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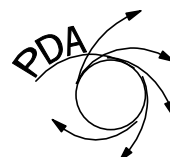
Carriacou, Grenada



## Report of the Strategic Planning Workshop for Non-Governmental Organisations (NGOs) and Community Groups in the Grenadines

The Rotary Club, Bequia, St. Vincent and the Grenadines

February 28 and March 1, 2007



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## BACKGROUND

An Institutional Self Assessment (adapted from the Nature Conservancy, TNC, methodology) of Non-Governmental and Community Based Organisations (NGOs and CBOs) in the Grenadines was carried out by the Sustainable Grenadines Project with support from TNC in 2006. This study indicated that these organisations were severely lacking in strategic planning and other skills related to their efficiency and sustainability. This workshop was held to provide basic strategic planning skills using the Technology of Participation™ Participatory Strategic Planning developed by the Institute of Cultural Affairs (ICA).<sup>1</sup>

### Workshop Opening

The workshop was opened and participants welcomed by the Project Manager, Mr. Martin Barriteau. A prayer was offered by workshop participant Mrs. Leah Belmar. There were 26 persons who attended the workshop from 17 organisations (Appendix 01). The workshop facilitator, Mrs. Sharon Almerigi was introduced.

The facilitator led the group in a ‘get acquainted’ activity where everyone was asked to stand and meet as many people as possible within five minutes. Next, each person introduced him or herself to the group. The facilitator then suggested group guidelines that the group could choose to adopt. These were:

#### **Group Guidelines for Productive Conversations**

- Speak in a way that others want to listen
- Listen in a way that others want to speak
- Balance advocacy and inquiry
- Keep the discussion focused
- Go for depth without going on and on and on and on...

#### **Group Guidelines for High Productivity**

- Be punctual – Respect designated times
- One person speaks at a time
- No side conversations
- Cell phones off (or set to vibrate)
- Use phones only during breaks

The facilitator shared the agenda for the workshop (Appendix 02) and the core values for ICA:

- Comprehensiveness – the methods pull as much diverse information as possible into the thinking process
- Intentionality – the dialogue creates a clear intention that works toward group consensus
- Future orientation – plans are future oriented designed for change.

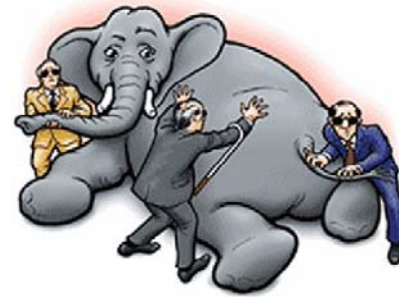
The facilitator subsequently explained the foundational values of the ToP™ Methods:

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<sup>1</sup> The Institute of Cultural Affairs is a non-profit organisation with world-wide experience, dedicated to development of methods for group participation. ICA is headquartered in Brussels.

- Inclusive participation which invites the engagement of all members of a group because each person represents an important piece of the puzzle on any issue
- Teamwork and collaboration – are necessary to get a task done more effectively
- Individual and group creativity – by encouraging dialogue between thoughts and feelings, the head and the heart, people are more creative
- Reflection and learning – learning through continuous reflection

The concept of leadership as a facilitator who pulls together the knowledge and insights of a group was noted, and the metaphor of the blind men and the elephant was used to illustrate the limitation of individual perspective showing that each person only sees a part of the truth.



The facilitator briefly explained the steps to the strategic planning process which include:

- Shared vision
- Assisting and resisting factors (SWOT analysis)
- One-year calendar of actions
- 90-day implementation plans

### **Umbrella Group Simulation**

To provide the experience of being one group involved in a strategic planning process the group adopted the role of an umbrella NGO charged with providing support and oversight to local Grenadines NGOs and CBOs. They named their group the Grenadines Association for Community Group Development and affirmed that they had \$20,000 in their treasury. The function of this group is to provide services to community groups in the areas of fund raising, training and development, sports and other activities.

### **PURPOSE AND MISSION SESSION**

The facilitator discussed the importance of an organisation finding its place in the environment, that is, in its community, nation, region, and even on an international level. The example of a fisherfolk organisation was used to show how it has a purpose locally and nationally by fueling the economy and providing nutrition, regionally through negotiation with other fisherfolk for the country's economic zone, and internationally through collaboration on international marine management.

Purpose, mission and values were explained and the difference between them noted as:

- The purpose of an organisation is ..
  - A statement of its reason for being
- It is **WHY** we exist
  - The mission of an organisation is ..
- A definition of its role or task



- It is **WHAT** we do
- The philosophy of an organisation is ..
  - A statement about the values it holds
  - It is **HOW** we do things

The session on developing a mission statement took the group through a series of smaller workshops<sup>2</sup> to establish the background data first such as the elements of our purpose, our stakeholders and our responsibilities to our stakeholders.

### **Purpose Workshop**

In this workshop participants were asked to brainstorm the answers to a series of questions:

1. Your son or daughter asks you why you are putting together this association, what is your answer?
2. 1000 years from now a history book of the Grenadines is uncovered. It has a section on your organisation’s contribution to society. What does it say?
3. What would the world lose if your organisation never got off the ground?

In teams of four to five, participants shared their answers and noted the words, pictures or ideas that came up more than once. Each team selected the three most often mentioned or seemed the most important and wrote these on cards. The facilitator clustered the cards by similarity and named each cluster by completing the sentence “The purpose of this association is .....” Table 1 shows the purpose workshop results. The top row consists of the names the group gave the four groupings of cards, which represents their consensus about the group’s purpose.

**Table 1: Our group’s purpose.**

<b>Social Development</b>	<b>Empowering Community Groups</b>	<b>Develop Capacity for Self Governance</b>	<b>Protect and Develop Resources</b>
All social and other development the group offers  Providing sports equipment, e.g. bat, ball, pad, etc.	To develop the capacity of organisations  To assist the development of groups  To help groups implement and execute aims and objectives  Community growth  To empower community organisations	Support effective functioning  Self governance  Present a Grenadine’s face  Self supporting  Financial support	Education and development  Grenadines Marine Centre  Collect and provide a history of the islands

<sup>2</sup> Workshop in this regard refers to a process of organizing ideas on the sticky wall, which is a nylon sheet sprayed with a non-permanent adhesive allowing for repositioning of cards.

## Stakeholder Workshop

Participants were asked to individually brainstorm answers to a series of questions that would indicate who their key stakeholders were.

- To what people, organisations or institutions are this organisation related?
- Who has a stake in this association?
- Who is the organisation dependent upon?
- Who is dependent upon the organisation?
- Who would be disappointed if the organisation didn't exist?
- Who would be pleased to see it succeed?

The names of stakeholders identified were put on cards and posted on the wall. Then participants were asked to brainstorm the responsibilities that their group has toward each of the stakeholders posted. Table 2 shows the results of the stakeholder workshop. The top row represents the stakeholders and the responsibilities toward them are listed below. After this data was organised the group noted the most important responsibilities and the facilitator (a volunteer from the group) underlined these in marker.

With the above data collected the participants worked in small groups and attempted to write a mission statement for the Grenadines Association for Community Group Development bearing in mind the guidelines for powerful mission statements shown in Table 3.

**Table 2: Stakeholders and our responsibilities to them.**

Resource Users	Community Groups	Funding Agencies	Citizens	Educators	Government
<u>Capacity development</u>	<u>Provide structure</u>	<u>Use money for intended purposes</u>	<u>To provide information</u>	<u>Research opportunities</u>	<u>Inform govt.</u> about our organisation and community needs
<u>Support</u>	<u>Motivation</u>	<u>Provide advertisement</u>	<u>To educate</u>	<u>Document Centre</u>	<u>Educate govt.</u> about our organisation & responsibilities
<u>Organise</u>	<u>Funding &amp; leadership support</u>	<u>Provide proper financial records</u>	<u>Involve them socially</u>		<u>Pay taxes</u>
<u>Engagement</u>	<u>Education</u>	<u>Proper money management</u>			<u>Inform govt.</u> about our children, education & health needs
<u>Information provider</u>					

**Table 3: Guidelines for writing mission statements<sup>3</sup>.**

Powerfully Written Mission Statements Are ...

- About who we are now, not what we want to be in the future
- Short, clear and usually less than 14 words
- “Bone deep” - stir up peoples’ passion
- Connected to our deepest interests
- Uniquely a description of us
- Not fuzzy - avoids words meaning different things to different people such as excellent, best, etc.

The facilitator suggested using a template to pull together the most appropriate expression of the group’s mission.

**Mission Statement Template**

Our mission is to \_\_\_\_\_ (what we do) \_\_\_\_\_  
through \_\_\_\_\_ (how we do it) \_\_\_\_\_  
because (optional) \_\_\_\_\_ (why we do it based on what we value) \_\_\_\_\_.

***Trial mission statements***

Each of the groups put forward a trial mission statement and these were posted on a flip chart to discuss in plenary. The trial mission statements put forward were as follows:

*Our mission is to educate, develop and empower our organisations and communities’ capacity as we strive to better our objectives and livelihoods.*

*To promote the development of the Grenadines through the empowerment of community groups for self governance and the protection and development of resources.*

*Our mission is to provide holistic development of our community and available resources by empowering and educating community groups.*

*Our mission is to empower and motivate community groups through education and self governance while protecting and developing resources.*

Participants discussed the elements of each of the statements that they liked best and adopted the statement below as the mission for the Grenadines Association for Community Group Development.

**OUR MISSION**

Our mission is to empower community groups in the Grenadines

<sup>3</sup> Developed by Management Consultant, Roger Harrison.

## **FACILITATION TOOLS**

Participants discussed techniques used by facilitators such as rational and experiential aims, brainstorming, recording on a flip chart and voting.

### **Rational and Experiential Aims**

A helpful tool used by facilitators to plan for the outcomes of an event whether it is a conversation, workshop, project or other goal is to consider in advance the aims on two levels; the rational and experiential. The rational aim is the intent or practical goal - it is what participants will know or understand after the event. The experiential aim is what the facilitator expects the inner impact of the overall experience will be on the group – how they will feel or what the mood will be when they leave the room. Thinking about these two aims can assist a facilitator in developing a focus question for the meeting or event. Other elements that are part of this planning include noting the area of concern, the stakeholders and participants involved and timeline of the event or project. The planning process for deciding the focus of an event or project is shown in Appendix 03.

### **Rules for brainstorming**

Brainstorming refers to thinking of ideas individually or as a group. It has also been called a “brain dump” because people are just letting their minds go and writing down whatever comes to mind without evaluating or judging the ideas. There are some important rules that help group members brainstorm their ideas effectively. These are:

- Quantity matters more than quality (think of as many ideas as possible)
- No “killer phrases” (no phrases such as “that’s a dumb idea!” or “that can never work!”)
- Wild and crazy is okay (those crazy ideas often turn out to be the best ones)
- When brainstorming in a group each person takes a turn (round-robin style)
- Save evaluation of the ideas until after all the ideas are out

### **Five-finger voting**

Five-finger voting lets each team member show how he or she feels about a proposal by holding up one to five fingers. It is especially useful when groups are attempting to reach consensus (unanimous approval) on an issue. Five-finger voting can be used to see if the team is at or near consensus, which is represented by all members voting 3, 4, or 5 on the proposal. The reason for using this type of voting is to allow a team to quickly sense the level of support for a proposal. Each finger represents a different level of support.

- **Five fingers:** I Love it – I support the idea and will work actively to help it become a reality.
- **Four fingers:** I really like it – I support the idea; while I may not be a major player, I will do what is appropriate.
- **Three fingers:** I’m neutral – I’m not opposed to the idea; I don’t care if others want to do it; I won’t undermine their efforts.
- **Two fingers:** I really dislike it – I prefer other options. While I dislike the proposal, I will abide by the decision of the group for at least a trial period of time and I will not “sabotage” the decision.

- **One finger:** Hate – I am opposed to the idea.

### **Dot voting**

Dot voting is a quick and easy way for a group to determine which items in a list are most important or to sort out categories. Some of the ways you can use this technique are to:

- Reduce a larger list into a manageable few
- Select the items the group feels are the most important
- Prioritise actions
- Assign responsibilities

The way it works is to give each participant a certain number of sticky dots and tell them how to use them. Different colours may be used for different purposes. For example: red dots could represent members first choice and a blue dot by their second, etc. (Discourage block-voting where a person puts all of the dots on one item, and no one is allowed to cut their dots in halves or quarters.)

Once all the voting is completed (all the dots are placed) you can discuss the issues that have the most dots and see if the group can agree to proceed with those. You may choose to remove the items with the fewest votes and repeat the voting with that number of dots. Dot voting is well suited for large groups and long lists. Its simplicity makes it very quick and easy to use. If the group does not have dots, members can be instructed to make a coloured circle with markers on their choices.

### **ToP™ Consensus Workshop Method**

The group discussed the steps the facilitator went through in the vision workshop. These were noted on the sticky wall (Appendix 4):

- Context – setting the stage, noting the timeline, introducing the focus question, asking warm-up questions
- Brainstorm – individual and group brainstorm, put ideas on cards (one idea per card, 3-7 words, write big), tell the groups how many ideas they can put on cards (do not exceed 40 cards total)
- Organise – facilitator makes 4-6 pairs of ideas with the group's help, cluster the rest of the cards with the group's help
- Name – read through the clusters one at a time and name each cluster with the group's help, try for a name that is 3-5 words and suggests "liveliness"
- Reflect – reflect on what the group has done, determine the next steps

## Revisiting the Grenadines Vision using ToP™ Focused Conversation Method

In 2002 a shared-vision for the Grenadines was created by the Sustainable Grenadines Project. Ms. Alexcia Cooke, Programme Officer for the Project, presented the vision statement to the group by PowerPoint and through a focused conversation.

### VISION STATEMENT FOR THE GRENADINES

*We see the Grenadines as a place comprising sustainable livelihoods with equity for the people through good governance, optimal utilisation and conservation of resources and enhancement of human capacity (empowerment) using participatory integrated sustainable development processes.*

Using the Focused Conversation format Ms. Cooke asked the group a series of questions about the Vision Statement for the Grenadines on four levels of awareness:

- Objective – information based on the five senses – “What words jump out at you in the vision statement.”
- Reflective – feelings, associations – “How do you feel about the vision?” “What do you like about it?” “What don’t you like?”
- Interpretive – meaning, significance – “Is the vision still current?”
- Decisional – resolve, possible action – “What would you change about the vision statement.” “What would you add or subtract?”

In the short conversation, participants were somewhat critical of the Vision Statement for the Grenadines. Comments included the following.

- The statement too long and somewhat unclear
- It is not understandable to the average man in the street
- It becomes clearer the more you look at it and think about it but this should not be necessary
- The vision statement’s meaning when read by anyone should be understood quickly.

Next the facilitator explained the steps of the Focused Conversation Method (Appendix 5) and asked for a volunteer to try leading the group in a conversation of his or her choice. Mrs. Leah Belmar from Bequia volunteered to lead the group in a conversation about security considerations for World Cup Cricket 2007 due to begin shortly in the Caribbean. As this is a topic relevant to everyone, it was an engaging conversation. Afterwards, the group debriefed Mrs. Belmar’s performance and noted her strengths as a facilitator.

## SHARED VISION WORKSHOP

The facilitator prepared participants for a shared-vision workshop by describing to them the characteristics of a shared-vision (Table 4).

**Table 4: The characteristics of a shared vision.**

What it is ...	What it consist of ...	How it functions ...
<ul style="list-style-type: none"> <li>• Shared – the group’s product</li> <li>• Practical – what we expect to see <u>in place</u></li> <li>• Intentional – describes where we will be and when we will get there</li> <li>• Inspiring – calls for the group to “stretch a bit” and take responsibility for the future</li> </ul>	<ul style="list-style-type: none"> <li>• The hopes and dreams that are real to us</li> <li>• What we carry inside us</li> <li>• Our experience</li> <li>• Each person’s insight that they bring into the room</li> <li>• A shared-plan of where we want to go</li> </ul>	<ul style="list-style-type: none"> <li>• Powerful and motivating</li> <li>• Emerges from the depth of our being</li> <li>• Fuels us with energy</li> <li>• Eliminates negativity and indecisiveness</li> <li>• Grows as we do</li> </ul>

The facilitator then led the group in a short visualization by asking them to close their eyes and visualize the Grenadines after five years of working with the Grenadines Association for Community Group Development. Next the group brainstormed individually and in teams what they would like to see in place in five years, or 2012. The ideas were organised on the sticky wall and named with the top names being the group’s consensus of a shared-vision shown below. The clusters of ideas and workshop titles that represent the shared-vision are shown in Table 5.

### Shared-Vision for the Grenadines Association for Community Group Development

- To have a strong organisation through committed membership with a strong financial base
- To have NGOs strengthened through capacity building
- To establish a Resource Centre for information sharing and a Grenadines University, that would serve as a model for community education
- To use our resources for sustainability
- To be so well known that we are a “household name”
- To see the Grenadines as one entity

### ASSISTING AND RESISTING FACTORS

Once the vision was completed, the facilitator shared a method called Assisting and Resisting Factors, a type of Force Field Analysis,<sup>4</sup> used to analyse the group’s strengths and weaknesses. The group brainstormed individually and in groups, factors that will assist them in reaching their vision and factors

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<sup>4</sup> Force field analysis is a management technique developed by Kurt Lewin, a pioneer in the field of social sciences, for diagnosing situations. Lewin assumes that in any situation there are both driving and restraining forces that influence any change that may occur.

that block movement toward their vision. It was also explained that the factors can be both internal (self-caused) or external (caused from outside forces).

### **Using the Data for a SWOT Analysis**

After the assisting factors were brought forward to the wall, the facilitator, with the help of the group, separated the ideas into “strengths” (the resources of the group) and “opportunities”. Likewise, the resisting factors were separated into “weaknesses” and “threats” thus producing the elements of a “SWOT” analysis.

A SWOT analysis is a strategic planning method used to monitor the internal and external environment of an organisation as it pursues its objectives. Strengths and weaknesses represent the organisation’s internal environment, whereas opportunities and threats represent the external environment. The organisation uses the information from this analysis to strategically build on its strengths, exploit its opportunities, minimize or stop its weaknesses, and remove or defend against threats. Table 6 shows the results of the workshop.

### **ACTION PLANNING**

The facilitator provided to participants a definition of SMART actions, an acronym for the type of actions necessary for building on strengths and opportunities and removing or minimizing weaknesses and threats and thus moving the group toward its shared vision. SMART actions are specific, measurable, action-oriented, realistic and timely (Appendix 6).

Participants were next asked to brainstorm one SMART action for each element of the vision taking into account the results of the SWOT analysis. This was the start of the Key Actions Workshop which was unfortunately stopped because of flight changes that removed more than half of the group from the remainder of the workshop. Before leaving, however the facilitator explained the following next steps in the strategic planning process:

- Creating a one-year calendar of actions
- 90-day implementation steps and
- Periodic progress review sessions

**Table 5: What do we want to see in place in for the Grenadines Association for Community Group Development 2012?**

<b>Strong Organisation Through Committed Membership</b>	<b>Strong Financial Base</b>	<b>We're a Household Name</b>	<b>Resource Centre for Information Sharing</b>
<p>Strong organisational structures in place</p> <p>Committed membership</p> <p>Active community groups in every community</p>	<p>More contributions from funding agencies</p> <p>Successful, completed NGO-funded project</p> <p>To provide a scholarship foundation</p> <p>More fund raising activities in place</p>	<p>International recognition of GACDG</p> <p>Known and visible</p> <p>Many accomplished programmes and projects</p> <p>Leader of a network of groups</p>	<p>Establishment of Grenadines Resource Centre</p> <p>Wealth of information</p> <p>To provide resources for the smaller groups</p> <p>Home for the organisation</p> <p>Have an staffed office</p>
<b>NGOs Strengthened Through Capacity Building</b>	<b>Using our Resources for Sustainability</b>	<b>Grenadines University (A Model for Community Education)</b>	<b>All Grenadines as One</b>
<p>More skills training for group members</p> <p>Good leadership skills</p> <p>Well educated/trained population providing excellent services</p> <p>More groups/citizens are empowered</p> <p>Well structured and educated community groups</p>	<p>Form a group co-operative</p> <p>Sustainable livelihoods</p> <p>Management or co-management of resources by strong NGOs</p> <p>Using and protecting our natural resources</p> <p>To create employment for group members</p> <p>Well developed and managed tourism</p>	<p>More educational awareness for groups and communities</p> <p>To erect educational signs within the community</p> <p>To implement programs to educate teenage parents</p> <p>Better able to write projects</p>	<p>Freedom of movement within the Grenadines</p> <p>Unity among Grenadines groups</p> <p>Unity among the groups within the Grenadines</p> <p>All the Grenadines as one</p>

**Table 6: Assisting and Resisting Factors organised into a SWOT Analysis.**

ASSISTING FACTORS	RESISTING FACTORS
Strengths	Weaknesses
<ul style="list-style-type: none"> <li>● Wealth of knowledge</li> <li>● Island integration</li> <li>● Rich natural, human and cultural resources</li> <li>● Committed people are involved</li> <li>● “Oneness” of Grenadines identity</li> <li>● More unity among the Grenadines</li> <li>● Survival</li> </ul>	<ul style="list-style-type: none"> <li>● Lack financial independence</li> <li>● Don’t know how to tap resources, e.g. funding</li> <li>● Limited resources</li> <li>● Narrow minded thinking</li> <li>● Conflicts</li> <li>● Too much back biting</li> <li>● Lack of self confidence</li> <li>● Member commitment low</li> <li>● Members having too many commitments</li> <li>● Lack of leadership skills</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>● New funding opportunities through user fees</li> <li>● Sustainable Grenadines Project</li> <li>● Strong support from funding agencies</li> <li>● Strong governmental support</li> <li>● Government and NGO partnerships</li> <li>● The Grenadines becoming more financially stable</li> <li>● A common heritage</li> <li>● Availability of time</li> </ul>	<ul style="list-style-type: none"> <li>● Lack of support</li> <li>● Not enough funds to carry out organisation obligations</li> <li>● Lack of public education</li> <li>● Citizens not empowered enough</li> <li>● Lack of public support</li> <li>● Too much red tape</li> <li>● Inter-political barriers</li> <li>● NGOs are not seen as an important sector in Government</li> <li>● Multi-island state</li> <li>● Separated by water</li> <li>● Free movements are sometimes restricted</li> <li>● (Un)reliable transportation</li> <li>● High cost of living</li> <li>● Resources not developed</li> </ul>

## Creating a One-Year Calendar of Actions

In this workshop participants will determine what they need to accomplish in the first 12 months of a program, project or event to begin to move from their current SWOT analysis to where they would like to be in three to five years. Participants take the results of the key actions workshop (the SMART actions they brainstormed) and group them according to accomplishment on the sticky wall. They will be grouped by what individual teams or committees can carry out. Each team will then plot their actions on a 12 year calendar, removing those that can be done at a later time and focusing on the priority actions. The names of each quarter will be placed at the top of the wall, e.g. Qt.1 – Jan to Mar, Qt. 2 – Apr to Jun, Qt. 3 – Jul to Sep, Qt. 4 – Oct to Dec; the names of the teams down the left side of the wall and the accomplishment down the right side (Table 7 shows an example of a one-year calendar of actions for a plan to build a coastal trail).

**Table 7: One-year calendar of actions for building a coastal trail.**

<b>TEAM NAME</b>	<b>Qt. 1 Jan to Mar</b>	<b>Qt. 2 Apr to Jun</b>	<b>Qt. 3 Jul to Sep</b>	<b>Qt. 4 Oct to Dec</b>	<b>ACCOMP- LISHMENT</b>
<b><i>BOUNTY HUNTERS</i></b> Eddie, Keith & Inga	Submit letters: local, regional & international		Follow-up meetings (present business plan)	Received donations (special presentation)	Matched government donation
<b><i>TRAIL BLAZERS</i></b> Beatrice, Diane, & Marian	First community meeting	Fish Fry on Codrington College grounds	Film show series on eco-tourism at Lodge School	Nature walk along planned coastal trail Thanksgiving church service	Establish regular community activities
<b><i>PICTURE PERFECT PR'S</i></b> Pooka, Calvin, & Jenny	Marketing/PR person identified	Marketing plan prepared	Launch media campaign to community using jingle, posters and model sketches		Clear public understanding of project & its benefits
<b><i>PHYSICAL PLANNERS AND CONSULTANTS</i></b> Stan, Keith, & Sonia	Tender for contractor Hire a project manager Hire environmental engineer	Budget Workplan in place Drawings complete	Phase 1 complete	Phase 2 complete	Community endorsement Completion of Phase 2

## 90-Day Implementation Steps

After the group completes its one-year calendar of action it is time to decide the implementation steps for the first-quarter accomplishments or first 90-days. The group will note the accomplishment at the top, then document each of the action steps to achieve this plus who will be responsible for the action and when it must be complete. Table 8 shows a sample Implementation Worksheet. These 90-day plans can be written up on either on a flip chart or on individual sheets of paper. After these are complete each team will read report on their implementation sheets to the rest of the group to discuss any corrections or additions.

**Table 8: Sample 90-Day Implementation Plan**

<b>Major Activity: CONDUCT COMMUNITY WORKSHOPS</b>		<b>Date:</b> March 9, 2006
To identify the needs and skills in the community for planning programmes and to facilitate community participation.		
<b>IMPLEMENTATION STEPS</b>	<b>WHO:</b>	<b>BY WHEN:</b>
<ol style="list-style-type: none"> <li>1. Identify facilitator</li> <li>2. Pre-workshop planning meeting</li> <li>3. Acquire resources</li> <li>4. Publicise workshops</li> <li>5. Conduct workshops</li> <li>6. Develop reports</li> </ol>	<ol style="list-style-type: none"> <li>1. Coord. committee</li> <li>2. FAC + CC</li> <li>3. Finance Committee</li> <li>4. PR Committee</li> <li>5. FAC</li> <li>6. FAC</li> </ol>	<ol style="list-style-type: none"> <li>1. March 16<sup>th</sup></li> <li>2. March 17th</li> <li>3. March 23rd</li> <li>4. March 23rd</li> <li>5. April 25th</li> <li>6. June 1<sup>st</sup></li> </ol>
<b>Coordinator:</b> Sandra		<b>Resource Needs:</b> \$45,000.00
<b>Team Members:</b> Claudette, Sandra, Philip, Stephen		

## Periodic Progress Review Sessions

Strategic planning is most successful when seen both as a planning event and a continuous process in which the plan is regularly reviewed, evaluated and refined.<sup>5</sup>The first step is to document the results of the planning process and the implementation plans. Everyone who participates should receive a copy as soon as possible as there are a number of actions that will need to be planned for by individuals and teams. At the end of the first quarter, the group will come together again to review and discuss their progress using copies of the plan to focus the discussion.

This meeting will take about three hours and is helpful to affirm what has been accomplished as well as takes into account the struggles, what has been learned and the need for adjustments to the plan. The group will draft their next 90-day plans after considering their progress together. Questions the group can ask of themselves include:

<sup>5</sup> Institute of Cultural Affairs 2005. Participatory Strategic Planning: Focusing Collective Power for Change. ICA, USA.

- What have we achieved?
- What have we not achieved and why?
- What has happened to help us that we didn't plan for?
- What have we learned?
- Where do we need to go next? (Draft the next Quarter/90-day plans)

Periodic progress reviews are essential if the group is to stay on track of its strategic plan. In addition there are other benefits such as

- They build teamwork and ownership of the plan
- They develop planning and problem solving skills
- They strengthen the organisation's learning process
- They allow for adjustments to unforeseen influences

### **Ongoing Planning**

At the end of one year the group will come together again for a half to a full day and in a process similar to quarterly reviews look ahead to the next year, completing a one-year calendar of actions and 90-day/first quarter implementation plans. After five years the group will meet again to determine if the vision is still relevant and the process begins again.

### **CONCLUSIONS AND RECOMMENDATIONS**

Although the planning simulated in this workshop was for an imaginary umbrella NGO for the Grenadines, several of the participants commented that this would indeed be a good idea. Therefore, the ideas put forward may actually seed a further attempt to create such a body.

It is hoped that all participants will benefit from the use of this methodology and this document. Any questions about the method or assistance in planning may be addressed to the facilitator at [salmerigi@caribsurf.com](mailto:salmerigi@caribsurf.com).

### **WORKSHOP EVALUATION**

Workshop evaluations were submitted by St. Vincent participants but none were completed by participants from Carriacou or Petite Martinique. (Those participants had to leave before the end of the workshop because of an unforeseen flight cancellation.)

Those who completed the written evaluation rated the workshop highly in terms of relevance of the workshop content to their needs, value of information to their organisations, workshop facilitation, workshop materials, and value of strategic planning methods. Three felt the time to cover the content thoroughly was adequate, three did not, and one was unsure. Five felt the registration and other logistical arrangements were well organised and two did not. Five agreed that the hotel arrangements and meals were adequate and two did not.

## APPENDIX 1 – PARTICIPANT LIST

	<b>Name</b>	<b>Organisation</b>	<b>Contact</b>	<b>Email</b>
1.	Winifred Harvey	Union Island Farmers' Association	455-6526	winharv2004@yahoo.com
2.	Kisha Bowen	Young Help Striders 4-H	485-8889	kishabowen@yahoo.com
3.	Neisha Thomas	Bogles Red Cross	473-443-6811	
4.	Jessel Grant	Royal Grenada Police Force (Carriacou)	473-406-0790	loveisaplus@hotmail.com
5.	Asha Douglas	Carriacou Environmental Committee	473-403-6999	ashadouglas@hotmail.com
6.	Elizabeth Jones	Carriacou Environmental Committee	473-443-1473	doublejss_c@yahoo.com
7.	Karlene St. Hilaire	Carriacou Environmental Committee	473-457-7566	spicekyatt@hotmail.com
8.	Trevlyn Cox	Bayaleau Development Committee	473-443-6073	trevolinaempres@gmail.com
9.	Tahera Paul	Petite Martinique Catholic Youth Movement	473-443-9130	taherapaul@hotmail.com
10.	Virginia Fleary-Noel	Carriacou Environmental Committee	473-443-8977/404-4678	virgnoel2000@yahoo.com
11.	Alexcia Cooke	Sustainable Grenadines Project	784-485-8779	susgrenpa@vincysurf.com
12.	Ricky Browne	Union Island Environmental Attackers	784-458-8179	united_travel_services@hotmail.com
13.	Anthony Thomas	Union Island Environmental Attackers	784-458-8530	greenrees@yahoo.com
14.	Philmon Taylor	Union Island Museum and Ecological Society	784-485-8838	phillo_10@hotmail.com
15.	Dwight Logan	PMRC Church Council	784-443-9080	
16.	Montgomery Laborde	Southern Grenadines Water Taxi Association	784-526-4616	legendemus@yahoo.com
17.	Jeremiah Jones	Southern Grenadines Water Taxi Association	784-533-4833	
18.	Thomas Alexander	Carriacou and Petite Martinique Water Taxi Association	473-443-6622	scoobytours@hotmail.com
19.	Kayon Roberts	PM Catholic Youth Movement	473-443-9191	kayonloves@hotmail.com
20.	Martin Barriteau	Sustainable Grenadines Project	473-418-8980	susgrenpm@vincysurf.com
21.	Anthony Compton	Paget Farm Government School 4-H Club	784-527-3875	comptonac@hotmail.com
22.	Wade Carter	New Group in process of forming	784-457-4729/ 528-3510	ctrtr_wd@yahoo.com
23.	Herman Belmar	Grenadines Affairs (Govt)	458-3510	humpback@vincysurf.com
24.	Marsha Gregg	BCHS Sandwatch Group	458-3997	bbbinone@yahoo.com
25.	Becky Jones	Peace Corps Volunteer	454-2489	rmjones10@gmail.com
26.	Leah Belmar	RIPPLES (youth project)	458-3514	belmars@yahoo.com

## **APPENDIX 2 – WORKSHOP AGENDA**

### **STRATEGIC PLANNING WORKSHOP FOR NGOs AND CBOs IN THE GRENADINES**

**Wednesday and Thursday, February 28<sup>th</sup> and March 1<sup>st</sup>, Rotary Club, Bequia**

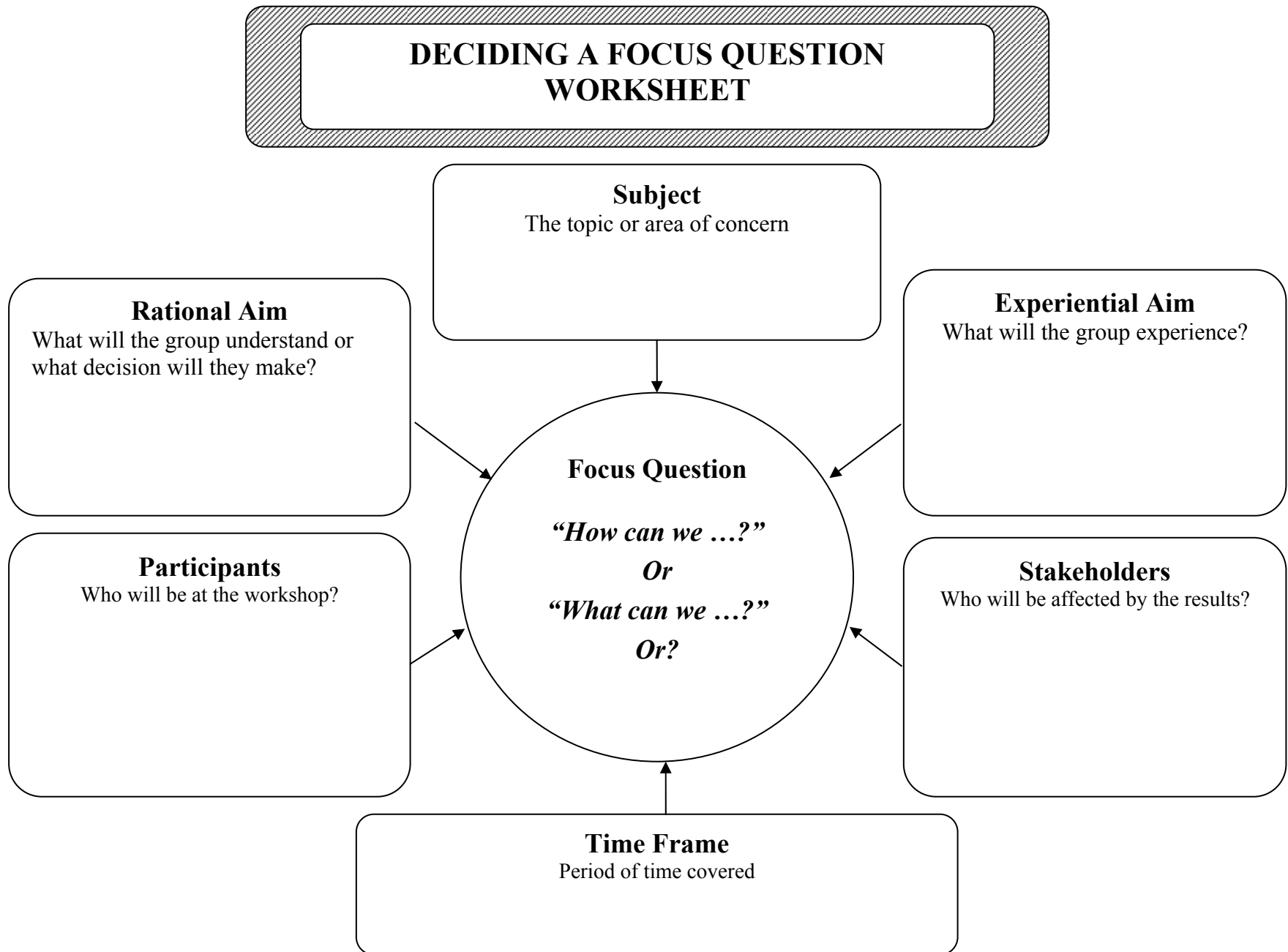
#### **Wednesday**

- **Introductions and Anticipations**
- **Foundational Values**
- **Background to Strategic Planning**
- **Purpose and Mission Workshop**
- **Break**
- **Facilitation Tools: Brainstorming, Flip Charting, Voting, etc.**
- **Lunch**
- **Vision Workshop**
  - **Rational and Experiential Aims**
  - **Determining a Focus Question**
- **Break**
- **Consensus Workshop Method**
- **Focused Conversation Method**

#### **Thursday**

- **Assisting and Resisting Factors**
- **Break**
- **Key Actions Workshop**
- **Lunch**
- **Action Planning Calendar – Quarterly and 90 days**
- **Break**
- **Progress Reviews**
- **Evaluation**

APPENDIX 3 – DECIDING A FOCUS QUESTION



## APPENDIX 4 - ToP WORKSHOP METHOD FORMAT

ToP WORKSHOP METHOD FORMAT		
STEP	PURPOSE	FACILITATOR DOES ...
1. Context	<i>Set the stage</i>	<p>Introduce <i>the</i> workshop topic</p> <p>Tell the group how long it will take and what they are going to do</p> <p>Ask “warm up” questions</p>
2. Brainstorm	<i>Get everyone involved</i>	<p>Provide time for individual work</p> <p>Star their best ideas</p> <p>Work in small teams and select best ideas</p> <p>Write ideas on cards <b>ONE IDEA PER CARD</b></p> <p><b>3-5 WORDS</b>      <b>WRITE BIG</b></p>
3. Organise	<i>Find connections in the ideas</i>	<p>Ask for 1-2 cards per group</p> <p>Make pairs of ideas (as directed by the group)</p> <p>Make 4-6 pairs before adding more cards</p> <p>Make groups of cards (clusters)</p>
4. Name	<i>Build group agreement (consensus)</i>	<p>Read <i>the</i> cards in the cluster</p> <p>Name the clusters (as directed by the group)</p>
5. Reflect	<i>What did we do?</i>	<p>Read the top cards (named cards)</p> <p>What do we notice about the board?</p>
6. Resolve	<i>Next steps</i>	Where do go from here?

**APPENDIX 6 – FOCUSED CONVERSATION AT-A-GLANCE**

<b>LEVEL</b>	<b>FUNCTION</b>	<b>FACILITATOR DOES ....</b>
<b>Opening</b>	<ul style="list-style-type: none"> <li>• To focus the attention of the group on the topic.</li> <li>• To prepare the participants.</li> </ul>	Introduce the topic, purpose and method of discussion.
<b>Objective</b>	<ul style="list-style-type: none"> <li>• To highlight data/information</li> <li>• What is present?</li> <li>• What are the facts?</li> </ul>	<p><i>Ask Objective Level questions:</i></p> <p>What do you see, hear, etc.?</p> <p>What words or phrases do you remember?</p> <p>What lines of dialogue do you remember?</p> <p>Who was there?</p>
<b>Reflective</b>	<ul style="list-style-type: none"> <li>• To encourage the free flow of reactions and feelings.</li> <li>• To encourage participants to make different associations from the idea being discussed.</li> </ul>	<p><i>Ask Reflective Level questions:</i></p> <p>Where were you surprised? Excited? Discouraged?</p> <p>What memories came to mind?</p> <p>What do you associate with this?</p>
<b>Interpretative</b>	<ul style="list-style-type: none"> <li>• To begin understand the key learnings or insights from the conversation.</li> </ul>	<p><i>Ask Interpretive Level questions:</i></p> <p>What new insights came to you?</p> <p>How is this important to you/us at this time?</p> <p>What was the meaning of that story?</p>
<b>Decisional</b>	<ul style="list-style-type: none"> <li>• To experience “coming together.”</li> <li>• To experience a personal resolve or conclusion made by the group.</li> <li>• To decide an action.</li> </ul>	<p><i>Ask Decisional Level questions:</i></p> <p>What imperatives do you now see?</p> <p>How can we use this in our daily life? Work?</p> <p>What applications do you now see?</p> <p>What title would you give this (article, section, etc.)?</p>
<b>Closing</b>	<ul style="list-style-type: none"> <li>• To bring the discussion to a close.</li> </ul>	Thank you for your participation ....

## APPENDIX 6 – SMART ACTIONS

### SMART ACTIONS (LEAD TO SMART GOALS)

S	<b>Specific</b> – State clearly the objective or outcome you want. Be precise.
M	<b>Measurable</b> -- State how you will know when you've attained it. What will it look like when it's done?
A	<b>Action-oriented</b> -- Use action verbs to describe the steps required, i.e. find, call, go, write, take, deliver, make, build, etc.
R	<b>Realistic</b> -- Confirm your belief that the goal is indeed possible. This would be nice, but can we really do it?
T	<b>Timely</b> -- Set a deadline for reaching your goal. What is your ETA (expected time of arrival)?

## APPENDIX 7 – WORKSHOP EVALUATION

### STRATEGIC PLANNING WORKSHOP FOR NGOs AND CBOs IN THE GRENADINES

Wednesday February 28<sup>th</sup> - Thursday March 1<sup>st</sup>, Rotary Club, Bequia

	0 No Answer	1 Strongly Disagree	2 Disagree	3 Unsure	3 Agree	4 Strongly Agree
1. The workshop content was relevant to my needs					1	6
2. The time was suitable to cover the content thoroughly			3	1	2	1
3. I gained valuable information/tools/ideas that I will use in my organization					1	6
4. The facilitator was engaging, interesting, informative and well-prepared					1	6
5. Workshop material was adequate and clear					1	6
6. Registration and other logistical arrangements were well organized	2				3	2
7. Hotel arrangements and meals were adequate	1	1			4	1
8. Overall, I see this workshop as a significant step in developing my strategic planning skills						7

#### 9. What new ideas did you learn about strategic planning?

- Brainstorming and selecting ideas for the vision statement
- The establishment of mission and vision statements
- How to organise the ideas into various categories and the voting strategy
- How to get people involved and letting them know that they are important and make them feel a part of what ever you are doing

- Putting the most important ideas together to come up with a statement
- About a mission statement

**10. How will the knowledge/information gained help you in your organisation?**

- Better strategic planning will allow us to set and achieve realistic goals
- It will help us to more long-term planning and determine our mission and vision
- It will help me to better prepare a plan of action and to write a proper mission and vision statement
- Can make a more rounded person and on a whole bring growth to my group
- It will help me to sit with my organization and come up with a mission statement
- To plan activities and how they can be easily executed
- To become more focus driven; to set goals and work towards them

**11. What did you like best?**

- The facilitator's easy going, friendly, interesting personality and approach
- The participation and involvement of the participants
- The group work and the discussion, meeting new people. The facilitator was also a very pleasant person, easy going, very appreciative of the participants comments
- The tools, skills and professionalism which were used to achieve those goals in the workshop
- The practical work in the workshop
- Everything
- The process of working together in groups and brainstorming

**12. What did you like least?**

- Unsure – oh abrupt ending (unplanned) of the workshop
- The abrupt closure but I understand the circumstances
- The way the workshop was cut short
- The attitude of many of those who were part of the workshop. Sadly many of them thought they were still at home or in their backyard.
- Nothing
- The meals

### 13. Any other comments or suggestions?

- The participants should meet again in future to discuss their progress since this workshop took place
- The drinks should have been natural instead of artificially flavoured and serving in bigger glasses
- I think that the workshop can be improved by arranging it at a better time. More of these kinds of workshops should be held.
- The last part of this workshop should be scheduled for some other time
- We need more workshops of this type
- The selection of the island and location for future workshops should be carefully considered in all aspects

*People Dynamics Associates, 2007*

