CARIBBEAN NATURAL RESOURCES INSTITUTE (CANARI)

ARLG participants and facilitators at Matura Beach on the field trip to Nature Seekers (source Tamoy Singh)

Going from Strength to Strength
**Action Research and Learning Group
Report of the third meeting
15-19 November 2009
Port of Spain, Trinidad**

Contents

EXECUTIVE SUMMARY

This report covers the third and final Action Research and Learning Group meeting under *Going from strength to strength,* a three-year (2008-2010) research and capacity building project, coordinated by the Caribbean Natural Resources Institute (CANARI) with funding from the John D. and Catherine T. MacArthur Foundation (MacArthur).

The project is based on the identification of a number of challenges facing the islands of the Caribbean in sustainably managing their natural resources in such a way that they continue to support local livelihoods. It recognises that the livelihoods of Caribbean people are inextricably linked to the natural resources and biodiversity of their islands, notably through agriculture and fishing, tourism and recreation, and long-standing cultural and spiritual practices. Also, that there is also a high dependence on natural ecosystems for the provision of critical services such as clean air, water, climate amelioration, and flood and erosion control. Yet, several recent assessments of biodiversity show escalating degradation of both marine and terrestrial resources in most islands, as well as high vulnerability to climate change.

The project seeks to address these challenges through a programme of activities designed to enhance the capacity of civil society organisations to play their role in developing and implementing strategies to:

- halt, and where possible reverse, biodiversity degradation;
- increase public awareness of the implications of loss of biodiversity and of climate change; and
- assist communities to adapt to climate change by increasing resilience and reducing vulnerability.

The focus of this meeting was on:

- building participants' capacity in the areas of leadership and people management; and communication and advocacy;
- consolidating earlier capacity building in the areas of institutional arrangements for protected areas; networking; financial sustainability; and strategic monitoring and evaluation;
- providing an overview of the Critical Ecosystem Partnership Fund for Caribbean Islands and CANARI's role as Regional Implementation Team, as well as proposed activities under CANARI's 2011-2013 grant from MacArthur;
- evaluating the results of the project, and specifically the small grant component and the action learning and research process.

As in previous meetings, the methodology included:

- ***facilitated and highly interactive capacity building sessions*** on leadership, people management, and communications (see Sections 8,11, 12 and 13);
- ***field study*** (see Section 9) – a visit to and discussion with Nature Seekers, a non-profit community-based organisation in north-east Trinidad, which provided useful insights and lessons in the areas of:
  - o institutional arrangements for protected areas;

- o networking (including collaborations with research scientists through the Wider Caribbean Sea Turtle Network; the private sector through Turtle Village Trust; and other community groups in the area through the Matura to Matelot network);
  - o leadership and people management;
  - o financial sustainability (sound financial management practices and diversified funding strategy
- ***analysis of lessons learnt*** from project-funded case studies on CANARI and Consorcio Ambiental Dominican (see Section 10);;
- ***peer exchange and mutual learning*** through participant presentations on advocacy; communicating with the media; and organisational/institutional structures (see Sections 10,11 and 13);
- ***participatory monitoring and evaluation*** of project results (see Section 15).

In evaluating the project results, participants identified significant improvements in their organisational capacity as a result of the project in terms of their:

- human resource management;
- strategic financial management;
- financial sustainability through diversification of their sources of funding and particularly increasing their revenue-generating activities;
- strategic monitoring and evaluation and focus on results; and
- development of strategic alliances and networks.

Participants indicated that the small grant component had made an important contribution to the above results, enabling them to build on and apply the learning from the ARLG meetings. They noted that even a small amount of money (the maximum grant was US$6000) can catalyse strategic organisational change. This validated CANARI's initial hypothesis that it is not always the amount of money that important but the ability to spend it on this type of strategic organisational development, for which it is usually difficult to source grant funding.

They also noted that the action research and learning process had:

- facilitated the building of relationships across national and linguistic boundaries and greater understanding of the differences and similarities between the different countries;
- made them feel valued;
- inspired them and given them new ideas; and
- facilitated peer exchange and the sharing of experiences.

Participants were keen to maintain and build on the connections established during the project both within and beyond the context of the CEPF and new MacArthur agreed. The following next steps were therefore agreed upon:

- Collective communication to donors and other partners on:
  - o why NGO capacity building is important and how it can be done;
  - o the need for collective, coordinated strategic investment; and
  - o the value of action research and learning as an approach.

- Stimulate continuing communication and peer exchange between GFS2S participants (and those in the similar UK Overseas Territories project, CEPF and new MacArthur project) via:
  - CANARI website;
  - Intranet;
  - Blogs and other social networking;
  - Skype discussion;
  - CANARI calendar of events (which could start to use Google calendar which could be embedded in the website and provide a means to share events;
  - Yahoo / Google groups

RESUMEN EJECUTIVO

Este informe presenta la tercera y última reunión del Grupo de Aprendizaje e Investigación en Acción (GAIA) para el proyecto de investigación y desarrollo de las capacidades organizacionales "Movilizando Fortalezas", de tres años de duración (2008-2010). Proyecto coordinado por el Instituto Caribeño de Recursos Naturales (CANARI) con fondos de la Fundación John D. y Catherine T. MacArthur (MacArthur Foundation).

El proyecto se basa en la identificación de una serie de desafíos que enfrentan las islas del Caribe en el manejo sostenible de sus recursos naturales, con el objetivo de apoyar los medios de sustento locales. Se reconoce que los medios de vida de la gente del Caribe están extrínsecamente ligados a los recursos naturales y a la biodiversidad de sus islas, especialmente a través de la agricultura y la pesca, el turismo y la recreación, y las prácticas culturales y espirituales. Al mismo tiempo, existe una elevada dependencia de los ecosistemas naturales para la prestación de servicios críticos como aire limpio, agua, mejoramiento del clima, control de inundaciones y de la erosión. No obstante, algunas evaluaciones recientes sobre la biodiversidad, muestran el ascenso de la degradación de los recursos marinos y terrestres en la mayoría de las islas, así como una alta vulnerabilidad al cambio climático.

El proyecto trata de abordar estos desafíos a través de un programa de actividades diseñado con el fin de mejorar la capacidad de las organizaciones de la sociedad civil para desempeñar su papel en el desarrollo e implementación de estrategias para:
- detener, y si es posible revertir, la degradación de la biodiversidad;
- aumentar la conciencia pública sobre las consecuencias de la pérdida de la biodiversidad y del cambio climático, y
- ayudar a las comunidades a adaptarse al cambio climático mediante el aumento de la resiliencia y la reducción de la vulnerabilidad.

Esta reunión sostuvo los siguientes objetivos:

- desarrollar las capacidades de los participantes en las áreas de liderazgo y gestión de personal, así como en la comunicación y en la promoción y defensa (advocacy)
- la consolidación de capacidades introducidas en las áreas de acuerdos institucionales para las áreas protegidas, creación de redes, sostenibilidad financiera, y monitoreo y evaluación estratégica;
- proporcionar una visión general del Fondo de Alianza para Ecosistemas Críticos (CEPF-Critical Ecosystem Partnership Fund) para las Islas del Caribe y el rol de CANARI como Unidad Regional de Implementación, así como las actividades propuestas por CANARI bajo la donación de MacArthur para el período 2011-2013;
- evaluar los resultados del proyecto, y específicamente el componente de pequeñas donaciones así como el proceso de aprendizaje e investigación en acción.

Al igual que en las reuniones anteriores, la metodología se basó en:

- **facilitar y realizar sesiones de capacitaciones altamente interactivas** sobre liderazgo, gestión de personal y sobre comunicación (véanse las secciones 8,11, 12 y 13);

- **un estudio de campo** (ver Sección 9) - visita y sesión de diálogo con Nature Seekers, una organización sin fines de lucro y de base comunitaria en el nordeste de Trinidad, que aportó información útil basada en su experiencia en las áreas y temas de:
  - acuerdos institucionales en áreas protegidas;
  - creación de redes (que incluye colaboraciones con investigadores científicos de la Red de Tortugas Marinas del Gran Caribe, el sector privado a través de Turtle Village y otros grupos comunitarios del área a través de la Red Matura hasta Matelot);
  - liderazgo y gestión de personal;
  - la sostenibilidad financiera (buenas prácticas de gestión financiera y de estrategia de financiación diversificada);

- **análisis de lecciones aprendidas** de los estudios de casos de CANARI y Consorcio Ambiental Dominicano, financiados por este mismo proyecto (ver Sección 10);

- **intercambio de experiencias entre pares y el aprendizaje mutuo** a través de presentaciones de los participantes en la promoción y defensa, de comunicados a través de los medios de comunicación y sobre estructuras organizacionales e institucionales (véanse las secciones 10,11 y 13);

- Monitoreo y evaluación participativa de resultados de proyectos (ver sección 15).

Al evaluar los resultados del proyecto, los participantes identificaron mejoras significativas en el fortalecimiento de su organización como resultado de este proyecto, en términos de:
- gestión de recursos humanos;
- gestión financiera estratégica;
- sostenibilidad financiera a través de la diversificación de sus fuentes de financiamiento y, en particular, aumentando actividades generadoras de ingresos;
- monitoreo y evaluación estratégica, así como en enfoque de resultados, y
- el desarrollo de alianzas estratégicas y de redes.

Los participantes indicaron que el componente de pequeñas donaciones había hecho una importante contribución a los resultados descritos, lo que les permite construir y aplicar el aprendizaje obtenido en las reuniones del GAIA.

Incluso señalaron que a través del pequeño aporte financiero (la subvención máxima era de 6000 dólares EE.UU.) se puede catalizar de manera estratégica un cambio organizacional. Esta experiencia ha validado la hipótesis inicial de CANARI, de que no siempre la cantidad de dinero es tan importante, sino más bien, se trata de la capacidad de invertirlo estratégicamente en este tipo de desarrollo institucional. El problema es que esta forma de financiación o donación suele ser difícil obtener.
También se señaló que la investigación en acción y el proceso de aprendizaje:

- ha facilitado la construcción de relaciones, a pesar de las fronteras nacionales y lingüísticas, y una mayor comprensión de las diferencias y similitudes entre los diferentes países;

- ha proporcionado el sentirse valiosos;
- les inspiró y les ha dado nuevas ideas, y
- ha facilitado el intercambio entre pares y de experiencias.

Los participantes están dispuestos a mantener y a ampliar las conexiones establecidas durante el proyecto tanto dentro como fuera del contexto del proyecto del CEPF y el nuevo acuerdo MacArthur. Para ello, acordaron los siguientes pasos:
- Comunicación colectiva hacia los donantes y otros asociados en:

   - el por qué la construcción de capacidades de las ONGs es importante y cómo se puede hacer;
   - la necesidad de inversiones estratégicas coordinadas y colectivas, y
   - el valor del método de aprendizaje e investigación en acción como enfoque.

- Estimular la permanente comunicación e intercambio entre los participantes de "Movilizando Fortalezas" (y de proyectos similares como el proyecto de Territorios de Ultramar del Reino Unido, el CEPF y el nuevo proyecto de MacArthur) a través de:
   - sitio web de CANARI;
   - Intranet;
   - Blogs y redes sociales o de otro tipo;
   - Diálogo a través de Skype;
   - El calendario de eventos de CANARI (que podría empezar a utilizar el calendario de Google, y ser incorporado al sitio web, proporcionando un medio para compartir eventos);
   - Yahoo y grupos de Google

RÉSUMÉ

Ce compte-rendu est celui de la troisième et dernière réunion du Groupe d'apprentissage et de recherche par l'action dans le cadre du projet « Going from Strength to Strength », un projet de de trois ans (2008-2010) pour la recherche et le développement des capacités, coordonné par l'Institut Caribéen des Ressources naturelles (CANARI) et financé par la Fondation John D. et Catherine T. MacArthur (MacArthur).

Ce projet est basé sur l'identification d'un certain nombre de défis auxquels sont confronté les iles de la Caraïbe, dans le cadre de la gestion durable de leurs ressources naturelles, de façon à ce que celles-ci continuent à contribuer à leurs moyens de subsistance. Le projet part du principe que les moyens de subsistance des peuples de la Caraïbe sont inextricablement liés aux ressources naturelles et à la biodiversité de leurs iles, notamment à travers l'agriculture et la pêche, le tourisme et les activités de loisirs, et les pratiques culturelles et spirituelles traditionnelles. De même, le niveau de dépendance aux ecosystèmes naturels pour la fourniture de services critiques tels qu'un air pur, l'eau, l'amélioration du climat, et le contrôle des inondations et de l'érosion des sols. Toutefois, plusieurs évaluations récentes de l'état de la biodiversité font état de dégradations croissantes des ressources marines et terrestres dans la plupart des iles, ainsi que d'une forte vulnérabilité au changement climatique.

Le projet cherche à porter une solution à ces défis à travers un programme d'activités destinées à améliorer la capacité des organisations de la société civile dans le cadre du développement et de la mise en œuvre des stratégies pour :

- Cesser, et lorsque c'est possible, résorber la dégradation de la biodiversité
- Accroître la sensibilité publique quant aux implications de la dégradation de la biodiversité et du changement climatique
- Assister les communautés dans le cadre de l'adaptation au changement climatique en améliorant la résistance et en réduisant la vulnérabilité

Les principaux objectifs de cette réunion étaient de :

- Développer les capacités des participants dans les domaines du leadership et de la gestion des personnes, de la communication et du plaidoyer
- Consolider les capacités précédemment acquises dans les domaines des arrangements institutionnels pour les aires protégées, la création/consolidation de réseaux, la durabilité financière et la gestion stratégique et l'évaluation.
- Présenter un aperçu du Fonds de Partenariat pour les Ecosystèmes critiques pour les iles de la Caraïbe (CEPF), et le rôle de CANARI en tant qu'équipe régionale de mise en œuvre, ainsi que les activités proposées dans le cadre de la subvention MacArthur pour 2011-2013
- Evaluer les résultats du projet, et plus particulièrement la composante relative aux petites subventions et au processus du groupe d'apprentissage et de recherche par l'action.

Tout comme lors des réunions précédentes, la méthodologie comprenait les éléments suivants :

- des sessions interactives de développement des capacités sur le leadership, la gestion des hommes, et la communication (voir Sections 8, 11, 12 et 13)
- Etude de site (voir Section 9) – une visite et une discussion avec Nature Seekers, une organisation à but non lucratif basée au nord-est de Trinidad, qui a fournit de très utiles leçons et aperçus dans les domaines suivants :

- o Arrangements institutionnels pour les aires protégées ;
- o Les réseaux (y compris la collaboration avec les chercheurs scientifiques du réseau Wider Caribbean Sea Turtle Network, ainsi que d'autres groupes et communautés du réseau Matura-Matelot ;
- o Leadership et gestion des personnes
- o Viabilité financière (gestion financière solide et stratégie de financement diversifiée)
- Analyse des leçons tirées des études de cas financés par le projet sur CANARI et le Consorcio Ambiental Dominicano (voir Section 10)
- Echange entre collègues et apprentissage mutuel grâce à des présentations sur le plaidoyer, communiquer avec les media, et les structures organisationnelles/institutionnelles (voir Sections 10, 11,13).
- Gestion participative et évaluation des résultats du projet (voir Section 15).

Lors de l'évaluation des résultats du projet, les participants ont identifié des améliorations significatives de leur capacité organisationnelle parmi l'un des résultats du projet, en termes de :

- Gestion des ressources humaines
- Gestion financière stratégique
- Viabilité financière à travers la diversification des sources de financement et en particulier des activités générant des revenus
- Gestion et évaluation stratégiques et axées sur les résultats, et
- Développement d'alliances et de réseaux stratégiques.

Les participants ont indiqué que la composante des petites subventions avait contribué de manière significative aux résultats susmentionnés, les rendant capables de capitaliser et de mettre en pratique les enseignements des réunions ARLG. Ils ont noté que même une petite somme d'argent (la subvention maximale était de 6000$ US) peut catalyser des changements à l'échelle organisationnelle. Ceci a par ailleurs validé l'hypothèse initiale de CANARI selon laquelle ce n'est pas la somme d'argent qui importe, mais bel et bien la faculté à pouvoir en faire usage pour ce genre de développement organisationnel, pour lequel il est difficile de trouver des financements.

Ils ont par ailleurs noté que le groupe d'apprentissage et de recherche par l'action leur avait :
- Facilité l'établissement de relations au-delà des barrières nationales et linguistiques ainsi qu'une meilleure compréhension des différences et similitudes entre les différents pays.
- Fait se sentir utiles
- Inspiré et donné des nouvelles idées
- Facilité les échanges entre collègues et le partage d'expériences.

Les participants ont volontiers maintenu et renforcé les relations établies au cours du projet aussi bien au sein et au-delà du contexte du CEPF et de la nouvelle subvention MacArthur. Les étapes suivantes ont dès lors été retenues:

- Communication collective aux bailleurs et aux partenaires sur :

  - o Les raisons pour lesquelles il est important de renforcer la capacité des ONG, et de quelle manière il était possible de le faire
  - o Le besoin d'un investissement stratégique, coordonné et collectif

- o La valeur de l'apprentissage par la recherche et l'action

- Stimuler la communication permanente et les échanges entre les participants du GFS2S (ainsi que ceux dans les territoires britanniques d'outre-mer, le CPEF et le nouveau projet MacArthur) par le biais :
  - o Du site Internet de CANARI
  - o L'Intranet
  - o Les blogs et autres réseaux sociaux
  - o Les discussions via Skype
  - o Skype discussion;
  - o Le calendrier des évènements de CANARI (qui pourrait utiliser un calendrier Google qui pourrait être integer au site et servir à partager des évènements
  - o Les groups Google et Yahoo

1   Overview of *Going from Strength to Strength* project

Going from strength to strength is a three-year (2008-2010) research and capacity building project, coordinated by the Caribbean Natural Resources Institute (CANARI) with funding from the John D. and Catherine T. MacArthur Foundation (MacArthur). It builds on the findings of and capacities developed under earlier CANARI projects, notably:

- *Improving governance through civil society involvement in natural resource management in the Caribbean* [2001-2006 funded by EC/Hivos-funded];

- *Developing and disseminating methods for effective biodiversity conservation in the insular Caribbean* [2003-2005 funded by MacArthur]; and

- CANARI's extensive experience of assisting government agencies and civil society organisations with processes of visioning, strategic planning and organisational development.

The project is based on the identification of a number of challenges facing the islands of the Caribbean in sustainably managing their natural resources in such a way that they continue to support local livelihoods. It recognises that the livelihoods of Caribbean people are inextricably linked to the natural resources and biodiversity of their islands, notably through agriculture and fishing, tourism and recreation, and long-standing cultural and spiritual practices. Also, that there is also a high dependence on natural ecosystems for the provision of critical services such as clean air, water, climate amelioration, and flood and erosion control. Yet, several recent assessments of biodiversity show escalating degradation of both marine and terrestrial resources in most islands, as well as high vulnerability to climate change.

The project seeks to address these challenges through a programme of activities designed to enhance the capacity of civil society organisations to play their role in developing and implementing strategies to:

- halt, and where possible reverse, biodiversity degradation;

- increase public awareness of the implications of loss of biodiversity and of climate change; and

- assist communities to adapt to climate change by increasing resilience and reducing vulnerability.

The main project activities are listed below:

a. Creation and coordination of a civil society **Action Research and Learning Group** (ARLG);

b. Three **ARLG meetings**, the first in Jamaica, the second spanning both Dominican Republic and Haiti and the third provisionally in Tobago, including a field/study/study visit component and formal capacity building activities, with two members of each participating organisation being invited to attend each ARLG meeting;

c. **Case studies** both specifically under this project and from complementary CANARI projects;

d. **A Small grants** window providing grants in the region of $5,000 – 10,000 for participating CSOs;

e. **Dissemination of project learning and capacity building**;

f. **Participatory monitoring and evaluation** throughout the course of the project including the development of an appropriate framework and the development of participants' capacity for monitoring and evaluation of their own organisations, institutions and projects.

For more information, see concept note attached at Appendix 1.

2   Target audience

Going from strength to strength focuses particularly on civil society organisations in the islands of Hispaniola (Dominican Republic and Haiti) and Jamaica, with some involvement of organisations in Trinidad and Tobago. Lessons learned will be disseminated to a wide range of stakeholders in the other islands of the Caribbean.

Eleven organisations were selected to become members of the Action Learning Group (three from Jamaica, three from Haiti, three from Dominican Republic, one from Trinidad and Tobago and one with offices in Jamaica and Haiti, plus CANARI itself). Each organisation was encouraged to nominate two persons to the ARLG, including ideally one senior staff person and one member of the Board.

Two groups were unable to participate in this meeting (Fondation Seguin and Buccoo Reef Trust) and one group (Fondation Macaya) was only able to send one representative due to visa problems.   A full list of participants is attached at Appendix 2.

3   Agenda and objectives for the meeting

The agenda for the second ARLG meeting is attached at Appendix 3.

The main objectives for the meeting were to:

- review how learning from the first and second ARLGs had been applied by participating organisations;

- continue the process of learning from and building the capacity of participating organisations, notably in the areas of:
    - o   building their facilitation skills through modelling of techniques;
    - o   enhancing their leadership and people management skills; and
    - o   developing a communication and advocacy strategy

- study and analyse through a field visit the lessons to be learned from the Trinidad NGO, Nature Seekers, in terms of themes from this and previous ARLG workshops:
    - Institutional arrangements for protected areas management
    - Leadership
    - Building financial sustainability
    - Getting added value from networks (provisionally, panel discussion with M2M members)

- Evaluate the outcomes of the small grants to date

- Evaluate the outcomes of the overall project

- Discuss next steps, with particular reference to the Critical Ecosystem Partnership Fund for the Caribbean and a complementary CANARI project being funded by the MacArthur Foundation from 2011-2013.

4 Methodology

The workshop was facilitated in a highly interactive manner, with participants playing key roles in the action learning process (story teller and mood investigator) as well as providing relevant examples of their organisations' practices in the area of leadership and communications. Opportunities were also provided throughout for participants to apply the learning to their organisational and national contexts, working in small groups. Templates were provided for continuing application of learning with other members of the organisations and their wider stakeholder base.

As at previous meetings, the facilitators continued to model and analyse action learning and other facilitation techniques, including:

- icebreakers
- learning from each other;
- facilitators as learning coaches;
- effective questioning;
- reflective inquiry and listening;
- the use of creative and visual techniques.

Wherever possible materials were translated into Spanish, and in some instances French, with Leida Buglass and Loïza Rauzduel/Sarah McIntosh providing translation from English as needed. This facilitated greater participation from the Spanish-speaking participants and contributed to a more equitable process.

5 Welcome and introductions

Sarah McIntosh, CANARI Associate and GFS2S Project Manager welcomed participants to the meeting. She also introduced her co-facilitator, Lisa James (who was also co-facilitator at the first ARLG), and Leida Buglass (independent consultant based in the Dominican Republic) and Loïza Rauzduel.

A 'human web' icebreaker was used for participants to introduce themselves and then identify another participant they were connected to in some way. This highlighted the interconnectedness of everyone, some of it stimulated by the ARLG process. It was also noted that CANARI and Jaragua act as hubs, with connections to several regional processes. The new participants from Grupo Jaragua and FAN provided some additional background on their roles in the organisations and all participants outlined their expectations which could be summarised as:

a) Improved networking with other participant organisations;
b) Learning from each other
c) Learning more about leadership and communications
d) Sharing lessons learnt from their small grant experiences.
e) Fundraising and financial sustainability

The facilitator noted that all the expectations except the last one would be specifically covered in the meeting but that e) had been covered during the second ARLG and would only be re-addressed if it emerged in relation to the themes selected for this meeting. However,

participants were encouraged to continue informal discussion and sharing of success stories on this topic during and after the meeting.

As with previous ARLG meetings, the role of storyteller/reporter and mood investigator/maco/suss/ sussoro was allocated on a daily basis

6   Recap of the Second Action Research and Learning Group meeting

Using the headings of the main topics covered in the second ARLG meeting (effective networks, strategic financial sustainability, strategic monitoring and evaluation), participants were asked to identify any of the learning that they had been able to apply within the context of their own organisational development. A number of organisations had made changes as a result of the workshop and these are covered in more detail in sections 7 and 15 below.

Discussing leadership

7   Participants' reports on activities since the last meeting, including their small grants

The following table outlines the activities undertaken by participating organisations since the second ARLG in July 2009. It clearly demonstrates both the strategic value in terms of organisational development of even very small grants (maximum US$6000) and application of capacities built during previous ARLGs (developing or maintaining a strategic focus, financial sustainability, creation and strengthening of networks, effective institutional arrangements and strategic monitoring and evaluation).

Table 1: Organisational updates

Organisation	General context	Small grant objectives/ activities/outcomes	Other activities/achievements
CANARI	• New Executive Director, Nicole Leotaud appointed in March 2010 though Sarah McIntosh continues to manage the GFS2S project. • Several other staff changes		• Appointed CEPF Regional Implementation Team • Secured new MacArthur grant to support CEPF implementation and civil society capacity building • Elected Chair of IUCN Caribbean Committee • Held regional Forests and Livelihoods conference, attended by some GFS2S members • *Karipanou* partnership with Panos and CERMES established
Grupo Jaragua	• Well-established group within the DR (management of Biosphere Reserve, formal advisor to Parliament, consulted on 3 occasions by the President, leading DR Red List review) and with strong international links (e.g.	• Had not applied for small grant because they felt that it might have affected their large MacArthur grant but following discussions with MacArthur recognised that this was not the case and that valuable use could have been made of the facility.	• Developed fundraising strategy • Secured additional unrestricted funding e.g. through partnership with supermarket for sale of re-usable bags which reduces solid waste as well as

Organisation	General context	Small grant objectives/ activities/outcomes	Other activities/achievements
	IUCN, BirdLife) • Have some challenges relating to leadership succession and sustaining membership		generating operational (unrestricted) funds for Jaragua • Secured funds to buy land • Continue to receive government subvention in spite of advocating against certain government activities • Launched DR IBA directory • Improved local participation through projects relating to solar energy, honey production, ecotourism and agro-forestry. • Developed monitoring strategy for the Biosphere Reserve. • Developed communication strategy (internal and external communications)
Fondation des Amis de la Nature (FAN)	• Earthquake has left FAN without headquarters and many members have emigrated •	*N/a – grant application not yet submitted*	• Pre- earthquake community education about earthquakes resulted in people there knowing what to do and suffering less loss of life. Now conducting further post-earthquake

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Organisation	General context	Small grant objectives/ activities/outcomes	Other activities/achievements
			sensitisation on earthquakes, in conjunction with seismic specialists • Facilitated teacher training workshop using volunteers and private sector financial support • Conducting training of media workers • Working with inner city children on environmental issues • Improving advocacy in conjunction with MacArthur Environmental Law Community
Fondation Macaya[1]	• Most members of the organisation emigrated after the earthquake as they had no houses or jobs. Those in the Macaya region are still there but the Port-au-Prince membership has dwindled to 3 persons		• Green Credit scheme still functioning • Have a tree nursery • Have signed contracts with the major committees who are protecting Pic Macaya • Have established strong working relationship with Société Audubon and hope to benefit from MacArthur Haiti emergency funding.

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[1] The Macaya representative was delayed due to visa issues so her report was made on Day 2.

Organisation	General context	Small grant objectives/ activities/outcomes	Other activities/achievements

Jamaica Conservation and Development Trust (JCDT)	• Former Executive Director(Susan Otuokon) left in April 2010 and replaced by the former Conservation Officer (Marlon Beale)	• Small grant used for participatory strategic planning process including review of most significant changes.
		• Process identified that JCDT had
		  o been true to its mission
		  o effectively monitored and achieved results
		  o improved its financial reporting
		• New strategic plan for 2011-2016 developed
			• Trust Fund income increased
			• 2009 Green Expo was a success, with exhibitors from government, civil society and private sector
			• Working with Carreras on carbon credit trading scheme with a view to covering operational costs
			• Blue Mountain Sustainability Plan developed (under IDB funding) with a focus on marketing the area as a tourism attraction and developing community attractions. Funding being sought for business planning.
			• Initiated process for getting World Heritage site status (environmental/cultural attraction)

Jamaica Environment Trust (JET)	• Government funding for education programme withdrawn • Endowment fund interest low • Downsized staff as a consequence	• Small grant used to redesign/ improve the website and introduce social networking, in part as alternative means to provide environmental education. • Over 1000 Facebook friends	• Secured three new projects • Continued schools environmental programme on a reduced scale and focusing particularly on 4 main areas, including

Organisation	General context	Small grant objectives/ activities/outcomes	Other activities/achievements
		• Two videos on YouTube	Environmental Club, solid waste and teacher training • Exhibited at Green Expo
Panos	• Earthquake forced Panos to move offices (but now has a larger space) and has delayed implementation of small grant.	• Small grant focuses on retrospectively establishing baselines for measuring the impact of Panos in the Caribbean islands over the past 10 years. Process of collecting data and developing indicators has started. • Some interest from donors in the methodology, indicating that the results and lessons learnt from the process should be widely shared	• Positioning itself to provide conference room space and recording studio to partners in Haiti • Conducted numerous environmental workshops for journalists • Training for 60 journalists under National Endowment Fund, where they were given recorders to prepare a report which will be disseminated. • *Karipanou* partnership with CANARI and CERMES established • Very interested in Trust Fund idea from ARLG2 and propose to pursue
Progressio	• Historically highly reliant on private sector funding, now aiming to diversify.	• Small grant was used to construct a greenhouse and grow organic crops both as a demonstration project and as a means of generating unrestricted funding. The project has now become self-sufficient without external funding.	• Have developed a strategic plan using a participatory process engaging both experienced stakeholders and youth, with a view to building succession. • Developing cross-cutting,

Organisation	General context	Small grant objectives/ activities/outcomes	Other activities/achievements
			communication strategy. • Producing a luxury book with good photos (sensitisation and revenue generation) • Used Environment Days for music and environmental education • Generating operational funding from car park revenue.
Southern Trelawney Environmental Agency (STEA)	• Historically highly dependent on volunteers • Insufficiently clear strategic direction	• Used small grant to fund strategic and financial planning including stakeholder perceptions survey and institutional mapping. • Identified eco-tourism activities as area ranked most highly by stakeholders, as well as the one with most potential for income generation. Currently actively pursuing permits and licences for tour guiding. • Networking and promotion of the organisation identified as main areas of weakness – currently being addressed (networking influenced by what learnt at ARLG2) • Hiring a marketing person	• Reviving/relaunch the Trelawney Yam Festival • Achieved greater financial sustainability for its core operations

8   Leadership and people management : reflections on leadership

a) Introduction: Leading in a changing world

The facilitator introduced the session by asking what are some of the changes affecting their leadership and what have been the impacts, which elicited the following responses:

- economic downturn: organisations doing more with less money and fewer people;
- natural disasters becoming more frequent and affecting a greater number of people;
- political changes: can be negative (but that can also stimulate creativity);
- citizens' changing expectations: they now expect government or NGOs to solve the problems rather than coming together collectively to do so;
- technology: has been an important tool and enabling factor in terms of being able to reach more people and empower them through the use of technologies like the internet, GIS/GPS, cameras and video to tell their own stories. However, use of technology is not confined just to good people so it has facilitated crime too. Email is also often over-used to the extent that even people in the same office now use it when a face-to-face meeting would be preferable.

The facilitator then closed the discussion by highlighting some of the key characteristics of the changing environment, as follows:

- organisations continuously evolving
- paradigms shifting
- employees changing: reference to e-generation
- requirement for shift in leadership paradigm: from leader as 'boss' to 'coach'; from 'top-down' decision-making to worker participation/employee empowerment/increased autonomy; from 'individual' to 'team' effort

b) Small group work

Participants were then divided into country groups to discuss and report on the following questions

i.   What are some of the leadership and people management issues or challenges currently affecting your organisations?
ii.   What are some of the strategies that your organisations have been using to address these?
iii. What specific issues would you like to address?

The feedback from the groups is shown in Table 2 below

Table 2: Small group work on leadership and management issues and challenges

Question	Dominican Republic	Haiti	Jamaica
What are some of the leadership and people management issues or challenges currently affecting	*Releve generacional – 'Generation gap'.* Need to shift leadership paradigm	• How to sensitize people? • How to mobilize people/energies?	• Top-down decision making and micro-management • Inactive Board

Question	Dominican Republic	Haiti	Jamaica
your organisation?	to include: transfer of leadership from older to younger members, and the need to embrace different styles. Also 'founder leaders' to encourage new ideas and different styles; need to break friendship-based networks • *Visión distorsionada "Líder" - d*istorted vision of leadership: if there is a problem, everyone sees what a leader is differently. A leader should not just be the person who solves the problem. 'Leadership' is associated with paternalism, so if the person doesn't behave like a father, they are perceived to be not doing right thing. • *Cambios gubernamentales -* governmental change affects organisations' leaders – you build contacts/relationships and then they change • *Disponibilidad de tiempo -* availablity of time: leaders are overloaded • *Fuerte influencia, disminuye*	• How to bring people together? (to attend training, meetings, etc…)	Members means the active ones are overworked. • Change in top management position. • Limited flexibility to make changes to standard practices and procedures. • Work load not evenly distributed due to staff shortage. • Resistance to change from staff members. • Inadequate (size of) staff.

Question	Dominican Republic	Haiti	Jamaica
	*capacidades de otros - s*trong influence of one person in organisation decreases others' ability to demonstrate their capacity *Manejo de diversidad de "pensamientos" y culturas org.-* management of diversity of thinking and organisational cultures.		

What are some of the strategies that your organisation has been using to address these?		• Education – information – communication but people have other concerns and more urgent (basic) needs.
		• There is therefore a need to get them to understand that environmental protection/conservation should be one of their primary concerns and is related to their basic needs.
		• Successful examples of strategies cited
		  o Use of a variety of media
		  o A theme everyone identifies with
		  o Gaining respect of the target audience
			• Monthly management meetings.
			• (Quarterly) Board Meeting
			• Open door policy by CEO/open office
			• Volunteers recruited (to overcome shortage of staff)
			• Documented chain of command.
			• One-on-one board-staff communication.
			• Former Executive Director currently on contract for smooth change – over.
			• Provide explanation/ rationale for change.

Question	Dominican Republic	Haiti	Jamaica
What specific issues would you like to address?	None of the groups had time to complete this section but the facilitator identified the following key areas for further discussion • Top down management • Roles of Board members • How to handle changes in top management/effectively plan succession • Dealing with resistance to change		

c) <u>Addressing some key leadership issues</u>

The facilitator began by establishing how long each organisation had been in existence, noting that being in existence for between 14 and 30 years was an indicator that the organisations had had strong leadership and management. She then made the presentation attached at Appendix 4, focusing primarily on leadership while clarifying the difference between leadership and management. Among the key points generated during these discussions were:

Leadership vs. Management

A critical distinction made, was in differentiating between Leading and Managing, which is expressed in the quote, "we manage **things**, and lead **people**". It was highlighted, however, that both sets of skills were required for effective organizational performance.

Leaders need to adapt to changing circumstances

Some of the key changes identified were growing awareness of the environment, greater focus on participatory processes involving the community, and the emergence of the "e-generation". While the latter was felt to have aspects that are positive (greater access to information, more knowledgeable, speed of communication) and negative (impacts on personal relationships), there was consensus that this is the reality in which we now live, so effective leadership means adapting to that reality.

> **Box 1**
> *Grupo Jaragua recounted how it had shifted from a purely scientific focus to working more with community organisations, so that in recent years most of the technical staff are from the community and there has been a transition from volunteering to becoming members of staff*

Leadership is about influence not authority

Although participants thought this should be the reality, in both Dominican Republic and Haiti, leadership can have negative connotations and associations with non-democratic political leadership. It is therefore important to make the distinction between people with power and those that are truly leaders and the quotations provided (see box on the right) could be useful tools to start to alter people's perspectives. It was subsequently agreed that ***leadership is about inspiring people not exerting authority*** would capture this even better.

Leadership is situational

While participants agreed that each situation was different, and therefore required a variety of leadership styles, there was general agreement that that NGO leadership needs to become more strategic. The major

> **Box 2**
> • *Leaders know the way, show the way, go the way (vision)*
> • *Leadership is a process whereby an individual influences a group of individuals to achieve a common purpose* (Northouse 2007)
> • *Leadership is action, not position* (McGannon 1991)
> • *We must become the change we want to see in others* (Gandhi)
> • *"Everyone a Learner, everyone a Teacher, everyone a Leader".*

barriers were perceived to be lack of time, lack of funding and ineffective time management though it was also argued that these are just further evidence of the need to be more strategic. Areas where participants felt the need for further coaching and guidance included:

- How to handle performance management and evaluation (both from the perspective of the person being – or wanting to be – evaluated and from the perspective of the leader/manager conducting it)
- Conflict management
- Communicating effectively

d) Key competencies of an effective leader

In response to the question *'What you would consider to be the key competencies required for effective leadership?'*, participants brainstormed the following list (points in italics are those clarified in subsequent discussion), which encompassed the main points identified in the facilitator's presentation (see Appendix 4 and Box 3 below)

- Authority.
- Motivator/ Inspiration.
- Open to change.
- Able to detect emotions/characteristics – *described by the facilitator as 'emotional intelligence, which requires*
    - *Self awareness*
    - *Self management*
    - *Social awareness*
    - *Relationship management*
- Understand people's needs
- Share ideas.
- Be flexible.
- Vision.
- Informed – *able to see the big picture and trends*
- Consistent- *fair to people*
- Analytical.
- Discerning.
- Humility.
- Credible – *by earning respect*   -
- Capacity to build consensus
- Prudence
- Love what you do
- Resolve conflict
- Not driven by money alone
- Strength/resilience
- Coaching capacity
- Hope opportune
- Create synergies
- Listener
- Sense of humour
- Respectful of others
- Make people comfortable
- Honest
- Patient
- Peacemaker

> **Box 3: Competencies for leadership effectiveness**
> - Self-Awareness
> - Emotional Intelligence
> - Personal Mastery
> - Personal Accountability
> - Behavioral Style Flexing
> - Giving and Receiving Feedback
> - Building Shared Vision
> - Thriving on Change
> - Creating Agreement/Conflict Management
> - Performance Development

- Passion – *considerable discussion as to whether this is an essential quality with the consensus being that 'passion is the fuel that drives you but it should not be blind passion'.*
- Proactive/Initiator
- Tolerance
- Pragmatic – *focused, with a practical approach to problem solving*
- Dynamic – *prepared to deal with change*
- Admit when you are wrong.

The original list also included 'management capacity. but this was subsequently eliminated as being a characteristic of a manager which a leader may have but is not essential

e) Organisational governance – a review of current structures

Each organisation then described its structure as shown in Table 3 below:

Table 3: Organisational structures

Organisation	Board	Staff and volunteers	Other aspects of governance
CAD	*Reviewed under presentation of CAD case study – see Section x*		
Dominica Beekeepers Association Network of private and public members – everyone related to beekeeping is part of it. Focus is transfer of knowledge and technology, marketing, Promoting beekeeping to young people through training centres		Fiver person - 1 paid by network and 4 representatives from 38 beekeeping associations	Largely project-based: each project has representatives from each participating organisation – create project management team, including 2 bee keepers who will be beneficiaries = responsible for work plan, budget, implement Working on consolidating with permanent structure – had Argentinian funding to create network initially and now providing additional funding to create a formal network, secretariat, procedures etc. Starting on 5 year strategic plan with CAD and have draft as basis for work under Argentinian funding
FAN Non profit organisation made up of many different groups, which form the membership. Main focus – motivation, advocacy, education Strength is willingness to evaluate interventions and learn from/change what has not worked	Central Committee made up of public relations (2 persons), coordinator, treasurer, training person Technical committees	• No permanent staff although have hired individuals for specific projects • Heavy reliance on volunteers • Recruiting new volunteers and allocating them to Haiti Green, Haiti Blue or Clean Haiti programme	

Organisation	Board	Staff and volunteers	Other aspects of governance
In restructuring phase			
Grupo Jaragua Founded 1987 but legally established in 1989 Member of IUCN (Chair of DR committee), CAD and work in partnership with the Ministry of Environment.		• About 25 employees, depending on projects, focus on employing local people. • Active members (volunteers) • Supplemented by consultants as needed	
JCDT Membership organisation, with members electing the Board Delegated authority to manage the Blue and John Crow National Park. Park has 3 administrative areas, each with a station chief and 2 recreational areas with ground staff Funding mostly from projects but get varying contribution from government and revenue from park entry fees.	Fifteen persons, supposedly spanning the different expertise needed, but currently no marketing and communications specialist. Subcommittees: • Finance • Fundraising and marketing	Total staff of 14: • Executive Director, also Acting Park Manager • Administration Manager • Three Programme Officers (covering six programmes. Need a Recreation and Tourism Officer) • Accountant and accounting clerk • Park rangers • Chief of Corps Different categories of volunteers – Green Expo, groups from communities (sometimes paid for services).	• Procedures manual • Management plan • Strategic plan (developed under GFS2S small grant) • Programme meetings every month • Annual evaluation, first with supervisor and staff member, then both with the Executive Director • A lot of informal communication – hallway meetings, ED as open door policy, everybody talk to everybody (including good relations with Board)
JET	Chair; Treasurer (one person currently combining these roles); CEO; Staff representative; Secretary; and	• CEO reports to the Board and oversees HR, project and administrative work • Staff is all female and	• Have a personnel manual • CEO does all the performance appraisals (even though not all

Organisation	Board	Staff and volunteers	Other aspects of governance
	six other directors. Board must contain legal and economic aswell as relevant technical expertise	mostly young • Programme Director reports to CEO, manages environmental programme, oversees overall running when CEO is out) • Legal Director – legal and advocacy, reports to CEO generally but to Programme Director on administrative matter • Projects team (currently one person)	reporting directly to her)
Fondation Macaya	Seven member Conseil d'Administration	• Numbers in flux since the earthquake and migrations	• Detailed guide of roles and responsibilities for Board and staff
PANOS Caribbean Regional organisation incorporated in Washington D.C., then Haiti, and with offices in Haiti (main office), Jamaica, USA (Washington). Also opening an office in Saint Lucia with just a Project Officer to oversee a child rights project. Plan to open in the DR. Overall, Panos has seven offices in different countries but each is autonomous and different	Nine persons, from UK, Haiti, Saint Lucia, USA	• Executive Director (based Jamaica) • Regional administration and financial officer (based Haiti), supervises all three offices • Now recruiting someone for fundraising and development • Director for each programme – Children's Rights (Haiti); Health Communications (vacant); Environment, media,	• Annual audit • Annual monitoring and evaluation and now developing (under GFS2S small grant) baselines for each programme/project • Strategic plan 2008-2018 • Skype is the medium used for communication between the different offices

Organisation	Board	Staff and volunteers	Other aspects of governance
		community (Jamaica); Gender (vacant) •	
Progressio Non profit organisation founded in 1983 Progressio is a Assembly of 22 *socios* (members) from the private sector who give money to become a member. They have to commit to give for 5 years. *Socios* are are categorised depending on how much they give, e.g.as protectors, nature lovers. Co-manages the Ebano Verde Reserve under the Protected Areas system plan even though Progressio bought the land (30 sq km with 250 hectares for production) and provides all the money. Progressio gets project grant funding, e.g. for reforestation (5 projects at present, have planted 350,000 trees)	• Board • Executive committee	• Operations Manager • Programmes managers – protection, production, resource mobilisation, administration • Group of consultants Substructure for Ebano Verde including sub-projects on community development, research, protection, recreation and eco-tourism • 5 technical staff • Secretary • Accountant, • Fundraiser/manager of volunteers • 12 rangers • 40 odd people working on the production project (of which 30 permanent)	
STEA	Nine members with officers being Chair, Treasurer,	• Executive Director • Financial Officer	• Membership (individual, group, student, corporate)

Organisation	Board	Staff and volunteers	Other aspects of governance
	Secretary Current chair is very active, informed on what is happening and 'asks questions that make you think'	• Two Peace Corps volunteers • Tour Guides – paid per tour • Volunteers	• Daily operations are divided into operations, projects, ecotourism and events • Executive Director has an open style and holds meetings every Monday at which all issues can be discussed • Staff, Peace Corps volunteers and tour guides have evaluations with the Executive Director every six months

Points made by the facilitator during the discussion included:

- diversity of structures and scope for learning from each other in terms of what works and what doesn't;
- while there are no absolute right or wrong governance structures, there are certain principles of effective management which include clear lines of reporting and responsibility;
- importance of building supportive governance structures, appropriate to the organisation's needs;
- Board Members in NGO's may play varying roles, depending on their core competencies; however, their key role is to provide support to the organization, including, at times, in critical management functions (Key: ensure the right talent is recruited on the Board); and
- building future leaders: important to engage in succession planning, performance management, and providing opportunities for ongoing employee development, so as to ensure organizational sustainability.

9   Field trip

The field trip was to Nature Seekers, a non-governmental community-based organisation in Matura, a village in north-east Trinidad about two hours away from Port of Spain. The intention was to examine what could be learnt from the organisation and its partners about
- o   Institutional arrangements for protected areas
- o   Leadership
- o   Financial sustainability
- o   Communications and advocacy
- o   Networking

Participants were divided into four groups, by self-selection to develop questions relating to the first four points, while the networking would be addressed via a panel discussion.

On arrival in Matura, participants visited the protected beach which Nature Seekers co-manages in terms of turtle protection, research and tours. This provided an opportunity to get a general sense of the range of activities in which Nature Seekers is involved, which in addition to the turtle work includes reforestation, agro-forestry, tour guiding, volunteer and eco-tourism management.

Dennis Sammy presenting at the beach

a)   Institutional arrangements for protected areas and networking

Dennis Sammy, Managing Director of Nature Seekers, mapped out the main aspects of the institutional arrangements in which it is involved (see below and overleaf)
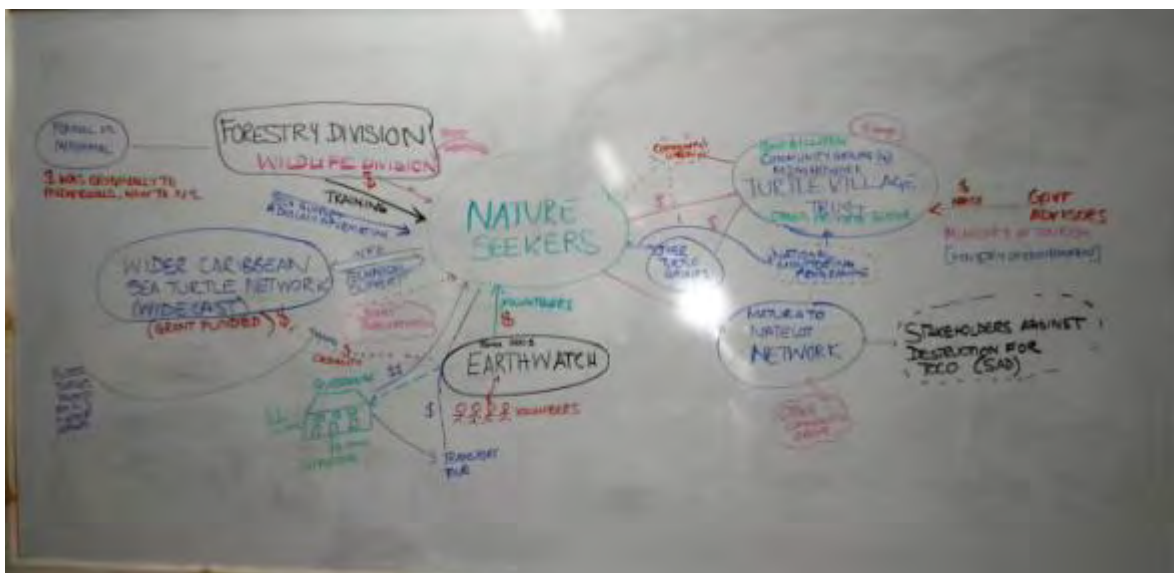
Figure 1: Institutional Structure of Nature

- Forestry funding originally to individuals, now directly to NS
- Formal vs, informal relationships

Government Advisors (Tourism, Environment

Community Liaison Officer

Money
Advice

OTHER TURTLE GROUPS

TURTLE VILLAGE TRUST
BHP Billiton
Other private sector
4 community groups
M2M network

FORESTRY DIVISION
Wildlife Section

Mutual trust between individuals

$

$, Training
Advocacy information

NATURE SEEKERS

$

National Turtle Monitoring Programme

Tech support

WIDECAST

- Also joint publications
- Contribution to NS credibility
- 11,000 turtles tagged by NS and other groups

Information

$
Volunteers

MATURA TO MATELOT (M2M) NETWORK OF NGOs
Nature Seekers
SAD for Toco
Other community groups

EARTHWATCH
since 2005

$

$

Guesthouse (part owner)
Transport
Tours

The presentation on institutional arrangements was complemented by a presentation by Stephen McClatchie on Stakeholders Against Destruction (SAD) for Toco, a community-based group which started in 2000 in response to government plans to build an industrial port in Toco without consultation with the villagers, and involving the forcible acquisition of 17 hectares of land and destruction of many livelihood activities. As well as successfully opposing the port, the group embarked on a consultative process throughout the Matura to Matelot region, which generated consensus on an *Alternative Development Plan for Toco,* which continues to guide SAD and M2M to this day[2].

Dennis Sammy and Stephen McClatchie (source M. Beale)

Key points that emerged from this discussion were
- there had initially been conflict with local people about having the beach declared a protected area with restricted access. However, they have broadly accepted the need for controls on killing of turtles and poaching of eggs. There was continuing concern about the restricted access but in practice only about 10-15% of the villagers apply for the permit that grants them access.
- A Board structure, such as Turtle Village Trust (TVT), which has members from different cultures and backgrounds can be challenging, particularly if the community representatives are not organised. However, with TVT this has been overcome to some extent by the development of a culture of "*prove me wrong and I will agree with you".*
- The M2M network is an informal network that meets as needed rather than on a regular formal basis. It is grounded in principles of respect for and listening to each other, support for each other's activities, and a willingness to continue talking even if there is disagreement.

Participants were very inspired by both the SAD story and the outline of how Nature Seekers operates, with the following being the other important points to emerge from subsequent discussions:

b)   Leadership, governance and people management
- Nature Seekers has recently recognised that in order to have the full capacity it would like at Board level as well as some persons who are not both employees and Board members, it will periodically need to seek members from outside the community. It has recently

Haitian participants in Matura , source M. Beale

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[2] For more information on SAD for Toco's experience in opposing the port, see
http://www.toco.interconnection.org/history.htm and http://www.toco.interconnection.org/repandpub.htm

- Nature Seekers has more than one leader currently; they regard themselves as largely self-driven but are also confident that a new leader will emerge from the membership when a transition is needed. Younger members are already demonstrating leadership qualities.
- Nature Seekers' decision-making is generally a collective process with all members having input and assisting with problem-solving.
- Plans to develop a Youth Leadership Programme, to include lectures on conservation and field trips.
- The reforestation project, which involves a lot of workers generated new human resource challenge so they invested a lot of time in developing human resource policies, e.g. regarding alcohol use, discipline, how to fire people etc.

c) Communications, advocacy and marketing

- Nature Seekers has not formally marketed its services to tourist but they have become well-known through word of mouth and the fact that its work is informed by research.
- Its main formal communication tool to stakeholders is its annual report and its website. However, it also takes the opportunity to make presentations to potential supporters and partners, such as companies, Chambers of Commerce, the Hotel Associations.
- Nature Seekers, in conjunction with other TVT NGOs, has initiated a Facebook page called Trinidad and Tobago Leatherback http://www.facebook.com/group.php?gid=23500917252 to stimulate support, dialogue and partnerships.
- Two areas where communications could be improved are with the local community and with the media. The media are generally reluctant to travel the long distance from Port of Spain and Nature Seekers lacks resources and skills to engage the full range of potential media.
- Schools visited from time to time and have a good working relationship but don't see school children as main stakeholder.

d) Financial sustainability

- Nature Seekers has diversified funding sources including:
  o grant funding, under which they often include initiation of a revenue-generating activity such as the jewellery production from glass collected on the beach;
  o Earthwatch volunteer programme, which contributes labour, funding for research and equipment, and revenue for the guesthouse in which it has a share;
  o tour guide fees
  o government support, e.g. approximately US$200,000 for developing visitor facilities and attractions at Salybia beach, including a forthcoming community kitchen which should generate further revenue;
  o opportunistic provision of services, e.g. Nature Seekers developed a data management programme for its project under the National Reforestation and Watershed Rehabilitation Programme (NRWRP), which is it now selling back to NRWRP.

e) Other

- Nature Seekers has a mission and vision but currently no strategic plan. Its strategic direction is guided mainly by identifying opportunities that match the mission and build on existing skills. Nevertheless, the value of formally engaging in the strategic planning process was acknowledged.

f) Summary of recommendations/areas identified for strengthening Nature Seekers

- Improve media relations, including building internal capacity to do so.
- Focus on further developing relationships and communicating with the community
- Develop a strategic plan for longer-term development and continued focus on thinking strategically.

- Appoint a Project Development Officer to free up the Managing Director for more strategic work.

g) Participant feedback on field trip on Day 4 and final reflections on leadership

Having reflected on the field trip overnight, participants identified the following as some of the things that had struck them most or that they had learnt from during the field trip. It is noteworthy that the majority of the lessons learnt focused on issues of leadership, providing valuable closing comments on the topic:

- The power of word-of-mouth marketing
- The extent to which Nature Seekers has diversified its funding and its entrepreneurial approach to developing revenue-generating activities.
- SAD's ability to advocate effectively without violence ("*powerful, effective, peaceful")* and in a 'mature' fashion – its experience and approach should be more widely disseminated.
- The evidence of different styles of leadership with Nature Seekers providing a good example of a leader/manager while SAD's leader was inspirational but without necessarily possessing the same level of management skills
- SAD's leader was described as exemplifying "*real leadership"* – he was humble and he didn't say everything was perfect...but he touched everyone emotionally
- The importance of a 'balanced' approach to leadership (as it relates to 'e-generation' approaches versus those characterized by 'maturity') was highlighted, powerfully concluding that there was value in both.

10 Lesson learnt from CANARI and CAD case studies

Sarah McIntosh presented CANARI's organisational structure and the main lessons learnt from the case study from CANARI (see http://www.canari.org/civil_sub2_sub2.asp and Figure 2 below), noting that it was now available in English and French and would shortly be available in Spanish.

Figure 2: Structure of CANARI
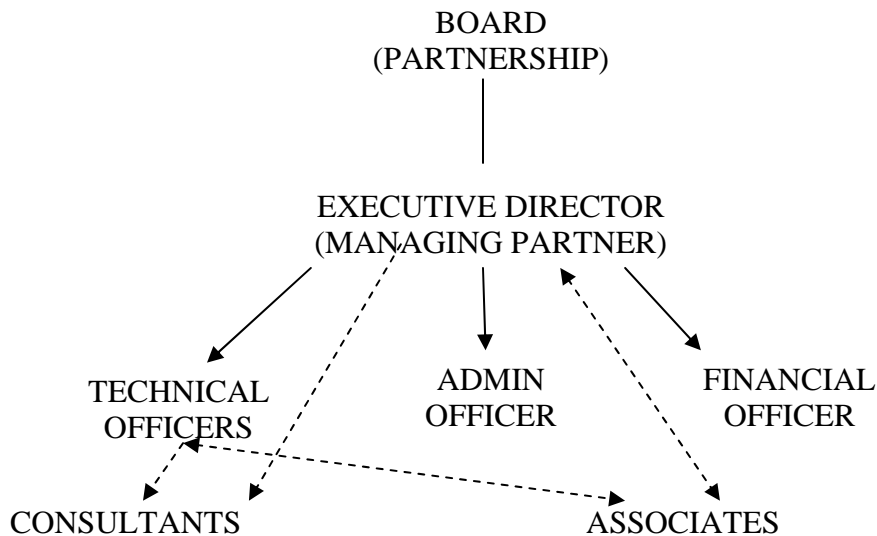
Points highlighted in the discussion of the organisational structure which participants found interesting were:

- that is not a membership organisation;
- the concept of the Board as a partnership between senior staff and appointed Board members, with currently all staff invited to take part in Board meetings;
- the concept of Associates – trusted consultants who have usually previously worked for CANARI or been on the Board – who supply both consultancy services and strategic inputs.

This was followed by a presentation by Sesar Rodriquez (CAD coordinator) and Leida Buglass (researcher/author) on the development and structure of CAD and the lessons learnt to date. The presentation of lessons learnt is attached at Appendix 5and the institutional structure is shown below:

Figure 3: Structure of CAD
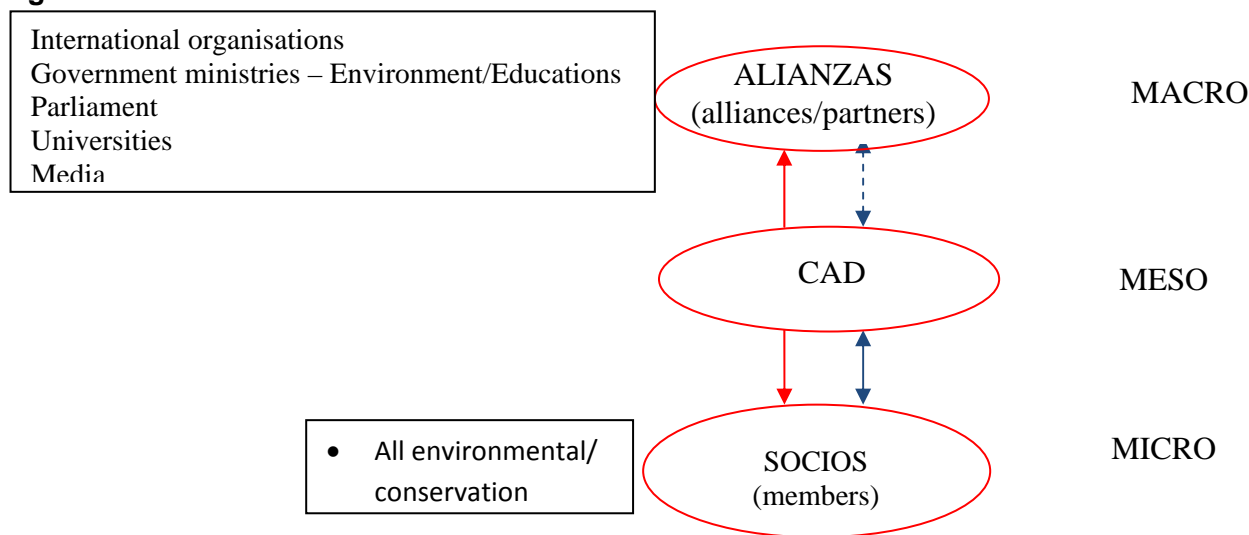
In addition to the points highlighted in the PowerPoint presentation, the following key points were made and discussed:
- CAD was originally created out of a project but over its 17-year history (11 as a formal organisation) has institutionalised the process of round table dialogue;
- CAD works at different levels, as outlined above, with members working a lot at community level and CAD itself seeking to influence policy and other processes.
- CAD has had an important impact on policy and practice and has built a high level of credibility (e.g. the President listened to CAD's position on the changing of the protected areas legislation).
- The Board of CAD is made up of representatives of the member organisations; the members elect the President.
- For CAD's coordinator, leadership in CAD = trust
- Some of the challenges CAD has faced and that are examined in the case study are:
  o Members concerns about competing with other members and about CAD competing for funding with its membership;
  o Amount of time CAD administration spends building strategic alliances versus supporting the membership.

11 Introduction to advocacy

Indi McClymont of Panos introduced this session by asking participants what methods they have found effective for advocacy, which elicited the following list:

- Media/press releases
- Electronic forums
- Using the private sector as intermediaries to politicians
- Talk shows
- Allliances with international agencies

Tamoy Singh and Suzanne Stanley then presented an overview of the diverse tools that JET uses for advocacy (see Appendix 6), which has a strong focus on using formal processes (EIAs, administrative appeals under various laws, access to information under the Freedom of Information Act) and legislative challenges, as well as education and outreach (including films) and advocacy in the media. However, they noted that it is extremely difficult to get funding for this type of advocacy work although they have been able to secure some funding for technical support of the legal aspects. Specifically, US foundations such as MacArthur risk losing their charitable status if they are found to be funding 'lobbying' so grantees need to ensure that the type of lobbying they are doing is not perceived as such but rather as information, education and outreach.

Other strategies that emerged in the subsequent discussion were:

- the use of high profile 'champions' such as artists and sports persons;
- the use of powerful intermediaries to reach certain target audiences, particularly politicians;
- tailoring the messages to make the target audience feel there is some benefit to them, rather than making them feel like 'the bad guys';

Participants again found the exchange of information useful but noted that advocacy, like leadership, is situational and must be tailored to the particular circumstances and culture.

12 Developing a communication strategy

Sarah McIntosh recapped the communication strategy format introduced at ARLG2 for the project (see template at Appendix 7) and presented as an example the strategy outline that CANARI developed for its Issues Paper 1 *Community participation in natural resource management: lessons from Caribbean small island states* (see Appendix 8 for outline and http://www.canari.org/docs/ Issue%20paper%201%20final.pdf for paper)

Participants were then divided into country groups to complete the following small group exercise:

1. Review the messages that have emerged from the case studies and issues paper and discuss whether there are other important messages about civil society participation in biodiversity conservation that should be included.
2. Agree on four messages that your group thinks are the most important or interesting to work on for your country and complete the communication and advocacy strategy template as far as you can. Be creative!

Haitian and Dominican Republic groups at work

The following are the outcomes of the exercise:

<u>Jamaican Communication Strategy</u>

Key Message
We want or we need a defined portfolio for the environment within the Government.

Objectives
1. More firmly placed on the national Agenda.
2. Highlight the urgency of environmental protection.
3. Enforcing change in policies for the environment
4. More voice for environmental management, protection and conservation.

Jamaica group work. Source Tamoy Singh

Target audiences
1. Politicians/Policy makers (Govt.)   OPPOSERS
2. Community leaders
3. Media   ALLIES
4. Educators/Academics
5. Private sector
6. Members of the public
7. Youth

Products
1. Video
2. Letters
3. Pamphlets
4. PowerPoint

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5. Press Releases
6. Public service announcements

Pathways
1. Workshops and lectures   PPT
2. Spokespersons and celebrities   VIDEO
3. Radio talk shows   PRESS RELEASES
4. The voice of the youth (in Parliament, letters, PM Radio Show)
5. TV and social networks

Dominican Republic Communication Strategy

Mensaje
* Políticas Sistema de Áreas Protegidas (*Policies for the Protected Areas System*)

Objetivos:
* Darlas a conocer y hacerlas "digeribles" (*To make them known and 'digestible'*)

Publico destinatario:
* Tomadores de decisiones (*Decision-makers)*
* Manejadores y co-manejadores (*Managers and co-managers)*
* Comunidades *(Communities)*
* Medios de comunicación *(Media)*
* Org. de cooperación *(Co-operation agencies)*

Productos
* Video
* Reporte – síntesis "atractivos" *(Reports, 'attractive' syntheses)*

Rutas
* Powerpoint
* Internet - "You tube"
* Conferencia *(Conferences)*
* Periódico "todos los domingos" *(Todos los domingos newspaper)*

Haiti Communication Strategy

Key messages
* Pie bwa se dlo, dlo se la vi (*Trees are water, water is life*)
* L'environnement en Haïti est malade, sauvons-le. (*The environment in Haiti is sick, let's save it*)
* We need to stop cutting trees, we neeed to stop commiting suicide!!

Objectives
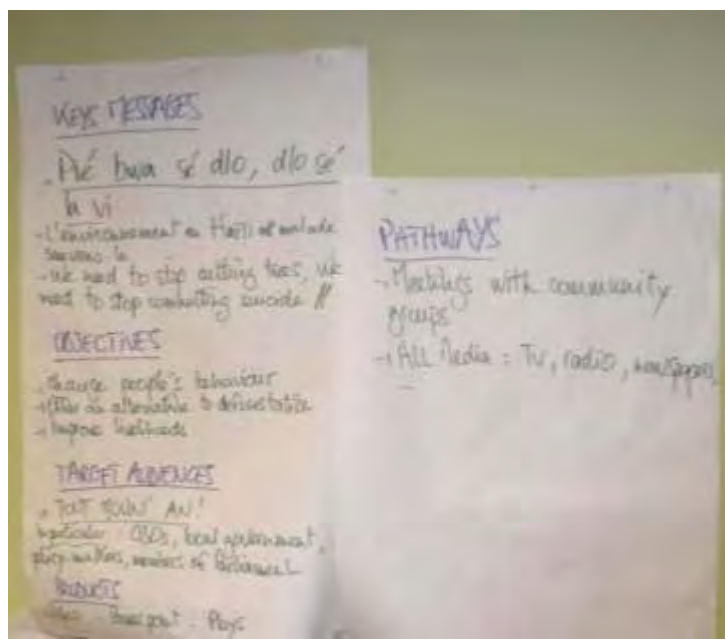
- Change people's behaviour.
- Offer an alternative to deforestation.
- Improve livelihoods.

Target audiences
- TOUT MOUN' AN!
- In particular: CBOs, local government, policy-makers, members of parliament.

Products
- Video
- Powerpoint
- Plays
- Community groups meetings
- Plays in schools
- PowerPoint presentation to students

Pathways
- Meetings with community groups.
- ALL media: TV, radio, newspapers...

In the debriefing of the exercise, it was agreed that the Haitian messages really exemplified the type of message that is likely to have an impact, whereas the other two had not really been crafted into messages likely to have an impact on the emotions, feelings or particular interests of the selected target audiences nor any indication of what action is required.

All participants found the process of thinking systematically and strategically useful and indicated that this was something they would seek to replicate in their organisations. STEA, for example, noted that the organisation had not historically done much about promoting itself but, as a result of the small grant findings and this session, recognised that they need 'to be bold and talk about what we do'.

The Panos representative suggested that there should be collective advocacy around the issue of donors needing to invest long term and strategically and it was agreed that CANARI and Panos should work on this, highlighting how such an approach strengthens civil society capacity and enhances the impacts of the funding.

13 Developing good media relations and writing press releases

Indi Mclymont-Lafayette made a comprehensive presentation on '*Making the most of the media'* (see Appendix 9, from which the following emerged as the points which participants found most interesting and relevant to their organisations

Indi Mclymont presenting on communicating with the media

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- Media people frequently complain that press releases from NGOs are badly written and are not news. News is what sells newspapers and therefore what they are looking for. As with other communications, the message needs to be tailored to the organisation and the medium.
- Journalists do not have the final say on the text that is published; tthat is the job of the editor so NGOs should not necessarily blame their journalist contacts if things do not appear as they had hoped. Similarly, it is a sub-editor that chooses the title of the piece.
- Print, radio and television all have their place and vary in terms of their immediacy (radio and television) versus their longevity (print).

Some specific tips for writing press releases and for being interviewed were provided and it was also noted that similar guidance is provided in two publications that CANARI was contracted to write:

- *Addressing Climate Change in the Caribbean: A Toolkit for Communities*, produced for Christian Aid and available in English at http://www.canari.org/documents/CAtoolkitEnglish.pdf and in Spanish and Kweyol from Christian Aid (Caribbean), 14 South Avenue, Kingston 1, Jamaica, Tel: (876) 754 8384

- *Communicating Climate Change: A toolbox for local organisations in the Caribbean* *http://www.canari.org/documents/CommunicatingclimatechangeAtoolboxforlocalorgansationspdf.pdf*

14 Introduction to the Critical Ecosystem Partnership Fund grants programme and activities under CANARI's 2011-2013 grant from the MacArthur Foundation.

Anna Cadiz, CANARI Senior Technical Officer responsible for the above two projects, made a presentation (see Appendix 10) on the role CANARI will play as CEPF Regional Implementation Team for the Caribbean Islands region and on how the MacArthur grant will be used to build capacity for CEPF grant implementation. Key points which she highlighted were:

- Grant making will be closely related to the findings and strategy outlined in the CEPF Ecosystem Profile for the Caribbean Islands (see http://www.cepf.net/where_we_work/regions/CaribbeanIslands/ecosystem_profile/Pages/default.aspx) and specifically the five identified strategic directions.

Anna Cadiz presenting on the CEPF

- Eleven islands are eligible for CEPF investment, including Dominican Republic, Haiti and Jamaica.
- There is a strong emphasis on protected areas.
- The total grant fund is US$6.5 for Strategic Directions #1-4 and US$400,000 for #5 (emergency support for Haitian civil society to mitigate the impacts of the 2010 earthquake), with specific amounts allocated for each strategic direction.

- There are two types of grants: small (up to US$20,000) and large (US$20,000- $1 million), with the expected average being US$100,000.
- In an eligible island, the project should support a single strategic direction but a grantee can have more than one grant at a time.
- Application is by Letter of Inquiry (LOI) initially; if accepted, this is the only step required for a small grant whereas applicants for a large grant will be required to develop a full proposal.
- There are 3 Country Coordinators working part-time with the Regional Implementation Team: Nicole Brown in Jamaica; Leida Buglass in Dominican Republic; and Paul Judex Edouarzin in Haiti.

15 Evaluation of the GFS2S project

Nicole Leotaud listening to evaluation feedback

Nicole Leotaud, CANARI Executive Director and facilitator of the session on monitoring and evaluation at ARLG2, introduced the session in Spanish, demonstrating her improvement in the language as an outcome of the GFS2S ARLG process. She noted that actions (she is attending Spanish classes) speak louder than words (her commitment at ARLG to improve her Spanish) when considering impacts.

She proposed that the evaluation of the project should evaluate change at all three levels: participating organisations; civil society in each country; everyone/wider society. The objective of the project was to develop strong and sustainable NGOs and she likened these to a flower blooming so the evaluation would take the form of a flower, where the centre is the structure of the organisation and the petals are the elements of strength.

Starting to construct the flower and comparing it to the identified areas for capacity strengthening

The strengths that were identified and that participants felt they had strengthened in their own organisations (see small flowers within each petal and Table x below) were:

- Human resource management – teams/membership
- Leadership

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- Good financial management – transparency/accountability
- Good governance – shared decision making
- Financial sustainability – diversified sources of funding
- Strategic/consistent focus- true to vision and mission/
- Results-oriented - strategic monitoring and evaluation
- Sharing information, collaboration and networking – strategic alliances, communications

The processes that had contributed to the strengthening of these capacities (the leaves) were:
- The action learning approach
- Ideas contributed by participants and facilitators
- Feeling valued
- Inspiration
- Shared experiences/working together
- Peer exchange

The completed flower – yes, we did go from strength to strength!

Table 4: Areas strengthened by the ARLG and small grant

Organisation	Areas strengthened through GFS2S
CAD	Impact on **financial sustainability**. This had been a big problem in the organisation but one they historically only thought about when a project was ending. GFS2S had helped to change their perspective and create a **focus on generating its own financial resources to be able to move to financial sustainability** and a **more entrepreneurial approach**. "*Small solutions can help to solve big problems.*", e.g. the CAD calendar and diary (under small grant). By selling rather than giving them away as they used to do under projects, they have demonstrated that such approaches can work. CAD is now working with non-traditional stakeholders, such as entrepreneurs and cattle owners to help generate funds. Also, one of the members is doing a project with a trans-national company whereby they get funds through sales of ice cream. CAD also **created an endowment fund**, linking with US partner with existing endowment fund. CAD is involved in a lot of things regionally, for example the inception meeting of the recent IUCN Caribbean committee and the week before that a, regional meeting on migratory bird species. GFS2S provides **a vision of different ways of doing things** and CAD **values the ARLG approach and ARLG spirit** whereas in the other meetings the focus is very technical.
FAN	**Networking:** reinforced links with Rezo Ekolo. Rezo network has also improved **communication with press** and now Audubon is hiring a coordinator for Rezo. Before the earthquake, they were starting to work on statutes that could harmonise the **structures** of all the organisations.
Jaragua	Have benefitted from **sharing experiences, at different levels and countries**. Have realise how important is to be in the **network**. They didn't take up a small grant originally as they didn't want to compete with organisations with less funding but now realise that they could use it for strategic development. **One idea would be to get young people to come up with unrestricted fundraising ideas**. Another idea, stimulated by the CAD and CANARI case studies might be to do a small abstract in journal on 10 years of Jarauga. **Learned about advocacy, how you do things with small amounts of money and people.** Field trip was very useful in terms of trying to solve problems in community. Jaragua changed its attitude to the project – recognised the importance of being together, including **potential to develop proposals together**. When MacArthur came to DR, Steve Cornelius emphasised what a strong position they were in to help others, including those in Haiti and this potential has been strengthened by the fact that theynow they **know Haitian organisations better.**
JCDT	**Improved financial management**, and they were rated very highly on this in the **strategic evaluation** conducted under the small grant. The ARLG component on this topic helped to focus JCDT on the importance of reporting and managing funds. They are now tracking expenses better by project and also fund balances. This has helped to build their credibility, e.g Forest Fund said "*JCDT makes our work easier*"
JET	**Increased communications capacity** – new website with social networking (1000 facebook fans), twitter, You tube uploads. **Monitoring and evaluation** – haven't used much in the past as they didn't have projects but intend to use now they have projects.

Organisation	Areas strengthened through GFS2S
Macaya	Macaya is also member of the Rezo Ekolo **network**. Macaya's work is ongoing in spite of the challenges and the ARLG gave them **more faith in how strong we can be when we put our strengths together**. They have learned important things they didn't know before. Also by **transmitting what you know to others makes you feel strong.**
Panos	Participation in the project has brought a lot of changes to Panos. **Monitoring and evaluation**: Panos has now included M&E in all its projects and programmes. **Financial and HR management capacity** has been reinforced and they now have an **HR, administrative and financial manual**. The presentation on the JET **endowment fund** at the last meeting stimulated a paper to the December 2009 Board meeting. Board members asked questions that he could not answer, but has now talked to Tamoy and has answers (*information exchange, networking, peer learning*). Under the small grant, they are conducting retrospective **collection of baseline data**. Have been doing training on the approach and now getting wider buy in.
Progressio	**Structure**: decided to change structure because looking at globalisation and changes in region. Need a mix of experience and youth/people with new ideas/that can influence others. In revised structure, intend to get someone to focus specifically on **financial sustainability** and relations with/building **membership**. Starting to think about transfer of responsibility from old to new generation. Progression knew it needed to do this but GFS2S *has motivated them and provided tools.* Under the small grant, a pilot was set up to **demonstrate to the Board the importance of the organisation generating its own revenues**. They set up a greenhouse and now planning three more. This is a win-win because it • **generates revenue for Progessio** and helps to **secure its financial sustainability** • has developed leadership in producing organic products and shows people that you can produce vegetables free from fertilisers > social production component. The investment was 195,306 pesos from CANARI and 50,000 from Progressio, which demonstrates **how with a little money, you can achieve a lot/have a significant impact**. And Progressio expects to re-coup its investment through sales.
STEA	Adopted a **new networking strategy**, drawing on members with networking abilities, in order to achieve organisational goals – e.g. using someone with corporate links to **fund raise** for the Yam Festival. Saw networking as an opportunity. Also used small grant funding for **perceptions survey/strategic evaluation** which identified need to network more. Also identified the need to improve **PR/communications/promotion** . They are also focusing on **greater financial sustainability** particularly through **improving/expanding the eco-tourism product**. In fact the reason why Hugh Dixon, Executive Director, was not at the ARLG was because he was meeting this week with TPDCO to acquire a licence to do tours.

While the direct impact of the project was clear and validated CANARI's theory of change – that two people from an organisation can provide the critical mass needed to bring about organisational change - the facilitator suggested there was a continuing need to focus on influencing others and the best way to do so. So our collective challenge now is to see if we can influence and change the wider civil society and government, and this will need time, money and hard work.

16 Next steps

- Collective communication to donors and other partners on:
  - why NGO capacity building is important and how it can be done;
  - the need for collective, coordinated strategic investment; and
  - the value of action research and learning as an approach.

Sarah and Lisa facilitating the discussion on next steps

- Stimulate continuing communication and peer exchange between GFS2S participants (and those in the similar UK Overseas Territories project, CEPF and new MacArthur project) via:
  - CANARI website;
  - Intranet;
  - Blogs and other social networking;
  - Skype discussion;
  - CANARI calendar of events (which could start to use Google calendar which could be embedded in the website and provide a means to share events;
  - Yahoo / Google groups

APPENDIX 1

CARIBBEAN NATURAL RESOURCES INSTITUTE

Fernandes Industrial Centre • Administration Building • Eastern Main Rd. • Laventille • Trinidad W.I.
Tel: (868) 626 6062 • Fax: (868) 626 1788 • Email: info@canari.org • Website: www.canari.org

CONCEPT NOTE

Going from strength to strength:
Building capacity for equitable, effective and sustained participation of civil society organisations in biodiversity conservation in Caribbean islands.

1. Overview

Going from strength to strength is a three-year (2008-2010) research and capacity building project, coordinated by the Caribbean Natural Resources Institute (CANARI) with funding from the John D. and Catherine T. MacArthur Foundation (MacArthur). It builds on the findings of and capacities built under an earlier CANARI projects, notably:
- *Improving governance through civil society involvement in natural resource management in the Caribbean* [2001-2006 funded by EC/Hivos-funded]
- *Developing and disseminating methods for effective biodiversity conservation in the insular Caribbean* [2003-2005 funded by MacArthur]
- CANARI's extensive experience of assisting government agencies and civil society organisations with processes of visioning, strategic planning and organisational development.

Going from strength to strength focuses particularly on the islands of Hispaniola (Dominican Republic and Haiti) and Jamaica, with dissemination of lessons learned to a wide range of stakeholders in the other islands of the Caribbean.

2. Problem being addressed

The livelihoods of Caribbean people are inextricably linked to the natural resources and biodiversity of their islands, notably through agriculture and fishing, tourism and recreation, and long-standing cultural and spiritual practices. There is also a high dependence on natural ecosystems for the provision of critical services such as clean air, water, climate amelioration, and flood and erosion control.

The islands of the Caribbean have also been identified as a global "hotspot" for biodiversity with numerous endemic, rare and threatened or endangered ecosystems and species. Yet recent assessments of biodiversity, such as those undertaken under the Millennium Ecosystem Assessment (Assessment of the Northern Range of Trinidad; Assessment of the Caribbean Sea), show escalating degradation of both marine and terrestrial resources. This is being directly driven by unsustainable exploitation of natural resources and conversion of natural ecosystems for development. Indirect drivers include growing populations, economic activity that is environmentally unsustainable, and consumption patterns that over-exploit natural resources. Under projected trends and scenarios for Caribbean islands (see http://www.canari.org/climate.asp) the ongoing degradation of natural ecosystems is likely to be further exacerbated by higher sea temperatures, sea level rise, and drier summers, notably in the Greater Antilles.   Ironically, as the ecosystems providing ecological services and livelihood opportunities continue to be degraded, the pressure further increases to over-exploit and convert the remaining natural areas in the name of 'development'.

There is therefore an urgent need for the region to develop effective strategies to halt, and where possible reverse, biodiversity degradation before the changes become irrevocable and further diminish sustainable livelihood opportunities. Civil society has a critical role to play in the development and

implementation of such strategies and in increasing public awareness of the implications of loss of biodiversity. Civil society is also increasingly being called upon to play a pivotal role in the development of adaptive strategies in the face of climate change.

Past research by CANARI indicates that key barriers to equitable civil society participation in natural resource management include both the wider institutional framework for governance and the internal capacity of civil society organizations[1] (CSOs), as outlined in Table 1 below.

Table 1: Analysis of key barriers to effective civil society participation in natural resource governance

Institutional framework / governance issues	CSO capacity issues
a) political and cultural barriers to strategic long-term planning and management for sustainable resource use and the development of sustainable livelihoods; b) outdated, overlapping and ineffective policies, legislation, institutions and practice; c) rigid governance structures that lack adaptability and resilience and exclude many of the key stakeholders; d) limited human and financial resources in government agencies (which are further stretched by demands for compliance and reporting under various multilateral agreements) and a world view and culture that resists collaboration with other partners, including civil society, private sector and other government agencies; e) under-valuing of the civil society capacity that exists; f) absence of or unwillingness to share the data essential to decision-making and failure to optimise the application of both scientific and traditional knowledge.	a) failure to strategically leverage the capacity which exists within the organisation; b) dependence on externally-driven capacity building programmes that are culturally inappropriate and often fail to draw or build on existing capacity; c) limited capacity of civil society organisations to participate in natural resource governance, with the following being the factors most frequently identified: • lack of strategic direction; • internal governance issues; • limited availability of human and financial resources; • ineffectiveness of most capacity building initiatives in creating resilient and sustainable organisations and institutions as opposed to strong individuals; • capacity of organisations sometimes depleted rather than built as a result of complex donor and partner requirements, with no apparent analysis of the cost/benefit. d) failure to capitalise on the collective strength of the CSOs in the region as a result of inadequate or ineffective collaboration between CSOs at the local, national and regional levels.

Although there has been some progress in engaging civil society in natural resource governance (for example through participatory decision-making and co-management arrangements), there are still too few documented Caribbean examples of equitable, effective and sustained participation of CSOs in conservation and too little research on what enables or constrains effective participation of this kind.

A few Caribbean conservation CSOs are thriving but many are still struggling to navigate the transition from volunteer group to professional organisation and/or from adversarial environmental advocacy to more collaborative partnerships with government and the private sector in the management of the resources critical to development. Too many Caribbean CSOs appear mired in a self-reinforcing cycle of lack of strategic direction, shortage of human and financial resources, overdependence on one or a few

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[1] For the purposes of this project, civil society organisations are defined as non-governmental and community-based organisations, whether operating at regional,national or local level.

key individuals, no succession planning, inappropriate governance structures, and rifts between board, staff and members.

3. Project approach

Going from strength to strength seeks to address the barriers outlined above through a process of **participatory research, action learning** and **capacity building** involving a core group of 10 CSOs. Rather than focusing just on the capacity gaps and weaknesses, this approach acknowledges that each participating CSO already has significant strengths on which it can draw, build and share with others in order to strengthen the collective effectiveness of all participating CSOs – and by extension their partners and beneficiaries – to promote and engage in effective biodiversity conservation and management of the region's natural resources. This approach builds on CANARI's experience of facilitating Action Learning Groups (under the *Who Pays for Water* project http://www.canari.org/alg.htm and its current Forests and Livelihoods projects). It also draws on feedback from the CSOs that participated in *Improving governance through civil society involvement in natural resource management in the Caribbean*, who all highly valued the opportunities to exchange information and experiences and recommended the institutionalisation of such exchanges in future projects. CANARI's coordination of the Action Research and Learning Group (ARLG) will seek to draw on its own strengths and it will also share the findings of its own processes of self-analysis and identification of capacity gaps.

Participating organisations will be selected based on their existing involvement in some aspect of biodiversity conservation; identified strengths in certain key areas of CSO competency; ability to act as leaders and change agents with a variety of different stakeholders in their countries, communities and sectors; and willingness to commit to a three-year period of self-analysis, open dialogue; cross-learning and capacity building. It is anticipated that at least eight of the groups will be based in Dominican Republic, Haiti and Jamaica. The intention is to have a mix of groups operating at regional, national and community level including several that have experience of active participation in civil society networks. Two representatives from each organisation will be invited to attend the ARLG meetings and the project will provide small grants for capacity building activities at the wider institutional and/or organisational level. In cases where a collective capacity need is identified that cannot be met through cross-learning, this will be addressed through external facilitation and training. Lessons learned from the project, and the tools and methods applied during it, will be widely disseminated to other key conservation actors in government, civil society, private sector and donor organisations.

4. Project goal

Strengthened governance arrangements for effective and sustained biodiversity conservation in the islands of the Caribbean through improved civil society capacity and enabling institutional arrangements.

5. Project objectives

a) ***to identify the key enabling factors for effective civil society participation in institutions for biodiversity conservation in Caribbean islands through the analysis of a range of participatory biodiversity conservation governance arrangements***, including a review of :
- the roles played by CSOs in biodiversity conservation;
- which biodiversity conservation governance arrangements work and why;
- the key factors in existing institutional arrangements that facilitate or hinder effective civil society participation in governance;
- the interactions between the different elements (e.g. people, policies, legislation) in these complex governance systems;
- the capacity that CSOs need in order to contribute to effective biodiversity conservation in the islands of the Caribbean;

- the most effective strategies, tools and methods for civil society capacity building.

b) *to learn from and enhance the capacity of 10 Caribbean CSOs to effectively promote and participate in biodiversity conservation through:*

- implementation of an innovative **Action Research and Learning Group** (ARLG) programme of cross-learning, information sharing, training, networking and case studies designed to draw and build on the existing capacity within the group;
- identification of priority capacity needs that require external facilitation and development of a programme of capacity building activities to address these;
- development of fundraising strategies for both CANARI and the CSO participants to complement and augment activities under this project;
- development of a framework for participatory monitoring and evaluation of initiatives designed to build the capacity of CSOs to participate in biodiversity conservation governance.

c) *to influence the policies and practice in government agencies, civil society organisations private sector companies and donor agencies to enhance civil society participation in institutions engaged in biodiversity conservation through:*

- dissemination of lessons learned and innovative tools and methods from the project in a range of formats such as case studies, policy briefs, newsletters and guidelines via print and audiovisual media;
- building the capacity of 10 CSOs to act as catalysts, change agents and facilitators for wider dissemination of lessons, tools and methods to the government agencies, donor agencies, private sector and other CSOs within their networks and institutions;
- design and facilitation of regional, national and local training programmes and seminars on the tools and methods identified through the project, by CANARI, other participating CSOs and specialist consultants;
- delivery of presentations at regional and international events by participating CSOs in the ARLG.

6. <u>Project results</u>

The project will be working towards contributing to changing the following behaviours and the structure and function of institutions for biodiversity conservation in Caribbean islands:

- CSOs effectively and equitably participating in institutions for biodiversity conservation;

- CSOs engaged in directing, monitoring and evaluating their own capacity building;

- CSOs collaborating with each other and their partners in government, academia, the private sector and the media to share information and to help each other build capacity;

- A core group of CSOs acting as leaders and change agents at regional, national and local level to promote effective tools and methods for capacity building of CSOs.

7. <u>Guiding research questions</u>

The following guiding research questions will be refined with the participating CSOs at the first ARLG meeting and in consultation with partner agencies involved in complementary initiatives:

- What are the barriers to and enabling factors for effective self-organisation of Caribbean CSOs involved in biodiversity conservation?
- How can CSOs effectively monitor and evaluate their own strategic development?
- Can all CSOs realistically become self sustaining? What other financing mechanisms exist?
- What tools and methods work best for building the necessary capacity in such CSOs in the Caribbean?

- What mechanisms can be developed and stimulated to sustain effective cross-learning between CSOs in the Caribbean?
- How do CSOs function within conservation institutions? Can complex system theory help us understand this?
- How do civil society networks function at local, national and regional levels in conservation and how is capacity built in a network? Can networks function more effectively?
- What role(s) are CSOs best fitted to play in promoting conservation and sustainable development in Caribbean islands at the start of the 21st century?
- What enabling framework (policies, structures, processes) is needed to facilitate and optimise this role?

8. **Project activities**

The core project activities comprise:

a. Creation and coordination of a civil society **Action Research and Learning Group** (ARLG)

b. At least four 4-5 day **ARLG meetings**, including a field/study/study visit component and formal capacity building activities, rotated between participants' countries, with two members of each participating CSO being invited to attend each ARLG meeting;

c. **Case studies** both specifically under this project and from complementary CANARI projects (see list in Appendix 1, to be refined at the first ARLG meeting).

d. **Small grants** of approximately $5,000 – 10,000: provision for each CSO in the ARLG to access a small grant for some aspect of building its capacity or that of its institution or network. This could include formal training programmes, strategic planning, organisational or programme evaluation, study tours. **A small grant mentoring and monitoring team** will be also be established, coordinated by CANARI.

e. **Dissemination of project learning and capacity building:** communication strategy to be developed at first ARLG meeting but to include:

   - mechanisms for **intra-ARLG communications** between meetings (e.g. intranet, newsletters, email listserv) ;
   - *Going from strength to strength* **web page** on CANARI's web site with links to ARLG member sites;
   - **training programmes**: at least four training modules including a "training of trainers" component;
   - **print and audiovisual materials,** where possible in English, French and Spanish;
   - **presentations by ARLG members**, including CANARI, at local, national, regional and international events and within the national and regional institutions of which they are part.

f. **Participatory monitoring and evaluation** throughout the course of the project including the development of an appropriate framework and the development of participants' capacity for monitoring and evaluation of their own organisations, institutions and projects. External independent consultants will contribute to the final evaluation of the project, with the results being made available to inform the development of the programmes of CANARI, ARLG members and other key partners, including donor agencies.

First Name	Last Name	Job Title	Organisation	Address 1	Address 2	City	Country	Tel (W)	Tel (M)	Email 1
Arabela	Adam	Resp. of Unit Environ	Federation des Amis de la Nature-Haiti Verte (FAN)	BP 15110		Petionville	Haiti	509 3445 5903	509 3724 4484	adamarabela@gmail.com
Hector Joselin	Ahdujar Batista	Miembro	Grupa Jaragua	El Vergel 33	El Vergel	Santo Domingo	Dominican Republic	809 472 1036	809 412 1667	handujar@hotmail.com
Jose	Angeles	Director	Fundacion Progressio	Erik Leonard Ekmann No. 14,	Altos de Arroyo Hondo	Santo Domingo	Dominican Republic	809 565 1422	809 549 3900	fund.progressio@yahoo.com
Yvonne	Arias	President	Grupa Jaragua	El Vergel 33	El Vergel	Santo Domingo	Dominican Republic	809 472 1036		yvonne.arias2@gmail.com
Marlon	Beale	Executive Director	Jamaican Conservation Development Trust	29 Dumbarton Avenue		Kingston 10	Jamaica	876 960 2848/9		jamaicaconservation@gmail.com
Anne-Marie	Brown		South Trelawny Environmental Agency	3 Grant's Office Complex, Albert Town		Trelawny	Jamaica	876 610 0818	876 561 6355	annebrow2003@yahoo.com
Meleisa	Brown		South Trelawny Environmental Agency	3 Grant's Office Complex, Albert Town		Trelawny	Jamaica			melebrown@gmail.com
Leida	Buglass		Freelance/CEBSE	Samana			Dominican Republic			leibuglass@gmail.com
Ramon	Castillo		Fundacion Progressio	Erik Leonard Ekmann No. 14,		Altos de Arroyo Hondo	Santo Domingo R.D.	809 565 1422	809 549 3900	ramon_elias_c@hotmail.com
Donna	Fray		Jamaican Conservation Development Trust	29 Dumbarton Avenue		Kingston 10	Jamaica	876 960 2848/9		jamaicaconservation@gmail.com
Jn St.Joie	Gorguette		La Fondation Macaya pour le Developpement local (FMD)	Bois Verna		Port-au-Prince	Haiti	509 2246 7806		brunomentor@yahoo.fr
Laurence	Lemoine	Treasurer	Federation des Amis de la Nature-Haiti Verte (FAN)	BP 15110		Bourdon P.P	Haiti	509 3445 5903		fanhaiti@gmail.com
Indi	McLymont-Lafayette	Regional Director Media and Environment	Panos Caribbean	#9 Westminster Road		Kingston 10	Jamaica	876-920-0070-1	876 852 8763	indi@panoscaribbean.org
Santiago Rivas	Laureano	Coordinator	REDAPI	Calle Jose Amado Soler, #50, Ens. Paraiso Apartado Postal 567-2		Santo Domingo	Dominican Republic	809 565 5603		srivas50@hotmail.com

Sesar	Rodriguez	Director Ejecutivo	Consorcio Ambiental Dominicano Inc	Ave Republica de Colombia, Edificio 1M8	Apto 2-2	Los Rios	Santo Domingo R.D.	809 385 0480	809 563 7172	cad@codetel.net.do
Tamoy	Singh		Jamaica Environmental Trust	Earth House, 11 Waterloo Road		Kingston 10	Jamaica	876 960 3693		tsingh.jet@gmail.com
Lucien	St. Louis		Panos Caribbean	Frera 20	Route de Frero	Petion Ville	Haiti	509 2511 1460	509 2942 0321	lslouis@panoscaribbean.org
Suzanne	Stanley	Programme Director	Jamaica Environmental Trust	Earth House, 11 Waterloo Road		Kingston 10	Jamaica	876 960 3693	876 470 7580	sstanley.jet@cwjamaica.com
Gerty	Surena		La Fondation Macaya pour le Developpement local (FMD)	Bois Verna		Port-au-Prince	Haiti	509 2246 7806		gertysur@yahoo.com

Mr.	Santiago Rivas	Laureano	Coordinator	REDAPI	Calle Jose Amado Soler, #50, Ens. Paraiso Apartado Postal 567-2		Santo Domingo	Dominican Republic	809 565 5603		srivas50@hotmail.com
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**THIRD ACTION RESEARCH AND LEARNING GROUP (ARLG) MEETING
15-19 NOVEMBER 2010**

DRAFT AGENDA

Date	Location/activity
Sunday 14 November	*Participants arrive in Port of Spain and transfer to Hotel Normandie*
Monday 15 November	**Workshop a.m.:** o Welcome and introductions o Workshop overview and recap of ARLG2 o Participants report on activities since last meeting, including their small grants. **Workshop p.m:** o Leadership and People Management: Reflections on Leadership - Presentations/Discussion on Pre-Workshop Reflection Questions

Tuesday 16 November	**Workshop: a.m.**
	o Leadership and People Management: Principles of leadership
	   - Exploration of the nature of leadership, and the competencies, skills and principles of effective leadership.
	Workshop p.m:
	o Leadership and People Management: Practical Applications
	   - Demonstration of leadership skills in action
	   - Leadership self-assessment:
	
	o Briefing on the field trip
	
	Evening
	Cocktail with additional Trinidad invitees

Wednesday 17 November	*Depart 7 a.m. for field trip to Nature Seekers, Grande Riviere* Small group analysis of field trip experiences in terms of themes from this and previous ARLG workshops: o Institutional arrangements for protected areas management o Leadership o Building financial sustainability o Getting added value from networks (provisionally, panel discussion with M2M members) *Return to Normandi*

Thursday 18 November	**Workshop a.m***:* ○ Debrief field trip ○ Review of lessons derived from CANARI and CAD case studies and Issues paper ○ Introduction to advocacy ○ Developing a communication strategy – recap followed by small group work **Workshop p.m***.* ○ Developing a communication strategy – small group work (cont.) and feedback ○ Developing good media relations and writing press releases

Friday 19 November a.m. only	**Workshop a.m***.:*
	○ Introduction of the CEPF small grants programme and activities under CANARI's next MacArthur grant.
	○ Evaluation of GFS2S project including
	   - ARLG meetings
	   - Small grants programme
	   - Communications
	• Next steps
	   - Project extension for completion of small grants and communication products?
	   - Building on current relationships/networks
	   - Using the CANARI Civil Society and Governance webpage for information exchange and social networking
	   - Disseminating project learning, locally, nationally, and regionally.

12.00 LUNCH *followed by participant departures for those that are leaving on Friday*	

CANARI
THIRD ACTION RESEARCH
AND LEARNING GROUP MEETING
15-19 NOVEMBER 2010,
Port of Spain, Trinidad

"Going from Strength to Strength"

**LEADERSHIP
AND
PEOPLE-MANAGEMENT**

Facilitated by:
LISA A. JAMES

LEADERSHIP AND PEOPLE-MANAGEMENT

Learning objectives: By the end of this session, participants will be able to:

- Differentiate between the concepts of leading and managing
- Assess leadership models/styles and apply the principle of situational leadership to their use
- Identify guidelines for effective leadership

SESSION OVERVIEW

- **The Changing Work Environment**
- **What is leadership ?**
- **Leading vs Managing**
- **Leadership Competencies**
- **Community Action Leadership Development: a Framework**

The Changing Work Environment

- **Organizations continuously evolving**
- **Paradigms shifting**
- **Employees changing:** e-generation
- **Leadership Paradigm shift:**
  – from leader as 'boss' to 'coach'
  – from imposed goals & top-down decision making to autonomy encouraged, worker participation, empowerment
  – From individual to team effort
  –from fragmentation re. role specialization to cross-fertilization

"Everyone a Learner, Everyone a Teacher, Everyone a Leader" – vibrant, healthy organizations grow and thrive through: *open dialogue, incorporating everyone's strengths and knowledge, and innovative leadership.*

Leadership

- Leadership is a process whereby an individual influences a group of individuals to achieve a common goal. Northouse (2007)
- "Leaders know the way, show the way, go the way"
- Leadership = INFLUENCE

"The key to successful leadership today is influence, not authority"

Ken Blanchard

Why is Leadership Important?

- It drives the 'people' side of the organisation.
- Without it, an organisation is likely to focus on tasks and transactions (for short-term results), but will not build employees' commitment to the long-term success of the organisation, nor the achievement of its vision.

Key Leadership Qualities

- Passion
- Vision
- Strategic
- People-skills: communicate,motivate,empower
- Inspiring
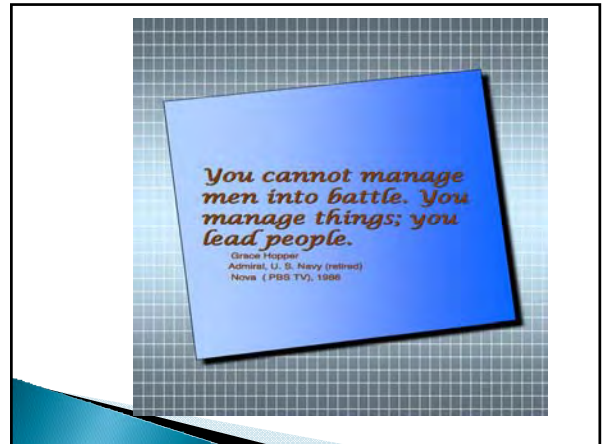- Persistence
- Change-oriented
- Resourceful
- Innovative

Leadership Guidelines: BE, KNOW, DO!

- **BE** a professional e.g.: Be loyal to organization; perform selfless service; take personal responsibility; possess good character traits (honesty, integrity etc)
- **KNOW** : the **requirements of leadership**, **your employees**; **the situation** ; **yourself** e.g.: strengths and weaknesses, knowledge, and skills; **human nature** e.g.: needs, emotions, and how people respond to stress ; **your job** e.g.: be proficient and be able to train others in their tasks); **your organization** e.g.: where to go for help, its climate and culture, who the unofficial leaders are etc.)
- **DO** **provide direction**: e.g. vision, strategic direction, goal setting, problem solving, decision making, planning) **implement** e.g.: communicating, coordinating, supervising, evaluating; **motivate** e.g.: develop morale in the organization, train, coach, counsel.

Leading (Influencing) without Positional Authority

- **Strategy #1: Build Positive Relationships**
  -Have person's best interest in mind: 'win-win vs. win-lose'
  -Understand and respect other person's work style , personality differences
  -Find areas of mutual interest
- **Strategy #2: Honor the Law of 'Give and Take'**
  -What do they need to succeed? 'WIIFM'
  - Their key concerns (or fears)
  - Key expectations (self, boss, constituents)
- **Strategy #3: Participate in Healthy Conflict**
  - Leads to: Expanding ideas and perspectives; Identifying more options; Better decisions; Inclusion vs. reinforcing exclusion

LEADING
VS.
MANAGING

You cannot manage men into battle. You manage things; you lead people.
Grace Hopper
Admiral, U. S. Navy (retired)
Nova (PBS TV), 1988

Management

- The ability to obtain desired results through the effective utilization of the organization's RESOURCES:
  i.e. **The 5 M's of Management:**
    - **M**aterials
    - **M**achinery
    - **M**ethods
    - **M**anpower
    - **M**oney
- The process of getting things done, effectively and efficiently through the key functions of :Planning; Organizing; Directing /Leading; Controlling

Leadership and Management

Management   Leadership

Management Leadership
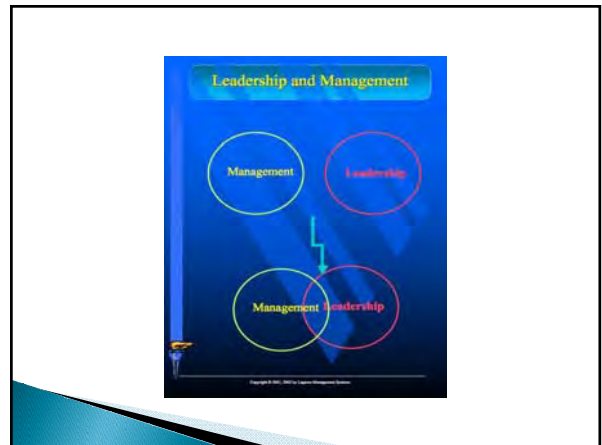
What are the key competencies we need to develop for effective leadership?

Competencies for Leadership Effectiveness

- Self-Awareness
- Emotional Intelligence
- Personal Mastery
- Personal Accountability
- Behavioral Style Flexing

- Giving and Receiving Feedback
- Building Shared Vision
- Thriving on Change
- Creating Agreement/ Conflict Management
- Performance Development/Coaching

COMMUNITY ACTION LEADERSHIP DEVELOPMENT: A Framework for 21st Century Leadership

Extracted from Paper presented by
Lorilee R. Sandmann, Ph.D and Lela Vandenberg, Ph.D.
Michigan State University Extension Services
East Lansing, Michigan

▸ New philosophy of leadership emerging, based on bottom-up transformation fueled by shared power and community building.
▸ Three (3) Common Themes:
  1. Shared leadership:
    · assumption is that all of us have leadership qualities that can be pooled and drawn upon as needed, when working with others on vital common issues.
  2. Leadership as relationship:
    · revolves around idea of a network of fluid relationships and is built on the concepts of empowerment, participation, partnership, and service.
  3. Leadership in community:
    ◦ envisions community as the conceptual setting in which the leadership relationship takes place.

Conceptual Framework

1. Holistic View of Leadership:
   a. Community b. Vision c. Learning d. Action
2. Seven (7) Action-Based Values:
   a. Visioning Together b. Leading Together
   c. Learning Together   d. Building Community   e. Developing Energy
   f. Acting Together g. Communicating
3. Seven (7) Leadership Roles:
   a. Facilitation b. Learner –focus c. Leadership–focus d. Issues/Actions focus
   e. Non-Prescriptive f. Process as Content

Conclusions :

➢ Leadership development for the 21st century is holistic; centered in groups or organizations, rather than individuals, and engages the group in heart, mind, spirit, and energy.

➢ Driving forces of this philosophy:
  – community, the heart of a group's leadership
  – vision, which engages the spirit;
  – learning, which stimulates the mind; and
  – action, which compels energy

Leadership and People-Management

Remember…
People don't care
how much you know….
Until they know
how much you care."

Thank you

Consorcio Ambiental Dominicano (CAD)

a consortium of civil society organisations and government agencies

Consorcio Ambiental Dominicano (CAD)

- Founded in 1999
- 7 partners organisations / members –
- 5 NGO´s - 2 Gov. Agencies

CAD promotes alliances and synergies in the conservation and participatory management of natural resources in the Dominican Republic.

Lecciones aprendidas

- **CAD ha logrado ser coherente y enfocarse en los objetivos estratégicos es el vehículo para lograr la misión de la organización**

- *CAD has been successful by staying true to its mission and strategic objectives and ensuring that the two are consistent*

-

Lecciones aprendidas

- **Las organizaciones socias no esperan siempre lograr el consenso, sino aunar esfuerzos para seguir trabajando en conjunto hacia un fin común.**
- *The member organisations do not always expect to reach consensus but continue to work together toward achievement of a common goal.*

Lessons learned

- **Dentro del CAD se ha identificado que el diálogo, "estar de acuerdo en el desacuerdo, la práctica de la mesa redondas, evitar posiciones jerárquicas como factores claves que mantienen tanto a los socios gubernamentales y las organizaciones de la sociedad civil trabajando juntos de manera eficaz**

- *CAD members have identified dialogue; 'agreeing to disagree'; roundtable discussions; non-hierarchical structure ; and mediation as the key factors that keep the state and civil society partners working effectively together*

Lessons learned

- **El conflicto es algo natural en el sector ambiental, así que la mediación es un medio inherente al CAD**

- *Conflict is common in the environmental sector and mediation is integral to CAD*

2

Lessons learned

- **Aunque una organización tenga una buena imagen y haya obtenido resultados exitosos, eso no significa que genere o capte los recursos económicos necesarios que garanticen su sostenibilidad financiera**

- *Even if an organisation has a good image and has achieved successful results, that does not mean it generates or acquires the economic resources necessary to ensure financial sustainability.*

Lessons learned

- **A pesar de los éxitos obtenidos, no significa que sus socios estén del todo satisfechos con el desempeño de la organización**

- *Despite successes, this does not mean that its partners are completely satisfied with the performance of the organisation*

JAMAICA ENVIRONMENT TRUST

TOOLS FOR ADVOCACY

The tools we use:

EIA review. JET routinely reviews and comments on EIA reviews, seeking expert help from our partners all over the world via the Environmental Law Alliance Worldwide, or ELAW. To date we have reviewed over 27 EIAs for various developments including large scale hotels, mining operations, and waste disposal facilities. These are published on our website.

Input into policy documents and legislation. We comment on public policy documents and proposed legislation, often seeking expert input as well. Policies which we have commented on in the past include the Jamaica Adaptation Strategy for the Sugar Industry, the Carbon Emissions Trading Policy, the Draft Beach Policy, the Mining Policy and the Green Paper on Whistleblowers legislation. We have also made submissions on the review of the Access to Information Act, the Draft Fisheries Bill, and the Draft Wastewater and Sludge Regulations.

Case studies/legal briefs/other materials. We prepare case studies on environmental legal issues – we have completed one in a series entitled "Environmental Regulatory Failure in Jamaica" and two more are underway. We have prepared a brief on the legal framework for captive dolphin attractions. We have produced a community guide to environmental law in Jamaica called "It Inna Di Law" which we distribute free of cost to the public.   We have also produced a community guide to participating in environmental decision-making with one of our partners.

Attending public meetings. JET routinely attends public meetings and raises environmental and development issues. Recently in Jamaica, developers have started to organize for public meetings, to bring in loud supporters of jobs, jobs, jobs. It is hard to stand up in a hostile meeting and argue for those things that have no voice – our natural resources.

Filing administrative appeals under various laws. Sometimes laws give the public a right of appeal and JET has used this provision in a number of cases. Example: We filed an appeal on behalf of fishermen near Montego Bay, who were displaced from a beach for hotel development. We have also asked to be heard by government ministers hearing appeals – e.g. the grant of approval for Phase 2 of a near 2000 room hotel in Runaway Bay- St. Ann, in the cases of the Treasure Beach Wall and Pellew Island. We have been allowed to attend and speak, although not to be present for the entire hearing.

Access to Information. We have made extensive use of the Access to Information law in Jamaica, making over 80 requests to government agencies for information and using the information gained to inform press releases and build public support. We have filed 16 appeals under the ATI Act, for information we were denied access to. One is outstanding – but all others were successful.

Free legal advice to communities affected by environmental issues. We have given advice to many communities facing environmental problems – the vendors at Winnifred Beach, pacing a take

over of the beach by the UDC, fishermen, the folks at Pear Tree Bottom, residents dealing with impacts from improper sewage treatment and disposal problems, and farming communities in Cockpit Country whose livelihood is threatened by bauxite mining.

Workshops for communities to increase awareness of environmental laws and their rights. We have held over 20 workshops since 2004 for various communities to educate them about environmental laws and informing of their rights. Some of these communities are farming communities in Cockpit Country faced with bauxite mining, a community managing a public beaches (Winnifred), and coastal communities facing controversial development (Treasure Beach canal construction, Runaway Bay's Gran Bahia hotel). We have also conducted workshops for law students and lawyers on environmental law.

Legal action. We have filed two Judicial Review cases – that is, asking for the court to review the actions of government and determine whether or not they have acted correctly. These are Pear Tree Bottom and the Harbour View sewage case. Both were successful. In the Pear Tree bottom case, the court found that the government agencies had not carried out the public consultation process correctly. In the Harbour View case, a consent order of the court is getting the plant fixed after over 30 years of it putting untreated sewage into the sea. JET files these types of legal action in partnership with local people who are affected.

Advocacy in the media. We have a specific programme to bring environmental issues to the media. We develop and maintain relationships with reporters, feed them with information, issue press releases, hold press conferences etc. We have seen a marked improvement in the coverage of environmental issues in the Jamaican media. In the past year, JET has generated or contributed to 113 stories on the environment in all types of media.

Making films. JET has made three films – feature length Jamaica for Sale, 24 minutes Cockpit Country, Font Hill (short – on YOuTube), working on Palisadoes and Harbour View Plant.

November 2010

COMMUNICATION STRATEGY TEMPLATE

Key messages: *what do we want to say?*	Objectives: *what do we want to achieve by sending the message e.g. change in policy, behaviour, relationships, institutions, etc*	Target audiences: *who do we want to receive our messages?*	Products: *What is the best format to present the information e.g. printed document, PowerPoint presentation, video etc.*	Pathways: *What is the best channel to get the information out e.g. though a website, face-to-face meeting, conference etc.*
Messages principaux : *que voulons nous dire?*	Objectifs : *quels sont les objectifs que nous voulons atteindre en communiquant ce message? Par exemple : des changements politiques, comportementaux, relationnels, institutionnels, etc.*	Publics cibles : *à qui voulons nous transmettre nos messages?*	Produits : *Quel est le meilleur format sous lequel l'information pourrait être présentée : par exemple, à travers un document imprimé, PowerPoint, vidéo etc.*	Voies de communication : *Quel moyen de communication serait le meilleur afin de transmettre le message, par exemple : à travers un site web, des réunions en personne, une conférence etc.*
Mensajes clave: *¿qué queremos decir?*	Objetivos: *¿qué es lo que queremos lograr mediante el envío de mensajes, por ejemplo, cambio en la política, el comportamiento, las relaciones, las instituciones, etc?*	El público destinatario: *¿quiénes queremos que reciban nuestros mensajes?*	Productos: *¿Cuál es el mejor formato para presentar la información, por ejemplo, documento impreso, presentación de PowerPoint, vídeo, etc?*	Rutas: *¿Cuál es el mejor canal para divulgar la información, por ejemplo, a través de una página web, reunión cara a cara, conferencias, etc?*

CANARI ISSUES PAPER No. 1

Type of product	Issues paper (long policy brief!)	
Title (working)	Community participation in natural resource management: lessons from Caribbean small island states	
Primary target audiences	Policy makers, donors, technical support agencies, private sector Corporate Social Responsibility programmes, non-governmental organisations (NGOs) that support community-based organisations (CBOs)	
Secondary target audiences	CBOs (as advocacy/fund raising tool). Also NGOs as many of the lessons and conclusions apply equally to them	
Desired results	- Greater understanding by policy makers and support agencies of the context in which community-based natural resource management is taking place - Improved policy and legislative framework for community-based management - Shift by donors to longer project/funding timeframes and/or strategic employment of resources to support community initiatives until they are 'self-sustaining' (able to source their own funds/support) - Design and implementation of capacity building programmes that reflect all the capacities needed for community management, including those of the partner agencies - Recognition by partner agencies of the importance of built trust and respect - Informal arrangements that clarify roles, responsibilities and mutual expectations - More integrated, collaborative programmes moving towards formal integrated institutional arrangements - Greater understanding of the role that the private sector can play. - Greater awareness of CANARI, the work that it does, and the resources it has (e.g. range of publications)	
Key messages		**Possible case study illustrations or explanatory boxes**
	1. What does it mean to be a sustainable CBO – diversified funding strategy,	

	not necessarily fully self-funded	
	2. Developing effective community-based natural resource institutions and organisations requires long-term commitment of resources. Better long-term results could be achieved if funding agencies and other external partners made strategic investments over a longer period in the same organisations.	SLU Watershed Management Committees Fond Gens Libre LFMCs Trinidad turtle protection groups
	3. The policy and legal framework for community participation in management needs strengthening (but the absence of it should not be an excuse for doing nothing)	Jamaica forest legislation, policy and strategic plan
	4. In the absence of formal contractual arrangements, development of mutual trust and respect is critical, but can break down easily with changes of personnel.	Nature Seekers, Grande Riviere, Fondes Amandes
	5. Build on existing organisations and structures can speed up and improve implementation....	National Reforestation and Watershed Rehabilitation project JCDT Grencoda/ART
	6. ...but it is important to give voice to the wider community	Aripo Savannas planning process
	7. Assessing and building capacity for community participation is essential and can be a lengthy process • Need a broader and more holistic approach, including the capacity building of government and private sector partners • Leadership is a critical enabling factor.	List the key capacities for participation
	8. Start-up organisations need special attention	CANARI small grants and mentoring – Buff Bay LFMC and St Vincent IFMDP group
	9. The value of an integrated, collaborative approach • Resources exist but often in different agencies – requires collaboration; not a current culture; may require new skills/personnel	Jamaica Forestry Dept and other govt and international agencies Consorcio Ambiental Dominicano Turtle Village Trust Ebano Verde
Product	• Stage 1: Electronic document in English • Future: translated into Spanish and French (funding permitting)	

	• Printed copies for conferences etc.	

Pathways	Stage 1: Dissemination via
	    • CANARI website
	    • List servs – GLISPA, Bruce Potter's lists
	    • Circulation to members of Forests and Livelihoods, GFS2S and Darwin ARLGs
	    • IUCN Caribbean members
	    • Other selected persons from CANARI's contact database
	    • At meetings with any of the target audiences.
	
	Future: discussion forum on the key points on the website or moderated discussion with selected donors.	

Evaluation mechanisms		

CANARI ISSUES PAPER No. 1

Type de produit	Document thématique (longue synthèse!)	
Titre (provisoire)	Participation de la communauté à la gestion des ressources naturelles: leçons des petits Etats insulaires de la Caraïbe	
Principales audiences cibles	Décideurs politiques, donneurs, agences d'assistance technique, secteur privé, programmes de responsabilité sociale, organisations non-gouvernementales (ONG) qui assistent les organismes communautaires (OC).	
Audiences secondaires	OC (en tant qu'outil d'assistance/collecte de fonds). Les ONG également, car bon nombre des conclusions et leçons leur sont applicables.	
Résultats escomptés	- Meilleure appréhension du contexte dans lequel la gestion des ressources naturelles a lieu de la part des décideurs politiques et agences d'assistance - Cadre législatif amélioré pour la gestion au niveau communautaire - Passage à des périodes de financement plus longues/projets plus longs et/ou utilisation stratégique des ressources afin d'assister les initiatives communautaires jusqu'à ce qu'elles soient « auto-renouvelables » (en mesure de se procurer leurs propres financements) - Design et mise en œuvre de programmes de renforcement des capacités requis pour la gestion communautaire, y compris celle des agences partenaires - Reconnaissance par les agences partenaires de l'importance de l'établissement du respect et de la confiance - Arrangements informels permettant de clarifier les rôles, responsabilités et attentes mutuelles - Programmes plus intégrés et collaboratifs allant dans le sens d'arrangements institutionnels formels intégrés - Meilleure appréhension du rôle que peut jouer le secteur privé - Meilleure appréhension de CANARI, du travail effectué, et des ressources dont il dispose (les diverses publications par exemple)	
Messages clés		**Possibles cas d'études d'illustrations ou encadrés explicatifs**

	10. Que signifie être un groupe communautaire viable – stratégie de financement diversifiée, pas nécessairement auto-financé	
	11. Développer de manière effective des institutions pour les ressources naturelles et des organisations requiert un engagement des ressources sur le long terme. Des résultats sur le long terme peuvent être atteints si d'autres partenaires externes investissent de manière stratégique sur une longue période dans les mêmes organisations.	Comité de gestion des bassins versants Ste-Lucie Fond Gens Libre LFMCs Groupes de protection des tortues Trinidad
	12. Le cadre légal pour la participation des communautés dans le cadre de la gestion des besoins doit être renforcé (mais si ce n'était pas le cas, cela ne devrait pas constituer une excuse pour ne rien faire)	Législation forestière en Jamaïque, plan stratégique
	13. En l'absence d'arrangements contractuels formels, le développement de la confiance et du respect mutuels est fondamental, mais peut être facilement détruit dans le cas de changement de personnel	Nature Seekers, Grande Riviere, Fondes Amandes
	14. Miser sur les organisations et structures existantes peut accélérer le processus et améliorer la mise en œuvre	Projet National de reforestation et réhabilitation des bassins versants JCDT Grencoda/ART
	15. ... mais il est important de donner la parole à la communauté dans son ensemble	Aripo Savannas processus de planification
	16. Evaluer et renforcer les capacités pour la participation des communautés est essentielle et peut être un long processus • Nécessite une approche plus vaste et holistique, y compris le renforcement des capacités du gouvernement et des partenaires du secteur privé • Le leadership est un important facteur habilitant	Liste des compétences clés pour la participation
	17. Les start-up requièrent une attention particulière	Petites subventions de CANARI et mentoring – Buff Bay LFMC et groupe de St Vincent IFMDP
	18. La valeur d'une approche intégrée et collaborative • Les ressources existent mais souvent au sein d'agences	Département d'exploitation des forêts de la Jamaïque et autres gouvernements et

	différentes – requiert de collaborer; n'est pas un élément de la culture ; pourrait nécessiter de nouvelles ressources/personnel	agences internationales Consorcio Ambiental Dominicano Turtle Village Trust Ebano Verde
Produit	• 1ère étape : document électronique en anglais • Dans le futur: traduit en espagnol et français (si financement) • Copies imprimées pour les réunions etc.	
Trajectoires	Stage 1: Diffusion via • Site web de CANARI • Listing : GLISPA, listes de Bruce Potter • Diffusion aux membres de Forêts et moyens de subsistance, GFS2S et ARLG Darwin • Membres caribéens de l'UICN • Autres personnes sélectionnées à partir de la base de donnés de CANARI • Lors de réunions avec les audiences cibles. Dans le futur: forum de discussion sur les points clés du site web avec les principaux donneurs	
Mécanismes d'évaluation		

CANARI ISSUES PAPER No. 1 - **DOCUMENTO SÍNTESIS de CANARI No. 1**

Tipo de producto	Documento síntesis (Temas emergentes)	
Titulo (en trabajo)	Participación comunitaria en la gestión de los recursos naturales: lecciones de los pequeños estados insulares del Caribe	
Audiencia meta primaria	Responsables de políticas, donantes, agencias de apoyo técnico, el sector privado con programas de responsabilidad social, las organizaciones no gubernamentales (ONG) que apoyan las organizaciones de base comunitaria (OBC)	
Audiencia meta secundario	OBCs (como promotor/ recaudación de fondos). También las ONGs, ya que muchas de las lecciones y conclusiones son aplicables	
Resultados deseados	- Mayor comprensión por parte de los responsables de políticas y agencias de apoyo técnico en el contexto de cómo se lleva a cabo la gestión de los recursos naturales de base comunitaria - Mejoramiento del marco político y legislativo para la gestión comunitaria - Cambio de los donantes hacia proyectos de plazo largo/ con plazos de financiamiento / o la utilización estratégica de los recursos para apoyar las iniciativas de la comunidad hasta que éstas sean autosostenible (capaz de crear sus fuentes de fondos propios) - Diseño e implementación de programas de capacitación que reflejen todas las capacidades necesarias para la gestión de la comunidad, incluyendo los organismos asociados - El reconocimiento por parte de las organizaciones asociadas sobre la importancia de la confianza y el respeto mutuo. - Acuerdos informales que aclaran las funciones, responsabilidades y expectativas mutuas - Mayor integración y colaboración de programas que avanzan hacia arreglos institucionales formalmente integrados - Aumentar la comprensión del rol que el sector privado que éste puede jugar.	

	• Aumentar el conocimiento sobre CANARI, el trabajo que realiza, y los recursos que tiene (p.e. series de publicaciones)	
Mensajes claves		**Posibles ejemplos de estudio de casos o cuadros explicativos**
	19. Qué significa ser una organización de base comunitaria sostenible - estrategia de financiación diversificada, no necesariamente totalmente autofinanciado	
	20. Fortaleciendo instituciones ambientales de base comunitaria eficaces y las organizaciones requieren de un compromiso a largo plazo de recursos. Mejores resultados a largo plazo se podría lograr si los organismos de financiación y otros asociados externos realizan inversiones estratégicas a largo plazo en las mismas organizaciones.	SLU Watershed Management Committees *(Comités de Manejo de Cuenca Hidrográficas SLU)* Fond Gens Libre LFMCs Grupo de protección de tortugas en Trinidad
	21. El marco político y legal para la participación comunitaria en el manejo/gestión necesita fortalecimiento (pero la ausencia del mismo no debe ser una excusa para no hacer nada)	Legislación forestal de Jamaica, políticas y plan estratégico
	22. Cuando no hay acuerdos contractuales formales, el desarrollo de la confianza mutua y el respeto es fundamental, pero puede deteriorarse fácilmente con los cambios de personal.	Nature Seekers, Grande Riviere, Fondes Amandes
	23. Fortalecer organizaciones y estructuras existentes puede acelerar y mejorar la implementación…..	Proyecto de Reforestación y Rehabilitación de Cuencas Nacional JCDT (Jamaica) Grencoda/ART (Granada)
	24. …..pero es importante involucrar (dar la voz) a la comunidad en general	Proceso de planificación de Aripo Savanna (Trinidad)
	25. Asesorar y evaluar la capacidad para la participación comunitaria es esencial, y puede ser un proceso largo • necesidad de un enfoque más amplio e integral, incluyendo el fortalecimiento de capacidades de los interlocutores gubernamentales y del sector privado	Lista de capacidades claves para la participación

	• el liderazgo es un factor crítico	
	26. La puesta en marcha de organizaciones necesita especial atención - Buff Bay LMGYAI y San Vicente grupo IFMDP	Subvenciones y tutoría de CANARI – Buff Bay LFMC y el grupo IFMDP de St Vincent
	27. El valor de un enfoque integrado y de colaboración • Los recursos existen, pero a menudo de manera desigual en distintos organismos – se requiere de la colaboración, no existe como cultural actual, pueden requerir nuevas habilidades / personal	Departamento Forestal de Jamaica y otras agencias gubernamentales e internacionales Consorcio Ambiental Dominicano Turtle Village Trust Ébano Verde
Producto	• Etapa 1: Documento electrónico en Inglés • Futuro: Traducciones al inglés y francés (si los fondos lo permiten) • Impresos de conferencias	
Vías y Formas	Etapa 1: Difusión a través • Pág. web de CANARI • Lista de "server" – GLISPA, Lista de Bruce Potter • Distribución a los miembros de "Bosques y Medios de subsistencia", Movilizando Fortalezas, y el GAIA Darwin • Miembros de IUCN Caribe • Otras personas seleccionadas de la base de datos de CANARI • En reuniones con cualquier de la audiencia Futuro: foro de discusión sobre los asuntos clave en la página web o debate moderado con determinados donantes.	
Mecanismos de evaluación		

Making the most of the Media

Presented by Indi Mclymont-Lafayette
Regional Director, Media, Community and Environment
Panos Caribbean
Canari, November 18, 2010

What is communication?

- It is the delivery of information from one entity to another. It takes place through the process of message transmission. Communication does not take place unless the message sent to another person is the one that is received by that person
- So if you say X to Uncle John, then you have to make sure that Uncle John does not hear Y (Scotty example)
- message?

WHAT ARE YOU SAYING?

- Start by defining your message – What do you want to say?
- Effective message delivery is critical to communication.
- So go to the media with a clear message
- Be absolutely clear in your own mind about the purpose of your message.
- Ask:
- WHY are you making this statement? WHAT response do you expect? What ACTION should people take on getting your

WHO ARE YOU SAYING IT TO?

- It is important to understand the media so that you can maximise the success of your public information and communications efforts.
- Types of Media
- Print is the least immediate, but most permanent medium. Once a publication is printed, it becomes part of the permanent record. Types of publication include journals, newspapers magazines, newsletters and books
- Radio is an immediate medium. News can be aired the moment it breaks and you can be live on air over the telephone.
- Television is also immediate. It is the most influential of all media because you are both seen and heard, giving the strongest and most enduring impression.
- News agencies or News Wire Services are international disseminators of news stories

What does the Jamaican media say about Climate Change?

- 2005 Panos London Policy brief:
- Low coverage: Jamaican journalists rated the level of coverage of climate change issues in the local and national media as low. Issues such as crime, poverty and violence are given higher priority
- - Lack of resources: The director of a nationwide news network said journalists – 'don't have the resources of rich countries and we are busy trying to cover issues of crime and poverty.'
- Little impact: One freelance journalist said that the quality is fair to good but 'there is no impact because of the lack of quantity
- Voices 2009 content analysis showed increased media coverage – more quantity of stories but still quality needs improvement

How journalists work/think

- **The journalist looks for an "angle"**
- **An angle is something that will make the story distinctive to the audiences and distinctive from those of the competition.**

How journalists work/think

- **A journalist must produce a story that is newsworthy**
- **Does not have the final say - the decision to publish rests with the editor.**
- **A story may not be published/carried, or only partially.**
- **Journalists don't write headlines – a sub-editor does.**

What is News?

- ***News is … (or should be) any or all of these:***
- Something that is happening now
- Different, unusual, unique, novel – "Man bites dog"
- Controversial, confidential
- Relevant to many people
- Extreme – very sad, very happy, very serious, very silly
- Conflict – 'Vendors are hopping mad over changes to…'

Differing agendas

- The media are professional and objective, but their interests are independent of yours – they are not extensions of a company's marketing or PR department. They might take a totally different tack from the one you wanted – so be prepared for that.
- Remember the pressures they face – editors, time, competition, opposition, suspicion, cynicism.
- Make it easy for them – phone number, full names, full facts, quotes etc. Journalists want information – not waffling.
- Don't use jargon and lots of technical and scientific terms. It is best to keep the information short and to the point than overkill. If they want clarifications or more info they will ask. Make your subject interesting enough for them to want more info.
- Nothing is "off the record." This is a tricky point as it depends on the relationship that you have cultivated with the journalist. It is always safer however to assume that anything you say can be source for a story.

Following up

- **FOLLOW UP PHONE CALLS**
- Following up stories requires delicate and sensitive handling
- **DO NOT…..**
- Do not begin the conversation with "Are you going to cover the story I gave you?"
- If the journalist wrote a piece and it was not used, do not phone the journalist to complain. Stories are sometimes cut at the last minute if there is not enough space.

Instead

- *Contact the journalist by telephone with the following questions:*
- *I sent you some information on xxxx. Is it something that they may find interesting?*
- *Do they require any further information, interviews, patient case studies or visuals?*
- *Would they be interested in a chat in person (Detail assistance)*
- *Are they likely to write anything?*
- *Be helpful, you can begin with "Do you need any further information on the story try?" or if you have any queries please give me a call"*
- *Approach a follow-up with some knowledge of the journalist: We met at the XYZ conference last week" or I read your feature and I thought you might like to discuss another idea I have".*
- *The key to a good follow up is good monitoring. A good media relations person will try to cover every media organisation in the country. Do not discriminate.*

Simple ways to reach the media

- Press releases – these can be sent before or after an event. If written properly they are like a ready made story that can be immediately used by the editor.
- Media invite – must cover the basic 5 W's – who, what, when, where and why. This is much shorter than the press release and only highlights basic information.
- Newsletter – if your organisation does a news letter send it to the media – it can be a good trigger for story ideas.
- Photo captions – One or two paragraphs with a very vibrant and 'catchy' photo.
- Field Visits or trips – sometimes the media does not have the resources to do this but if you can identify the reporter that covers the environment beat – they with proper planning usually love field trips – how does the project work – first hand experience makes great features.
- Basic public service announcements and short radio dramas can be powerful message conveyors and help to change behaviour.

What is a Press Release?

- A press release is a story or announcement written for distribution to news publishers (newspapers, television, radio, websites, etc).
- Although press releases can be written and distributed by anyone, they tend to be the domain of publicists. For example, when a large company launches a new product, their public relations officer would write a press release with the relevant details. They would have a list of media contacts and send the press release to all of them in the hope that at least some would use the story and help promote their product.

What is a press release?

- A press release can be thought of as a news story with an agenda. Whilst the story itself should be genuinely newsworthy, it may be carefully crafted to promote a particular business, organisation or point of view.

How to write a press release

- There is a fairly standard format for creating press releases. It will help your credibility and chances of being published if you present your material this way. Each press release should include the following:

Press release format

- **FOR IMMEDIATE RELEASE:** These words should appear at the top left of the page, in upper case. If you don't want the story to be made public yet, write "HOLD FOR RELEASE UNTIL ...." instead.\
- **Headline -** Just like a headline in a newspaper. Make sure this describes the content of the story.
- **City, State/Country - Month Day, Year:** These details precede the story and orientate the reader.
- **Body:** This is where the actual story goes. There should be more than one paragraph, each paragraph no more than a few sentences. If there is more than one page, write "-more-" at the bottom of the page. Careful attention should be paid to the first paragraph or the lead.
- **Company/organisation info-** Include any background information about the company or organisation featuring in this press release.
- **Contact Information-** Include contact person, company name, phone/fax, email, physical/postal address.
- **ENDS** or **###**This indicates the end of the press release.(xxx words) If you like you could include the total number of words contained in the press release.

From headline to the lead

- In newspaper stories, the headline gives the <u>essence</u> of the story. Write a headline for your story. This helps to concentrate your mind on the real purpose of the message. Having stated the purpose of the message in the 'headline' you need to explain, simply, what the headline means – to expand the headline into a somewhat fuller explanation of the story.
- Newspaper reporters are trained to write <u>Leads</u> or <u>Lead paragraphs</u> which expand the headline and provide a quick survey and introduction to the meat of the message. Reporters are trained to look for the essential <u>elements of action</u> within the story. There is a formula generally known as the Five W's: Who, What When Where Why As you can see, all of these are concerned with action: Who (actor) has done, What (action) When (time) Where (location of the action) and if possible Why (reason for the action) In a lead paragraph, any one of the Ws may come first, depending on what has happened. There is no concrete rule about which of these factors must come first. It all depends on which is more important.

Don't's

- Go over the word limit for the lead – maximum 39 words
- Start by including all the partners in the project in the lead. That is background information for much further down in the release.

3

Writing the lead

- An official communication which announces a new development may begin with the actor: "The UN Secretary General has announced that…" On the other hand, if the action is more significant: "All developing country debts are to be forgiven …" the action will obviously be of much more importance than the fact that it is announced by the SG or whoever.
- **You therefore need to select and isolate the single most significant fact in your message**
- Everything else will flow from that fact. To help you decide on this theme, sometimes it helps to try the "tell-a-friend" technique. Imagine your friend asking, "What's your story about?" Answer that question in one sentence that captures the essence of the entire story. After reading the lead, your reader makes a critical decision: Shall I read on? You have little time, according to Donald Murray, author of *Writing for Readers*. "Three seconds and the reader decides to read or move on to the next story," Murray said. "That's all the time you have to catch the reader's glance and hold it; all the time you have to entice and inform.

Exercise

- In groups of three write a press release (two paragraphs) on a new development that you would like publicity for.
- Time: 30 mins

Finally!

- dialogue and communicate – cultivate relationships with the journalist that cover the environment (a designated area that a journalist covers is called a beat in journalism jargon). If the journalist does not get the information right – work with him or her by providing accurate data in a friendly way. Build his or her capacity – no cussing and writing off the journalist – persisting at clarifying your message leads to good communication
- This presentation also draws on previous presentations on the topic done by veteran environmental journalists, Jamaican John Maxwell and Barbadian Julius Gittens

CEPF in the Caribbean Island Hotspot

Objectives

- Definitions

- What is the CEPF?

- CANARI's Role as the RIT

- Eligibility

- Outline of Project Process

Biodiversity hotspot

- Characterised by exceptional levels of plant endemism and by serious levels of habitat loss.

- To qualify as a hotspot, a region must meet two strict criteria

  - it must contain at least 1,500 species of vascular plants (> 0.5 percent of the world's total) as endemics

  - and it has to have lost at least 70% of its original habitat.

Biodiversity conservation corridor

- Strategically located regions that link key habitats for plants and animals, including protected areas. Rather than the narrow strip of land you might envision, a corridor is actually a broad landscape that encompasses a range of land uses, including agriculture, human settlements, and even industrial activities.

What is the Critical Ecosystem Partnership Fund?

- A global programme founded in 2000

- Provides grants to civil society to help protect biodiversity hotspots

- Helps to create strategic alliances

- Eliminate duplication of efforts

- Joint programme of 6 Donors

CEPF's Niche

- To support civil society groups so that they can serve as effective advocates, facilitators and leaders for conservation and sustainable development of their islands.

A Unique Partnership of Donors
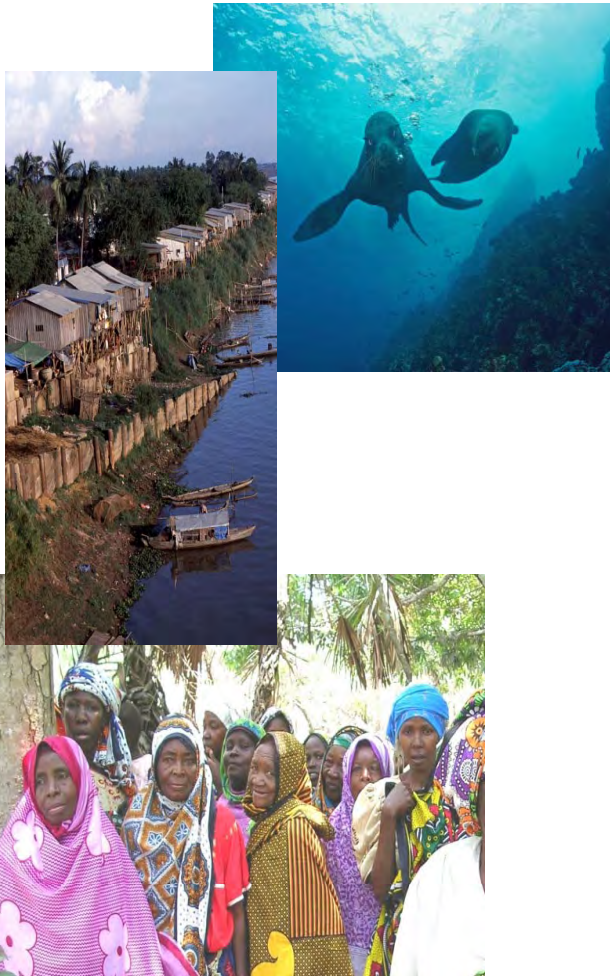
- l'Agence Française de Développement

- Global Environment Facility

- Government of Japan

- MacArthur Foundation

- The World Bank

- Conservation International * (fund administrator with a CEPF Secretariat in Washington)

CANARI's Role as the RIT

- To provide strategic leadership for the Caribbean Hotspot

- To build a broad constituency of civil society groups to work on the conservation goals of the hotspot

- To provide support to applicants during the proposal writing phase

- National Coordinators (15% of their time):
  - Leida Buglass – Dominican Republique
  - Paul Judex Edouarzin – Haiti
  - Nicole Brown – Jamaica
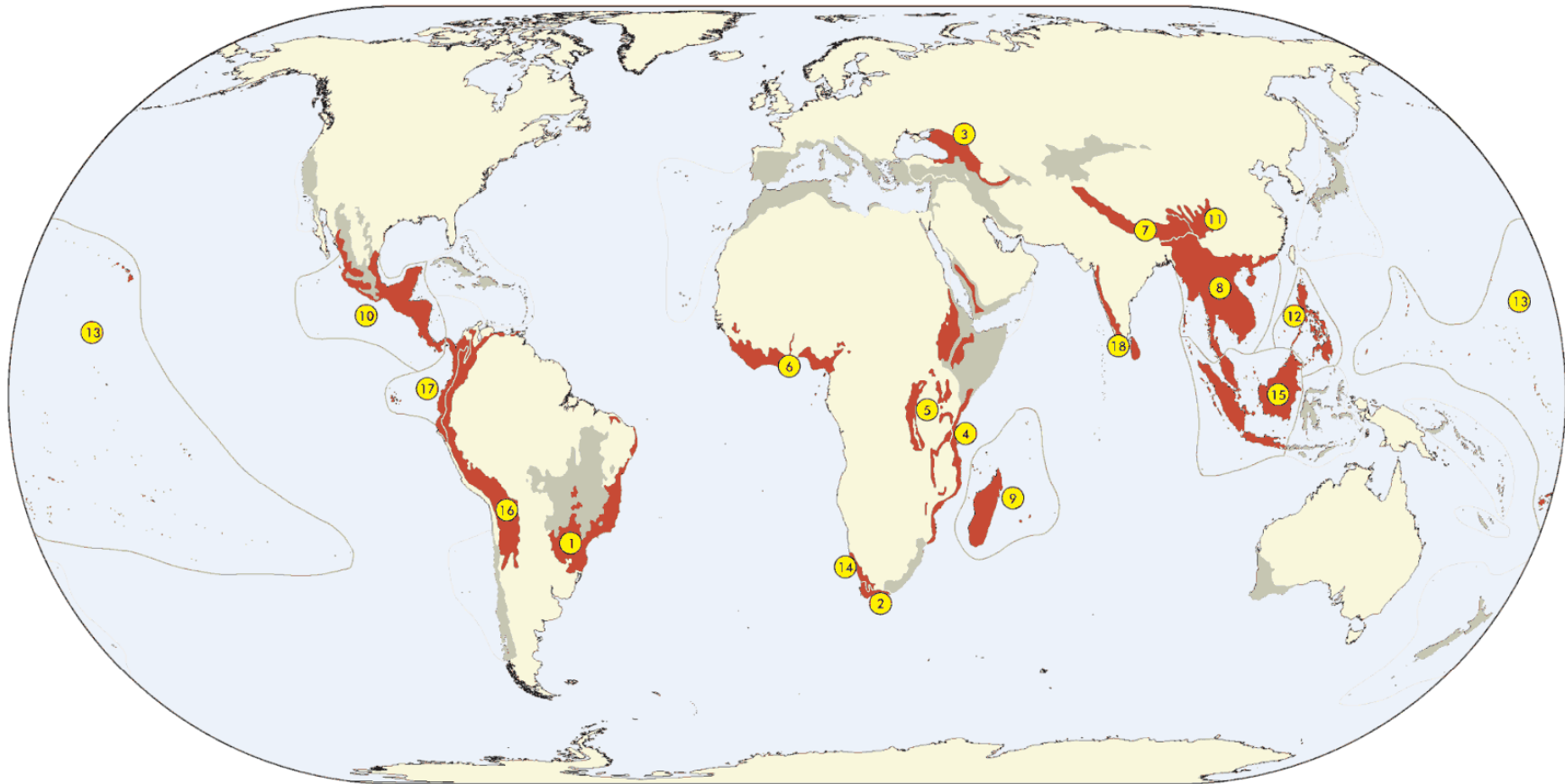
Critical Ecosystem Partnership Fund / Where We Invest
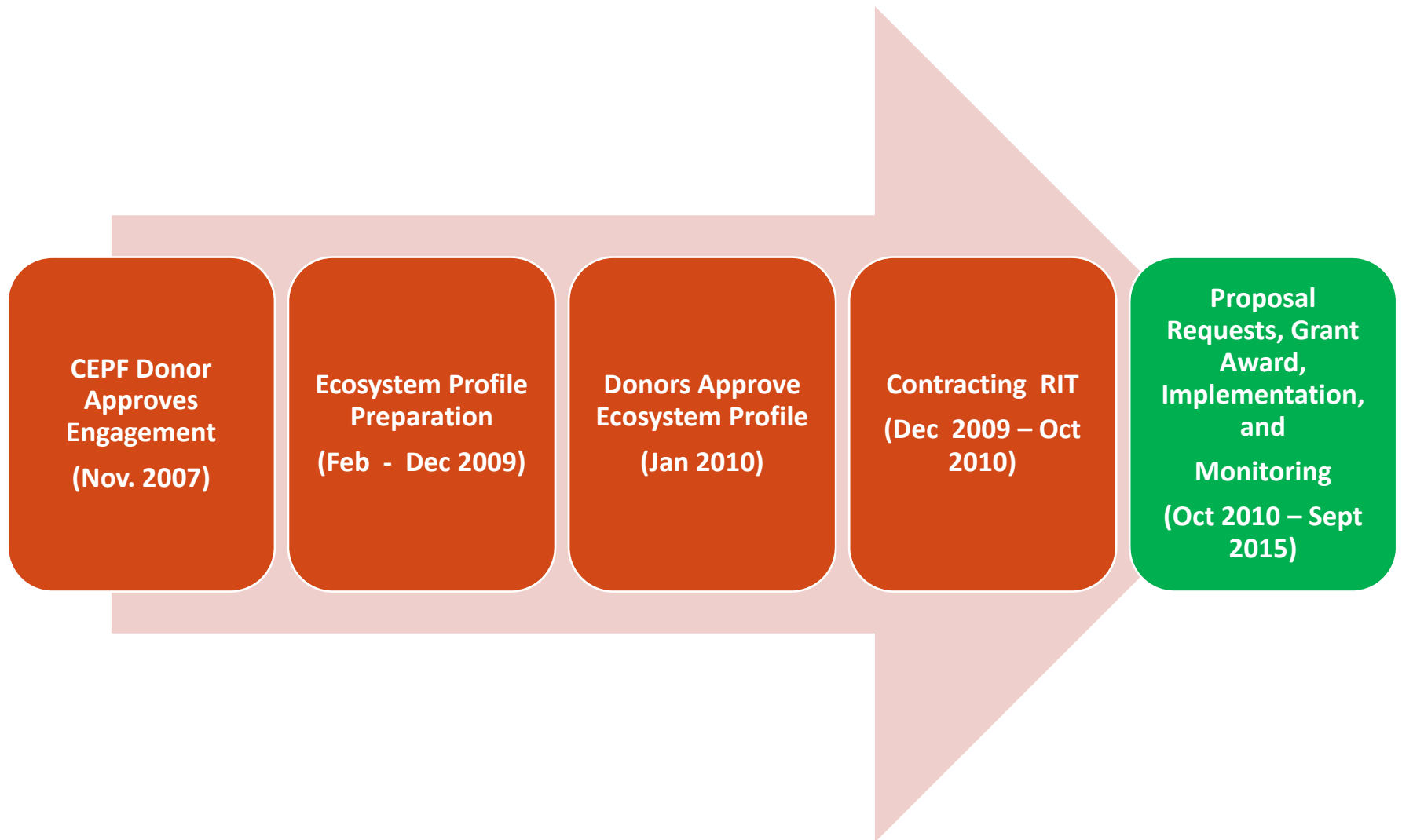
biodiversity hotspot

■ CEPF investment
■ other

Earth's biologically richest places, with high numbers of species found nowhere else. Hotspots face extreme threats and have already lost at least 70 percent of their original vegetation.

1. Atlantic Forest
2. Cape Floristic Region
3. Caucasus
4. Coastal Forests of Eastern Africa
5. Eastern Afromontane
6. Guinean Forests of West Africa
7. Himalaya
8. Indo-Burma
9. Madagascar and Indian Ocean Islands
10. Mesoamerica
11. Mountains of Southwest China
12. Philippines
13. Polynesia-Micronesia
14. Succulent Karoo
15. Sundaland
16. Tropical Andes
17. Tumbes-Chocó-Magdalena
18. Western Ghats & Sri Lanka

CEPF Engaging the Caribbean

CEPF Donor Approves Engagement (Nov. 2007)	**Ecosystem Profile Preparation** (Feb - Dec 2009)	**Donors Approve Ecosystem Profile** (Jan 2010)	**Contracting RIT** (Dec 2009 – Oct 2010)	**Proposal Requests, Grant Award, Implementation, and Monitoring** (Oct 2010 – Sept 2015)

Eligible Countries in the Caribbean

1. Antigua & Barbuda
2. Bahamas
3. Barbados
4. Dominica
5. Dominican Republic
6. Grenada
7. Jamaica
8. Haiti
9. St. Kitts & Nevis
10. St. Lucia
11. St. Vincent

Signatory to the CBD

Eligible for World Bank assistance

5 Strategic Directions

1. Improve protection and management of 45 priority key biodiversity areas

2. Integrate biodiversity conservation into landscape and development planning and implementation in six conservation corridors

3. Support Caribbean civil society to achieve biodiversity conservation by building local and regional institutional capacity and by fostering stakeholder collaboration.

4. Provide strategic leadership and effective coordination of CEPF investment through a regional implementation team

5. Provide emergency support to Haitian civil society

Types of Grants

- Small Grants (< $20,000.00)
- Large Grants (> $20,000.00 - $1 million)

Main Points on Eligibility

- Project supports a CEPF Caribbean strategic direction

- Groups can apply for more than one (1) grant at a time

- Projects can work in multiple areas

- Proposed activities observe all relevant CEPF safeguard and social policies

How to Apply?

RIT will issue a Call for Proposals (January – March, 2011)

For Small Grants (< $20,000.00)

1. Submit a Letter of Inquiry (LOI) to the RIT (this constitutes the full proposal)

For Large Grants (> $20,000.00 - $1 million)

1. Submit a Letter of Inquiry (LOI) to the CEPF

2. If invited, submit a Full Proposal

3. RIT, CEPF Secretariat and CEPF Executive Director approves

4. Project Duration - must end by October 2015

Application (LOI) and Application Guidelines - available in French and Spanish

Muchas Gracias
Merci
Thank you