

Jamaica Social Investment Fund
Social Development Commission

Training for Community Based Organisations

**MODULE 1
ORGANISATIONAL
DEVELOPMENT**

TRAINER'S GUIDE

**REVISED
JULY, 2001**

This Training Module was originally designed by Frances Madden, 1999.

Following extensive use with more than 30 Jamaican CBOs, it was revised by Jane Dodman, 2001.

Illustrations by Dan Jupp, 2001

PRINCIPLES OF ADULT LEARNING

We are all familiar with the expression, *“If you give a man a fish you feed him for a day. If you **TEACH** him how to fish, you feed him for life.”*

Learning is a lifelong continuing process during which the “Learner’s” acquisition of knowledge and experience, lead to changes in his behaviour. Learning has been described as “self-development” through “self-activity.”

Dr Malcolm Knowles, a noted lecturer and author in the field of Adult Education, coined the word “ANDRAGOGY”, which refers to the art and science of helping adults to learn. The hypothesis is that adults learn differently from children, and therefore in learning situations they should not be treated like children.

- ❑ Adults resent being treated like children
- ❑ Adults have more experience than children and can draw on their experiences and the experiences of others to enhance the learning process
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- ❑ Adults must have the desire to learn if they are to be taught. To *want to* learn is to be motivated
- ❑ Adults want to know why they are learning a particular subject and how acquiring certain knowledge, skills and attitudes will help them.
- ❑ The adult learner is problem-centred. Learning will be easier when he can relate/apply that learning to real life situations.

Research has shown that....

- people learn better in pleasant surroundings.
- learning takes place through repeatedly performing a task....doing it again and again until we have mastered it. As the common expression goes *“practice makes perfect”*.
- adults can, and will learn when the “need to know” exists.
- every new idea, fact or concept is learnt best when we can relate it to information we already have.

Some underlying principles....

- ◆ Learning is a self-activity: Acquiring knowledge, skills and attitudes occurs within the trainee and is activated by him. **Trainers can teach but only trainees can learn.**
- ◆ People learn at different rates
- ◆ Learning is a continuing process
- ◆ Learning results from stimulation of the senses. Trainers must therefore employ as many of the senses as possible in training sessions
- ◆ Positive reinforcement enhances learning. Like children, adults want to be praised and recognized for achievement
- ◆ We learn best by doing. The opportunity to apply what is being learnt, by practical exercises, will reinforce learning. It is said that people remember only about 10% of what they hear and about 50% of what they see. However, they are likely to recall about 90% of what they **DO**.
- ◆ People want to ENJOY the learning process. *“what’s learnt with PLEASURE is learnt full measure”*

Course Summary

This organisational development training programme has been designed to equip participants with the understanding of how to establish, structure and nurture a Community Based Organisation (CBO). It is also designed for existing CBOs, which need re-establishing or re-structuring.

By the end of the course participants should:

- i. Be aware of different types of CBOs and what function they fulfil
- ii. Know how to establish, structure and nurture a CBO.

It is intended that the course will stimulate new thinking, new learning and community action. Participatory methodologies are employed throughout.

The course is divided into five inter-connected themes. There are a number of activities related to each theme. The suggested timing for each activity is a guideline only. If participants find an activity particularly helpful, spend more time on it. If some activities are not applicable to the particular CBO or its needs, omit them or just spend a short time on them.

- For each session you will find some comments on the topics to be covered. These comments either introduce a new activity or introduce a handout.
- The *Trainer's Notes* are found inside boxes, these are for guidance and ideas but are not intended to be exhaustive.

⇒ When you see this arrow, it indicates an instruction or activity that you, as the trainer, will give the participants.

The handouts are primarily intended for reinforcement. They become part of the personal record and documentation for individual participants. Participants should be encouraged to write on the handouts to add their own ideas and suggestions that arise out of the discussion and activity.

Reference is made to the JSIF handbooks for CBOs. Participants should be encouraged to refer to the relevant pages of the handbooks after the session.

Encourage the participants to try out some of the activities discussed in sessions between sessions (homework). This will make the sessions more productive and enable you to cover the module in the twelve hours stipulated.

We hope that you will enjoy this module.

Course Outline

The course, which is designed for 12 hours contact time is divided into the following themes and activities as follows: -

Theme 1: Defining the CBO (2 hours)

Activity 1.1:	Definition of the CBO	15 minutes
Activity 1.2:	Types of CBO	30 minutes
Activity 1.3:	What does a CBO do?	30 minutes
Activity 1.4:	Attributes of a CBO.	45 minutes

Theme 2: Establishing the CBO (2 hours)

Activity 2.1:	Strategies for Starting a CBO	1 hour
Activity 2.2:	Publicity and Venues to Attract	45 minutes
Activity 2.3:	Timing of Meeting	15 minutes

Theme 3: Organisational Development (5 hours)

Activity 3.1:	Whose Organisation?	1 hour
Activity 3.2:	Organisational Structure	1 hour
Activity 3.3:	Leadership Styles	1 hour
Activity 3.4:	Succession Planning	15 minutes
Activity 3.5:	Role of Officers within the Organisation	45 minutes
Activity 3.6:	Creative Ways to Discuss the Role of the CBO	30 minutes
Activity 3.7:	Criteria for Taking on Organisational Responsibilities	30 minutes

Theme 4: Stages of Organisational Development (1 hour 30 minutes)

Activity 4.1:	Understanding what Stage we are in	45 minutes
Activity 4.2:	Dorming	45 minutes

Theme 5: CBO Constitution (1 hour 30 minutes)

List of Handouts

Handout 1: Definitions of a Community Based Organisation (CBO)

Handout 2: Types of CBOs

Handout 3: Some of the Functions of a CBO

Handouts 4i and 4ii: Attributes of a CBO

Handout 5: Forming the Initial Committee or Revitalising the Old One

Handout 6: Suggested Types of Publicity

Handout 7: Possible Venues for Meetings

Handout 8: Vertical Organisational Structure

Handout 9: Horizontal Organisational Structure

Handout 10: Umbrella Organisational Structure

Handout 11: Roles and Responsibilities of the Executive of the CBO

Handout 12: Leadership Styles

Handout 13: Myself as a Leader

Handout 14: Describing the CBO like parts of the human body

Handout 15: Stages of Organisational Development

Handout 16: Guide to Drafting a Constitution

Materials needed

1. Flip chart paper (lots)
2. Markers
3. Small pieces of paper or cards (8" x 4")
4. Scissors
5. Rough paper
6. Fibre tipped pens of different colours
7. Masking tape (1" wide)
8. Coloured paper (for dumpling diagrams)
9. Coloured dots (for scoring 'best time for meetings')

CBO Best Practices

Included in the package of CBO Development Handbooks is a pamphlet entitled *CBO Best Practices*. CBOs should try to implement and follow this list of standards to ensure that they are efficient and effective organisations. Refer participants to these best practices at the relevant places in the training. Also refer participants to the relevant Development Handbook, where these practices are explained in more detail.

The following best practices are particularly applicable for this Organisational Development Module:

The CBO has:

- ✓ A constitution which clearly and simply defines roles and responsibilities of the Executive and members (Handbook 2)
- ✓ This constitution is understood by everyone belonging to the CBO

The CBO is:

- ✓ Participatory, enabling members and the wider community to participate in decision making
- ✓ Representative. Where the CBO is working for the whole community it seeks to ensure that it consults with persons of all ages, men and women, as well as those from different socio-economic groups
- ✓ Transparent, readily providing accurate information about its activities
- ✓ Credible and trustworthy so that members value membership
- ✓ Flexible and dynamic, ensuring that it meets new challenges, regularly reflects on its strengths and weaknesses and constantly seeks to improve itself

The CBO has:

- ✓ Regular, action oriented meetings
- ✓ A large number of persons who are ready to volunteer services for the CBO (Handbook 2)
- ✓ A well functioning succession arrangement, where people are developed to take over leadership of the CBO (Handbook 2)
- ✓ Representation in CBO Federation at parish level (Handbook 1)
- ✓ Positive recognition from inside and outside the community

List of Acronyms

CBO	Community Based Organisation
CDC	Community Development Committee
CDO	Community Development Officer
JSIF	Jamaica Social Investment Fund
MONFIS	A CBO assessment tool. The abbreviation stands for Management, Organisation, Networking and mobilisation, Financial management and fund raising, Impact, Sustainability
NGO	Non Government Organisation
PTA	Parent Teachers' Association
RADA	Rural Agricultural Development Authority
SDC	Social Development Commission
SWOT	Strengths, Weaknesses, Opportunities and Threats

Theme 1: Defining the CBO (2 hours)

Our first theme will enable us to have an understanding of what we mean by a Community Based Organisation, or CBO for short. We will examine some definitions of a CBO, look at the different types and finally explore what CBOs do.

Activity 1.1: Definition of a CBO (15 minutes)

In our first activity we are going to work out our own definition of a Community Based Organisation. It is usually referred to as a CBO.

⇒ **THINK**: How would you define a CBO? Think about your CBO and any other CBOs you know about. Use that knowledge and understanding to help you define a CBO.

Distribute a piece of paper to every participant.

⇒ **WRITE** your definition of a CBO on a piece of the paper. Write it large enough for everyone to see.

⇒ **STICK** your definitions on the wall/board.

⇒ **DISCUSS** your definitions.

⇒ **WRITE** a comprehensive definition of a CBO, taking all participants' definitions into consideration.

⇒ **DISPLAY** the definition on the wall for the duration of this course.

Here are some definitions of a CBO, which you may find useful. Provide a copy of Handout 1 for each participant. They should add their group's definition at the end of the list.

Organisational Development

Handout 1:

Definitions of a Community Based Organisation (CBO)

Here are some suggested definitions of a CBO, which you may find helpful.

- A CBO is a group of persons within a community whose main focus is to encourage decision making and participation through organised activities. It ensures representation within the wider society.
- A CBO is an organisation comprising community persons operating within the community for the development of the community.
- A CBO co-ordinates the activities of a number of people for the achievement of some common purpose or goal. This is done through decision making, division of labour and functions.
- The main thing that distinguishes a CBO from other types of organisation is that it is community based and works for the community.
- A CBO is an organisation whose membership is voluntary and which claims some representational function on behalf of its members.

- Our group's definition of a CBO:



There are other organisations working in our community but they are not exclusive to us. They are not CBOs.

Activity 1. 2: Types of CBOs (30 minutes)

In our last activity we developed our own definition of a CBO. There are several different types of CBOs and we are now going to look at some of them. They can have different functions. Some function on the basis of shared or common interests, some focus on special issues, some are concerned with community development.

⇒ **IDENTIFY** the different types of CBO.

⇒ **LIST** your responses on a flip chart.

⇒ **DISCUSS** these responses. Talk about the kinds of CBOs and what they do in the community. Identify the CBOs in your community.

There are some possible suggestions in Handout 2. You can add other groups to these lists. Distribute Handout 2.

Refer participants to Handbook 1, page 12: *What is a CBO?*

Organisational Development

Handout 2: Types of CBOs

Shared Interests

Youth Clubs
Sports Clubs
Golden Age Clubs
Women's Groups

Issues Based

PTAs
Environmental Groups
Church groups
Returning Residents' Associations
Health Committees
JAS Branches
Burial Schemes
Neighbourhood Watches

Community Development

Consultative Committees
Community Councils
Community Development Councils
Citizens' Associations

Add other CBOs to these lists

Service clubs
Past Students' Associations
Political Associations

Note : these are not always CBOs- it depends on their particular function and style

Activity 1.3: What does a CBO do? (30 mins)

We have seen in our last activity that there are several different **kinds** of CBOs. A CBO also has many different **roles**. We are going to discuss these roles now.

⇒ **DIVIDE** into small groups of four to five persons.

⇒ **DISCUSS** what you think CBOs **should** do.

⇒ **WRITE** different ideas on small pieces of card/paper.

⇒ **DRAW** a chart with the word 'participation' in the centre.

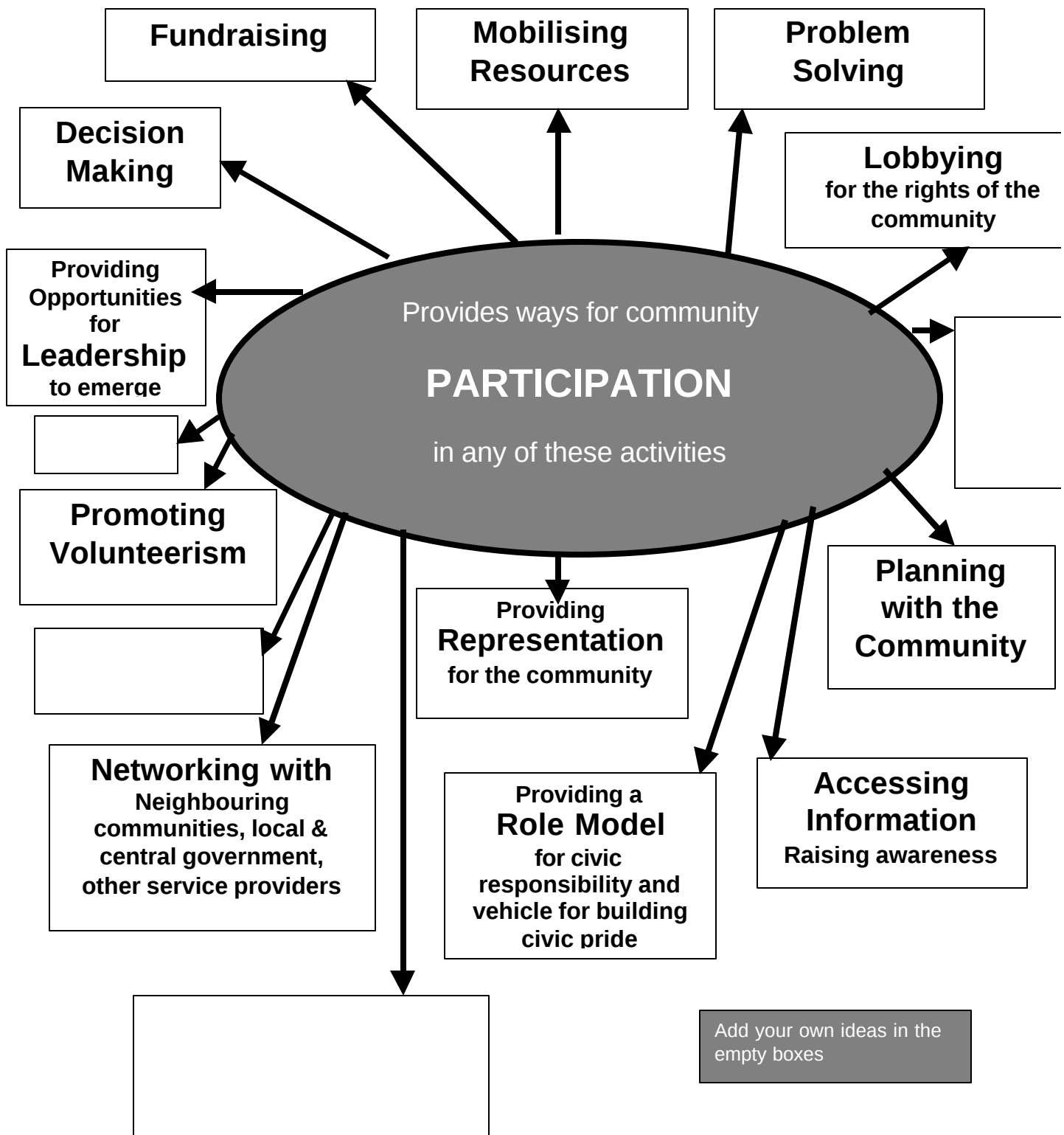
Draw the chart as in the handout, but the participants' cards go on the outside, with their ideas. They will receive the handout after the activity.

⇒ **STICK** the cards round the central theme of participation.

Here are some possible suggestions in Handout 3. It is important to emphasise that **participation** is central to all the activities of a CBO. Participants can add their own ideas in the empty boxes.

Refer participants to Handbook 1, page 13: *Ten Important Roles of a CBO*.

Organisational Development
Handout 3: Some of the Functions of a CBO



Activity1. 4: Attributes of a CBO (45 minutes)

Our final activity under the theme 'defining a CBO' looks at the attributes of a CBO. CBOs have special features, which allow community persons to work together in planning and doing community activities.

Prepare in advance a list of attributes, each one on different pieces of paper. The list can come from the ones in Handout 4. Divide participants into groups and give each group its own set of pieces of paper with all the attributes.

⇒**PICK** out from the set of attributes the **five** most important attributes that a CBO should have.

Participants come back together and share their five selected attributes.

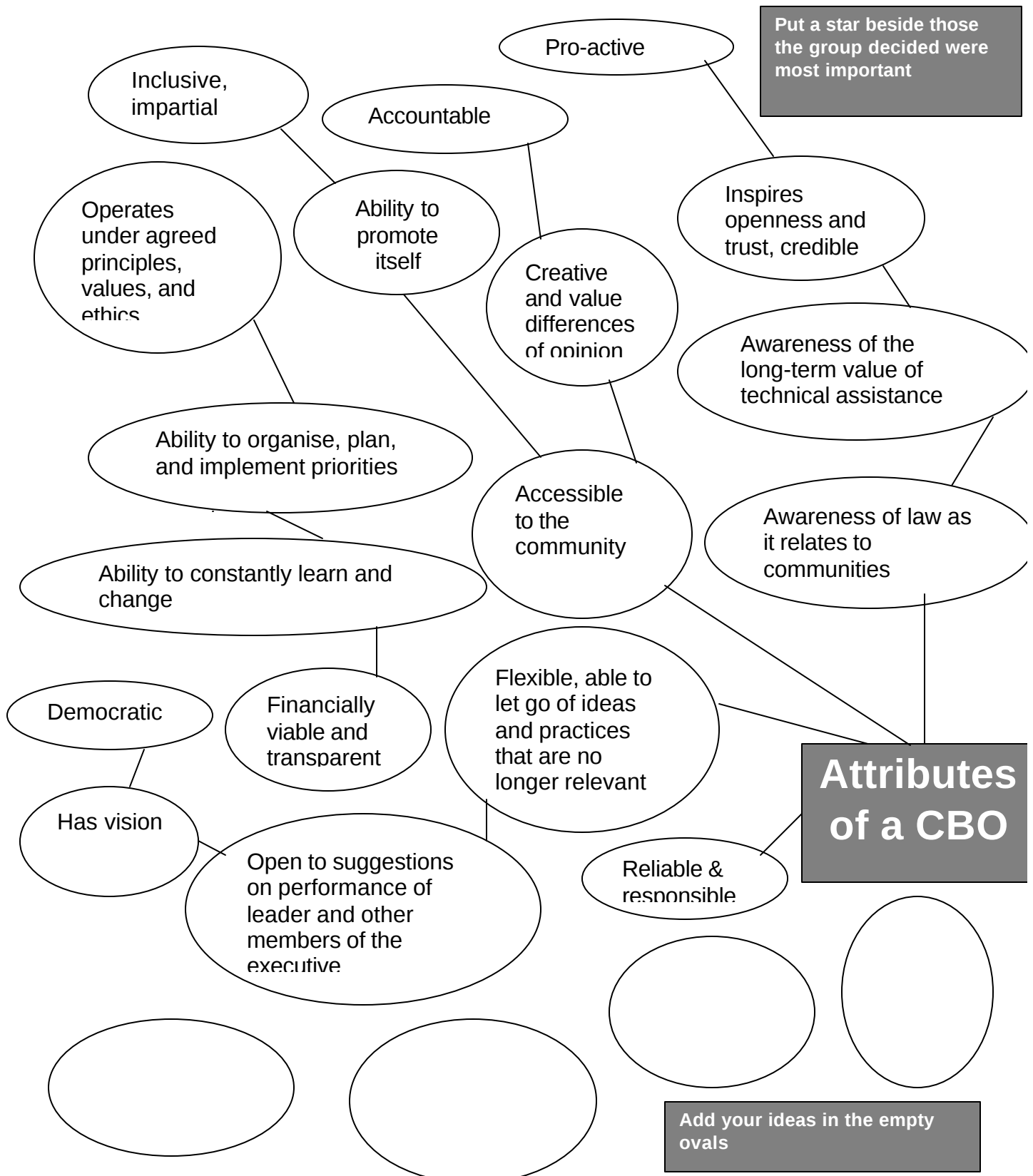
⇒**DISCUSS**: Why were the attributes chosen thought to be the most important ones? Were there any major differences of opinion between different groups? If so, why? Come to some consensus on the most important attributes of a CBO.

Are there any other important attributes that you would like to add?

⇒**DISTRIBUTE** Handout 4.

Organisational Development

Handout 4 i: Attributes of a CBO



Organisational Development

Handout 4 ii: Attributes of a CBO

Here are definitions of some of the words used in this handout. Can you think of ways in which your CBO does or could demonstrate these attributes?

- *Accessible:* readily available, open, easy to understand
- *Accountable:* responsible, willing to answer for behaviour or actions
- *Credible:* can be believed
- *Democratic:* showing equality, giving people a say or a vote
- *Ethics:* behaviour guided by certain standards and morals
- *Impartial:* acts in a just manner, treats all sides fairly
- *Inclusive:* doesn't leave people out, encourages participation by all
- *Principles:* thinks or acts according to basic truths
- *Pro-active:* makes things happen
- *Transparent:* open, doesn't hide things

Theme 2: Establishing or Re-establishing a CBO (2 hours)

Our first theme focussed on defining a CBO. Now, for our second theme, we are going to look at how we establish or re-establish a CBO. This will include discussing strategies for starting a CBO, the most appropriate ways of publicising a meeting, the most suitable venue for a meeting and finally deciding on the best time for a meeting.

Activity 2.1: Strategies for Starting/ Re-starting a CBO (45 minutes)

Sometimes we have lots of good ideas, but we don't know where to begin. We are going to look at some different ways to help start or restart a CBO.

⇒ **WRITE** the following statement on a flip chart or board or **READ** out loud

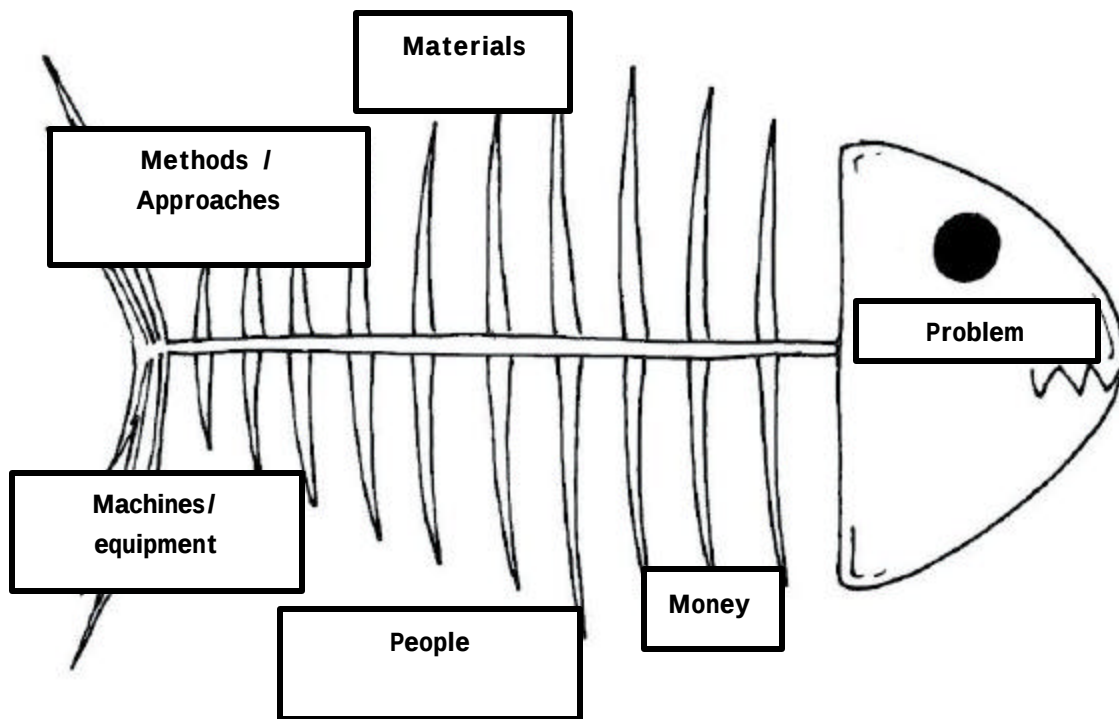
*Problem deh everyweh inna de community.
Nobody waan fi tek responsibility.
Everyweh dat could deal wid de problem lock down.
People fraid o' different ways fi deal wid de problem.*

⇒ **ASK** Have you heard people make comments like this about your community?
How can we respond in helpful and constructive ways to such comments?
How can we organise our CBOs in ways that encourage people to attend and participate in meetings and then work together in community action?

We are going to do an activity which can help us to look at the cause and effect of community problems.

Trainer's Notes

Show the participants how to use a fishbone diagram to show cause and effect. Participants write the problem at the head end of the fish and the causes of the problems in the boxes attached to the fish's bones. Additional boxes can be added if there are more causes. The problem should relate to the state the CBO is in at the moment which members are not happy with, for example, 'too few people are interested,' 'all talk and no action.' The fishbone is segmented into manpower, money, methods (approaches), materials and machines (equipment) so that systematically the group can analyse the problem in each of these terms. For example, in order to stimulate discussion on methods the following question could be asked: 'Are too few people interested because the meetings are boring, activities are infrequent and geared only to one group?'



⇒ **DIVIDE** into groups of four to five persons.

⇒ **INDICATE** in the fishbone diagram the problems and the causes, which relate to the state the CBO is in at the moment which members are not happy with. Link all the causes of the problem related to people, e.g. conflict, generation gap, too few volunteers etc. to the fishbone labelled 'People'. Similarly, list all the problems related to money e.g. people don't pay dues, fund raising not profitable etc to the fishbone labelled 'Money' and so on.

When the fishbone diagram is complete, discuss what steps you would take to change the situation to encourage greater interest and participation in your CBO. You will need to look at the ways in which you would move from identifying a first group of concerned citizens to having your first community meeting.

Handout 5 gives some suggestions for re-energising the CBO. Give the handout to participants at the end of this activity. It is important to emphasise that the group of concerned citizens is temporary. This group is there to get things started. It does not mean that this group will form the leadership of the CBO once it is established. There will be elections for the new or re-vitalised CBO and people must be encouraged to vote for the best people for the Executive once it is formed/re-formed.

Refer participants to Handbook 1, pages 14-20: *Getting Started*.

Refer participants to Handbook 2, pages 17-21: *Meetings*.

Refer participants to Handbook 7, pages 23-27: *Communication in Meetings*.

Organisational Development

Handout 5:

Forming the Initial Committee or Re-vitalising the Old One



- Encourage concerned citizens to come together and discuss their issues, problems and ideas.
- Have the group of concerned citizens prepare suggestions to deal with the problems.
- Have the group identify and contact other concerned persons they feel would be willing to establish an interim/start up committee or working group.
- The working group will further discuss the issues and put together a list of the problems and the suggested solutions.
- The working group will then invite the wider community to a meeting to prioritise the list of problems as well as to discuss and offer their own solutions. They must also state the type of organisation they feel would be necessary to deal with the problems.
- The meeting should be well publicised. This will entail telling persons on the streets, in bars, through announcements in church, at home or at any other gathering points in the community.

REMEMBER – determine the task first and structures later

- What other ideas do you have?

Activity 2.2: Publicity and Venues (45 minutes)

Now that we have identified the people to work with starting or re-starting our CBO, the planning for and the implementation of the first community meeting become our next important task. Community residents need to feel that the venue is acceptable and the time is convenient for them. We will now look at how we can publicise the meeting and determine the venue.

⇒ **DIVIDE** participants into two groups.

⇒ **GROUP 1: BRAINSTORM** the different ways of publicising the meeting. Then explore the advantages and disadvantages of using the different forms of publicity. Take into consideration the forms of publicity, which you now use or have used in the past? How effective are they?

⇒ **GROUP 2: BRAINSTORM** the possible venues for the meeting. Then explore the advantages and disadvantages of the different venues. Take into consideration the venues, which are currently used in your community for meetings? Why are these venues chosen?

⇒ **WRITE** the responses on flip chart paper, in a matrix/table, with a column for the types of publicity/possible venues, a column for the advantages and a column for the disadvantages.

Use pictures in the first column of the matrix/table of the types of publicity / possible venues, instead of words. These can be copied from Handouts 6 and 7, if necessary.

⇒ **MAKE** flyers or posters to advertise the CBO or an upcoming community meeting or event.

This activity can be done by some participants whilst others do the matrix above. Alternatively the matrix can be omitted and all participants can make the flyers.

⇒ **SHARE** the matrices or flyers with the other participants.

⇒ **DECIDE** which forms of publicity would be most appropriate for your community and which venue would be the most acceptable to community residents.

Trainer's Notes

- *Handouts 6 and 7 provide a summary of the types of publicity and possible venues. It is best to use a variety of types of publicity, not only one. Explain that this will ensure that more people are informed. For example, some people will read a flyer, others will look at a community notice board, whilst others may be more likely to listen to the radio.*
- *Encourage participants to add any additional types of publicity or community venues to the handouts. Venues should allow free movement and enable different types of activity to take place (plenary, group work, moving plenary etc.). They should be **central** and **open to everyone**.*

Refer participants to Handbook 7: pages 8-22: *Promoting your CBO's image*.

Organisational Development

Handout 6:

Suggested Types of Publicity

Types of Publicity	Advantages	Disadvantages
Word of Mouth 	- Information is quickly spread - More personal - Allows for face to face interaction and explanation - Begins to energise the community - No cost	- Community might feel that individuals are seeking personal gains - Nothing new - Misinformation
Fliers/Posters/Letters 	- Can be posted in the community - Easily circulated - More accurate information	- Not everyone can read - Subject to damage by weather - Creates litter in the community - Resources to do the flyers may not be available - High costs - People often don't pay attention to letters
Community Notice Board 	- Usually in a central position in the community - Accessible to all persons - Not easily damaged - People are accustomed to checking the notice board - No cost	- Not everyone can read - Some persons might not check the notice board
Town Crier 	- Can move all over the community - Traditional	- irritates some people - timing has to be just right.
Radio and TV 	Reach most persons in the community	- Maybe very costly (there are some free services) - People may not pay attention
Add your own ideas		

Organisational Development

Handout 7:

Possible Venues for Meetings

Venues	Advantages	Disadvantages
Church and Church Halls 	• No Cost • Often felt to be neutral Ground • Often able to accommodate many people	• Some persons might feel uncomfortable: consider who might feel this way and be sensitive to their feelings • Religious conflict • Fixed seating might not encourage participation • Mode of dress may be unacceptable • Certain topics might not be allowed for discussion e.g. politics, family planning
Community Centre 	• No or low cost • Owned by the community • Easily available	• Seating may be limited or not available • Might be branded as political • Need to be sure who has the key!
School 	• Seating available • Can hold more people • Chalkboards are available to write on • No Cost • Often it is centrally located	• Seating not suitable for adults or participation in meeting • Cannot meet during school hours • Only available nights and weekends
Open Air 	• Avoids suspicion • Open to everyone • Less threatening to committee members • People feel free to participate in discussions	• Rain • No crowd control • Noise from music and cars • Might get complaints
Add your own ideas:		

Activity 2.3: Time of the Meeting (15 minutes)

Proper timing for meetings is very important. In most cases Thursday through Saturday is considered marketing or hustling days. Sundays (Saturdays for some) are Church days, although evenings are usually considered good. There might be different days for different age groups to attend meetings. Usually it is best for your community members to set their own day and time for a meeting.

Use the participatory, two votes method for selecting the best time for meetings, following this format. Prepare a blank matrix/table on flip chart paper and ask people to cast their two votes.

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
4pm	○ ○	○	○			○ ●	○ ●
5pm	● ● ●		● ● ●				
6pm	○ ○ ○ ● ● ● ●	○ ○ ○ ○ ○ ● ○ ● ○ ○ ● ● ● ● ●	○ ○				
7pm	○ ●	● ○ ●	○ ● ●				○ ○ ○ ●

○ represents a red circle ● represents a yellow circle

This shows that the best time for meeting for this group is at 6pm on a Tuesday.

⇒ **DECIDE** the most convenient time for you for a meeting and the second most convenient time.

⇒ **PUT** a red circle in the day/time box for your first choice and a yellow circle in the day/time box for your second choice.

⇒ **COUNT** the number of circles in the different boxes and the box with the most circles will be the most convenient day/time for most people.

Refer participants to Handbook 5: pages 22-23: *Identifying the best time for implementation.*

Theme 3: Organisational Development (5 hours)

Our first two themes explored the definitions of a CBO and how to establish or re-establish a CBO. Now, for our third theme, we turn to organisational development – who does the organisation belong to? What are the different leadership styles and why is our leadership style important? What are the roles and responsibilities of the leaders and the CBO itself?

Activity 3.1: Whose Organisation? (1 hour)

We will begin by looking at who ‘owns’ the CBO.

⇒ **ASK**: Whose organisation is your CBO or your proposed CBO?

⇒ **LIST** your responses on the flip-chart/board.

Introduce the concept of **stakeholder**

Trainer’s Notes

Usually community persons view organisations as belonging to someone. They must have ownership. Stakeholders are persons who have an interest or a concern in something. A CBO has a variety of stakeholders. Some will be potential members and people from the community. It will make a difference to their lives and to the wider community if the CBO is active in organising community projects and events. Other stakeholders will be persons from outside the community and from other groups or organisations who are concerned about and committed to enabling the CBO. For example, organisations like RADA, SDC and JSIF, who work with the CBO are stakeholders. They want to know that their support for the group makes a difference and enables the group to function more effectively.

Refer to Community Development Handbook 2, page 9 which explores problems which may arise when the ownership of the CBO is not with the community as a whole.

Explain the use of Dumpling Diagrams.

⇒ **DIVIDE** participants into groups of four to five persons. Each group will prepare a Dumpling Diagram.

⇒ **CUT OUT** circles of coloured paper to represent the different stakeholders in your CBO or proposed CBO. Using your definition of ‘important’ the size of the circle indicates the importance of each stakeholder. The bigger the circle, the

more important the stakeholder. Write the names of the stakeholders on the circles.

The stakeholders may include the President and/or other members of the Executive, the church, the community, the politician, other community groups, local and international funders, organisations like RADA, JSIF, SDC.

⇒ **DRAW** a circle in the middle of a piece of flip chart paper to represent the CBO.

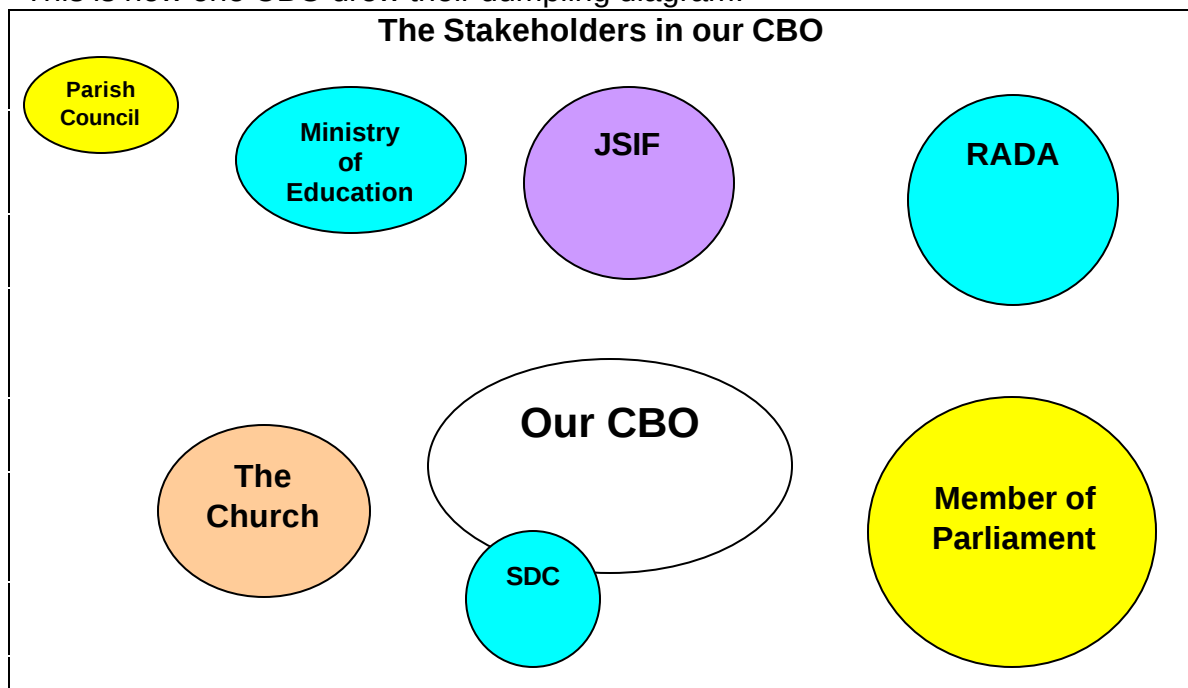
⇒ **PLACE** the circles representing the stakeholders onto the flip chart paper. The more supportive and close the stakeholders are to the CBO the nearer they are placed to the centre circle.

Encourage people to alter the size of the circles and move the circles closer/further away depending on how each feels about the importance and the relationship. This way rich discussion ensues about how people feel about the different stakeholders. Only when everyone is satisfied with the positions of the circles, can they be pasted on to the backing paper.

⇒ **SHARE** the diagrams with each other. Explain the reasons for the size and location of the circles. What are the positives and negatives of each stakeholder? Focus on the positives of community organisation.

⇒ **DISCUSS** what type of CBO you would like to have. Which stakeholders would you like to have?

This is how one CBO drew their dumping diagram.



Trainer's Notes

Encourage participants to talk about the extent to which they really feel they are stakeholders in their CBO. Talk about what they do if they feel that certain members of the CBO or the Executive behave in ways that exclude the majority of the membership and discourage others from joining.

Are there some people in the community who are unwilling to become members of the CBO because they feel it is exclusive and not for people like them? For example, some community residents feel that CBOs are primarily run by and serve the more educated residents, or those who are in regular employment.

If there are feelings of exclusiveness, encourage people to talk about them and to explore ways of addressing them.

Refer participants to Handbook 2, page 9: *Whose organisation?*

Networking with other organisations is an important function of a CBO. Refer participants to Handbook 7, pages 31-36: *Representation outside the community.*

Activity 3.2: Organisational Structure (1 hour)

We have a better sense of who our CBO belongs to. We now need to determine what kind of organisational structure we want for our CBO. There are different types of organisational structure and we will now look at some of them.

Trainer's Notes

There are three main types of organisational structure:

- *Vertical*
- *Horizontal*
- *Umbrella*

⇒ **SHOW** the participants a pre-prepared outline of each type of structure, one after the other. These should be drawn on separate sheets of flip chart paper before the session.

⇒ **DISCUSS** each one.

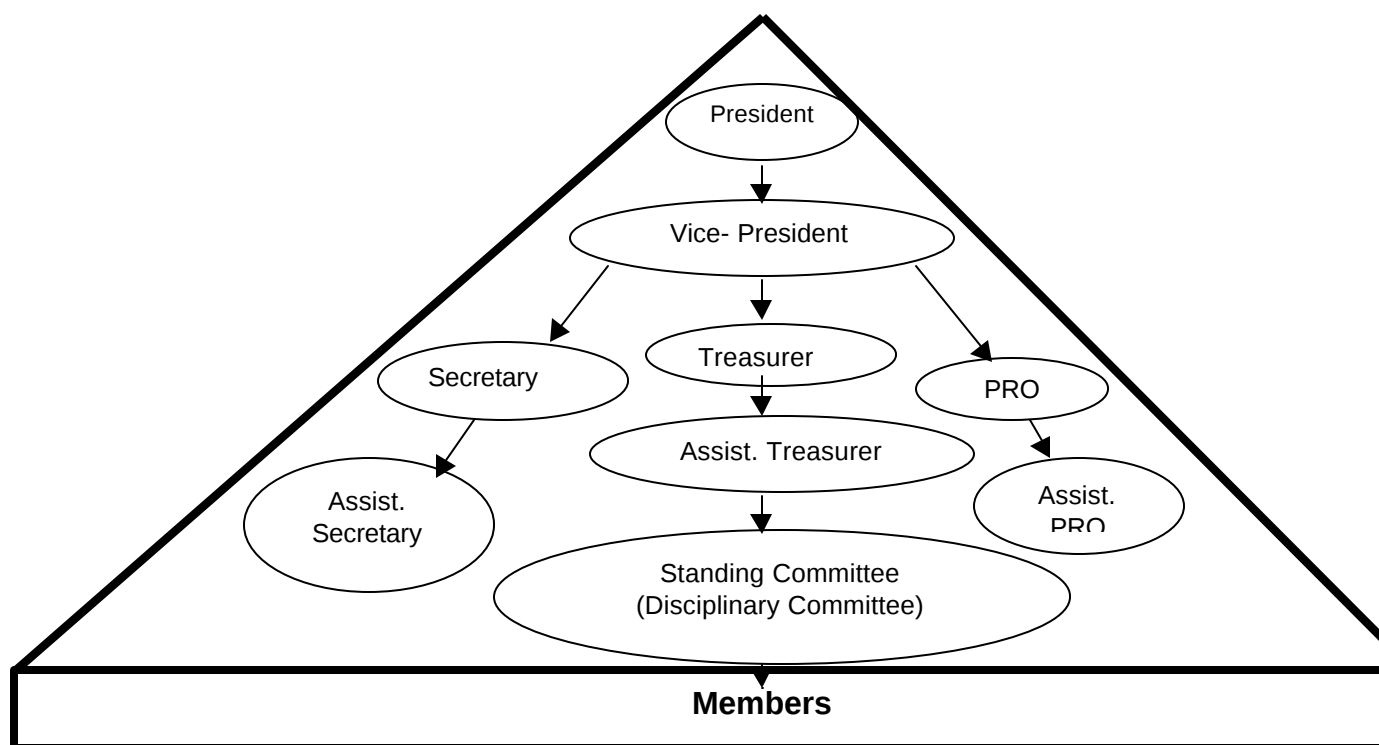
Provide participants with handouts of the different structures at the end of this activity.

Refer participants to Handbook 1, pages 26-28: *CBO Structure*.

Organisational Development

Handout 8: Vertical Organisational Structure

This is the most traditional type of organisational structure



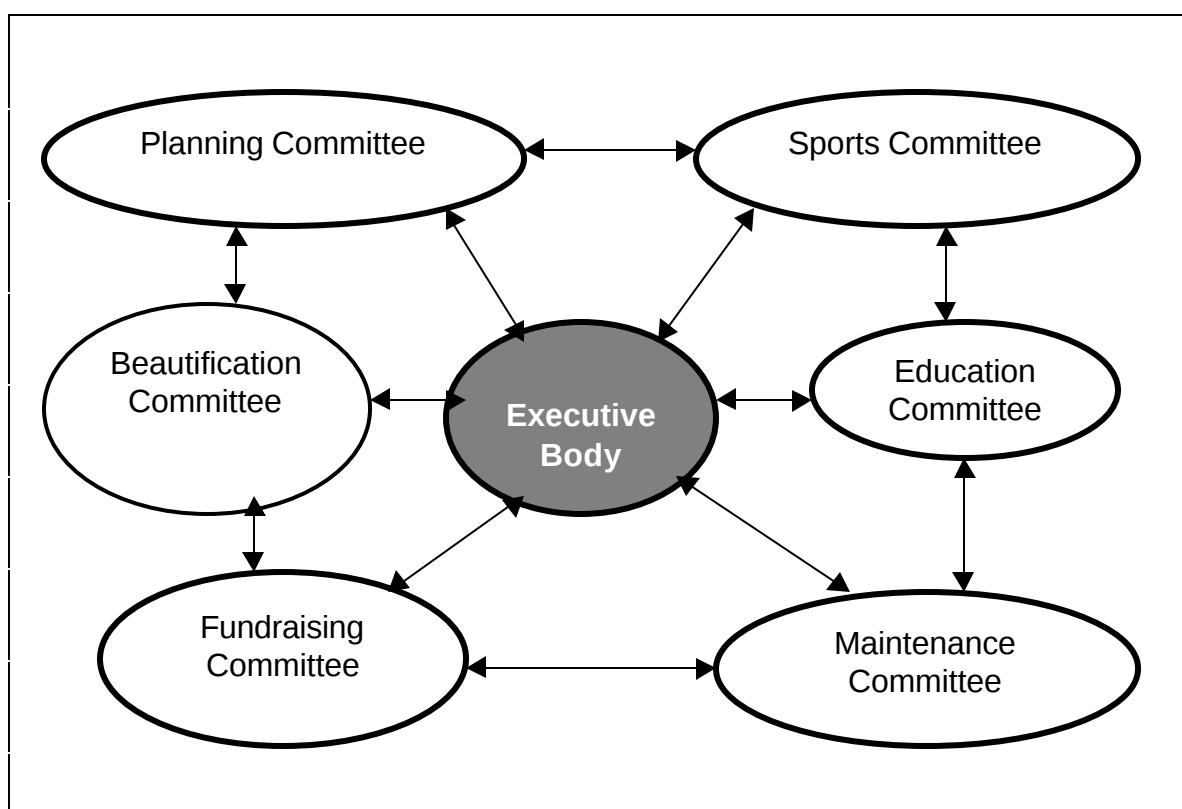
Here are some positives and negatives of this structure. Can you add others to the list?

Positives +	Negatives -
• Positions are clearly defined • Flow of information and decision making clear • May be readily accepted by members because it is traditional • Structured and orderly • Chance for upward mobility	• Insufficient opportunities for the membership to express opinions • May lack participation of the wider membership • Easy for members to shun responsibility • Tendency of leaders to control the organisation • Might encourage concept of president for life • No room for new leadership to emerge • Might encourage subversive groups and conflict • Might lead to lack of transparency

Organisational Development

Handout 9: Horizontal Organisational Structure

This consists of several task-oriented committees. There could be committees for planning, sports, beautification, education, maintenance, fundraising. Decide which you want and need for your CBO. The co-ordinators of each committee usually form the Executive.



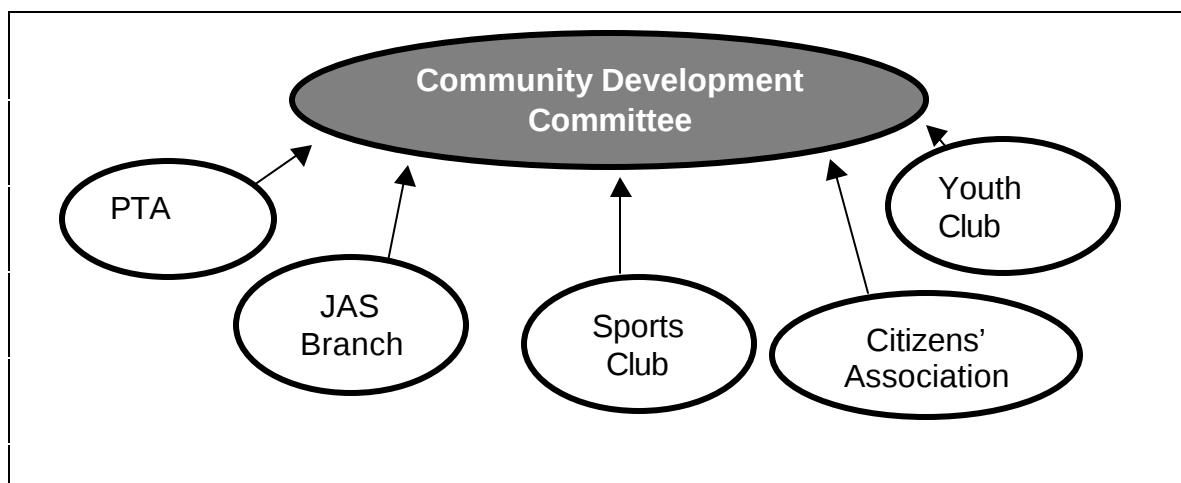
Here are some positives and negatives of this structure. Can you add others to the list?

Positives +	Negatives -
• Broad base participation –spreads the load • Tasks are easily achievable • Room for leadership to emerge • Direct responsibilities for tasks • Can lead to high level co-operation • Commitment to the organisation	• Time consuming for decision making • Too many leaders could emerge • There could be mis-interpretation of roles • Threat of dominance • Difficulties in co-ordination and communication (task teams doing their own thing)

Organisational Development

Handout 10: Umbrella Organisational Structure

The umbrella CBO comprises representatives from other community organisations and/or CBOs



Here are some positives and negatives of this structure. Can you add others to the list?

Positives +	Negatives -
• Wider representation • Recognition and integration of smaller organisations • Wider delegation of responsibilities • Transparency • Sustainability • Pooling of resources • Breakdowns barriers • Wider community participation	• Conflict of ideas and interest • Class and cultural biases may inhibit co-operation • Loss of identity , particularly of smaller groups • Dominance by stronger groups • Difficulties in co-operation and communication

Vertical structures are the ones we are the most familiar with. However, to enable participation, to ensure a wider cross-section of the community are mobilised and motivated, and to assist in succession the horizontal and umbrella structures are more suitable and should be encouraged.

Activity 3.3: Roles of Officers within the CBO (45 minutes)

For an organisation to be effectively run, it is important for persons in leadership positions to fully understand their roles and function. For the leadership to work collaboratively and harmoniously it is important that all the members of the Executive know and understand their roles and functions well. Most CBOs do not think it is necessary to have a job description for members of the Executive. But without them, people accuse each other of not doing their job, there is duplication of effort and some things just don't get done at all. The job description can be very brief. We are now going to prepare job descriptions for the officers of our CBO.

⇒ **LIST** all the activities, which have to be done routinely by the members of the Executive on small pieces of card. Write one task/activity on each card and put the card on the wall/board.

⇒ **LIST** the titles of the different members of the Executive on small pieces of card and place them on the wall/board.

⇒ **PLACE** the different tasks/activities under the relevant officer. This will provide us with an outline of a job description for each officer. Each officer should have about four or five main tasks.

⇒ **LOOK AT** Handout 11. Here are some suggestions for the roles of the different members of the Executive. How similar is your list to this one? Discuss any differences and reasons for them. If you are working towards a horizontal organisational structure does the way in which the Executive is structured and roles assigned help or hinder this process?

⇒ **PREPARE** a final job description for the officers of your CBO. Keep this as part of your record from this training programme for use by your CBO.

Trainer's Notes

Ensure that participants take into consideration the need to ensure a balance on the Executive. This could include considerations of age, gender and where people live. It is important that members of the organisation feel that people 'like them' are represented on the Executive. Younger members can bring a different perspective, their presence also allows for succession planning. Encourage people to consider the gender balance on the Executive and the roles that men and women play. For example, is the President usually a man and the Secretary usually a woman? If so, why and should this be changed sometimes? If people come from several communities, is there representation from each community on the Executive? If it is an umbrella CBO is there representation from each of the member organisations on the Executive?

Refer participants to Handbook 2, pages 15-16: *Job Descriptions*.

Refer participants to Handbook 2, pages 28-29: *Building Consensus and Decision Making* and page 30: *Delegating*.

Organisational Development

Handout 11:

Roles and Responsibilities of the Executive of the CBO

These are some suggestions. Add your own ideas too:

The President

- Calls and chairs meetings of the Executive and general meetings
- Prepares agendas for meetings
- Follows up on action agreed in meetings
- Acts as public representative of the CBO
- Monitors all activities of the CBO
- Delegates tasks to other members of the Executive



The Vice President

- Works with the President in all his/her tasks
- *The President should deliberately delegate some tasks to the Vice President. This can assist with succession planning, although it should not be assumed that the Vice President will automatically become the next President. Delegation also helps the President not to become overburdened with tasks.*



The Treasurer

- Receives and accounts for all monies on behalf of the CBO (membership fees, rental etc)
 - Makes payments and accounts for all payments on behalf of the CBO
 - Presents monthly financial reports to the Executive
 - Presents financial reports to the general membership at least once per year
 - Prepares an annual budget for approval by the Executive and then the general membership



The Secretary

- Records minutes of all meetings or ensures that this is done
- Maintains records of all minutes of all meetings
- Maintains records of all correspondence, contracts, publicity etc.
- Maintains a membership and mailing list



The Public Relations Officer

- Together with the secretary, maintains a membership and mailing list.
- Assists with proposals requesting funds from funding agencies, businesses, individual benefactors etc.
- Prepares promotional material about the CBO and its activities.
- Maintains good relations with local media, e.g. newspapers, radio. Ensures that they receive information about the CBO for publication and broadcasting



Activity 3. 4: Leadership Styles (1 hour)

We are now coming to the fourth activity relating to our theme of organisational development. We have already asked and sought to answer the question, 'Whose organisation is it?' and we have looked at the different kinds of structures that we might choose for our organisation. Now we turn to the very important and sensitive issue of leadership. Most of us here are leaders. We are going to be challenged to look at our own styles of leadership and the leadership styles of others that we know. We want to become more effective leaders so that we enable the growth and development of the CBOs we represent. One of the key elements of enabling the wider membership of our CBOs to come to realise their own ability and have confidence, is their relationship to us as the leaders of the group.

⇒ **DISTRIBUTE** Handout 12.

Organisational Development Handout 12: Leadership Styles

Autocratic/Dictatorship/Authoritarian Leadership

This kind of leader:

- Likes to get things done
- Controls
- Tells or sells his/her ideas to the larger group
- Makes the decisions and announces them
- Talks a lot about what the organisation has to do
- Pushes ideas through
- Makes everybody work hard
- Runs meetings his/her way
- Is task-oriented.



Laissez Faire Leadership

This is a French term, which means 'letting things happen'.

This kind of leader:

- Lets the members of the organisation do things with minimal involvement from him/her as the leader
- Spends a lot of time being nice to people
- Is all things to all people
- Is very friendly, but little gets done
- Is people-oriented but not task-oriented
- Does not involve him/herself in decision making
- Does not ensure that there is co-ordination of decisions or programmes.



Consultative Leadership

This kind of leader:

- Helps members explore issues but retains the power of veto
- May listen, but may filter what he/she hears looking for validation of his/her own ideas
- Maybe unwilling to change decisions.



Enabling Leadership

This kind of leader:

- Involves everyone
- Creates unity among the members
- Ensures that all the relevant information relating to a decision is provided
- Helps the members to come to a decision **themselves**
- Helps members to identify solutions and discuss them.



What kind of leader are you?

⇒ **DIVIDE** participants into two or three groups.

⇒ **DISCUSS** the styles of leadership presented on the handout.

⇒ **PREPARE and PRESENT** skits (role play) on the different leadership styles. Each group take a different style. Bring out the good points and not so good points of each style in the skits.

⇒ **DISCUSS** and come to a consensus on the type of leadership the CBO would like to support, taking into consideration the strengths and weaknesses of the different leadership styles.

Trainer's Notes

It is important to note people can switch from one leadership style to another. Sometimes this happens as people are learning to move from a more authoritarian style to a more enabling style. There are times when leaders need to make decisions without consulting the rest of the group. Sometimes they have been mandated by the organisation to do something and this requires a level of decision making to effect the task.

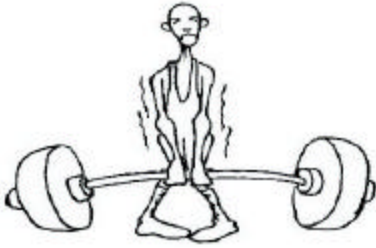
However, it is important that the other members of the Executive and the wider membership are clear on which tasks can be done without consultation and which need consultation with either other members of the Executive or the wider membership. Decisions that are taken without the rest of the Executive or wider membership need to be shared as soon as possible after they have been taken. If the other members are unhappy with the decisions taken, there needs to be further discussion and consensus about the kind of decisions that can be taken by individuals or groups of individuals without the prior consent of the rest of the Executive or the wider membership.

⇒ **DISCUSS** situations where leaders have taken decisions without the prior consent of the rest of the Executive or wider membership. Try to find examples where this was acceptable and where it was not acceptable, stating the reasons.

⇒ **DISTRIBUTE** Handout 13 and ask participants to assess their own strengths and weaknesses as a leader. This activity can be done before the next meeting.

Refer participants to Handbook 2, pages 10-12: *Leadership*.

Organisational Development Handout 13: Myself as a Leader

Strengths	Weaknesses
	

In view of my strengths and weaknesses, these are some of the things I need to work on in order to become a more effective and enabling leader:

Activity 3.5: Succession Planning (15 minutes)

Many CBOs presently operating within our communities are in crisis, as leaders are burnt out and wish to give up responsibilities. Who will take over? This could be avoided if other persons were trained to take over. This training and preparation of future leaders is called **succession planning**.

⇒ **DISCUSS** what ways the CBO could use to ensure succession occurs smoothly?

⇒ **WRITE** on the flip chart/board different approaches. Which ones will you as a CBO adopt? How?

Trainer's Notes

These different approaches could include:

- *Training of members*
- *Rotating /revolving chair (everyone has a chance to moderate meetings, make presentations)*
- *Shadow (each executive member has a second who shadows them)*
- *Establish clear terms of office – people **have to move** on after their term is complete*
- *Establish task teams – each one will have own leadership.*

Refer participants to Handbook 1, pages 30-31: *Getting People to Take Over*.

Activity 3.6: Creative Ways to Discuss the Roles of the CBO (30 minutes)

We have been looking at the leadership styles and roles within our CBOs. Now we are going to look at what is required from both the elected leadership and the general membership for our CBOs to become effective community organisations. We are going to use the metaphor of the human body. The human body represents our CBO.

⇒ **DRAW** a human head on the flip chart/board. Make sure that enough space is left to add the hands, feet and the rest of the body as this activity progresses. Who represents the head in our CBO? What does the head do?

⇒ **WRITE or ILLUSTRATE** the responses on or close to the head. Arrows can be drawn from the responses, linking them to the head.

Trainer's Notes

Let the participants give their own suggestions. Some of the following may emerge:

The head

- *Generates ideas/creates vision for the future*
- *Observes body language of members/level of participation*
- *Listens/learns/focuses members on main issues*
- *Facilitates discussions*
- *Guides through questioning*
- *Summarises what has been said*

⇒ **DISCUSS:** Can the head alone carry the organisation?

The usual answer is 'No' (but if yes, you could return to flip chart and remind group of the problems with having only a head).

⇒ **ASK:** What else is needed for the head to function?

The usual answer is 'support.'

⇒ **ASK:** Where will the head get support?

The usual answer is 'hands and feet.'

⇒ **DRAW** the hands and feet on the flip chart/board, in their right places in relation to the head. Who represents the hands and feet in our organisation? What do the hands and feet do?

⇒ **WRITE or ILLUSTRATE** the responses on or close to the hands and feet. Arrows can be drawn from the responses, linking them to the hands and feet.

Trainer's Notes

Let the participants give their own suggestions. Some of the following may emerge.

The feet:

- *Take information to other agencies*
- *Give support to organisation*
- *Keep organisation upright/steady*

The hands

- *Take minutes*
- *Answer the telephone*
- *Write letters*
- *Engage in practical projects and programmes*

⇒ **ASK** Is this enough for an organisation to work? What else is needed?

The usual answer is 'the body'. The body is the most important part of the organisation. It represents various groups and committee structures

⇒ **DRAW** the body on the flip chart/board, in its right place, connecting to the head, hands and feet. Who represents the body in our organisation? What does the body do?

⇒ **WRITE** or **ILLUSTRATE** the responses on or close to the body. Arrows can be drawn from the responses, linking them to the body.

Trainer's Notes

Let the participants give their own suggestions. Some of the following may emerge.

The body:

- *Is the pulse of the organisation*
- *Breathes life*
- *Processes information, ideas and generates new ideas.*

The body is the most important part of the organisation. It represents various groups and committee structures.

Give participants a copy of Handout 14. It can be completed after the session if time is short.

Trainer's Notes

Using the same example of the body, the body parts can be compared with the functions of different officers and committees:

- **Head** *President*
- **Hands** *Secretary/Treasurer*
- **Feet** *Networking/fundraising group*
- **Body** *Structure in groups/committees*

The task team structure, satellite executive committees and umbrella groups can also be used to explore the functions of the different officers and committees. See Handbook 1: pages 26-29.

Discuss some of the committees that the CBO may need. These can include: project committee, maintenance committee, membership committee, income generating committee. Discuss the roles and functions of these different committees.

As many members as possible of the general membership should serve on committees to ensure ownership of and participation in the CBO. Some committees or task groups can be established for a particular purpose at a particular time and then disbanded once their task is completed.

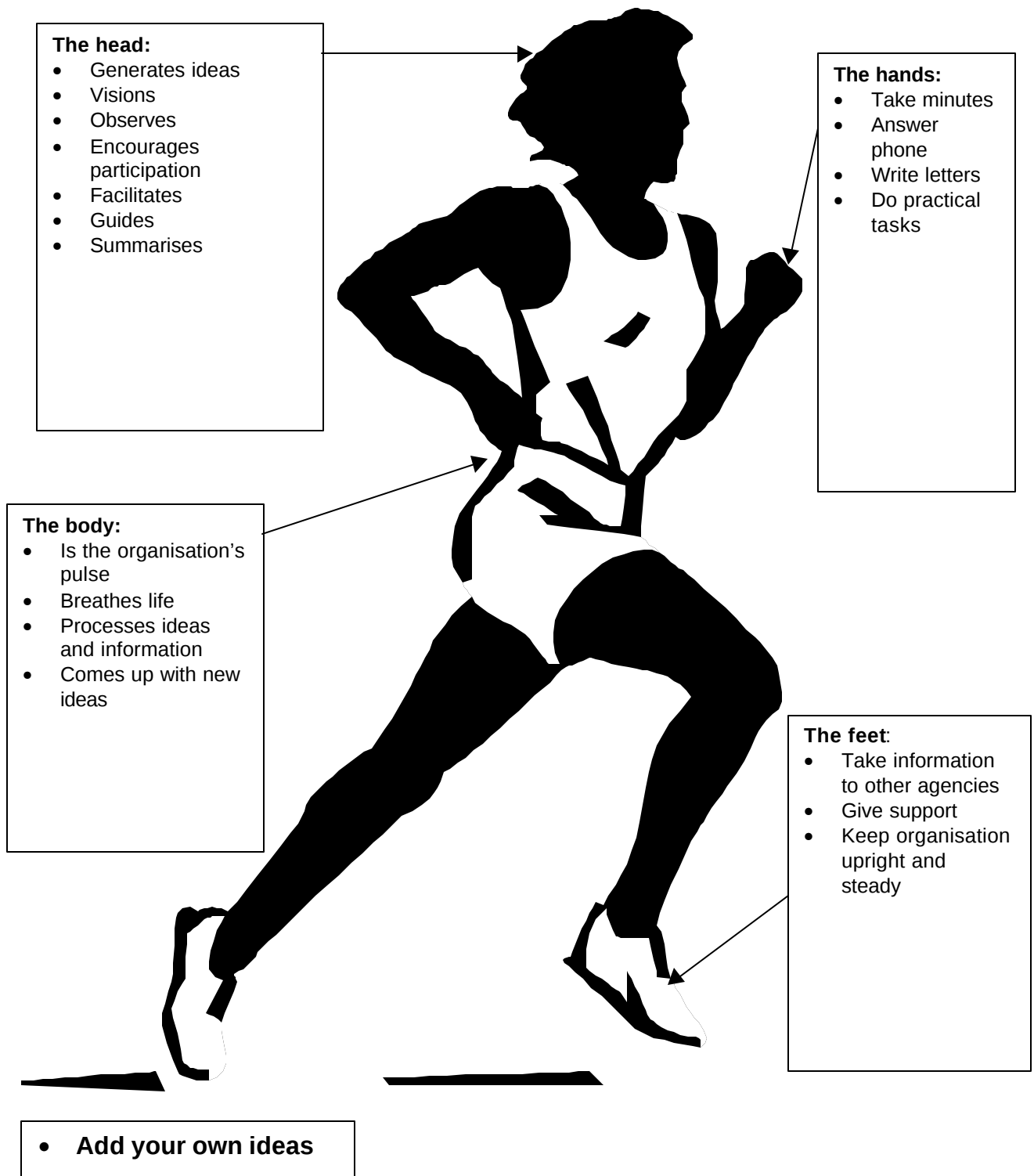
Refer participants to Handbook 1, page 29: *Thinking about our Organisation like a Human Body.*

The handbook offers an alternative activity, Soup Pot, where thinking about the organisation is compared with making red pea soup.

Organisational Development

Handout 14:

Describing the CBO like the Parts of the Human Body



Activity 3.7: Criteria for Taking on CBO Responsibilities (30 minutes)

We have seen the importance of involving as many members of the CBO in committees, task groups and decision making roles. How do we determine who is most suitable to take on a particular responsibility in the CBO? Before persons are nominated to sit on committees or task teams, everyone should be aware of the selection criteria.

⇒ **DIVIDE** into groups of four to five persons.

⇒ **DISCUSS** the criteria for membership on committees and write the criteria on a sheet of flip chart paper.

⇒ **PRESENT** the criteria from each group to the larger group and discuss the relevance of the criteria.

Some of the possible criteria are listed in the boxes below:	
• Good communication skills • Able to motivate others, share vision • Good public relations person • Patience and tolerance • Honesty • Active and sociable person • Respectful • Accessible • Responsible • Ability to keep proper records • Tolerance of others • Commitment	• Reliable • Acceptable lifestyle • Non partisan • Accountable • Agreeable • Out going • Good Interpersonal skills • Knowledge of resources • Ability to transfer knowledge to others so that they will be able to carry out the function of any of the positions • Flexible – able to see other people's view

⇒ **DISCUSS** any criteria, which may inhibit effective participatory management.

⇒ **ASK** Do all post holders have to have all these attributes? Are some attributes required for just some committees or task groups?

Trainer's Notes

Some CBOs may note criteria such as persons must be:

- *Professional*
- *Over a certain age*
- *Church goers*
- *Literate*

Are these attributes really necessary?

Facilitate a discussion to ensure that eligibility for election to committees is not too exclusive - the main thing is that the members must be resourceful, energetic, committed and responsible. Remind participants of the earlier discussion about a balance of age, gender and representation from different communities or organisations (in the case of an umbrella CBO).

Theme 4: Stages of Organisational Development (1 hour 30 minutes)

Our first three themes enabled us to define a CBO, to see how to establish or re-establish a CBO and to have some understanding of organisational development. Our fourth theme in this module on organisational development is 'stages of organisational development.' Organisations and groups of all types often go through predictable stages. We are going to learn about those stages and to see what stage our organisation is in.

Activity 4.1: Understanding What Stage We Are In (45 minutes)

We need to begin by understanding what stage our organisation is in.

⇒ **STICK** cards with the following stages at intervals along the wall.

- Forming
- Storming
- Norming
- Performing
- Dorming

Forming is the first stage of an organisation, everything is new.

Storming usually follows when arguments take place and power struggles develop.

Norming results from sorting out differences and settling down.

Performing is the stage when the organisation is really able to achieve its aims.

Dorming is the last stage when things get taken for granted and it is '*same ole, same ole ting.*'

⇒ **DISCUSS** what each stage means.

⇒ **DRAW** pictures to illustrate the different stages and mount them on the board/wall.

⇒ **STAND** in front of the stage, which you feel your CBO is in. Explain the reasons for your choice.

⇒ **DISCUSS** why people have different perceptions of where they are. What are positives and negatives of being in each stage? Depending on where you see yourself, what action should be taken?

⇒ **DISTRIBUTE** Handout 15.

Refer participants to Handbook 1, pages 21-23: *Rocky Ride*.

Organisational Development

Handout 15: Stages of Organisational Development

FORMING



Many persons are excited about setting up an organisation. They are willing to volunteer their time. However, they may have to give up a lot of time and put in a lot of energy at this stage. They may not be able to keep up this pace.

STORMING



Ideas are being discussed, individuals are working out their different roles and deciding on priorities but some persons feel it will take a lot of committed time, and feel it is not worth it as they cannot see any personal benefits. At this time many persons leave the group.

NORMING



Members have found a way to work together. The group is ready for action.

PERFORMING



Plans drawn up are put into action. Group members feel they are achieving something, as community members see benefits

DORMING



There are two types of dorming:

1. The friends group. Group members become friends, meetings become a social event and the same topics are discussed. There are no new ideas being generated for discussion, contact with the community is lost.

2. Burn out/frustrated group Same people have been doing everything, they are tired and stressed. Little is happening, no new members have joined. There is little interest among the community

- What stage is your CBO in?
- Explain the reasons for your decision.

If your CBO needs revitalising, over page note what action should be taken and by whom?

Trainer's Notes

*It is important to give some consideration to the 'storming stage,' particularly if any of the participants think that their CBO is in the stage. People often feel uncomfortable in this stage. Some people will leave. However, as Module 4, 'Communication and Conflict Resolution' will confirm, disagreement is useful for the development of the CBO. **Do not suppress it.** It is a very natural process in the development of any organisation. Help people to work through the issues. Take time to do this.*

Activity 4.2: Dorming (45 minutes)

As dorming can be so comfortable (friends group), organisations and groups can easily fall into this stage. This is particularly true for volunteer organisations. Alternatively, the dormant group might have resulted from burn out or frustration. In either case something needs to be done to prevent this.

⇒ **ASK:** What can you do to prevent 'dorming'?

Do you need to make any changes within your organisation itself?

Could you identify some easily achievable tasks (EATS) so that people could be fired up and see success quickly?

Trainer's Notes

Here are some suggestions that might emerge about changes to be made within the organisation itself.

- *Review roles*
- *Hold new elections*
- *Self evaluate*

As suggestions emerge, discuss the process for making those changes. For example, what process would they use to review the roles of the leaders?

Some of the easily achievable tasks (EATS) might include:

- *work day*
- *putting up street signs,*
- *painting a pedestrian crossing*
- *clearing drains/gullies,*
- *beautification*
- *organising small fund raising*
- *garbage disposal*
- *book exchange programmes*
- *repainting e.g. school*
- *renovating empty unused buildings for community use*

Participants will have other ideas from things that need doing in their community.

Participants may also need to identify long term plans and break them down into phases so that achievements can be easily monitored and celebrated.

*Summarise by indicating that the actions identified are all designed to **re-energise** and build people's **confidence**.*

Note that EATs are also useful when organisations are newly starting up and people start to get frustrated that nothing is happening. Again people become energised, build confidence, learn to trust each other, break down barriers (including accusations that 'nothing happen'), rally around a common cause, begin to function as a group in an organised way. The task defines the type of organisation, which should emerge.

⇒ **DISCUSS** what should and can be done if your organisation is already in the 'dorming' stage.

Trainer's Notes

Possible steps to reactivate a dormant CBO:

- **Identify a core group** (e.g. remaining Executive members and some concerned citizens) to brainstorm why the organisation has become dormant. What are the root causes? (e.g. is there low attendance because of the choice of venue, timing of meetings, trust in the leadership, people don't feel that the organisation has any impact etc?)
- Facilitate a **MONFIS** or conduct a past analysis, situational analysis (SWOT). These activities will help to identify strengths and weaknesses. These activities will provide direction and identify issues that need urgent attention.
- Possibly contact an **external facilitator** (someone without bias, fresh eyes e.g. SDC CDO, NGO to assist with the process). It may be useful for this person to do a **walkabout** and identify the community's perceptions. Feed back this information to the core group.
- The core group will list the key issues and consult with different groups from the wider community to ensure that they also **participate in the analysis**.
- The core group will brainstorm **alternative** solutions e.g. new organisational structures, new focus including short term objectives, new venue.
- Publicise an **open community meeting** when the analysis of problems will be shared and suggestions taken to address the issue of re-activating the CBO based on the presentation of alternatives.
- Agree on an **EAT** (easily achievable task) so that the organisation can get results quickly, work on developing a workable organisational structure and building confidence.

Refer participants to Handbook 2, pages 25-27: *Stimulating Creativity and Energising People*.

Theme 5: CBO Constitution (1 hour 30 minutes)

For the final theme you are going to prepare a constitution for your CBO. If you already have a constitution we will look at it and see if there are ways in which you want to modify it or simplify it.

A constitution is a formal document, which sets out the fundamental principles and guidelines by which your CBO is governed. In order for your CBO to be effectively managed, it is important to establish a constitution. Your constitution speaks to the kind of organisation that you are. It defines the roles and responsibilities of the organisation and individuals. It will incorporate many of the principles of organisational development that we have looked at under the previous themes. For example, if you wish to have a horizontal organisational structure, this will be reflected in your constitution. The titles of the officers of your CBO will be in the constitution, along with the committee structure.

The constitution will speak to many of the issues that have been addressed during this module, including meeting places, titles and roles of Executive, committee structure, membership, administration, meetings. We will revisit these issues and collate ideas, decisions, charts etc. to assist us as we write the constitution.

The constitution does not have to be complicated. The principle of KISS (Keep It Short and Simple) should be used when developing the constitution.

⇒ **DISTRIBUTE** Handout 16. Look at how it is laid out and what it contains.

⇒ **EXPLAIN** that under Article 1, you need to include a mission statement.

⇒ **DISCUSS** the purpose of a mission statement. It should comprise one short statement which describes why the organisation exists, whom it serves and its values. It needs to be short enough so everyone can remember it.

⇒ **PREPARE** a draft constitution for your CBO. This will need to be shared with the members of the Executive and then the full membership for final approval.

⇒ **ENCOURAGE** participants to have a copy of the CBO's mission statement in a prominent place in their meeting venue.

Handout 16: Guide to Drafting a Constitution

Article I	
Organisation name and contact address	Write the name of the organisation agreed by everyone. Record the address to which correspondence/letters should be directed.
Objectives of the Organisation (Mission statement)	Write one short statement which describes why the organisation exists, whom it serves and its values. It needs to be short enough so everyone can remember it.
Article II	
Meeting place	State the name/address of the venue where meetings will be held.
Article III	
Titles of officers	List all the officer titles e.g. President, Treasurer, Secretary etc. Explain how they are appointed e.g. election at the Annual General Meeting, election by the Executive etc. State how long each officer is allowed to serve.
Committee structure	Name any permanent committees which the CBO will form e.g. fund raising Committee, health committee, education committee, maintenance committee etc. Describe how they are formed (elected or selected) and the numbers and Positions of people serving on these committees.
Quorum	This term means the number of people who must be at a meeting before Business can be conducted and decisions made. Generally 1/3 of membership should be at regular meetings and 2/3 at Annual General meetings when elections take place.
Aims and objectives	Describe in more detail the specific aims and objectives of the organisation.
Article IV	
Membership	State who is eligible to be a member, how they can become a member and any Conditions of membership. Members may be executive, general, co-opted or observers.
Article V	
Dues/membership fees	Define what dues are to be paid, how often, when due, to whom dues should be paid. State who determines the fee rates.
Article VI	
Election of officers	Define the criteria for taking office. State the method of nominating and frequency of elections. Describe election procedures.
Article VII	
Administration	Describe the structure of the Executive Body. Provide brief descriptions of the job each officer is expected to perform. Provide a brief description of the function of each sub committee.
Article VIII	
Annual General Meeting	State when it should take place, where it will be held and the agenda it will follow.
Article IX	
Meetings	Describe the different types of meetings which will take place. These may be i. Executive meetings, ii. Members' meetings iii. Sub committee meetings, iv. Emergency meetings. Describe how each type of meeting will be conducted.
Minutes	State who will be responsible for taking minutes. Describe what should be contained in the minutes e.g. date, time and venue of meeting, persons present, decisions made, action to be taken. Describe how they will be confirmed as accurate records of meetings. Describe how amendments will be dealt with.
Article X	
Accountability	Describe how financial accounts will be maintained and information shared with the members through the Treasurer's report. Frequency of reports. Describe how amendments to the Constitution can be made. Describe how resignations should be dealt with. Describe how disciplinary matters will be dealt with.

⇒ **DIVIDE** the participants into groups of four or five persons.

⇒ **USE** the guide to develop a constitution or revise your existing one.

⇒ **DISCUSS** in plenary and develop a draft to share with the rest of the Executive and then the full membership.

Discuss the registration of the CBO. There are some suggestions and information about registration in Handbook 1, pages 35-38.

We have now come to the end of our module on organisational development. The constitution pulls together many of the issues we have discussed. It becomes the guideline or the map for the way in which we function as a CBO.

Refer participants to Handbook 2, pages 13-14: *The Constitution*.

Refer participants to Handbook 1, pages 35-38: *Registration of CBOs*.

Once a CBO has a constitution and an active Executive and membership, they should be encouraged to register.

Annex 1

Community Based Organisation Capacity Assessment Tool MONFIS

Six components of organisational effectiveness have been identified:

1. Management
2. Organisation
3. Networking and mobilisation
4. Financial management and fund raising
5. Impact
6. Sustainability

This is called the MONFIS. This tool can be used to identify relative, not absolute values of organisational development weaknesses and develop interventions to address these. The progress of a CBO is measured on change observed from one assessment to another.

The tool should be administered in a participatory way with the CBO members. The relevant parts of the MONFIS for each module should be administered at both the beginning and the end of the training period. This will assist in evaluating the impact and effectiveness of the training.

Name of CBO:

Date of Assessment:

Conducted by:

Rating Scale

- 6.Needs urgent attention
- 5.Needs attention
- 4.Needs improvement on fairly wide scale, but not major or urgent
- 3.Needs improvement in limited aspects
- 2.Minor adjustments needed
- 1.No need for immediate improvement

Management

1.1	CBO has annual development plan with clearly defined objectives and performance indicators	1	2	3	4	5	6
1.2	Information and records are maintained systematically, can be easily retrieved and are consistently used	1	2	3	4	5	6
1.3	Planning in the executive is done in a participatory way	1	2	3	4	5	6
1.4	Regular self evaluation exercises are conducted where executive, members and wider community can review successes and failure and modify management practices and programmes accordingly	1	2	3	4	5	6
1.5	Communication within management is broad and communication systems are simple but informative	1	2	3	4	5	6

This section of the MONFIS assesses and evaluates the way in which the CBO is managed:

- 1.1 The CBO develops an annual plan. This includes input from both the executive and the wider community. It has to be agreed on by all the stakeholders. The plan sets out what the CBO hopes to achieve during the year and evaluation tools for assessing the impact of the different parts of the plan.
- 1.2 The CBO needs to keep good records which can be accessed easily. These can be kept on a computer and/or in a well organised filing cabinet. The records should provide information about the membership of the CBO as well as the CBO's activities.
- 1.3 All members of the Executive should have a voice at meetings.
- 1.4 All the stakeholders in the CBO should participate in evaluation exercises which enable the CBO to evaluate and plan.
- 1.5 There is a recognition of the need to keep people informed about what is happening in the CBO and the wider community.

Organisation

2.1	The CBO has clear, simple vision/mission statement	1	2	3	4	5	6
2.2	The vision/mission is undertaken by the executive/task teams, membership and wider community	1	2	3	4	5	6
2.3	The executive/task teams' links to members and wider community are strongly consultative	1	2	3	4	5	6
2.4	The executive/task teams have a clear understanding of their roles and responsibilities which are well documented	1	2	3	4	5	6
2.5	The CBO has carefully considered the value of CBO registration with its membership and has well documented justification for its position on registration	1	2	3	4	5	6
2.6	The executive is strongly representative of its community, there is evidence of a democratic selection process and cross section of age, gender, employment etc	1	2	3	4	5	6

2.7	General members have a clear understanding of their roles and responsibilities	1	2	3	4	5	6
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This section of the MONFIS assesses and evaluates the way in which the CBO is organised:

- 2.1. The vision or mission statement will form part of the constitution.
- 2.2. It is important to ensure that there is a commitment from the executive, the members and the wider community to put the vision/mission into action in the organisation and the wider community. The plans, projects and programmes of the CBO should be influenced by and speak to the vision/mission.
- 2.3. The CBO must operate in a participatory way. To be consultative, it must listen to people, seek their views and opinions and give them serious consideration when making plans and implementing programmes.
- 2.4. There should be written job descriptions for the executive members, so that they and other members of the CBO are clear about their responsibilities.
- 2.5. The CBO should consider being registered. The discussion and decision taken about registration must be recorded
- 2.6. There must be a properly convened meeting to elect the executive. The process for this meeting and the election forms part of the constitution. The executive should comprise a range of people from the community and in order to be representative should reflect the people who live in the community. Therefore, there should be a mix of different age groups, men and women and people from different educational and work backgrounds.
- 2.7. Members know what is expected of them.

Networking and Mobilisation

3.1	CBO has excellent relations with members and wider community and can mobilise and motivate a wide cross section of persons to support projects and activities	1	2	3	4	5	6
3.2	CBO is a member of the CDC, actively participates in these activities and keeps own organisation informed of federation activities and progress	1	2	3	4	5	6
3.3	Maintains productive relations with service providers, inviting them to provide information on a regular basis and co-operates with them	1	2	3	4	5	6
3.4	The CBO is well known/respected <u>outside</u> its own community	1	2	3	4	5	6
3.5	The CBO has the capacity to reach and involve marginalised persons	1	2	3	4	5	6
3.6	The CBO is able to identify and manage conflict speedily and effectively	1	2	3	4	5	6

This section of the MONFIS assesses and evaluates the CBO's relationship with the wider community and other groups and organisations:

- 3.1. CBO has a responsibility to encourage others to become involved in the CBO's programmes and activities.
- 3.2. The CBO should be a member of the Community Development Committee (CDC), the umbrella organisation for all the CBOs in the community. If a CBO already represents the interests of all the other CBOs in the community, it may itself become the CDC. The CDCs have linkages with organisations outside the community, who have an interest in community development. See Handbook 1, page 41.
- 3.3. The CBO should keep in contact with people and organisations who provide services to the community. These include government agencies, for example, SDC, the Ministry of Education, RADA, the Parish Council; the utility companies, for example, the electricity company and the National Water Commission; as well as other key organisations, for example, churches, JSIF and other funding agencies.
- 3.4. The CBO should find opportunities to participate in activities outside the community. It should invite other CBOs and organisations to visit the community. This will help to establish its reputation in other communities and with other agencies.
- 3.5. The CBO should place special attention on working with people who are often left out or excluded from community life because of their special circumstances. These will include the very poor, persons with disabilities, the elderly.
- 3.6. The members of the CBO must be committed to developing conflict resolutions skills, so that when disagreements occur they are equipped to resolve them.

Financial and Fundraising

4.1	Financial/accounting records are up to date, easy to understand and accurate	1	2	3	4	5	6
4.2	Budgets developed at least annually are developed in consultation with executive and members	1	2	3	4	5	6
4.3	Budgets are based on previous year's experience and are accurate within 10%	1	2	3	4	5	6
4.4	Audits are carried out by independent persons each year	1	2	3	4	5	6
4.5	The CBO produces accurate, complete and timely financial reports, which are made available to other members, wider community and others						
4.6	The CBO has a fundraising plan each year and is able to organise the fund raising events and raise funds to within 20% of predictions	1	2	3	4	5	6
4.7	The CBO is able to recover recurrent costs	1	2	3	4	5	6

This section of the MONFIS assesses and evaluates the CBO's financial affairs:

- 4.1. All financial accounts are kept up to date and are in a form that is easily understood.
- 4.2. The CBO develops an annual budget ensuring full participation in the process.
- 4.3. The previous year's budget is used as a guide for the next year's budget.
- 4.4. There is an annual audit of the CBO's financial affairs. This is undertaken by someone who is not a member of the CBO.
- 4.5. Financial reports are prepared regularly and shared with the wider memberships
- 4.6. The CBO actively engages in fundraising activities.
- 4.7. The CBO is able to meet its day to day financial expenses – these will include rent, salaries, utilities, stationery.

Impact

5.1	Members and wider community feel real benefit from services and programmes of the CBO	1	2	3	4	5	6
5.2	The CBO meets priority needs of members and the wider community	1	2	3	4	5	6
5.3	Members and the wider community perceive services and programmes as sufficient and cost effective	1	2	3	4	5	6
5.4	Impact indicators are developed for all objectives and are jointly assessed on a regular basis	1	2	3	4	5	6
5.5	Community sees CBO as credible and trustworthy	1	2	3	4	5	6

This section of the MONFIS assesses and evaluates the difference that the CBO is making to community life. It should make an assessment of projects which are completed, not projects which are in the pipeline:

- 5.1 The programmes of the CBO should make a difference to the lives of the members and the wider community.
- 5.2 The CBO should seek to address the issues which are of most concern to the community residents.
- 5.3 The programmes must serve the people they are meant to serve adequately, and give good value for money.
- 5.4 There should be agreed targets for all the CBO's programmes and activities. These should be discussed and evaluated regularly to see that they are on stream and meeting their targets. Any changes to the original plan must be agreed by the executive and then by the membership.
- 5.5 The CBO must be believable and honest.

Sustainability

6.1	CBO understands and has a plan for continuity	1	2	3	4	5	6
6.2	CBO has a diversified financial resource base, possibly including a cost recovery system	1	2	3	4	5	6
6.3	Community persons value membership, membership is increasing	1	2	3	4	5	6
6.4	CBO is capable of adapting to emergent needs	1	2	3	4	5	6
6.5	CBO continues to attract volunteer support	1	2	3	4	5	6
6.6	CBO has well functioning succession strategy	1	2	3	4	5	6

This section of the MONFIS assesses and evaluates the ways in which the CBO is working to ensure its long term future:

- 6.1 The CBO has a plan for beyond the present, into the future.
- 6.2 The CBO has a variety of sources of funds.
- 6.3 Community persons are proud to belong the CBO – membership is growing.
- 6.4 The CBO can change as new needs in the community become evident.
- 6.5 The CBO has a strong group of volunteers.
- 6.6 The CBO is grooming others to take over.

Annex 2: ICEBREAKERS

WHAT IS AN ICEBREAKER?

The icebreaker is a simple activity designed to help group members relax, ease inherent group tensions and find their comfort zones.

WHY USE AN ICEBREAKER?

Breaking the ice sets the tone and tempo for the session. It usually starts group members interacting and therefore bonding. The icebreaker paves the way for a successful outcome, as it generates “good vibes” and gets group members talking. It also tends to “pull out” the shy ones.

WHEN TO USE ICEBREAKERS

An icebreaker is not always necessary. It is very useful when:

- ◆ There is apparent group tension
- ◆ Group members are unfamiliar with each other
- ◆ There is time
- ◆ Unresolved conflicts exist in a group (serves as a diversion)
- ◆ Group size is relatively small (20 persons or less)
- ◆ A larger group has facilitators to help with the management

WHERE TO USE ICEBREAKERS

- ◆ Immediately after scene setting at the start of a session
- ◆ Where there are obvious tensions in the group even after the session has started
- ◆ When members of small groups don't want to work together

Here are some tried and tested icebreakers which you might find helpful.

ICEBREAKER #1 INTRODUCING YOUR PARTNER

(use in groups where members are from different CBOs/organizations/communities and are not familiar with each other)

In advance prepare on small pieces of paper pairs of the numbers or pairs of coloured cards or phrases which go together (e.g. ackee and saltfish, bun and cheese, donkey and cart etc). As participants enter, let them pick out one. Then ask them to find their partner , i.e. the one holding the same number/colour or the matching half of the phrase.

If there is an “odd person” with no partner, then prepare to partner that person yourself.

Allow 3-5 minutes for them to get to know each other. They could be asked to get answers to these questions:

- ◆ Name
- ◆ CBO / organization / community
- ◆ Position in the CBO / organization/community
- ◆ Occupation
- ◆ How they think their CBO / organization/community will benefit from the training

Sometimes , it is fun to include something a bit unusual e.g. find out if the partner has a secret talent, find a similarity between each other, find out something unique about the person.

Ask for a volunteer to begin by introducing his/her partner, giving the answers to the questions asked. Each person must do the same.

Close by asking group members to refer to each other by name as often as possible throughout the session. This will also help you to learn the names quickly.

ICEBREAKER # 2 : STORY TIME

(Use in groups where members are from the same CBO and already know each other)

Sitting in a semi-circle, group members will create and complete a story lasting no more than 5 to 6 minutes.

Let members know that this is purely for fun, and the idea is to REALLY LISTEN to all that goes before and to keep adding.

Select a bright, outgoing member to start this imaginary story. He must stop after a few sentences when the story has gathered some momentum and direction, and “tag” (touch) his nearest neighbour, who must continue the story. Each member gets his/her turn to continue the same story, and the last member in the line up concludes it as interestingly as he can.

Be prepared to encourage and motivate those who think they cannot keep it going.

ICEBREAKER # 3: ALLITERATION NAMES

Ask group members to:

- ◆ say their middle names (or their first names or nicknames)

- ◆ using the first initial of that middle name find an adjective that might describe their personality and share it with the group (eg. My middle name is Jerusha..... I am Jealous Jerusha)
- ◆ continue this around the group until everyone has had a chance.
- ◆ See if people can remember all the names and adjectives.

Annex 3: ENERGISERS

WHAT IS AN ENERGISER?

The energiser is a “picker-upper”. They are supposed to be fun, quick and easy.

This is a very useful technique when group members are un-responsive due to tiredness, boredom, lack of interest, limited or lack of motivation.

WHERE TO USE THE ENERGISER

- ◆ Just before lunch
- ◆ Just after lunch
- ◆ mid afternoon if it's an all-day session running into evening
- ◆ after a mentally draining activity
- ◆ a training session after a long day's work
- ◆ after a long plenary session

HOW TO USE THE ENERGISER

- ◆ explain the purpose
- ◆ choose appropriate activity
- ◆ make the activity simple, light and interesting
- ◆ describe the task
- ◆ ensure task is clear to all participants
- ◆ set and manage the time frame

Here are some tried and tested energisers for you to use...

ENERGISER # 1 BRAIN MOTIVATOR

- ◆ divide members into small groups using a one of the following:-
 - ◆ count participants off 1...2...3... depending on the number of groups you desire. All '1's form a group, all '2's from another group etc.
- or
- ◆ distribute paper with colours, animal names, bird names, counties (Cornwall, Middlesex, Surrey) etc . Those with the same word form a group.
- ◆ Ask the groups to make a list of as many of the following as possible in, say one minute:
 - ◆ Place names in Jamaica beginning with “ St.”
 - ◆ People's names which are also names of occupations eg. Mason, Gardner, Cook etc.

- Names of rivers in Jamaica
- Boys names beginning with J
- Etc.
- Winners are the group with the most different answers, which no other group came up with.
- Have small prizes ready for the winning team (e.g. sweets)

ENERGISER #2 : MUSICAL PARTNERS

This game can only be played in an area with much space for free movement

- ◆ You will need a tape player and a cassette with music.
- ◆ Each person is to select a partner and stand beside this person
- ◆ There must be an odd one out, standing by herself
- ◆ The game is like musical chairs but without the chairs
- ◆ Begin playing the music
- ◆ Each time you stop the music, members must change partners (run and grab someone else)
- ◆ Keep this going for a while and your group members will really have fun

ENERGISER #3 :MIND GAMES

These are all common expressions. Write them up on a flip chart /board or prepare transparencies if you have a projector. ASK groups to try and work them out.

i RIGHT i

MIND
MATTER

STANDING
MISS

HARD
x AHEAD

SIR
+ FOOD

FA TH

Answers:
Right between the eyes
Mind over matter
Misunderstanding
Hard times ahead
Surplus food
Blind faith

WEAR
LONG

HEAD
HEELS

BENDING
UOY ROF

CI lifeTY

NOON SUNDAY

ARE YOU LONESO ?

ANSWERS:
Head over heels
Long underwear
Life in the city
Bending over backwards for you
Sunday afternoon
Are you lonesome without me

ENERGISER #4: WRITING WITH YOUR BODY

This is a good energiser when the group has been sitting still for a long period.

- Chose a word or phrase e.g. the CBO's name, a relevant word from the training (e.g. communication, management)
- Ask the group if they have ever written with their bodies before
- Tell them that we are all going to do this together
- Any part of the body can be used e.g. they can write the word with their whole body , their head, their nose, their hips etc.
- Give yourselves a clap when completed

JAMAICA SOCIAL INVESTMENT FUND
TRAINING FOR COMMUNITY BASED ORGANIZATIONS

CBO: _____ PARISH _____
MODULE _____ DURATION _____

PARTICIPANTS' EVALUATION FORM

Please assess the Training programme you have just completed. Your responses can help us to improve the effectiveness of the course. We appreciate your help.

1. During this training course I learnt:

2. Please use the following rating scale to evaluate these statements below.

SCALE: 1 to 10 [1 is the lowest, 10 is the highest]

This training met my needs and expectations _____

It will be useful to me in my CBO _____

The instructors explained clearly _____

I understood what was taught _____

My CBO will benefit from my participation in this course _____

These are my recommendations/comments



THANKS!

Trainer's name.....

NOTES