

TRAINING PACKAGE # 5

GENDER PRACTICE AND REFLECTION

MODULE # 3

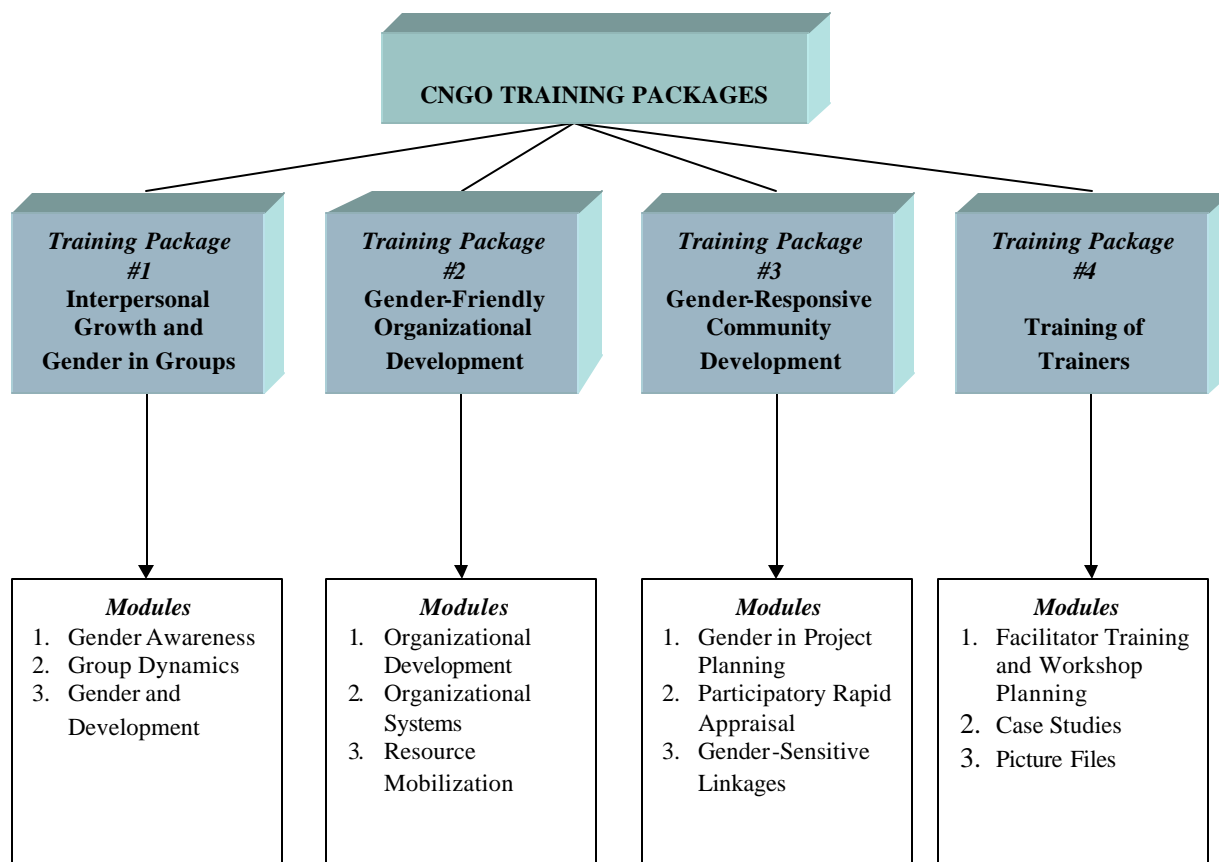
SUSTAINING YOUR GENDER RESOURCE ORGANIZATION



**Canada-Nepal Gender in Organizations Project
with the support of the Canadian International Development Agency**

ABOUT THE GENDER RESOURCE ORGANIZATION MODULE

This module complements the series of training packages that was produced by the CIDA-funded Canada-Nepal Gender in Organizations Project. The training series consists of four packages, each with several modules. This package - #5 ***Gender Practice and Reflection***, contains three training modules: # 1 “Violence against Women and Safety Strategies”, #2 “Building NGO-Government Linkages through Gender Training with District Government Officials”, and #3 “Sustaining your Gender Resource Organization”.



Each module is divided into several sections:

- ✦ Section 1: ***Background Information*** defines some key concepts and provides information on the topic.
- ✦ Section 2: ***Participatory Activities*** describes step-by-step activities. The facilitator should look to these for ideas, but should be selective and develop additional activities to fit specific circumstances.
- ✦ Section 3: ***Reference Materials*** provides background reading, tools, examples and worksheets relevant to the topic and the activities.

CONTENTS

SECTION 1: BACKGROUND INFORMATION.....	1
Introduction	1
SECTION 2: PARTICIPATORY ACTIVITIES	2
Activity Set #1: GRO Conceptualization	2
Sub-Activity #1.1: Concept of a GRO	3
Sub-Activity #1.2: Concept of Social Entrepreneurship	5
Activity Set #2 GRO Sustainability.....	6
Sub-Activity #2.1: Organizational Change and the Concept of Sustainability – Virtuous Spiral...	7
Sub-Activity #2.2: Inquiry into Viable Organization.....	9
Sub-Activity #2.3: Inquiry into Resources.....	10
Sub-Activity #2.4: Inquiry into Impact	11
Activity Set #3: GRO Sustainability Plans.....	12
Sub-Activity #3.1: Checking the Vision Statement.....	13
Sub-Activity #3.2: A Viable Organization is a Learning Organization.....	14
Sub-Activity #3.3: Develop a Marketing Plan for your GRO.....	16
Activity #4: Consolidation	17
SECTION 3: REFERENCE SECTION.....	18
Reference #1: Characteristics of a GRO	18
Reference #2: Social Entrepreneurship	20
Reference #3: Timeline of Inputs.....	21
Reference #4: Virtuous Spiral for Sustainability	22
Reference #5: Purpose and Development of a GRO Marketing Plan	24

SECTION 1: BACKGROUND INFORMATION

Introduction

The purpose of this module is to consolidate learnings, ensure conceptual clarity on role and responsibilities as a Gender Resource Organization (GRO) and develop sustainability plans for the future.

The target audience for this module are NGOs that have participated in a gender integrated capacity building program to become gender experts in their districts. The support may be directly from CNGO, or perhaps using the CNGO training packages, or with other capacity building support.

This module brings together the individual and organizational learning, and internalization of gender concepts at the end of this capacity

building process. Each person, individually and organizationally in their NGO, is asked to reflect on their change process and their vision of a GRO. At a practical level, the NGOs will develop a sustainability plan, which includes components on organizational learning and marketing to sustain their work as a GRO. A sustainability plan is integrated into the NGO Annual Plan.

Note that the module could be delivered to one NGO or to several together. The group work in each activity would be adjusted so that each NGO works on its own, and then they can share their work in plenary with the other NGOs present, if any.

Learning Objectives

- ✦ NGOs understand and can explain the concept of a GRO
- ✦ NGOs learn the concept of social entrepreneurship to support their sustainability
- ✦ NGOs consolidate their capacity building learnings, and reflect on organizational changes as a GRO through the lens of a virtuous spiral
- ✦ NGOs reflect on their vision and mission statements as the foundation for sustainability
- ✦ NGOs develop GRO sustainability plans: learning and marketing components

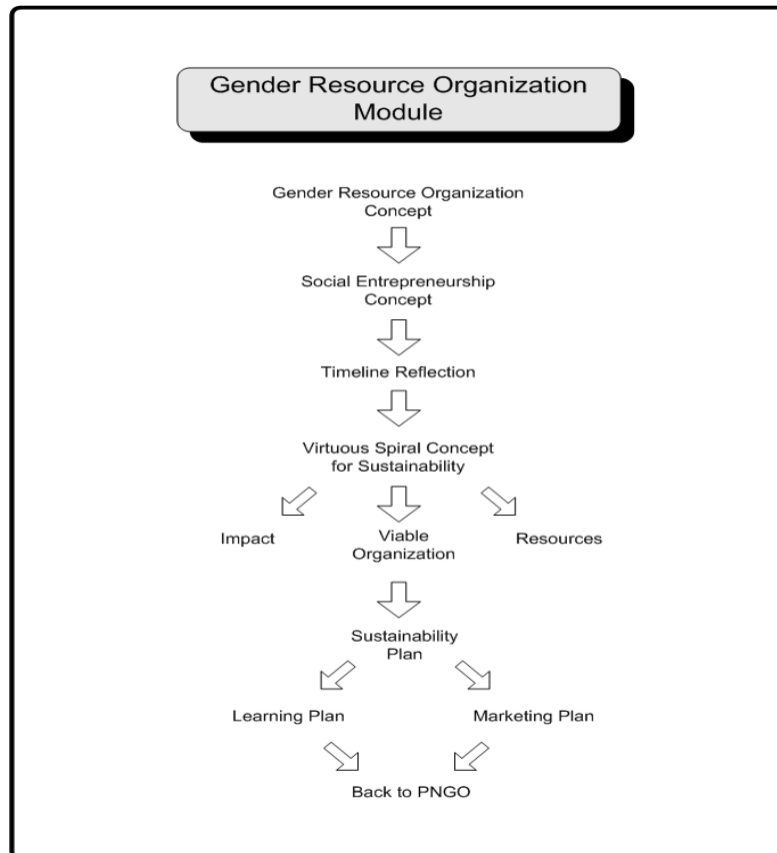


Figure 1: The GRO Module Flow

SECTION 2: PARTICIPATORY ACTIVITIES

Activity Set #1: GRO Conceptualization

This set of activities is to help participants clarify the concept of a Gender Resource Organization, and introduces the definition and concept of “social entrepreneurship” as important for a GRO.

Sub-Activity # 1.1: Concept of a GRO

Sub-Activity # 1.2: Concept of Social Entrepreneurship

Sub-Activity #1.1: Concept of a GRO

OBJECTIVE

Participants understand and can explain the concept of a GRO

KEY QUESTIONS

What are the fundamental characteristics or elements of a GRO?

TIME

3 hr.

METHODOLOGY

group discussion, case study, buzz groups, plenary

MATERIALS

Flipchart paper, markers, Reference #1: Qualities of a GRO; Sample responses to buzz group questions; case study

PREPARATION

Write out buzz group questions on meta cards

STEPS

1. Facilitate a discussion in plenary about a GRO by asking participants to:
 - Suggest other organizations that they know that they would consider as Resource Organizations /Support Organizations, or more particularly, Gender Resource Organizations. With a few suggestions in mind, ask participants why they selected these organizations, and what is it that they do that makes them a resource organization?
2. Read aloud the case study of a Nepali resource organization, and discuss the questions raised. (NOT included) ***
3. Form buzz groups of pairs (if more than one NGO is participating, pair people from different NGOs) and assign each buzz group one of the following questions written on a meta card. Ask them to discuss the questions briefly (about 10 minutes) and summarize three main points:
 - a. What is different about an NGO versus a GRO (or other resource organization)?
 - b. What is the same about an NGO versus a GRO?
 - c. How does an organization become a (gender) resource organization?
 - d. How does an organization become recognized as a GRO?
 - e. Why is a GRO needed?
 - f. Who will want to use the GRO?
 - g. How do RO's / GRO's obtain financial resources?
 - h. What is the main activity of a GRO?
 - i. What does a GRO do voluntarily and what does it do for a service fee?
4. After the buzz groups have completed their short discussion, have them present their main findings to the whole group.
5. Facilitate a summary discussion about the main characteristics of a GRO. Record the main points on the flipchart.

CLOSURE

Core Message: A GRO shares many of the same qualities of a good NGO, however the difference is that the GRO focuses on gender equality as it serves and builds the capacity of other individuals and organizations. A GRO is a catalyst for change and a focal point for gender equality. Ensure that the participants feel confident to explain to anyone that their organization is a GRO and what a GRO does.

Tips for Facilitators

If there is deep understanding and clarity of the GRO concept, the facilitator may select some of the above steps rather than do all of them in this activity set.

Some examples of gender resource organizations are: SBAN, Didi Bahini, Shtri Shakti

Some examples of resource organizations are: Samuhik Abhiyan, VDRC, SAP

In the buzz group exercise, the facilitator may add other questions that are appropriate for the group or that arise from the case study or other discussion.

Reference #1 describes some of the qualities and characteristics of a GRO, which can be shared in the plenary at the end of the activity, to ensure participants capture as many ideas about a GRO as possible.

Sub-Activity #1.2: Concept of Social Entrepreneurship

OBJECTIVE

Participants understand and can explain the concept of social entrepreneurship and how it applies to good performance as a GRO

KEY QUESTIONS

What are the fundamental characteristics or elements of a social entrepreneur and how can this concept – attitude and behaviour - improve their effectiveness as a GRO?

TIME

3 hr.

METHODOLOGY

Presentation, group discussion, force field analysis

MATERIALS

Flipchart paper, markers, Reference #2 Qualities of a social entrepreneur

PREPARATION

Prepare the “qualities of a social entrepreneur” as a hand-out for distribution and write on flipchart paper to post

STEPS

1. The Facilitator defines “social entrepreneur” – and the main elements. Post a short description of each element. Ensure participants are clear on the definition and main elements.
2. Ask participants to think about these elements individually for a few minutes, and reflect on what each means to them personally and whether these are useful qualities/characteristics for a GRO.
3. Form groups, and discuss:
 - a. Whether a social entrepreneur attitude could help their organization to be a stronger GRO (or not)? How would it make them stronger?
 - b. What are the driving forces and barriers (use force field analysis) to adopting “social entrepreneurship” in their own organization? How can the driving forces be supported and barriers mitigated?
 - c. What steps could they take to practice social entrepreneurship?
4. Share findings in plenary group. Record key points for improving their personal and organizational practices as a GRO that incorporates social entrepreneurship.

CLOSURE

Core message:

Social entrepreneurs are at the leading edge of social change, and creating social value (building communities and changing lives for gender equality). Social entrepreneurs are passionate about their work.

Therefore as a GRO, participants will benefit from nurturing these qualities in themselves and the organization.

Tips for Facilitators

Reference # 2 discusses “social entrepreneurship”. Post the main qualities and keep it on the wall during the training.

CNGO Training Package #2 **Gender Friendly Organizational Development**, Module #2 *Gender Friendly Organizational Development*, describes how to do force field analysis in Reference # 3.

Activity Set #2 GRO Sustainability

This activity set explores the concept of sustainability of the organization, using the virtuous spiral as a lens. Participants reflect on their personal observations about the change in the organization.

Sub-Activity #2.1: Organizational Change and the Concept of Sustainability – Virtuous Spiral

Sub-Activity #2.2: Viable Organization

Sub-Activity #2.3: Resources

Sub-Activity #2.4: Impact

Sub-Activity #2.1: Organizational Change and the Concept of Sustainability– Virtuous Spiral

OBJECTIVE

Participants reflect on and understand the change process they have worked through in the organization. Participants understand the “virtuous spiral” as a tool for understanding sustainability for their organization.

KEY QUESTIONS

The NGO change process is coming to an end, therefore what was the process and results? How does organizational change continue beyond external support? How does organizational change contribute to NGO sustainability?

TIME

2.5 hour

METHODOLOGY

Group work, presentation

MATERIALS

Flipchart paper, markers, Reference #3 Sample timeline format for facilitators use
Reference #4 Virtuous spiral diagram and explanation

PREPARATION

Prepare a Timeline format and a diagram of a virtuous spiral to post

STEPS

Part A: Organizational Change Marked on a Timeline

Time: 1.5 hour

1. Explain that participants have participated in an organizational change process (either with CNGO or another external change process). At the beginning of the process, the roles and responsibilities of the NGO and the external support project were agreed. In a participatory way, the capacity building process was followed. We want to reflect on this change process today. To do this, ask participants to form groups by NGO to collectively develop a Timeline of the major events or milestones in their organizational change process. On a flipchart, have participants record the inputs (such as training, workshops, reflection meetings, study tour, coaching, practice, etc) that CNGO and other organizations have provided to build individual and organizational capacity over the period of the capacity building support. Note achievements (successes) along the way. They could also record on the timeline their feelings as they went along the change process path. This should give a good sense of achievement to everyone.
2. Summarize the timelines of the NGO(s) in plenary. Post the Timeline for reference in the next sets of activities (#2.2, #2.3, and #2.4).

Part B: Virtuous Spiral

Time: 1 hr.

3. Explain that now we will learn about the concept of the virtuous spiral because the spiral helps us to understand organizational change and sustainability. (sustainability: is simply saying that the organization will continue to exist to fulfill its mission and grow in the future).
4. The facilitator explains the virtuous spiral concept by referring to the diagram and explanation in Reference # 4. Note that the spiral consists of three elements – viability, resources and impact. Define each of these elements for participants. Then discuss how the elements can be placed on a spiral diagram, and that the elements flow from the starting point, the mission statement of the organization. Next is becoming a viable organization, which has some resources. The organization creates impact due to its work. This impact is noticed by other stakeholders. After they implement new programs, the organization reflects again and integrates new learnings for greater impact in future programs.

Thus stakeholders are willing to provide resources to an organization that is seen to be doing good work and building its strengths.

5. Ask participants to provide some examples of whether this spiral has happened in their organization. This will help them to understand the concept. If they have no examples, provide an example to start their thinking. (See Facilitators Tips)
6. Answer any questions about the virtuous spiral from participants.

CLOSURE

Core Message: Part A: Recording the inputs and achievements will celebrate their accomplishments, and also consolidate or pull together in a holistic way all that has happened to the organization over the past few years. Both positive and negative changes have happened, and it is a time to reflect on their progress as external support is coming to an end.

Part B: The virtuous spiral is simply a tool to think about or conceptualize sustainability for the organization. When each element (viability, resources and impact) works well, then ideally the organization will be sustained, in an ever - expanding and upward spiral. If the elements are insufficient or not working together, then the organization may find itself irrelevant or unsupported by stakeholders.

Explain that in the next activity # 2.2 we will do an organizational exploration / inquiry reflecting on each of these elements of the virtuous spiral – viable organization, resources and impact.

Tips for facilitators

PART A: The purpose of the timeline is to consolidate the capacity building program –the “activities and inputs” so that there will be a list of all the trainings and workshops, etc and also their reflections of change and achievements as it occurred, for example, when they changed their executive to include women, or redesigned a saving and credit program to include men, the DDC began to invite them to meetings, the gender policy was implemented, possible conflicts among members over the change in direction to a GRO, etc. They might have felt that change was difficult at first, as some people resisted the new dynamics of shared power and responsibility, or the changes were positive because they felt empowered within the organization. They can record how they felt about these changes.

When recording the timeline, use different coloured markers for “inputs”, “achievements” and “feelings”.

PART B: An example that an organization might use when thinking about the virtuous spiral: An NGO has a **Mission** statement to work for equality in society. They are an established and **viable** NGO that is implementing a women’s reproductive health project for a donor. They have funds and staff (**resources**) to implement the program. Women are using the service but their husbands are not supportive. So the NGO’s **impact** is not as good as they want. The NGO reflects and realizes that it is better to include men in some of their programs, so that it is easier for women to participate and benefit. They have learned new skills to integrate gender in their work. They adjust their program (**organizational viability**) with the donor **resources**, and the **impact** at the community is much better – now more women come for services and improve their health, as well as their husbands. Due to their good work, other stakeholders notice and their reputation is enhanced. Local government gives them an appreciation award. The organization builds these learnings into other programs they are implementing (**viable organization**). New donors approach the NGO to implement programs with them, and their **resources** grow, and their **impact** is expanded. The NGO is increasing its chances of sustainability, through the virtuous spiral.

Keep the virtuous spiral diagram on the wall during the training for easy reference.

Note that the virtuous spiral on sustainability is also referred to in CNGO Training Package # 2, Module #3 Resource Mobilization Reference # 4.

Sub-Activity #2.2: Inquiry into Viable Organization

OBJECTIVE

Participants understand what a *viable organization* is and how this is essential for sustainability.
Participants explore their organizational change process.

KEY QUESTIONS

What makes a viable organization, and is the organization a “viable organization”?

TIME

2 hr.

METHODOLOGY

Group discussion, plenary

MATERIALS

Flipchart paper, markers

PREPARATION

Post the previously prepared Timeline.

STEPS

1. Ask each person to think again for a few minutes about what their organization was like before the capacity building process began. Refer to the Timeline already prepared. Think about the elements of a viable organization discussed in the virtuous spiral. Participants may wish to write a few points in their notebook.
2. Form groups by NGO. Then ask them to discuss what works best in the organization now: have them tell stories about successes as a viable organization – what worked really well - and what makes them happy/proud/excited to be in the organization. Another way to think about what works best is to ask what are the organizational “best practices” - the processes and ways of working in the organization - (e.g. communication among all members and staff, equitable decision-making, empowerment of women, committed volunteers, power sharing within the executive body, gender integrated program design) Ask why do they think these are their best practices? Note that best practices often are the foundation for the success stories of the organization. Have them select several of these best practices and key success stories to share in plenary later.
3. Share a select number of stories and best practices in plenary.
4. Refer to the definition of a social entrepreneur, and ask whether their stories show that they are social entrepreneurs. Did the organization adapt and grow as a viable organization?

CLOSURE

Core Message: A viable organization learns and adapts (learning cycle) so that continuous change is happening, and they are able to regenerate the organization when necessary to survive and achieve sustainability. Social entrepreneurs understand the need to adapt and innovate.

Tips for Facilitators

These stories should be used as ways to have the NGO identify their strengths and what they do best to smoothly run their organization. They should motivate the NGOs to continue to do this good work because they are meaningful to them. These stories might be on how they motivate women to participate in the executive, how their gender policies are implemented, that they monitor their programs and improve them based on feedback, etc. Each story represents a change in the organization – be sure that participants understand that change is needed for viability and sustainability.

This and the next two sub-activities can be facilitated as separate activities or alternatively combined, and all the success stories and best practices discussed at one time. Then group the success stories and best practices under the categories of viable organization, resources or impact. This is necessary in order to be clear on how each element of the virtuous spiral for sustainability is handled within the organization.

Sub-Activity #2.3: Inquiry into Resources

OBJECTIVE

Participants will understand that *resources* will be attracted to the organization if they do good work.

KEY QUESTIONS

What are “resources” and how does good work by an organization attract resources?

TIME

2 hr.

METHODOLOGY

Group discussion, plenary

MATERIALS

Flipchart paper, markers,

PREPARATION

Have the Timeline, virtuous spiral and definition of social entrepreneur posted for easy reference.

STEPS

1. Form NGO groups. Think first about what resources your organization had before the capacity building process. How did you define resources then? Discuss the inputs provided to build your organization resources.
2. Then think about what resources are in your organization now. Ask if the definition of resources has changed - what do you think are resources now compared to previously (e.g. resources can be defined as: women are especially accommodated, many volunteers help, community members give their time, local business people donate supplies, donors provide funds, their reputation spreads, and linkage partners share information)
3. Tell stories about resource successes – what worked really well to gain resources - and what makes you happy/proud to be in the organization when thinking about resources for the organization. Use a gender lens on the stories. What are your best practices in attracting and acquiring resources and why? Do the resources come to the organization because of the impact the organization has in its work?
4. Summarize and share in plenary.
5. Introduce into the plenary discussion the concept that a GRO not only provides services when there is income (one type of resource) but also when there is no funding (using other organizational resources such as volunteer time or organizational savings). The organization needs to find a balance between delivering donor funded programs that meet the gender mission statement (and provide their personal salaries), and programs that create social value for gender equality but that are not tied to funding or donors (e.g. mass meetings, advocacy campaigns, celebrations). Clarify that they understand this concept, and ask what is the balance in their organization? Is it appropriate? (e.g. 60% of programs are funded and 40% are non-funded)

CLOSURE

Core message: Resources are essential to an organization. Resources mean much more than simply funds. People are the best resource. Linkages are important in order to learn about resource availability (e.g. community needs, new contracts and programs, new people). Relating their success stories in attracting resources is also a way to enhance their reputation to others.

Equally important is the contribution that the members make voluntarily (without fees) because they are committed to the social cause and creating social impact (change) for gender equality.

Tips for facilitators

Have participants think about resources using the timeline they developed as a guide. Celebrate the successes in “trapping” resources, and reflect how a viable (learning) organization can better innovate and enhance its opportunities to secure resources when others see that they have impact from their work. Connect these ideas with the concept of social entrepreneurs who are able to attract resources to meet their vision.

CNGO Training Package #2, Module #3 on Resource Mobilization is useful as a reference.

Sub-Activity #2.4: Inquiry into Impact

OBJECTIVE

Participants understand why *impact* is important for sustainability.

KEY QUESTIONS

Why is impact essential for sustainability? Who needs to know about the impact?

TIME

2 hr.

METHODOLOGY

Group discussion, plenary

MATERIALS

Flipchart paper, markers,

PREPARATION

Have the Timeline, virtuous spiral and definition of social entrepreneur posted for easy reference.

STEPS

1. Form NGO groups. Review the definition of impact from the virtuous spiral. Discuss what your organization was able to achieve/what impact it has had. Refer to the Timeline if necessary.
2. Tell stories about successes at the impact level – what worked really well - and what makes you happy/proud/excited to be in the organization. Why did it work well? Were strategic gender needs met as well as practical gender needs? Then ask participants, who outside the organization knows about their work, and has recognized it? How did this happen?
3. Share some of the stories in plenary.
4. Relate the impact element of the virtuous spiral with the desire of social entrepreneurs to create social value/impact.

CLOSURE

Core Message:

Impact is the test of their performance as an organization, and what outsiders see about them. Without impact, they are wasting their own time and resources. For a GRO, the impact must be related to gender equality, and particularly addressing women's strategic interests. The better the impact, the more likely they are to attract new resources to the organization, and to learn from their experiences.

Tips for Facilitators

Stories should be on the impact / results at the community or in the local government bodies that they have worked with, e.g. women's literacy program that led to the women demanding services from the VDC. Relate the Remind participants that these stories are the successes and strengths to build on and what makes the organization energized.

Activity Set #3: GRO Sustainability Plans

In this activity set, participants reflect on their vision statement. They then develop sustainability plans (learning and marketing) for the future of their organization. These plans should be incorporated into the NGO Annual Plan, which includes other components such as linkages.

This activity set especially helps to prepare the NGOs for the phasing out of external capacity support, and taking responsibility for their own sustainability.

Sub-Activity #3.1: Checking the Vision Statement

Sub-Activity #3.2: Learning

Sub-Activity #3.3: Marketing

Sub-Activity #3.1: Checking the Vision Statement

OBJECTIVE

To reflect on their Vision statement as the guide telling them who they are and where they want to go.

KEY QUESTIONS

What is the value of the Vision statement in planning for sustainability?

TIME

1 hr.

METHODOLOGY

Group discussion

MATERIALS

Flipchart paper, markers,

PREPARATION

Review the definition of a vision statement.

STEPS

1. Ask the NGO to record their Vision Statement. Discuss what it means and be sure that everyone understands their organizational vision statement. Validate with them that the Vision Statement tells everyone who they are, what they do and what they stand for. Discuss as necessary to be clear that the Vision is what guides their work and stands for the best that they do – as a GRO.

CLOSURE

Core Message:

Note that the vision statement is their “dream”. After having reflected on the changes and growth personally and organizationally, this activity is a review of the organizational vision statement. This vision statement is an expression of what they want the organization to be, and it inspires them to work for the organization. If gender equality is at the heart of the vision statement then this is what they do.

Tips for Facilitators

NGOs should have previously developed its vision, mission, values and goals statements. (See CNGO Training Package # 2, Module # 1, Gender Friendly Organizational Development). “Vision and mission may be combined into a single statement that reflects both the long-term ideal that the organization hopes to achieve, but also indicates the specialized way in which the organization will work toward this ideal. By expressing the ultimate aims of the organization, the vision and mission statements provide members with a sense of shared purpose and direction”.

In this module, the group can choose to review all these statements or the vision statement only. What is important is that they appreciate the core work of the NGO in these statements and re-establish/affirm their “dream” for the future.

Sub-Activity #3.2: A Viable Organization is a Learning Organization

OBJECTIVE

Participants analyze their ability to continue to grow and learn, in order to continue to improve their capacity as effective GROs.

KEY QUESTIONS

How can learning contribute to organizational sustainability?

TIME

3 hr

METHODOLOGY

Discussion

MATERIALS

Flipchart paper, markers,

PREPARATION

Review learning methods

STEPS

1. Start the discussion by asking:
 - Why participants personally and organizationally need to keep learning? (to be a viable organization that is vision-led)
 - What do they need to learn?(eg. keep current with new gender concepts, national gender policy and legislation, national initiatives on topics such as violence against women and witchcraft; new concepts in organizational development, improving organizational systems and renewing the organizational vision, membership/board/staff; expand opportunities for the organization etc.)
 - Who needs to keep learning? (everyone)
2. Brainstorm on what methods (the “how”) each person could use to keep learning and building their skills and knowledge to be part of a GRO? Make a list. Prioritize the most important methods, based on the benefits to the organization and feasibility of implementing the method. Discuss how they could implement these methods. Note that some need external resources, while others require them to devote their own time to learning, without salary.
3. Have each NGO summarize these methods on a worksheet for continuous learning. Include steps to monitor implementation. Especially note to check whether there has been an impact in the organization and in the community as a result of their continuous learning.

CLOSURE

Core Message:

Learning is at the centre of sustainability. Without learning and incorporating learning into the organization, the organization cannot grow as a GRO. There must be a conscious effort to learn and share within the organization, and making a learning plan will help to achieve this, if it is implemented and monitored.

Tips for Facilitators

Brainstorm learning methods in small buzz groups. Then have each pair contribute one idea until all ideas are posted.

Alan Fowler, *Virtuous Spiral* page 137 is a reference for the learning spiral. Other methods to continue their learning process are to attend conferences and trainings, meet other resource people, research, network among NGOs and share knowledge, build knowledge with gender experts/allies, expand their resource centre/library/ resource materials, maintain strong relationships with community groups, practice action learning methods, reflection, etc

Encourage them especially to appreciate the benefits of networking among like-minded NGOs, and include ways of maintaining contact/cooperation. (e.g. mail newsletters to each other, share curriculum’s, arrange to meet each other when travelling to Kathmandu)

Remind them again about social entrepreneurship as an attitude and behaviour set for learning also.

The sample plan format is intended as an example for the facilitator.

Sample learning work plan format

Activity	Results expected	Date	Person Responsible	Monitor
Attend conference/workshop	Learn new concepts; share learnings	One per year	Chair	Report back at Annual meeting
Network with other NGOs - Share materials; collaborate on projects/proposals; campaign together	Strength in advocacy; new materials collected	Meet Twice per year; phone/write quarterly	Linkage Committee	Report to Executive Committee
Reflection meetings with all members on programs impact	Build learning throughout the organization	Meet monthly	Program Committee	Report to Executive Committee
Collect newspaper articles on important topics	Keep current on issues	Collect weekly	Information officer	Executive Committee

Sub-Activity #3.3: Develop a Marketing Plan for your GRO

OBJECTIVE

Participants understand the purpose of marketing and develop a GRO marketing plan.

KEY QUESTIONS

Why is marketing necessary for a GRO and how is it done?

TIME

4 hours

METHODOLOGY

Group discussion

MATERIALS

Flipchart paper, markers, Reference #5 Purpose and development of a GRO marketing plan

PREPARATION

List the components of a marketing plan

STEPS

1. Ask what the participants already know about marketing, and together make a definition of marketing to post. Discuss the purpose of marketing, and how it is useful for a GRO.
2. Discuss the purpose of a marketing plan, and ask what participants already know about a marketing plan. Ask what their NGO is using now for a marketing plan. Ask participants to list the major components of a marketing plan. The facilitator can then fill in the gaps. Work through step by step the main components to develop a marketing plan.
3. Have participants form groups by NGO, and develop a marketing plan. Apply a gender lens to the marketing plan.
4. Finally, in plenary, discuss with the participants how to ensure that the marketing plan has value and continues to be useful. Ask question such as: Should someone be monitoring progress on the marketing plan? Should the executive see summaries of this monitoring monthly? Should it be evaluated annually for usefulness and value? Should it be revised annually? Who should be responsible for the plan document and its execution?

CLOSURE**Core Message:**

Marketing is:

A marketing plan is an organized set of plans to enhance organizational reputation and attract resources. As a GRO, marketing must be done in a sensitive way that builds on their social mission for gender equality, rather than only “selling” their services. It is important to remember that GROs will need to create a demand for gender equality among the community and district local bodies by raising gender awareness (social marketing and social capital concepts). This is important because often the person paying for the gender service will be different than the target beneficiaries, and the target beneficiaries (e.g. community women) will not have money to pay for gender services.

Activity #4: Consolidation

This activity consolidates the training module activities

OBJECTIVE

Participants understand that their strategy for sustainability may include learning and marketing components, as well as other components .

Participants know that learning and marketing components (plans) must be approved by their executive bodies and be included as part of their Annual Plan for implementation.

KEY QUESTIONS

What does a sustainability plan include and who needs to support/approve it?

TIME

1.5 hours

METHODOLOGY

Group discussion

MATERIALS

Flipchart paper, markers,

PREPARATION

Note the components of sustainability strategies and plans

STEPS

- 1 Ask participants to summarize what has been accomplished/achieved in this workshop for them and their organization. Remind them that this workshop was to consolidate their learning and prepare them for sustainability.
- 2 Ask what other strategies and plans they have for sustainability that complement the learning plan and the marketing plan. Provide some suggestions. (linkage plans, trust funds, ...)
- 3 Discuss what they will do with these plans on their return to their organization. Note that the plans should be approved by the executive body and included in their Annual Plans and long term plans.
- 4

CLOSURE

Participants have a duty to ensure their learnings from this workshop are integrated into the organizations plans and implementation activities.

SECTION 3: REFERENCE SECTION

Reference #1: Characteristics of a GRO

Gender	Resource	Organization
*Role model of gender mainstreamed organization *Superior knowledge on gender topic Gender is mainstreamed in the organization (vision, mission, objectives, and at policy level) Gender in programs and materials Gender sensitive staff and members *Women are empowered	*Attitude or mindset to work with others to build them up *To lead, and to be proactive – leading edge – as situation changes *Wide range of expertise – able to provide consulting services Helps others through their skills and knowledge, and material resources Focal point for information dissemination Collect resources Advocate for gender Sensitive to new and emerging issues affecting women and able to respond Able to influence Able to coach Focal point or catalyst for gender in district Capacity building support to other organizations	*Institutionally developed/mature *Capacity for policy feedback *Commitment, motivation and passion Social entrepreneurs Innovation – develop and keep up with new methodologies and approaches Part of coalitions – enmeshed or networked with other people and organizations Operate their own program to meet own objectives – vision led Generate resources Fighters Capacity to work with diverse groups from grassroots to Prime Minister Inspire respect and recognition from others Reflective, sharing, learning Able to generate livelihoods from revenue and also to volunteer with passion Good fit of individual and organizational vision/mission Capacity to mobilize others on different levels

* Indicates key qualities of a GRO; other qualities may also be shared by a good NGO

Buzz group questions and some sample responses for use of the facilitator – other responses can be added by participants:

- What is different about a GRO (or other resource organization) versus an NGO?
 - GRO builds capacity of other organizations; NGO delivers program services
 - GRO is a role model for gender equality; NGO may not have internalized gender concepts
 - GRO takes a lead role in NGO community; NGO participates in NGO forums
- What is the same about a GRO versus an NGO?
 - Both deliver programs to the community with external funding
 - Both may have skilled and capable staff and members
 - Both may do fund-raising and write proposals
- How does an organization become a (gender) resource organization?
 - Develop skills and knowledge of staff and members

- Internal commitment to a vision statement; be passionate about the vision for gender equality
 - Develop volunteers of the organization
4. How does an organization become recognized as a GRO?
 - Practice the vision of the organization and be a role model
 - Establish linkages with different local and national organizations and government, and publicize the organization's services and expertise
 - Deliver services as a GRO, such as providing advice on mainstreaming gender in other organizations
 5. Why is a GRO needed?
 - Communities lack awareness about gender inequality and what to do about it
 - HMG Policies and programs on gender mainstreaming are not well implemented
 - Other NGOs need their organizational capacity built and gender integrated into their programs
 6. Who will want to use the GRO?
 - Communities, CBOs and NGOs
 - Local Government
 - Line Agencies
 7. How do RO's / GRO's obtain financial resources?
 - Income generating projects such as operate a PCO
 - Deliver programs/projects funded by government and donors
 - Fund raising through song competitions or other entertainment
 8. What is the main activity of a GRO?
 - Advocate to government on gender equality
 - Provide leadership to the NGO community on gender equality
 - Deliver gender services such as training, technical advice and gender-integrated programs
 9. What does a GRO do voluntarily and what does it do for a service fee?
 - Voluntarily meets with local government to advocate for gender equality
 - Voluntarily helps women who are victims of violence
 - Voluntarily takes time to build skills and knowledge, and share among all the members
 - Takes a service fee to deliver programs for donors

Reference #2: Social Entrepreneurship

WHAT IS SOCIAL ENTREPRENEURSHIP?

Definition: *Social entrepreneurship combines the passion of a social mission with business-like discipline, innovation, and determination.*

The definition is important as it suggests a blurring or overlap of the boundaries between business and social work. Entrepreneur” is someone who starts an important project or activity. It has been used to identify risk-taking individuals who stimulate economic progress by finding new and better ways of doing things. They are catalysts, innovators and leaders. Thus, they are the change agents in the economy. A social entrepreneur has the same qualities in the social field.

The elements of “social entrepreneur” are as follows:

1. Change agents in the social sector/field:

Social entrepreneurs are change agents (reformers and revolutionaries) with a social mission. They make basic changes in the way things are done in the social sector. Social entrepreneurs bring gradual and systemic changes and sustainable improvements.

2. Adopt a mission (statement) to create and sustain social value:

The social mission is the most important. Social impact is the indicator of success. Social entrepreneurs want to create lasting improvements in society. They think about sustaining the impact.

3. Recognize and constantly/relentlessly pursue new opportunities:

Where others see problems, entrepreneurs see opportunity. In addition to the insight and compassion towards social need, social entrepreneurs are determined to make their vision work. The key element is persistence combined with a willingness to make adjustments as one goes. They always seek a way to make things work.

4. Engage/participate actively in the process of continuous innovation, adaptation, and learning:

Entrepreneurs are innovative. Entrepreneurship is a continuous process of exploring, learning, and improving. With innovation, then uncertainty and risk of failure also arises. Entrepreneurs learn how to manage risks for themselves and others. They treat failure of a project as a learning experience, not a personal tragedy.

5. Act boldly without being limited by resources currently available:

Social entrepreneurs are skilled at doing more work with fewer resources and at getting resources from others, in working toward their vision. They use limited resources efficiently, and they make the most of their limited resources by working with partners and collaborating with others. They explore all resource options, from finding donations to the commercial methods of the business sector.

6. Show a sense of accountability to the areas served and for the outcomes created:

Social entrepreneurs must be certain that they are creating social value. This means that social entrepreneurs must correctly identify the needs and values of the people they intend to serve and the communities where they work, by working closely with them. They understand the expectations and values of the "Donors/Funding Agencies," that help them. They want to provide real social improvements to their beneficiaries and their communities, as well as positive (social and/or financial) benefit to their donors/investors. Social entrepreneurs monitor their progress in terms of outcomes, not simply activities or processes. They also correct their work based on the feedback they receive.

Source: “The Meaning of Social Entrepreneurship”, J. Gregory Dees, Stanford University

Reference #3: Timeline of Inputs

The facilitator can choose the format for developing a time line, either as a chart or in a horizontal diagram. Sample methods are included:

Date	Input	Achievement	Feelings
March	NGO is selected for capacity building program		Happy to be a partner
April	Gender training	Understand gender concepts	A bit confused on how to apply gender concept in our daily work
May	Group dynamics training	Better communication flow in organization	Positive feelings among members
June	Gender and development training	Develop a gender lens for our health program and change our program to include both women and men	Proud to use gender lens in program
July	Study tour	Understand how other GRO's operate	Motivated to improve the organization
August	Coaching on accounts	Maintain transparent and accurate set of accounts	Happy to knowing the status of programs spending

Reference #4: Virtuous Spiral for Sustainability

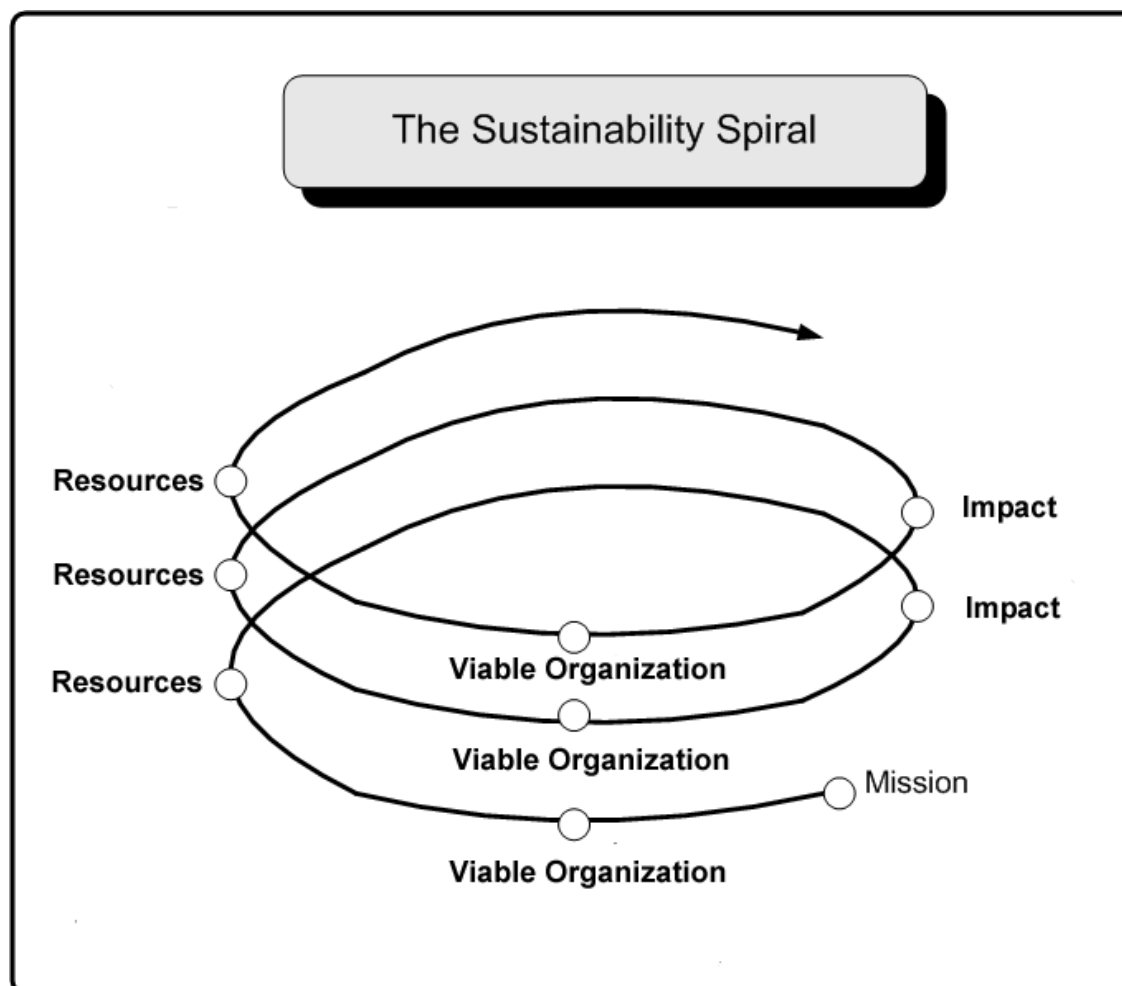


Figure 2: The Sustainability Spiral

One way to think about sustainability is the interaction of three elements of the virtuous spiral:

Definitions:

Viable organization – is efficient and effective at carrying out its mission and tasks is the simplest definition but a viable organization needs to be doing much more to remain relevant and alive. A viable organization must be a learning organization, and the learning needs to be translated into organizational change and regeneration.

Impact – is more than simply *doing or implementing* a program – impact is the *difference* due to the program. There must be results for enduring social value: building community and changing lives for gender equality that is recognized and valued by the community, local stakeholders, the media, local government. For example: women take leadership roles in a forest users group; the VDC includes many women in the annual planning process; women begin to receive the same wages as men for the same work; girls are sent to school, along with their brothers.

Resources – is mobilizing and using all the different resources needed for the organization to fulfill its mission, such as motivated and skilled people (staff, volunteers, members), facilities (office, furniture, phone, supplies), funds, linkages, reputation, donations from business people, and volunteer time donated to the organization.

The Spiral:

The starting point of the spiral is the *mission statement* of the organization. This guides and focuses the organization, and tells the organization and other stakeholders what the organization believes in and why they do what they do. The *viable organization* is able to do good work (performance) because it constantly builds its knowledge and skills, and regenerates itself.

Resources are available for the programs of the organization.

The good work that comes from the viable organization and resources results in an *impact* in the community (or whichever target group the organization is working with). This impact is seen and acknowledged by others. The recognition of their success builds their reputation.

The organization can plan new programs. These new programs integrate what they learned through reflection on their previous work and by making linkages in their environment in an insightful way (e.g. seeking out needs and opportunities for work). Thus the organization changes and regenerates itself through this learning and by adaptation to be a *viable organization*.

Then, with the recognition gained, the organization is able to attract new *resources* to the organization. For example, people are excited and motivated to volunteer and work for the organization, and funders are attracted to support new programs. Social entrepreneurs expect that resources will be found to fulfill their social mission.

The program has an *impact*, improving people's lives and creating social value (a social entrepreneur).

The cycle continues: a virtuous spiral grows. When these elements work together they create a synergy for sustainability.

See Alan Fowler, *The Virtuous Spiral*, Earthscan Publication Ltd, 2000, especially pg 183-186

Reference #5: Purpose and Development of a GRO Marketing Plan

The key ideas of marketing are:

- intelligence gathering about customers¹ (who pays for their services), products (types of services they provide), competition (market share and pricing), target beneficiaries (satisfaction and support), skills within the organization, and intermediaries² (those who provided references or recommendations to funders to use your organization – will they in future?),
- meeting the needs of customers, and
- continuous improvement to meet changing needs.

The basis of the Marketing plan is the organization's vision and mission statements. Building upon these, the participants should look at the 4 P's - product, promotion, price and positioning:

- **Products** (i.e. projects and services) should be analyzed by market growth and market share. If more funders are focusing on a particular service, then the organization should consider committing resources to it – if it's part of its mission. On the other hand, if a service has many competing providers or is in declining demand, then resources should be reassigned.
- **Promotion** – how do funding decision makers/influencers learn about your good work and abilities? (i.e. visits to funders, proposals, presentations, brochures, newspaper articles, attend meetings, websites, and contacts with potential sponsors or people who are knowledgeable about funders or funding opportunities). Note: the organization needs to present an image of capability beyond their current activity; otherwise, the funders may not consider them for different or new opportunities.
- **Pricing** – How should fees be determined? (salary plus costs, what the sponsor will pay, similar to other NGOs?) What fees are needed to maintain the organization and staff salaries? Are they similar to other organizations? Is there enough funding to support unsponsored/non funded work or training?
- **Positioning** - What social issues relating to gender will the organization focus on? This could be geographic (e.g. six VDCs) or sector-based (e.g. natural resources). Note: "concentration is the key to economic results"³; too many diverse projects will dilute the specialty.

The main components of a marketing plan:

- Mission (vision) statement
- Current Objectives: what the organization wants to do, by when and how. Be specific, quantifiable and inclusive of the whole organization.
- Market analysis: What are the legal, social, political, economic and technological factors that may influence your services? Who are intermediaries, suppliers, competitors, and customers (INGOs, bilateral agencies, parastatals, government), or service recipients (community/CBOs, NGOs)? What is changing with these organizations? Any there any new organizations? Any new opportunities (these may be problems that have higher profile)?
- Target audience: Who are your potential customers? (parastatal organizations, government line agencies, INGOs, other NGOs, bilateral or multilateral implementing agencies, communities) How can you reach your potential customers? Who are your potential target beneficiaries? (What makes them attractive to donors?)
- Competitive Analysis: Who are these competitors? What are they doing in relation to your service? What advantage do you have? Can you maintain that advantage? Is there an opportunity for collaboration for large opportunities or sharing resources?
- Action Plan: Define the best method to reach your customers and to take advantage of opportunities. Identify the work to be done, when and by whom. Various activities could

¹ Customers are those who request and fund activities. They may be target beneficiaries, but in many cases they are not.

² Intermediaries are people who provide references to potential customers, for example, the CNGO project manager or one of your facilitators may recommend to DfID that they use your NGO for a project that they are planning to initiate.

³ Peter Drucker

include: media monitoring for advertisements requesting services, (including websites), joining any lists for information, brochure revision and distribution, visits, presentations, press releases, understanding the timing/cycles for opportunities from various agencies, and preparing documentation that can be used to quickly apply to opportunities (organization profile, references, staff skills and experience, training materials). It is important that everyone in the organization feel that they are part of the marketing plan and have a role to play.

- **Monitoring and Evaluation:** Define when reporting will occur and who will monitor the action plan. The marketing plan, once written, should not be ignored. Someone in the organization should be responsible for reporting to the board, at least quarterly, on progress, obstacles encountered and the approaches used to resolve obstacles. This way the organization learns from and can contribute to the marketing activities.

Sample Marketing Plan

Note: The participants should develop their own plans and **not be given this sample**. If they are given this sample, they will not explore and more fully understand the concepts, rather they will simply copy this work.

The Women's Development NGO

Marketing Plan

for April 2003 to March 2004

Mission: To promote gender equality in Rukum District.

Current Objectives:

1. Organize 5 micro-credit organizations in the district.
2. Train 5 VDCs in gender sensitive development.
3. Establish a resource centre of gender training materials.
4. Develop and maintain at least 5 staff as trainers.
5. Obtain 5 contracts to sustain organization.
6. Focus on health and sanitation, water supply sector

Market Analysis:

Factors influencing social environment:

1. Local Bodies disbanded.
2. Maoist threats and permission required.
3. INGOs employing more local resources.
4. Many people leaving district to avoid conflict.

Target Audience:

Potential Customers:

1. RWSSFDB – drinking water schemes & women income generation
2. CNGO – gender awareness community training
3. ...

Target Beneficiaries

1. 20 communities that want drinking water schemes
2. 10 communities that need gender awareness training.
3. ...

Competitive Analysis:

Competitors: NGO1 (associated with SNV), ...

Our Key Advantages: CNGO Training, connections with local CBOs, part of DDC Gender committee ...

How to maintain/extend advantage: Additional training especially in conflict-sensitive skills, complete project successfully, promote ourselves to Kathmandu-based decision-makers.

Collaboration Opportunities: Join networks, link with national NGOs

Action Plan:

1. Monitor publications for opportunities and assess our suitability.

2. Prepare our information sheet outlining our background, previous work, skills and resources.
3. Consult with knowledgeable contacts to identify upcoming opportunities (at least quarterly).
4. Research work needed to do rural water supply scheme.
5. Survey 10 district communities to assess needs.

Monitoring & Evaluation:

Marcia Gurung will lead marketing effort with Tshering Lama as assistant. Action Plan progress reports will be presented to the Board in August, November, and February, and an evaluation and revised plan presented in May prior to the Annual General Meeting.

ANNEX: Our products

Product/Service	Promotion	Pricing	Positioning
CNGO Training Modules	LDO, INGOs in district, other NGOs in district : use brochure, make website, discuss at meetings, street drama's, posters, awareness campaign, hold interaction workshop on issues, invite potential clients to attend trainings as observers, linkages	Rp 1,000/staff/day or for groups > 20 Rp 100/participant/day	Most basic to intermediate and refresher training; Gender-integrated; INGO-funded Target LA with potential for gender integrated programs
Community mobilization for sanitation and health	posters, street dramas, radio programs,		CBOs VDC leaders
Water scheme coordination and training	LDO, Communities, RWSSFDB : meetings, website, observation tour to their project with donors	Set by RWSSFDB	Whole district, but near home preferred.
etc.			