things. She was impressed by participants' input particularly GARD's strategic planning initiative after Module 1. She valued CANARI's workshops participation and process. She learnt

about the logframe, which she thought she had understood but the discussion brought greater clarity. She currently doesn't use logframes unless they are required but made a promise that she will use in a team context in her organisation. She said that she really had a good time in the group and advocated the importance of empowering people from the bottom up.

Steve Bass (Mac Arthur Foundation): He felt that good grant-making in a large part depends on contact with those that are doing the projects. He felt that his participation was useful to help understand the capacities available in the region and the needs in the region. He noted that NGOs should make sure when they are submitting a proposal to submit it to the most suitable donor to match their interests.

***Written evaluations:***

Appendix 5 gives the blank evaluation form and Appendix 6 is a compilation of the completed evaluation forms. The written evaluations were all extremely positive and commended the participatory facilitation style, including the use of group work and the "clinics". Participants said that all of the sessions were extremely useful, with the most frequently cited ones being team building and the logframe. The course structure and delivery were rated generally as very good or good. Some participants felt the sessions were a bit rushed and more time was needed. Logframe analysis was the most commonly cited thing that participants would apply when they returned to their organisations. Several additional capacity building needs were identified, with financial management / fundraising / proposal writing being the most commonly given.