Civil Society Organisational Strengthening Report of the First Mentors Training Workshop

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• Overview of the project and training workshop
• Role of the PISCES CSO strengthening mentors
• Understanding CSO development
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• Getting ready to mentor

The PISCES project is supported by the European Union. Read more here.
Overview of the PISCES project

**Project title:** Powering Innovations in Civil Society and Enterprises for Sustainability in the Caribbean (PISCES)

**Supported by:** European Union (ENV/2016/380-530) Civil society and small and micro enterprise innovation for marine and coastal conservation in the Caribbean

**Project lead:** [Caribbean Natural Resources Institute](https://canari.org) (CANARI)

**Project partners:**
- [Caribbean Coastal Area Management Foundation](https://camfoundation.org) (C-CAM)
- [Caribbean Network of Fisherfolk Organisations](https://cnfo.org) (CNFO)
- [Environmental Awareness Group](https://eagcaribbean.org) (EAG)
- [Fondation pour la Protection de la Biodiversité Marine](https://probi.org) (FoProBiM)
- [Sustainable Grenadines Inc](https://susgren.org) (SusGren)
- [Saint Lucia National Trust](https://saint-lucia-national-trust.org) (SLNT)

**Timeframe:** January 2017 – December 2020

**Total project budget:** EUR 1,933,815 (EUR 933,815 is co-funding pledged by the project partners)

**10 project countries:** Antigua and Barbuda; The Bahamas; Dominica; Grenada; Haiti; Jamaica; Saint Kitts and Nevis; Saint Lucia; Saint Vincent and the Grenadines; and Trinidad and Tobago.
Overview of the Mentors training workshop

Who?
20 Mentors representing the 10 PISCES project countries: Antigua and Barbuda, the Bahamas, Dominica, Grenada, Haiti, Jamaica, Saint Lucia, St. Kitts and Nevis, St. Vincent and the Grenadines and Trinidad and Tobago.

Why?
To train 20 Mentors across the 10 project countries in civil society organisational strengthening.

How?
A four-day mentors training workshop held in Trinidad and Tobago during 13-16 March, 2018 and facilitated by CANARI.

Results
The 20 Mentors who participated in the training workshop:

- enhanced their understanding of the organisational challenges facing Caribbean civil society organisations (CSOs) to become strong, effective and sustainable organisations
- enhanced their knowledge on building capacity in key areas for CSO organisational strengthening
- left the workshop ready to apply an organisational assessment tool to conduct a capacity needs assessment for 1-2 CSOs in their country
- understand their role as mentors and the planned approach under the PISCES project to build capacity of at least 15 CSOs across the 10 project countries
- formed relationships with each other which has benefits for regional sharing and learning as the project progresses
The PISCES CSO Strengthening Mentors

The overall purpose of the Mentors is to provide organisational strengthening support to selected target CSOs in the 10 project countries.

The Mentors achieve their purpose primarily through:
- participating in Mentor training workshops conducted by CANARI;
- conducting organisational needs assessments of CSOs and advising CANARI on needs;
- inputting on development of a capacity building strategy for the project;
- facilitating training, coaching, action learning and peer exchange sessions for CSOs;
- evaluating capacity built;
- advising CANARI on capacity building undertaken, results, lessons learnt, and relevant issues;
- sharing information on experiences and lessons learnt with other Mentors.

Workshop participants discussed the characteristics of an effective mentor noting that the role of the mentor is to:
- Build rapport and trust
- Practice active listening
- Carry out effective questioning to further explore ideas or to challenge their mentee’s thinking
- Provide constructive feedback and help mentee consider options
- Be empathetic
- Help to identify areas for development
- Allow opportunities for mentees to practice new skills
- Provide guidance, not direction and do not solve problems but act as a collaborator in the problem solving process
- Maintain confidentiality
- Be accessible
- Promote responsible decision-making
- Motivate and support the mentee to achieve their goals
- Ensure a professional relationship
- Recognise when it is time to relinquish the mentoring role

CANARI defined mentoring and mentors as a process of sharing knowledge, skills, experiences, insights and opinion to provide strategic advice and guidance to help people make decisions to achieve their desired objectives. Mentors are trusted counsellors or advisors.
### Mentors

<table>
<thead>
<tr>
<th>No.</th>
<th>First name</th>
<th>Surname</th>
<th>Position/ Title</th>
<th>Organisation</th>
<th>Country</th>
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<tbody>
<tr>
<td>1</td>
<td>Sophia</td>
<td>Steele</td>
<td>Eastern Caribbean Project Coordinator</td>
<td>Fauna &amp; Flora International</td>
<td>Antigua &amp; Barbuda</td>
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<tr>
<td>2</td>
<td>Therez</td>
<td>Walker</td>
<td>Researcher and Consultant</td>
<td></td>
<td>Antigua &amp; Barbuda</td>
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<tr>
<td>3</td>
<td>Arkada</td>
<td>Ventour</td>
<td>Programme Coordinator</td>
<td>Young Americas Business Trust</td>
<td>Grenada</td>
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<tr>
<td>4</td>
<td>Agnes</td>
<td>Esprit</td>
<td>National Coordinator</td>
<td>Global Environment Facility – Small Grants Programme</td>
<td>Dominica</td>
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<tr>
<td>5</td>
<td>Jeanelle</td>
<td>Brisbane</td>
<td></td>
<td></td>
<td>Dominica</td>
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<tr>
<td>6</td>
<td>Ronald</td>
<td>Cademus</td>
<td>Consultant</td>
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<td>Antigua &amp; Barbuda</td>
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<td>7</td>
<td>Paul Judex</td>
<td>Edouarzin</td>
<td>Environmental Governance Specialist</td>
<td>United Nations Environment Programme - Haiti</td>
<td>Haiti</td>
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<tr>
<td>8</td>
<td>Martine</td>
<td>Jean-Claude</td>
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<td>Haiti</td>
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<td>9</td>
<td>Ann</td>
<td>Haynes-Sutton</td>
<td>Independent Environmental Consultant</td>
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<td>Jamaica</td>
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<tr>
<td>10</td>
<td>Karen</td>
<td>McDonal Gayle</td>
<td>Conservation Trust Funds Specialist</td>
<td>Caribbean Biodiversity Fund</td>
<td>Jamaica</td>
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<tr>
<td>11</td>
<td>Glaston</td>
<td>White</td>
<td>Chairman</td>
<td>Half-moon Bay Fishermen’s Cooperative</td>
<td>Jamaica</td>
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<tr>
<td>12</td>
<td>Craig</td>
<td>Henry</td>
<td>Programme Officer- Conservation Department</td>
<td>Saint Lucia National Trust</td>
<td>Saint Lucia</td>
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<tr>
<td>13</td>
<td>Martin</td>
<td>Weekes</td>
<td>Consultant</td>
<td></td>
<td>Saint Lucia</td>
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<td>14</td>
<td>James</td>
<td>Lord</td>
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<td>Sustainable Grenadines (SusGren)</td>
<td>St. Vincent and the Grenadines</td>
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<td>15</td>
<td>Katrina</td>
<td>Collins</td>
<td>President</td>
<td>Union Island Environmental Attackers</td>
<td>St. Vincent and the Grenadines</td>
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<tr>
<td>16</td>
<td>Nikkita</td>
<td>Browne</td>
<td>Oceanography and GIS Officer</td>
<td>Department of Marine Resources (DMR)</td>
<td>St. Kitts and Nevis</td>
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<td>17</td>
<td>Tracyann</td>
<td>Gaskin Audain</td>
<td>Cooperative Officer</td>
<td>Department of Cooperatives</td>
<td>St. Kitts and Nevis</td>
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<td>18</td>
<td>Eric</td>
<td>Carey</td>
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<tr>
<td>19</td>
<td>Frédérique</td>
<td>Fardin</td>
<td>Technical Officer</td>
<td>Caribbean Natural Resources Institute</td>
<td>Trinidad and Tobago</td>
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<tr>
<td>20</td>
<td>Melanie</td>
<td>Andrews</td>
<td>Technical Officer</td>
<td>Caribbean Natural Resources Institute</td>
<td>Trinidad and Tobago</td>
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### Workshop facilitators

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<tr>
<td>21</td>
<td>Nicole</td>
<td>Leotaud</td>
<td>Executive Director</td>
<td>Caribbean Natural Resources Institute</td>
<td>Trinidad and Tobago</td>
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<tr>
<td>22</td>
<td>Anna</td>
<td>Cadiz-Hadeed</td>
<td>Senior Technical Officer (Adjunct)</td>
<td>Caribbean Natural Resources Institute</td>
<td>Trinidad and Tobago</td>
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Understanding Civil Society Organisational Development

Workshop participants discussed the importance of understanding what stage a CSO is at in order to help Mentors assess organisational needs and capacity building priorities and to design a tailored capacity building strategy.

For example, an organisation that only has volunteers and no staff is not necessarily in need of a human resource management policy, even though this is important for more mature CSOs. Or an organisation that just reached the stage of establishing a bank account needs help to develop its financial management system and is probably not ready to look at establishing an endowment fund.

Civil Society Organisations (CSOs) (sometimes referred to as non-governmental organisations (NGOs)) development has been classified into different stages by some researchers according to their competence in different components of organisational capacity. For example, classification may be into: start up (nascent), emerging (young), expanding (growing), and mature.
Civil society organisational development: Assessing key capacity areas

CANARI trained the group of 20 Mentors in CSO organisational best practice targets under each of the following key capacity areas and discussed why they are important for CSOs to build a strong and effective organisation. The workshop also included a field exercise whereby Mentors worked in groups to facilitate rapid organisational capacity needs assessments with three community-based organisations in north-east Trinidad.

- Governance and the role of the Board
- Planning, monitoring, evaluation and learning
- Fundraising and financial management
- Human resources and organising work
- Stakeholder engagement and partnerships
Governance and the role of the Board

Good governance leads to better managed organisations that are equipped to make a meaningful long-term contribution.

A central discussion of the governance session was the importance of good governance in allowing a CSO to achieve its mission and ensuring that the organisation remains viable.

CANARI noted that for CSOs, governance is about:
1. Setting and maintaining strategic direction
2. Providing oversight for accountability - ensuring that an organisation is effectively and properly run
3. Ensuring viability and sustainability

Workshop participants worked in small groups to review a case study and evaluate the performance of the Board using a Board self-evaluation checklist as a tool.

During the debrief, participants discussed the importance of Boards conducting regular evaluations, including self-evaluations, to assess their performance and effectiveness. Based on evaluation results, Board members should seek capacity building support (e.g. via training or coaching) to plug competency gaps, adopt best practices or (where appropriate) appoint new Board members with the relevant expertise. CANARI noted that there are several examples of Board evaluation forms and processes which Mentors can use to support CSOs.

Other discussion points:
• There is often confusion and blurred lines within CSOs in terms of the governance and management roles, which are very important to distinguish.
• The competences needed on the Board of any CSO should be clearly outlined in the Board Terms of Reference.
Governance and the role of the Board

Common challenges that small CSOs face regarding governance:

• Moving from the individual vision of the founder(s) to a shared understanding of ‘our values’ as the organisation grows.

• An overdependence on some of the original founder(s), leading to a lack of fresh thinking and new perspectives at Board level.

• The need to ‘professionalise’ the board – to facilitate effective management of its workload and enable it to operate at the strategic level.

• Getting committed Board members while recognising they are volunteers.

• A Board that works too much at the operational level rather than focussing attention on the strategic level.

• Dealing with the dynamics between the different people in the governance system, managing strong personalities and building a team.

• Ensuring the governance team is ‘self-critical’ – reflecting on and reviewing practice.


Key responsibilities of the Board:
1. Determining mission, policy and strategy
2. Appointing and overseeing the Executive Director/ Manager
3. Managing the governance process
4. Monitoring and evaluating performance

What Board members DON’T do:
1. Engage in the day-to-day operations of the organisation
2. Hire staff other than the Executive Director
3. Make detailed project or programme decisions without consulting staff
Planning, monitoring, evaluation and learning

Why should organisations plan?
- To clarify the organisation’s goals/objectives/desired results for the planning time frame
- To identify strategies and actions to maximise the potential for achieving these
- To identify the resources needed
- To serve as a yardstick when determining priorities and assessing project opportunities

Workshop participants discussed other key points about planning:
- It is important for CSOs to plan in order to attract funders; communicate what the organisation wants to do; be sustainable; and to track management effectiveness.
- A new, small organisation with only one project probably doesn’t need programme or annual plans. However, as an organisation grows, things get more complicated and developing appropriate plans becomes critical for efficiency and effectiveness.
- Planning is not necessarily a linear process – an organisation can develop plans in different orders. There are no rules in terms of when plans should be developed.
- Organisations should check in with plans and revise them as needed.

Types of organisational plans

- **Strategic Plan**
  - Longest time horizon, typically 3-5 years
  - Highest level goals and results
  - Strategies
  - No budget but might include goals for acquiring new resources

- **Programme Plan**
  - Details on implementation of specific area of strategic plan
  - Multi-year
  - Can identify specific projects

- **Annual Plan**
  - 12 month horizon, coinciding with financial year
  - Workplan – multiple projects
  - Balanced budget of income and expenditure
  - Planning process should include reflection on how annual plans contribute to strategic goals

- **Project Plan**
  - To implement strategic plan and programme plans
  - Detailed objectives, results, workplan, budget

Planning: Mentors worked in small groups to discuss one type of organisational plan including a strategic plan, annual plan, programme plan and a project plan. Groups were tasked with developing:

1. **Process**: Best practices on how these plans are developed and used by CSOs
2. **Content**: A list of key elements on what is needed in this type of plan (table of contents)
3. **Capacity needs**: The challenges to CSOs being strong and effective in developing plans
Planning, monitoring, evaluation and learning

What is the purpose of monitoring & evaluation?

- **Accountability** for delivery of results to the donor, relevant authorities, stakeholders involved in implementing the project and target stakeholders.

- **Learning** to assess what lessons are being learnt to increase knowledge and understanding to improve planning/management for enhanced efficiency and effectiveness, assess potential for replication and build capacity.

Mentors demonstrated their understanding of the difference between different levels of results - **impacts, outcomes and outputs** – by completing a logframe puzzle game.

Mentors discussed the fact that outputs occur at the project level while outcomes and impacts have other contributing factors that may be outside of the project.

For example, one of the PISCES project partners, CNFO, may be undertaking their own capacity building initiatives, different to what is being done under the PISCES project, but that still help to achieve the overall outcomes and impact of the PISCES project.

What's the difference between monitoring and evaluation?

<table>
<thead>
<tr>
<th>What does it take place?</th>
<th>Monitoring</th>
<th>Evaluation</th>
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<tbody>
<tr>
<td>Conducted throughout the activity – a continuous process</td>
<td>Conducted at completion of activity - a defined single process</td>
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<table>
<thead>
<tr>
<th>What is assessed?</th>
<th>Monitoring</th>
<th>Evaluation</th>
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<tbody>
<tr>
<td>Progress On track Design</td>
<td>Relevance Impact Effectiveness and efficiency Sustainability</td>
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<thead>
<tr>
<th>What information does it give?</th>
<th>Monitoring</th>
<th>Evaluation</th>
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<tr>
<td>Gives information on if following the plan, what assumptions change, what steps not achieved, etc.</td>
<td>Gives information on whether the activity was successful, had negative impacts, suggests improvements, identifies gaps &amp; new avenues, etc.</td>
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<table>
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<tr>
<th>What is it used for?</th>
<th>Monitoring</th>
<th>Evaluation</th>
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<tbody>
<tr>
<td>Inputs into constant revision of plan - Adaptive management</td>
<td>Inputs into designing new projects Encourages broader reflection</td>
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</table>
Planning, monitoring, evaluation and learning

Some discussion points from the workshop:

• Doing evaluations only at the end of a process does not facilitate adaptive management where needed. It’s important to evaluate at many different points of a process.
• In terms of an organisation’s monitoring and evaluation (M&E) approach, several complementary methods can be used to show real results and reflect change. In addition to the traditional Logical Framework approach, organisations can use Outcome Mapping, Theory of Change and/ or the Most Significant Change approach. These types of participatory approaches to M&E recognise that change is not linear and that stories of change can be told in a more complex way.
• Workshop participants did note, however, that participatory M&E can require more resources and be challenging to implement.
• In the Caribbean, more needs to be done to get stakeholders involved in the analysis and learning aspects of M&E, not just the data collection.
• There is value in having an independent, neutral evaluation done to complement a self-evaluation.

Approaches to planning, monitoring, evaluation and learning

1. **Logical framework**: measure results using indicators reflecting observable changes in state
2. **Outcome mapping**: results as changes in behaviour, relationships, actions of people
3. **Theory of change**: maps out story of how change occurs
4. **Most Significant Change**: assesses results from stories, open and not pre-determined results

Why participatory M&E?

• Understand & negotiate stakeholder perspectives  
  o Include specific local information  
  o Provide information on relevance, sustainability  
• Empower stakeholders  
  o Share information > facilitate learning  
  o Make activities ‘visible’ > increase motivation  
  o Strengthen relationships > build institutions
Fundraising and financial management

Four key elements of CSO financial sustainability

- Budgeting
- Record keeping
- Reporting
- Effective cash management
- Capacity
- Procedures and policies
- Meeting all statutory responsibilities to tax authorities
- Covering staff and other administrative costs!!!
Fundraising and financial management

Analysing the financing mix

The first step in building financial sustainability for an organisation is to map its current sources of income and analyse whether the income is unrestricted or restricted and short-term or long-term.

Workshop participants worked in four groups to develop a simple financing mix matrix for four different CSOs as case studies. Each group determined which quadrant a particular income source should be allocated to and then worked out the total percentage of income in each quadrant.

In the activity debrief, participants agreed on the usefulness of this simple exercise in helping organisations to develop a fundraising plan and strategise. Completing a financing mix matrix can help organisations to project, set target percentages for the type of funding they want to secure, and to set priorities for fundraising.

Mentors noted the inter-connectedness of the capacity areas. For example, in order to fundraise, a CSO needs to do effective M&E to have data to tell impactful stories, have strong communication and visibility (e.g. websites), good planning and good governance for accountability and to show credibility.

One Mentor shared an example of how he developed a 5-year fundraising plan:

**Step 1:** Assess current situation

**Step 2:** Set targets, look at operating budget, need to know your costs

**Step 3:** Identify sources – potential unrestricted, revenue generating options

**Step 4:** Build capacity – importance of visibility, have a good website, need to demonstrate your credibility. A pre-requisite to get funding. Look at Board role, activities to do.

**Step 5:** Budget for fundraising – how will you cover your fundraising costs?
Fundraising and financial management

Administrative costs are general costs related to the running of the organisation as a whole. They include management, governance and development / strengthening of an organisation as well as costs such as building rent, office supplies and insurance.

Workshop participants discussed some key points about administrative costs:
• CSOs need to know what their administrative costs are, budget for them, and control expenditure.
• Donors feel that CSOs should ideally not have administrative costs be more than 15-20% of their total expenses.
• There are several strategies to cover administrative costs and CSOs should use as many as appropriate.
• When CSOs cannot fully cover their administrative costs every year they build up a deficit (in their Administrative Fund).

Some strategies for covering administrative costs:
1. **Prepare an accurate budget for core costs**: to help you minimise costs and know how much you need.
2. **Allocate as much as possible to specific projects**: e.g. equipment
3. **Claim any money that donors provide for core costs**: e.g. rent, utilities, 7% of the total budget
4. **Identify specific sources of funding for core costs**: charge % mark-up on staff time; some donors fund CSO organisational strengthening
5. **Use unrestricted funding to pay for core costs**: e.g. fees charged for services, sale of products, donations from the public
6. **Tight financial monitoring and adaptive management**: to control costs

**Myth busting!**
- Donors should also support administrative costs and strengthening of CSOs, not just project costs
- Non-profits should make a surplus and have a financial cushion
- Non-profit staff deserve to be well paid for their competencies and commitment
- Non-profits should have sound financial (business) management and entrepreneurial thinking
Human resources and organising work

Why is HR Management important for CSOs?
• Strong HR management leads to more efficient, effective and compliant CSOs
• It is the fundamental strength upon which people, strategies, processes and operations are based.
• CSOs are legally required to comply with HR laws

Workshop participants focused on one of the best practice targets for HR Management in a CSO: Performance management and development system used

During the workshop sessions, two Mentors shared real life challenges, commonly faced by CSOs:
1) A dominating Founder of a CBO on a small island is controlling the organisation and using “creative” ways of keeping herself in power.
2) A group of professionals is volunteering their time to work with an organisation but they have reached a tipping point of volunteer burnout. What can the group do keep the organisation alive?

Mentors worked in two large groups in an Action Learning Group (ALG) setting to draw on each other’s expertise and experience to come up with solutions to the above problems. Mentors noted that these situations are seen frequently in Caribbean CSOs and are not clearly defined issues on the organisational needs assessment tool (i.e. “Dominating Founder/ The Founder Effect” or “Volunteer Burnout”). Mentors need to pay attention to some of these kinds of underlying root causes of conflict or ineffectiveness within organisations and try to come up with creative solutions to help the organisation move forward. Especially in the case of the “Founder Effect”, there may be too much resistance to change and even if performance management systems are put in place, the Founder may still find ways around it. You cannot force an organisation into change if they are not ready.
Human resources and organising work

Civil society organisational management
In order for CSOs to **effectively and efficiently** carry out their work and achieve their mission, they need to continuously **improve and professionalise** their work. This requires management and leadership.

**Why is CSO management important?**
- Accountability – to CSO, stakeholders, donors
- Clarity and Transparency – everyone knows what they have to do
- Effectiveness and Efficiency
- Translating strategy into action

**Participants emphasised that:**
- Successful CSOs provide high quality services to beneficiaries
- Competition among CSOs in the delivery of services and in getting donor funding is rising.
- To achieve success, CSOs have to continually improve and professionalise their work, which puts more and more demands on the management and leadership of an organisation.
- There are increasing demands for CSOs to meet donor requirements. CSOs are more and more responsible for social, political and environmental impacts of what they do.
- Focus has changed from donations of unrestricted funding to contracts with international and multi-lateral entities, private sector and governments.

**Organising work:** In an interactive game, mentors worked in two large groups to decide which policies and procedures two different organisations should have in place immediately and which could wait until the following year to be developed, based on each CSO’s stage of development.

CANARI emphasised some key steps in developing systems for a CSO are to:
- Think about what is appropriate for the organisation’s stage of development
- Prioritise given that a CSO will have limited time and resources to develop polices and procedures
- Think about WHO should be involved
- Constantly review and revise to improve systems
**Stakeholder engagement**

Workshop facilitators referred to [CANARI’s Participatory Natural Resource Management (PNRM) Toolkit](#) to guide Mentors in working through the steps to effective stakeholder engagement. Mentors worked in two groups to develop a stakeholder engagement and communications strategy for two scenarios:

1. A Marine Protected Area managed by a CSO
2. The PISCES project Component 1 seeking to build the capacity of CSOs through mentoring

Each group set the purpose of their particular strategy focusing on the context and objectives. Next, they followed the steps outlined in the PNRM Toolkit to outline a stakeholder identification and stakeholder analysis process. The groups also defined the kind of participation they wanted to have for each type of stakeholder and then identified appropriate engagement strategies for each stakeholder or groups of stakeholders.

A communication plan was developed for the key stakeholders using a table to outline the communication objective, key messages, products and pathways, and means of verification. The final step was to outline an implementation plan including M&E and learning.

A key message of this activity was that **CSOs should have a systematic and deliberate strategy for engaging stakeholders.**

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**Partnerships**

- A partnership is a **mutually beneficial** collaborative relationship where the CSO and one or more other organisations collaborate to achieve clearly articulated **common or complementary goals**.
- Partnerships may be forged along a **continuum** of working relationships ranging from joint implementation of a short-term specific project component to a broader-based or programmatic arrangement over the medium to long-term.
- A CSO can enter into a partnership **informally**, or **formally** through a contractual agreement for a specific scope of work or a MOU to guide a longer-term, overarching agreement for collaboration.

**Guidelines on making partnerships work:**

1. Determine the purpose and type of partnership
2. Identify and evaluate a potential partner
3. Negotiate partnership terms
4. Implement, manage and monitor the partnership
5. Evaluate the partnership
Selecting target CSOs to mentor under the PISCES project

Based on the following criteria, mentors selected a total of 21 CSOs in their respective countries to mentor. A strategy of reaching out to the CSOs was discussed.

**Essential criteria**

The target CSOs must:

- Be one of the following types of organisations:
  - Fisherfolk organisation (FFO)
  - Community-based organisation (CBO)
  - National non-governmental organisation (NGO)
- Be located in one of the 10 project countries
- Be working in marine and coastal governance and management
- Include organisations working in and around the five priority MPAs/MMAs: Portland Ridge and Bight PA, Trois Baies, NEMMA, Pointe Sables, Tobago Cays Marine Park
- Include at least two organisations that have women in leadership positions

**Desirable criteria**

- Include the project partners if they would like: CANARI, C-CAM, CNFO, EAG, FoProBiM, SusGren, SLNT
- Include organisations to which mentors have a current relationship with
- Include organisations that are partners of project partners or mentors
Workshop participants reviewed the timeline for Component 1 of the PISCES project and agreed on next steps, including confirming the targeted CSOs and conducting organisational needs assessments.

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<th>Timeframe</th>
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<tr>
<td>Jan – Feb 2018</td>
<td>Selection of mentors</td>
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<td>March 2018</td>
<td>First four-day mentors training workshop</td>
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<td>Selection of target CSOs</td>
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<tr>
<td>March - May 2018</td>
<td>Development of draft CSO organisational strengthening toolkit</td>
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<tr>
<td>March – April 2018</td>
<td>Mentors conduct organisational needs assessments using needs assessment tool</td>
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<td>Submit needs assessment reports to CANARI</td>
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<tr>
<td>May – June 2018</td>
<td>CANARI develops overall capacity building strategy</td>
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<tr>
<td>September 2018</td>
<td>Second four-day mentors training workshop</td>
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<tr>
<td>Ongoing</td>
<td>Mentors provide ongoing training, coaching, peer exchanges and action learning to beneficiary CSOs</td>
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<tr>
<td>October 2020</td>
<td>Finalisation of toolkit</td>
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<tr>
<td>October 2020</td>
<td>Mentors reapply organisational assessment tool to compare with baseline assessment</td>
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At the end of each session, the CANARI facilitators asked the Mentors to record what they want to learn more about and also what best practices they may have to share with the group.

## What next?

<table>
<thead>
<tr>
<th><strong>What next?</strong></th>
<th><strong>I want to learn more about...</strong></th>
<th><strong>I can share best practices on...</strong></th>
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<tbody>
<tr>
<td><strong>Governance and the role of the Board:</strong></td>
<td>Ways in which Board members can be recruited that enable both representation and competence (Akarda, James, Therez, Judex)</td>
<td>Organisational Standard Operating Procedures (Eric)</td>
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<td></td>
<td>Managing conflict of interest (Martine)</td>
<td>Strategy for identifying prospective Board members (Eric)</td>
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<td>Legal aspects such as by-laws (Therez)</td>
<td>Financial reporting (Therez)</td>
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<td>Processes of self-evaluation for Board members (Sophie)</td>
<td>Guidelines for Board members (Ann)</td>
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<td>How to deal with a dysfunctional Board (Ann)</td>
<td>Charters for Board and Committees (Karen)</td>
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<td>Board accountability/ authority over staff/ CEO</td>
<td>Formation/ decision-making (Agnes)</td>
</tr>
</tbody>
</table>

| **Planning, monitoring, evaluation and learning:** | Programme planning (Akarda, Nikkita, Therez, Glaston) | Logframes (Karen) |
| | Theory of Change (Nicole, Karen, Judex) | Examples of Theory of Change (Karen, James, Ann) |
| | Monitoring methods (Craig, Akarda, Nikkita, Therez) | Outcome mapping (Nicole) |
| | Outcome mapping (Katrina, Sophie, James) | Monitoring and evaluation (Nicole) |
| | Most Significant Change (James) | Strategic planning (Ann) |
| | Logical Framework | |

| **Fundraising:** | How to better fundraising efforts (Akarda, Judex, Sophie, Craig, Ann) | Co-financing (in-kind/ cash) grants – writing and management (Agnes) |
| | Partnerships that have worked (Agnes, Akarda) | General fundraising and sustainable financing (Eric) |
| **Human resources:** | Toolkits relevant to HRM systems (Akarda) | Caribbean Sustainable Finance Mechanism (Karen) |
| | Motivating people/ building team morale (James) | Grant writing (James) |

| **Financial management:** | Financial planning at the strategic level (Nicole) | Budget sheets for multiple funders (Karen) |
| | Simple financial systems used for/ by successful CSOs (Akarda, Craig) | Financial polices and procedures (Eric) |

| **Financial management:** | Budget sheets for multiple funders (Karen) | Caribbean Trust Fund Executive Director TORs (Karen) |
| **Human resources:** | Caribbean Trust Fund Executive Director TORs (Karen) | |
Mentor learning systems

At the end of the workshop, Mentors recommended ways in which they could communicate with each other, share knowledge and experiences and document learning:

• Matching Mentors – those who “want to learn more” under each capacity area with those who “can share best practices on”

• Creating a Mentor buddy system – to talk through experiences and share

• Creating a Mentors listserv

• Participating in quarterly virtual meetings on thematic areas

• Tracking what organisations are doing through our collective websites, newsletters, etc.

• Developing a skills bank

• Writing guest blogs (for example on the Bahamas National Trust’s blog that is shared with their network)

• Leveraging resources/ consultants to help more than one organisation

• Celebration of things that work, documenting success stories

• ‘Add on a day’ when traveling to each others’ countries for work. Spend that leveraged time with each other in whatever way is needed or could be helpful

• Bartering skills – “I’ll give you one day on financial systems if you give me one day on strategic planning”

• Shared folder online for Mentors to upload useful documents, resources and templates
Reflections from workshop participants

"What is most significant for me was given the opportunity to meet with other mentors from different parts of the region sharing their best practices, experiences and advice to enable me to consider to use in my own organization. I am especially grateful to CANARI for providing us with the tools and knowledge to build capacity within our organizations and to increase our capacities as well as truly a valuable experience."

"I got to appreciate how useful I could be as a support mechanism for CSO’S and as well to other mentors. I also got a clearer understand the skills I need to develop to be an effective mentor to anybody."

"The workshop reinforces my perception that there is a crucial need for a professional mentorship programme like PISCES."

"The most significant change to me is growth in my awareness of the crucial role of governance of any CSO."

"I feel like I have learnt a lot more about the various CSOs in the region and what processes they have in place and common visions and need – I am always uplifted by that.”

"I learned I will have to be patient and listen to the mentee if I want to be able to offer the most effective guidance.”

"The most significant change in me as a mentor:
1. Confidence to do it
2. Knowledge of various aspects of CSO governance and management, for example learning new tools for monitoring, evaluation and learning, greater appreciation for the importance of good governance.
3. Skills for mentorship, such as how to ask questions to make the mentee consider ideas, rather than stating “you should” assuming that.
4. Feel more supported, knowing there is a pool of resources and people I can call upon.”

"I gained an understanding of the essential elements of a well-run CSO.”

"I liked the participatory exercises and openness of participants and facilitators in addressing issues / concerns / challenges.”

"I liked the feeling of available support from CANARI & fellow mentors as we progress with the mentorship programme.”

"The workshop was very informative; diversified, well organized and facilitated; exciting.”

"I’m leaving workshop with a much clearer idea of what my role should be as a mentor.”