Towards Financial Self-Reliance:
A Handbook on Resource Mobilization for Civil Society Organizations in the South

Trainer Manual

by Richard Holloway

containing:

- Facilitator's Guide to the Text
- Complete set of Overheads
- Complete set of Handouts
- Instructions for Exercises

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INTRODUCTION

Introduction, Timetable and Logistics

This Manual is for the use of trainers or facilitators who want to manage a four-day course in 'Resource Mobilization for Civil Society Organizations in the South'. This Manual provides the core text of the handbook, plus suggestions for how each section of the course can be presented. It contains the hard copy to be made into overheads to assist the facilitator in his/her work. It also contains copies of all the handouts ready for photocopying. Finally, it provides suggestions for the exercises to be used in the course.

The course lasts over four days and should be structured like this:

DAY 1	DAY 2	DAY 3	DAY 4
Session One: The Larger Picture	**Session Four:** Revenue from Earned Income	**Session Eight:** Resources from Government	**Session Twelve:** Conversion of Debt **Session Thirteen:** Microcredit Programmes
Session Two: Overview of Possibilities	**Session Five:** Indigenous Foundations	**Session Nine:** Resources for Sustainability from Foreign Development Agencies	**Session Fourteen:** Social Investment **Session Fifteen:** Use of the Internet
LUNCH			
Session Three: Why Should Anyone Help a Southern CSO?	**Session Six:** Individual Philanthropy	**Session Ten:** Resources of the Corporate Sector	**Session Sixteen:** Deciding Which Way to Go
Session Three: (continued)	**Session Seven:** Building Grass-roots Organizations	**Session Eleven:** Building Reserve Funds and Endowments	**Session Sixteen:** (continued)

It is likely that the participants interest will extend some of these sessions, in which case everything can be pushed back, still leaving a last session for planning. Suggested session plans are given at the end of this section.

The participants in the workshop should be Southern civil society organizations that have expressed an interest in the subject of resource mobilization. The best set up is to have a range of civil society organizations represented, both large and small, with more than one person from each organization. The facilitator should be able to handle 10 - 12 organizations with 2 people from each, giving

20-24 participants. This will give a variety of experiences, but not too time consuming when asking for different organization's experiences.

The workshop will last four days, and participants should be prepared to attend all sessions. It is not a good idea to announce the daily programme in advance so that people are tempted to attend just sessions that they are interested in. The locale should be a room with good ventilation, good lighting, and well-equipped chairs and tables for all participants. The walls of the room should be bare and should be able to take flip chart paper stuck up with masking tape. The best arrangement of furniture would be 4-5 tables, each with 4-5 peoples at them arranged in a half-circle around a screen (or wall) for overhead projection and chart paper. There should be easy access for all participants to come up to the chart paper to attach cards.

There should be the following equipment:

- Pin boards x 3
- Flip chart easels x 2 (with flip chart paper and reserves)
- Masking tape
- Pen markers (enough for all participants and three for trainer)
- Pins
- Large numbers of cards (300 one color, 100 another color)
- A table for display of books, papers
- An overhead projector
- A screen (not necessary if good white wall)

All participants should be asked to bring copies of their organization's:

- Brochure
- Any publications or documents connected to their own fundraising or fund-generation work

The trainer should come prepared with:

1. The trainer manual
2. Copies of all the transparencies that will be needed
3. Copies of all the referenced books, if possible
4. Spare transparencies
5. Markers and pens for transparencies
6. The facilitator should have a portable computer/printer, or access to a computer/printer so that he/she can finalize some documents that the participants will take away with them.

Style and Methodology

The training will be based on the belief that all participants who are coming from civil society organizations will have ideas to contribute. The trainer's job is to stimulate ideas and discussion within the structure of the workshop outline, but the trainer should not be regarded as an expert on the subject in hand. He/she will guide the participants through a structure that will cover useful topics, but the value of the workshop will come from a combination of the structure and the experiences and thoughts of the participants.

The trainer has the following techniques available to him/her:

1. Showing transparencies and generating discussion by leading questions based on the transparency.
2. Reading text of the handbook and generating discussion.
3. Brain-storming ideas, listing them on flip chart and generating discussion by leading questions.
4. Requesting information on cards, displaying it, and generating discussion.
5. Undertaking exercises, and discussing the results.
6. Requesting private or group work, showing the results to the plenary and generating discussion around that.

It is important for the participants' learning that all are involved and all participate. A problem may be that participants come from a variety of different stages in their thinking about financial self-reliance. The exercises, however, are designed to make sure that the group's experience is displayed before everybody, so that everyone can be part of it, and everyone can be conversant with all other participants' experiences.

The facilitator is urged to become very conversant with the handbook. Facilitators will be expected to have read the text of the handbook and be familiar with the points made there. The preferred methodology is for the facilitator to elicit ideas from the participants, but the facilitator should know the topic in hand, in case participants may not come up with such points and the facilitator must introduce the points as new ideas (and be able to defend them).

The structure of the handbook allows the facilitator to work his/her way through the 12 approaches. It is helpful if the facilitator has experience of civil society organizations in theory and practice, since the participants will all come from this background. It is also helpful if the facilitator has some experience in facilitation. A list of reference books to help prepare those without a great deal of facilitation experience is provided.

An important point for the facilitator to emphasize at the start is that the course is not going to be lectures where the expert tells the students what should be. The course can only exist through the experiences of the participants interacting with the framework and examples that the facilitator provides.

Warm-up exercises, ice-breakers, and other group exercises that are the stock in trade of facilitators have not been included specifically. Facilitators should use their own experience to introduce these when they are needed. References are, however, provided for access to such materials.

An important part of the methodology is that participants' ideas (written on cards or on flip charts) are displayed throughout the workshop. This both gives validity to the participants' contributions and enables participants to browse in the coffee, lunch or final breaks and remind themselves of what they have all said. This means that the room is going to be increasingly filled with large sheets of paper. The facilitator needs to get used to the logistics of this - having sheets prepared, having masking tape ready for sticking up cards, having space ready for moving to with the big sheets for display, sticking up the big sheets so that they stay stuck up and do not fall off in the breeze. You can understand why the choice of a room with lots of wall space is important. It is also possible to use Bluetack or some either proprietary brand of solid adhesive, broken off into small pieces, for sticking material up instead of masking tape.

I do not advise the use of Post-it cards, although they seem ideal since the adhesive is already on the back. They are usually too small to have the ideas written on them seen at the back of the room, and they curl up when hanging so that the writing is obscured.

The Facilitator's Job

a. to present some ideas and encourage discussion on those ideas
b. to collect some information from the participants and encourage discussion on that information
c. to present some examples and encourage discussion of those examples
d. to introduce participatory exercises, carry them out, and then encourage discussion on the product of those exercises

The IDEAS are the subject matter of the handbook, presented in the overheads

The INFORMATION is the output from the exercises.

The EXAMPLES are the case studies, the examples quoted in the handbook, and any other examples that the facilitator may produce.

The facilitator's job is to elicit the ideas, comments, thoughts from the participants, either by discussion or with the flip charts, and then use the overheads as 'top-up' information to confirm what the participants have said, and to add to their remarks. In some cases, where the information is probably new to the participants, then the overheads will need to be used as the source of new information. The value of the 'card and chart' techniques (explained below) is that all participants contribute something, and that the contributions are not limited to those with loud voices and extrovert personalities. All participants experience and ideas are important and must be elicited.

Please see the detailed 'session plan' so that the facilitator knows in advance what materials are going to be needed for each session.

Card and Chart

One of the important ways of eliciting information from the participants is by encouraging discussion, and recording the highlights of such discussion on flip charts. Another way is by encouraging participants to write their ideas on cards that are then displayed in front of all. These cards can then be moved around to 'cluster' them in groups of similar ideas. This is called the 'card and chart' method, and has been popularized by German Agency for Technical Cooperation (GTZ). If pin boards are available (and these can usually be borrowed or hired from a local office of GTZ, together with pins, cards, glue) then a large sheet of paper is pinned onto the pin board and cards are pinned onto this and moved around on the pin boards for clustering. Once the exercise is complete, the pins are removed from the cards and they are glued in place. The whole sheet is then moved off the pin board and displayed somewhere else in the room as a record of the discussion and decision of the group. GTZ supplies large sheets of brown packing paper as the backing paper.

Pin boards and brown paper from GTZ, while valuable, are not, however essential. The card and chart technique can be used with cards stuck on to the large sheet of paper by masking tape. The large sheet is 4 flip chart sheets stuck together. If masking tape is used, such tape will survive 5-7 times peeling off and sticking down again. Once the exercise is finished, then the sheet can be immediately removed and displayed somewhere else in the room as a record of the discussion and decision. If white paper is used as the background sheet, then colored cards should be used for contrast. If facilitators are making their own cards, then they should buy colored card from a stationers and, using a paper guillotine, cut them down to 3 per A4 sheet.

Important aspects of card and chart technique are:

1. All participants have marker pens and lots of cards.
2. Participants are asked to write CLEARLY, LEGIBLY and LARGE, using no more than three lines on a card, and one idea to a card.
3. Cards are presented anonymously - no names are attached.
4. Participants can ask for explanations of cards if they do not understand them.
5. A large sheet of paper (the size of the pin-board) is first pinned to the pin boards. All cards are then pinned or stuck on to that.
6. At the coffee break, or lunch break, or at the end of the day, the sheet with the cards on it is removed from the working area at the front of the room, and displayed somewhere else in the room as a record of the discussion/decisions. To do this, the cards are either glued onto the base paper in place, and the pins taken out for use again (if you are using pin boards) or the base sheet is simply removed and displayed somewhere else. The sheet is a record of the participants' output, and is displayed through out the workshop.

Flip Charts and Use of Displayed Materials

The facilitator should make extensive use of flip charts, outside the more formal card and chart exercises. Ideas generated by the participants should be written up on flip charts - in clear writing - and if something important is written down, these flip chart sheets should be torn off and stuck up on the wall. Make sure that the title of the sheet is written clearly so participants who browse the walls can be clear what it is they are looking at.

From time to time the facilitator will be asked to provide participants with half or quarter flip chart sheets so that they can carry out some exercise. The facilitator should cut these up in advance for distribution and prepare a large flip chart sheet (4 x flip chart sheets in size) to receive the finished contributions from the participants on these half or quarter flip chart sheets and stick them on to it. Once the exercise is finished, the large sheet is taken out of the working area and displayed as a record elsewhere in the room.

Facilitators must study the trainer manual and the sequence of exercises in advance and be ready prepared with the right materials. The room will become increasingly filled with large sheets (4 x flip chart) on which are mounted either cards or flip chart halves and quarters.

Transparencies

The facilitator should make transparencies of all the sheets marked ‘OHT’ (for overhead transparencies) in the trainer manual in advance for use as overheads. Be careful when using the photocopier to copy from hard copy to transparency that you have bought and are using the right kind of transparency. The wrong kind melts in the photocopier.

As mentioned before the transparencies have two functions:

1. To stimulate discussion. The facilitator displays the overhead, goes through it point by point asking for examples from participants own experience. When showing the overhead, it is best to reveal them one phrase at a time to ensure the participants’ concentration is focused.

2. To confirm the participants points. The facilitator elicits the participants’ ideas verbally, writes them on flip charts, but then finally displays the overhead as a confirmation and validation of the points that the participants have made. If participants have made some point which is not on your prepared overhead, but which you consider important, then make sure you have pens to write on transparencies available so that you can immediately write it on the overhead.

Participants are bound to ask you for copies of the overheads as handouts. You are also likely to start off with participants desperately trying to copy down the material on the overhead. Tell all participants that they will receive a copy of the handbook at the end, and that the actual overheads can be downloaded for free on the Web as part of the trainer manual. Discourage copying of the overheads as it reduces people's concentration on the discussion.

Handouts

Have multiple copies of the handouts ready to give out when the right moment comes. Participants should keep them, but the facilitator should also tell the participants that the complete set of handouts is in the handbook (which they will be given at the end) or they can be downloaded for free from the Web.

The facilitator should ask for volunteers to read the handout out loud to the group, and then, at the end of each reading, ask if participants have any reflections on the story, whether they know of anything similar, and whether they think such an idea would work in their place. If the response is 'it may work there, but it could never happen here', then probe a bit to illicit what elements seem foreign to local experience. Often participants will have seen something like the example in the handout, but not necessarily used in the same way. For instance, participants may have no knowledge of indigenous foundations for development purposes, but they may know about foundations for veterans or pension funds. Participants may not know of individual philanthropy for development purposes, but are aware of it for charitable or religious purposes. Constantly challenge participants to think whether ideas can be drafted into the field of civil society organizations from other fields.

Further Reading

'The Instructor's Pocket Book – a Pocketful of Tips, Techniques, and Tools for Instructors, Teachers, and Group Leaders' by John Townsend. Management Pocket Books, 14 east St., Alresford, Hants SO249EE, United Kingdom. 1985

'Games and Exercises – a Manual for Facilitators and Trainers involved in Participatory Group Events' by UNICEF-ESARO, P.O. Box 44145, Nairobi, Kenya. 1998

'Games Trainers Play – Experiential Learning Exercises' by John Newstrom. Mcraw-Hill Inc. USA. 1980

'The Instructor's Survival Kit – a Manual for teachers of Adults' by Peter Franz Renner. Training Associates Ltd., Vancouver BC, Canada. 1989

'Training of Trainers – a Manual for Participatory Training Methodology in Development' from PRIA, Delhi, India.1988

'Training for Transformation – a Handbook for Community Workers' by Hope and Timmel. Mambo Press, P.O.Box UA320, Harare, Zimbabwe. 1984