Powering Innovations in Civil Society and Enterprises for Sustainability in the Caribbean (PISCES)

Civil Society Organisational Strengthening Report of the Second Mentors Training Workshop

Contents
• Overview of the PISCES project and training workshop
• PISCES Regional Capacity Building Strategy
• CANARI’s Facilitators Toolkit on Civil Society Organisational Strengthening
• Sharing Mentors’ experiences
• A deeper dive: Priority capacity areas for strengthening CSOs
• Managing conflicts of interest
• Next steps for PISCES Mentors

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)

**Project objective:** To support innovative actions by civil society and coastal community small and micro-enterprises for conservation of marine and coastal biodiversity and development of sustainable and resilient livelihoods.

**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 (CANARI)

**Project partners:**
- Caribbean Coastal Area Management Foundation (C-CAM)
- Caribbean Network of Fisherfolk Organisations (CNFO)
- Environmental Awareness Group (EAG)
- Fondation pour la Protection de la Biodiversité Marine (FoProBiM)
- Sustainable Grenadines Inc. (SusGren)
- Saint Lucia National Trust (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 Component 1 of the PISCES project

The objective of Component 1 of the PISCES project is to apply innovative capacity strengthening methods to build efficient, effective and resilient fisherfolk organisations (FFOs), community based organisations (CBOs) and national non-governmental organisations (NGOs).

To achieve this objective, the PISCES project will build the capacity of a cadre of Mentors, who will:

- **Select target civil society organisations (CSOs) to mentor:** at least 10 beneficiary FFOs, CBOs and NGOs in the 10 project countries;
- **Conduct needs assessments with their mentee organisations:** using an organisational assessment tool and developing an overall strategy for capacity building;
- **Provide targeted training, coaching, peer exchanges and action learning with their mentee organisations:** guided by a toolkit on organisational strengthening for Caribbean CSOs; and
- **Evaluate change:** reapply assessment tool in final year.

Capacity building will be provided to Mentors by conducting two training workshops and virtual webinars on CSO organisational strengthening and mentoring skills and providing mentoring resources e.g. toolkit on organisational strengthening for Caribbean CSOs.
Overview of the Second Mentors Training Workshop

Who?
19 of the 21 CSO 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 strengthen Mentors' skills in priority areas of civil society organisational strengthening.

How?
A four-day mentors training workshop held in Saint Lucia during 29 January-1 February, 2019 and facilitated by CANARI. This workshop was a follow-up to the First Mentors’ Training Workshop which was held in March 2018. The report of the first workshop can be accessed on CANARI’s website here.

Results
The 19 Mentors who participated in the training workshop:

✓ strengthened their skills and knowledge in priority capacity for CSO organisational strengthening including governance and board strengthening; participatory monitoring and evaluation; long-term sustainable financing; and participatory strategic planning;
✓ benefited from peer learning by sharing their experiences in mentoring, including conducting an organisational capacity needs assessment, developing capacity building action plans and building capacity of CSOs;
✓ strengthened their relationships with each other which has benefits for regional sharing and learning as the project progresses.
The **overall purpose** of the Mentors is to provide organisational strengthening support to selected target CSOs in the 10 project countries. CANARI defines mentoring as a **process** of sharing knowledge, skills, experiences, insights and opinions to provide strategic advice and guidance to help people make decisions to achieve their desired objectives. Mentors are trusted counsellors or advisors.

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.
In 2018, Mentors undertook organisational capacity needs assessments of their mentee organisations.

Analysis of the organisational capacity assessment reports revealed four common priority capacity building needs among CSOs:
1. Governance & Board strengthening
2. Strategic planning
3. Leadership and organisational culture
4. Strategic financial management & fundraising for long-term sustainability

The PISCES Regional Capacity Building Strategy was developed to guide how the project will build the capacity of Mentors to address these and other priority capacity needs including through the development of a Facilitator’s Toolkit on Organisational Strengthening for Civil Society Organisations in the Caribbean.

Mentors were reminded that:

- There is no one-size-fits-all approach or methodology as each organisation is unique and capacity building is complex.
- Capacity building is dependent on several internal and external factors, and can be costly.
- Some capacities can be built in a relatively short period of time while other capacity areas require a medium- to long-term approach to be fully addressed.
- Organisational strengthening usually requires a multi-dimensional approach that is tailored to meet the specific needs of an organisation.
CANARI is drafting a Facilitator’s Toolkit on Organisational Strengthening for Civil Society Organisations in the Caribbean.

The purpose of the toolkit is to provide facilitators, mentors and CSO leaders working in natural resource governance and management in the Caribbean islands with practical information to assist them in strengthening organisations so that they can more effectively deliver their mission.

The Second Mentors Training Workshop was used as an opportunity to test some of the toolkit modules and activities with Mentors.

Based on feedback from the workshop, the draft toolkit will be refined as a key output under the PISCES project and something that the Mentors can use to support their capacity building efforts with their mentee organisations.

In addition to others, the toolkit will include sections dealing with the organisational capacity areas that emerged as the highest priority needs in the Mentors’ capacity assessments of their mentee CSOs.

Section 1: Understanding CSO organisational strengthening

Section 2: Planning, monitoring, evaluation and learning

Section 3: Resources/ capacity

Section 4: Governance

Section 5: Management

Section 6: Stakeholder engagement and partnerships

Section 7: Case studies
Sharing mentors’ experiences

Using a reflective exercise, Mentors shared some of their experiences (insights and learnings) over the past year with mentoring. Feedback from Mentors included the following:

- Mentors need to know how to tailor their work to the needs of their mentee organisation and not go in with their initial ideas.
- Effective communication is important – know how to speak to your group in a way they understand.
- Know when and how to adjust our approach as a Mentor, especially when the environment changes – important to manage risk and conflict.
- Be open-minded, don’t force things.
- Identify influencers within the group and use them to support.
- Mentors need to be mindful of how they are perceived by the CSO based on their other roles/ jobs.
- Mentee needs to be ready for and open to being mentored – needs to be the right time for an organisation.
- In moving forward, you can be creating conflict/ discomfort. Some people may be settled in their ways and as a Mentor, you need to destabilise/ raise discomfort…which you need to manage.
- Manage expectations of the CSO and what the CSO expects from the Mentor.
- Don’t be too patient. It’s a collaboration, Mentors need to call their CSOs to account.
- Sometimes things will not work, there will be failures.
- Sharpen your skills: Seek out opportunities to mentor within your own organisations.

- Have patience with yourself and others.
- Be open-minded, don’t force things.
- Respect opinions!
- Your resources may not always match your ambition.
- Build trust and establish relationships.
- Identify influencers within the group and use them to support.
- Value the mentoring and value the organisation.
- Listen to understand and not to reply.
- Don't be too patient. It's a collaboration, Mentors need to call their CSOs to account.
- Sometimes you can get so involved in the process and it’s helpful to step back and get outside support, from your buddy mentor or otherwise.
The Second Mentor Training Workshop built on the capacity areas that were introduced in the first workshop and dived deeper into the highest priority capacity needs that were collectively identified in Mentors’ reports of their CSOs. CANARI trained 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 mentor two CSOs in Saint Lucia.

- Participatory strategic planning
- Governance: Board strengthening
- Financial resource management: Long-term sustainable financing
- Outcome mapping: A method to do participatory monitoring and evaluation
Participatory strategic planning

Key aspects of strategic planning
• The overall approach is based on an understanding of the broader context in which you function, your own strengths and weaknesses, and the problem you are attempting to address.
• Gives you a framework within which to work.
• Clarifies what you are trying to achieve and the approach you intend to use.
• It does not spell out specific activities.

Key questions to consider during the strategic planning process
• Who are we?
• What difference do we want to make?
• What problems are we addressing?
• What capacity do we have/what can we do?
• Which critical issues must we respond to?
• Where should we allocate our resources?/ What should our priorities be?
### Participatory strategic planning

#### Key aspects of participatory strategic planning
- Organisation is intrinsically involved in every step of the process
- Helps build consensus
- Helps an organisation/group/community come together in explaining how they would like their organisation or community to develop over the next few years

#### Benefits of participatory strategic planning
- Builds a spirit of ownership and commitment in an organisation
- Flexible and applicable to multiple settings
- Enables a diverse group to be meaningfully involved and reach consensus
- Participants often find the process and outcome inspiring

#### Challenges to participatory strategic planning
- The process requires
  - trained facilitator(s)
  - buy-in and commitment beforehand from the organisation’s leaders
  - Hard work and commitment
  - Involvement of a wide range of stakeholders
- Can be a lengthy and costly process

Mentors worked in small groups to determine the best approach for implementing a participatory strategic planning process using three CSOs with different resources and needs and at different stages of development as examples. The groups were also asked to define the strategic framework, including how to communicate the plan.

During the plenary debrief, it was noted that the strategic planning process should:
- not be too rigid
- be tailored to the CSO’s stage of development, needs and available resources
- be packaged and communicated in different ways to reach the CSO’s target audience(s). For example strategic plans can be communicated in video format rather than in writing.
Participatory strategic planning: Sharing experiences

To highlight differences in approach, two Mentors were asked to share their experiences with how they went about the strategic planning process for their CSO.

CSO 1: Developing the first strategic plan for the CSO.

- Funding for the strategic planning process was accessed through the GEF Small Grants Programme.
- A consultant with experience in developing strategic plans for CSOs was hired to facilitate the strategic planning process.
- Key stakeholders were identified and their input on the strategic plan was received through surveys and interviews.
- Staff and Board were engaged in the strategic planning process through focus groups and workshops.
- To facilitate ownership and buy-in, the Board and staff led the writing of the plan with guidance provided by the strategic planning consultant.

**Key challenge:**
Gathering background organisational information for the strategic plan was difficult since the institutional memory of the organisation was not well-preserved in some instances e.g. some key information about the organisation was held only with previous staff who had left the organisation.

CSO 2: Developing the third strategic plan for the CSO

- Funding for the strategic planning process was drawn from various project budgets. For previous plans, funding was received from the government and an international non-governmental organisation.
- A consultant with experience in financial strategic planning was hired to help develop the strategic plan.
- Key stakeholders were identified and consulted in the strategic planning process.
- Board members and stakeholders were engaged in the strategic planning process through reflection and visioning exercises.

**Key challenge:**
The 2018-2022 strategic plan was completed in August 2018 but then things in the external environment that would impact the organisation started to change. This meant that a review and revision of the plan had to be undertaken shortly after it was completed.
Governance: Board strengthening

What is Governance?
For CSOs, governance is about...
• setting and maintaining strategic direction
• providing oversight for accountability - ensuring that an organisation is effectively and properly run
• ensuring viability and sustainability

Key responsibilities of the Board
• Determining mission, policy and strategy
• Appointing and overseeing the Chief Executive Officer
• Managing the governance process
• Monitoring and evaluating performance
Governance: Board strengthening

To highlight key concepts in Board strengthening, Mentors were engaged in an experiential exercise which required them to work together as a team to solve a problem.

Mentors were unable to solve the problem in the time allotted. In debriefing, Mentors shared their learning by drawing parallels between the experiential exercise and how CSOs can strengthen the ways in which their Boards operate:

<table>
<thead>
<tr>
<th>Learning from the exercise</th>
<th>Parallel between Board strengthening</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not all Mentors were clear on the objective of the exercise</td>
<td>The Board must always keep its objective in mind</td>
</tr>
<tr>
<td>Not all Mentors were focused on reaching the same goal in the exercise</td>
<td>Board members must share the vision and mission of the organisation they are leading</td>
</tr>
<tr>
<td>Not all Mentors were clear about the rules/guidelines for the exercise</td>
<td>It is important to establish clear Terms of Reference for the Board to operate</td>
</tr>
<tr>
<td></td>
<td>To participate effectively, Board members should have the requisite skills and knowledge</td>
</tr>
<tr>
<td>Some Mentors felt that information was intentionally being withheld from them in the exercise</td>
<td>Building and maintaining trust among Board members is important</td>
</tr>
<tr>
<td>Not all Mentors agreed with the proposed solutions for the problem</td>
<td>The Board should have consensus on decisions made</td>
</tr>
<tr>
<td>Not all Mentors (accurately) shared the information they had during the exercise</td>
<td>Boards need to be provided with the necessary information to make well-informed decisions</td>
</tr>
</tbody>
</table>

Photo credit: CANARI
Financial resource management: Long-term sustainable financing

What is a financing strategy?

1. **Where are you now?**
   a) your current financial situation
   b) an analysis of the main risks and barriers to funding

2. **Where do you want to be?**
   a) your funding objectives and how these relate to your mission
   b) your specific targets for the next 3-5 years, including your ideal income mix (e.g. % income from each income source)

3. **How will you get there?**
   a) fundraising strategies to increase income
   b) strategies to manage expenditure
   c) your key funding relationships and any new relationships that will be essential to achieving your objectives
   d) any resources you need to achieve your financial objectives (people, skills, knowledge, networks, equipment)
   e) your reserves, fundraising, pricing and administrative recovery policies
Financial resource management: Long-term sustainable financing

When thinking about long-term sustainable financing, Mentors should help CSOs consider the following:

Where are you now?
- **Current financial situation** – indicators and trends e.g.
  - Sources of income (analysis of types, diversity and relative importance)
  - Funding mix matrix
  - Administrative expenditure and recovery
  - Reserves
- **Risks and barriers** to fundraising

Where do you want to be?
Funding objectives e.g.
- Make effective use of funds raised
- Diversify sources of income
- Expand a source of income
- More funds for administrative costs
- More long-term funding
- Funding for innovation and learning

How will you get there?
Fundraising strategies e.g.
1. Grant funding
2. Earned income (goods and services)
3. Membership fees
4. Donations
5. Investments

What financing is needed?
In the longer-term (3-5 years?):
- A **survival budget** – the bare minimum needed in order to continue functioning and to justify the existence of the CSO
- A **guaranteed budget** – the amount that is guaranteed income
- A **probable or working budget** – what the CSO confidently expects to raise or generate
- An **ideal or optimal budget** – this covers more ambitious projects and programmes that the CSO hopes it will be able to support

A CSO will have to assess the range of different fundraising strategies and determine which it will use based on appropriateness (to the need), feasibility (based on capacity, opportunities) and fit (to its mission, image, culture).
Financial resource management: Long-term sustainable financing

Mentors undertook a role play exercise to better understand how a CSO can assess which funding strategies are best for it. Based on their knowledge and experience, Mentors were asked to give advice to a mentee organisation on the pros and cons of each of the 5 funding strategies. A few pros and cons for each strategy include:

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant funding</td>
<td>😊 Many options available to access grant funds</td>
<td>😐 Funding is restricted to a particular purpose or project</td>
</tr>
<tr>
<td></td>
<td>😊 Opportunities for repeat funding if projects are successfully implemented</td>
<td>😐 No control over when you get disbursements, which can upset the cashflow of the organisation</td>
</tr>
<tr>
<td></td>
<td>😊 Wide range of grant funds available (small to large)</td>
<td>😐 Organisation usually has to be legally registered and have financial and other systems in place to access grant funds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>😐 Could be highly competitive (so skills are needed to be successful)</td>
</tr>
<tr>
<td>Earned income</td>
<td>😊 Funding is unrestricted</td>
<td>😐 Must be providing a service or product that is in demand (and ideally aligned with the CSO’s mission) to be profitable</td>
</tr>
<tr>
<td>(goods and services)</td>
<td>😊 Can be a source of funding for innovation and learning which may be restricted by some other types of funding e.g. grant funding.</td>
<td>😐 Must maintain a competitive advantage over others offering similar services or products to remain profitable</td>
</tr>
<tr>
<td>Donations</td>
<td>😊 Funding is usually unrestricted</td>
<td>😐 Charitable donations may not always be easily available in the country where the CSO operates. For example, in the US you can raise money from rich individuals but in the Caribbean it may be a little more challenging</td>
</tr>
<tr>
<td></td>
<td>😊 Could receive large donations</td>
<td>😐 Takes time to build a good and reliable list of donors</td>
</tr>
<tr>
<td></td>
<td>😊 Can be a source of funding for innovation and learning which may be restricted by some other types of funding e.g. grant funding.</td>
<td></td>
</tr>
</tbody>
</table>
## Financial resource management: Long-term sustainable financing

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Pros</th>
</tr>
</thead>
</table>
| **Investments** | ☺ May get good returns on investments if done well  
☺ Funding is usually unrestricted  
☺ Can be a source of funding for innovation and learning which may be restricted by some other types of funding e.g. grant funding.  |
| **Membership fees** | ☺ Funding is unrestricted  
☺ Can be a source of funding for innovation and learning which may be restricted by some other types of funding e.g. grant funding.  |

<table>
<thead>
<tr>
<th>Cons</th>
</tr>
</thead>
</table>
| ☹ Requires special skills and knowledge in investing to be successful  
☺ Will need to have proper financial and legal procedures in place  |
| ☹ Need to maintain a strong membership base to be a reliable funding source  
☺ Members may not always pay fees on time or at all  
☺ Greater expectation of benefits by members if dues are collected  |
### Outcome mapping: A method to do participatory monitoring & evaluation

#### Purpose of M&E

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

**Learning** to increase knowledge and understanding that can improve planning/management for enhanced efficiency and effectiveness, assess potential for replication and build capacity

- Assess relevance, results, sustainability
- Prove merit
- Engage stakeholders
- Assess effectiveness and efficiency
- Improve planning/management
- Build organisational and stakeholder capacity

<table>
<thead>
<tr>
<th>When does it take place?</th>
<th>Monitoring</th>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Conducted throughout the activity – a continuous process</td>
<td>Conducted at completion of activity - a defined single process</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What is assessed?</th>
<th>Monitoring</th>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Progress</td>
<td>Relevance</td>
</tr>
<tr>
<td></td>
<td>On track</td>
<td>Impact</td>
</tr>
<tr>
<td>Design</td>
<td></td>
<td>Effectiveness and efficiency</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sustainability</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What information does it give?</th>
<th>Monitoring</th>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<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>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What is it used for?</th>
<th>Monitoring</th>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Inputs into constant revision of plan - Adaptive management</td>
<td>Inputs into designing new projects</td>
</tr>
<tr>
<td></td>
<td>Encourages broader reflection</td>
<td></td>
</tr>
</tbody>
</table>


Outcome mapping: A method to do participatory monitoring & evaluation

Some approaches to planning, monitoring and evaluation include:
1. **Logical framework**: measures 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

Key elements of outcome mapping
- Measures results as changes in behaviours and relationships of **boundary partners** = the people with whom an organisation, programme or project works directly.
- Desired result of changed behaviours of these partners as **outcome challenges** that, if achieved, will result in a positive contribution to the desired development change.
- For each boundary partner **progress markers** are then identified as a graduated series of change in behaviours that are **indicators** towards this ultimate vision of success.

Steps in the outcome mapping process
1. Developing a vision
2. Developing a mission
3. Identifying boundary partners
4. Developing outcome challenge statements
5. Identifying progress markers
6. Developing a strategy map
7. Review organisational practices
8-11. Monitoring
12. Developing an evaluation plan

Outcome mapping is based on the central concept that **development is by and for people**, and thus seeks to measure change in people.
Mentors worked together in small groups to apply Outcome Mapping to the PISCES mentor programme. Each group was asked to identify a few sentences that will be part of the outcome challenge statement for mentors (description of result) and identify 3-8 progress markers (indicators of progress).

<table>
<thead>
<tr>
<th>Question</th>
<th>Outcome challenge statement</th>
<th>Progress markers</th>
</tr>
</thead>
</table>
| How are mentors working on being good mentors? | Mentors are demonstrating best practices of a mentor; having positive relationships with their mentee organisations/mentees; and proactively working to build their own competencies. | • Mentors giving regular reports on progress of their groups  
• Mentors submitting deliverables by agreed deadlines  
• Mentors attending and participating in training workshops and other capacity building activities under the PISCES project (e.g. virtual webinars)  
• Mentors actively participating in the WhatsApp group sharing experiences  
• Mentors proactively seeking support from other mentors  
• Mentors registering and participating in other workshops, conferences or programmes to help build technical and mentoring skills |
<table>
<thead>
<tr>
<th>Question</th>
<th>Outcome challenge statement(s)</th>
<th>Progress markers</th>
</tr>
</thead>
<tbody>
<tr>
<td>How are mentors working with each other?</td>
<td>Supporting peer mentors with their work</td>
<td>Use a peer review team to give feedback on mentor’s work</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create an annual mentorship newsletter (encouragement through success stories)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mentors attend and host annual social events/meet up to give feedback and support</td>
</tr>
<tr>
<td>Creating/developing / strengthening a network of Caribbean mentors</td>
<td></td>
<td>Form a mentor team (both local and regional)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Form a mentor team that meets at least twice a year and shares resources</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mentors are sharing knowledge of regional resources (e.g. funding/fundraising and training/development)</td>
</tr>
<tr>
<td>Collaborating amongst one another to learn from each other, pool resources and ideas</td>
<td></td>
<td>Sharing reports, documents to grow together as mentors based on experiences</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create a database to pool information and resources</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mentors are mentoring each other and sharing resources, like technical skills.</td>
</tr>
</tbody>
</table>
### Outcome mapping: A method to do participatory monitoring & evaluation

<table>
<thead>
<tr>
<th>Question</th>
<th>Outcome challenge statement</th>
<th>Progress markers</th>
</tr>
</thead>
</table>
| How are mentors working with their mentees?   | The PISCES project intends to see mentors who are providing responsive, effective and efficient support to CSOs (e.g. building motivation, trust, confidence independence, problem solving capacity) | • Mentors are actively encouraging participation of CSOs by establishing effective, clear communication in appropriate formats (# meetings # attendees # social media posts)  
• Mentors working with CSOs to establish rules of engagement  
• Mentors and CSOs developing agreements on what they are jointly aiming to achieve (MOU or verbal agreement)  
• Mentors are helping mentees to identify and solve problems (#questions asked # decision-making tools shared, supporting processes of problem solving)  
• Mentors and CSOs are developing and implementing monitoring of progress to shared goals |
### Outcome mapping: A method to do participatory monitoring & evaluation

#### Question
How else are mentors working to achieve the vision?

#### Outcome challenge statement
The project seeks to have mentors who are contributing to national development through doing and promoting mentoring for strengthening CSOs in the Caribbean.

#### Progress markers
- Mentors are applying their acquired mentoring skills to building capacity of their own organisations.
- Mentors are developing new mentors outside of the PISCES project network through conducting training and coaching.
- Mentors are serving as facilitators at workshops to develop capacity in mentoring.
- Mentors are advocating for mentoring as an approach to capacity building to donors and other important stakeholders.
Managing conflicts of interest

The facilitators expressed that important aspects of the Mentors’ Terms of Reference are conflict of interest and maintaining confidentiality. It is critical that Mentors have a good grasp of what these sensitive matters mean so that they can avoid crossing any legal or ethical lines. Mentors played a game using five different real-life scenarios to discuss how Mentors can best handle some common conflict of interest and confidentiality situations when mentoring CSOs.

Key best practices highlighted from the session:

- Mentors should not have any relationship with their mentee CSO where any form of compensation or equity is involved
- As a Mentor, your primary interest should not be in scouting new opportunities for work, but rather to help build the capacity of your mentee CSO
- A Mentor should never approach a mentee to offer their services as a paid consultant
- Mentors should recuse themselves from any dealings or perceived dealings with their mentee CSO
- When in doubt, Mentors should have a discussion with CANARI to seek guidance and agree on a proper course of action

A conflict of interest is “a situation that has the potential to undermine the impartiality of a person because of the possibility of a clash between the person's self-interest and professional or public interests” (Business Dictionary, 2019).
### Mentors supporting mentors

<table>
<thead>
<tr>
<th>Name</th>
<th>I need help with...</th>
<th>I can help with...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Martin</td>
<td>Procrastination/time management</td>
<td>Facilitation</td>
</tr>
<tr>
<td>Arkada</td>
<td>Confidence and coordination</td>
<td>Reading moods</td>
</tr>
<tr>
<td>Agnes</td>
<td>Networking and tolerance</td>
<td>Facilitation and patience</td>
</tr>
<tr>
<td>Ann</td>
<td>Assessing my mentoring skills</td>
<td>Options for suitable governance structures</td>
</tr>
<tr>
<td>Tracy-ann</td>
<td>Coordination</td>
<td>Listening skills</td>
</tr>
<tr>
<td>Nikkita</td>
<td>Knowledge of facilitation tools</td>
<td>Coordination</td>
</tr>
<tr>
<td>Glaston</td>
<td>Knowledge of facilitation tools</td>
<td>Networking</td>
</tr>
<tr>
<td>Lashanti</td>
<td>Tolerance</td>
<td>Facilitation</td>
</tr>
<tr>
<td>Jeanelle</td>
<td>Facilitation skills</td>
<td>Tolerance</td>
</tr>
<tr>
<td>Martine</td>
<td>Fundraising</td>
<td>Trust building</td>
</tr>
<tr>
<td>Katrina</td>
<td>“Tolerance” “Aggressiveness”</td>
<td>Trust building</td>
</tr>
<tr>
<td>Sophie</td>
<td>Confidence and facilitation tools</td>
<td>Patience</td>
</tr>
<tr>
<td>Arica</td>
<td>Governance</td>
<td>Confidence</td>
</tr>
<tr>
<td>Melanie</td>
<td>Understanding CSO development</td>
<td>Tolerance and managing “aggression”</td>
</tr>
<tr>
<td>Orisha</td>
<td>Understanding CSO development</td>
<td>Listening skills</td>
</tr>
<tr>
<td>Judex</td>
<td>Listening and patience</td>
<td>Managing conflict</td>
</tr>
<tr>
<td>Ronald</td>
<td>Listening and governance</td>
<td>Facilitation skills and tools</td>
</tr>
</tbody>
</table>

Mentors shared the skills and competencies that they needed help with to be better mentors and also identified the areas where they could help other mentors.
Workshop participants reviewed the timeline for Component 1 of the PISCES project and agreed on next steps. Mentors proposed the following topics for the upcoming webinars:

- Conflict resolution
- Facilitation skills
- Effective proposal writing and project design
- Board strengthening
- Orientation to the PISCES small grant fund and grant application form (mentees can also be invited to this webinar)

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Lead</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 Feb 2019</td>
<td>Send Mentors’ report (1-2 pages) to the Au Picon Group</td>
<td>Craig</td>
</tr>
<tr>
<td>8 Feb 2019</td>
<td>Send Mentors’ report (1-2 pages) to the Coalition Group</td>
<td>Melanie</td>
</tr>
<tr>
<td>28 Feb 2019</td>
<td>Upload draft CSO organisational strengthening toolkit online, invite Mentor’s peer review, feedback</td>
<td>CANARI</td>
</tr>
<tr>
<td>March 2019</td>
<td>Send Mentors the draft outcome mapping framework</td>
<td>CANARI</td>
</tr>
<tr>
<td>1 April 2019</td>
<td>PISCES Regional Innovation Fund launch (small grant opportunity for target CSOs) Mentors support CSOs to develop proposals</td>
<td>CANARI Mentors</td>
</tr>
<tr>
<td>April 2019</td>
<td>Facilitate training webinar: TOPIC?</td>
<td>CANARI Mentors?</td>
</tr>
<tr>
<td>May 2019</td>
<td>Facilitate training webinar: TOPIC?</td>
<td>CANARI Mentors?</td>
</tr>
<tr>
<td>TBD</td>
<td>Facilitate training webinar: TOPIC?</td>
<td>CANARI Mentors?</td>
</tr>
<tr>
<td>Feb-Jun 2019</td>
<td>Send Anna your signed mentoring agreement</td>
<td>Mentors</td>
</tr>
<tr>
<td>Feb-Jun 2019</td>
<td>Draft Mentor’s Profiles and upload to CANARI website/FB</td>
<td>CANARI</td>
</tr>
<tr>
<td>30 Jun 2019</td>
<td>Submit interim report to Anna</td>
<td>Mentors</td>
</tr>
<tr>
<td>30 Sept 2020</td>
<td>Submit final report to Anna</td>
<td>Mentors</td>
</tr>
<tr>
<td>No.</td>
<td>First name</td>
<td>Surname</td>
</tr>
<tr>
<td>-----</td>
<td>------------</td>
<td>---------</td>
</tr>
<tr>
<td>1</td>
<td>Sophia</td>
<td>Steele</td>
</tr>
<tr>
<td>2</td>
<td>Arica</td>
<td>Hill</td>
</tr>
<tr>
<td>3</td>
<td>Arkada</td>
<td>Ventour</td>
</tr>
<tr>
<td>4</td>
<td>Agnes</td>
<td>Esprit</td>
</tr>
<tr>
<td>5</td>
<td>Jeanelle</td>
<td>Brisbane</td>
</tr>
<tr>
<td>6</td>
<td>Ronald</td>
<td>Cademus</td>
</tr>
<tr>
<td>7</td>
<td>Paul</td>
<td>Judex</td>
</tr>
<tr>
<td>8</td>
<td>Martine</td>
<td>Jean-Claude</td>
</tr>
<tr>
<td>9</td>
<td>Ann</td>
<td>Haynes-Sutton</td>
</tr>
<tr>
<td>10</td>
<td>Glaston</td>
<td>White</td>
</tr>
<tr>
<td>11</td>
<td>Craig</td>
<td>Henry</td>
</tr>
<tr>
<td>12</td>
<td>Martin</td>
<td>Weekes</td>
</tr>
<tr>
<td>13</td>
<td>Katrina</td>
<td>Collins</td>
</tr>
<tr>
<td>14</td>
<td>Orisha</td>
<td>Joseph</td>
</tr>
<tr>
<td>15</td>
<td>Nikkita</td>
<td>Browne</td>
</tr>
<tr>
<td>16</td>
<td>Tracyann</td>
<td>Gaskin Audain</td>
</tr>
<tr>
<td>17</td>
<td>Eric</td>
<td>Carey</td>
</tr>
<tr>
<td>18</td>
<td>Lashanti</td>
<td>Jupp</td>
</tr>
<tr>
<td>19</td>
<td>Melanie</td>
<td>Andrews</td>
</tr>
</tbody>
</table>

**Workshop facilitators**

<table>
<thead>
<tr>
<th>No.</th>
<th>First name</th>
<th>Surname</th>
<th>Position/ Title</th>
<th>Organisation</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>Nicole</td>
<td>Leotaud</td>
<td>Executive Director</td>
<td>Caribbean Natural Resources Institute</td>
<td>Trinidad and Tobago</td>
</tr>
<tr>
<td>21</td>
<td>Anna</td>
<td>Cadiz-Hadeed</td>
<td>Senior Technical Officer</td>
<td>Caribbean Natural Resources Institute</td>
<td>Trinidad and Tobago</td>
</tr>
<tr>
<td>22</td>
<td>Kathryn</td>
<td>Jones-Douglas</td>
<td>Human Resource Manager</td>
<td>Caribbean Natural Resources Institute</td>
<td>Trinidad and Tobago</td>
</tr>
</tbody>
</table>
Reflections from workshop participants

“I quite enjoyed the real-world examples from mentors and using these examples as scenarios to discover how to move forward”

“This workshop allowed me to learn more deeply what my role is as a mentor”

“The amount of information provided was sufficient to allow digestibility and facilitate learning”

“I learned that mentorship is a skill that needs to be worked on continuously. And that it’s important to continue building oneself professionally”

“I gained a better understanding of what outcome mapping is and how to do it”

“This workshop was more powerful because I got to understand more in depth than the first one”

“I felt more confident in my mentoring skills”

“I was comforted by peers having similar issues”

“I liked the access to a range of strong mentors. I think that the networking at the workshop was really good and linking mentors was useful”

“It was beneficial to have more experienced mentors present to give good advice”

“The importance of trust in governance and management became even clearer to me as I listened to shared experiences”

“It was beneficial to have more experienced mentors present to give good advice”

“The amount of information provided was sufficient to allow digestibility and facilitate learning”

“I liked the access to a range of strong mentors. I think that the networking at the workshop was really good and linking mentors was useful”

“The importance of trust in governance and management became even clearer to me as I listened to shared experiences”