UWI
IGDS
INSTITUTE FOR GENDER &
DEVELOPMENT STUDIES
NITA BARROW UNIT,
CAVE HILL, BARBADOS

BARBADOS
COUNCIL
For the Disabled

THE
LIVITY
PROJECT

LIVITY
LEADERSHIP
ACADEMY TOOLKIT

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ABOUT THE LIVITY PROJECT

The LIVITY Project is a five-year, seven-country partnership of the Institute for Gender and Development Studies: Nita Barrow Unit (IGDS: NBU) at The University of the West Indies, Cave Hill Campus, the Barbados Council for the Disabled (BCD) and the Eastern Caribbean Alliance for Diversity and Equality (ECADE), which is an umbrella Lesbian Gay Bisexual Transgender and Intersex civil society organization headquartered in St Lucia.

The LIVITY project is funded by the European Union and targets Barbados, Dominica, St. Vincent and the Grenadines, Antigua and Barbuda, St. Kitts and Nevis and St. Lucia.

The objective of this initiative is to meaningfully address marginalisation, discrimination and exclusion of persons with disabilities, LGBTI Caribbean citizens, women, girls, youth and the elderly in national and regional decision-making processes through enhancing CSO capacity and participation.

ABOUT THE
LIVITY LEADERSHIP ACADEMY

The LIVITY leadership academy is a training programme for CSOs which seeks to fill the knowledge and skills gap required to support the internal governance of CSOs, their contribution to policy analysis and policy dialogue as well as their communication and advocacy functions.
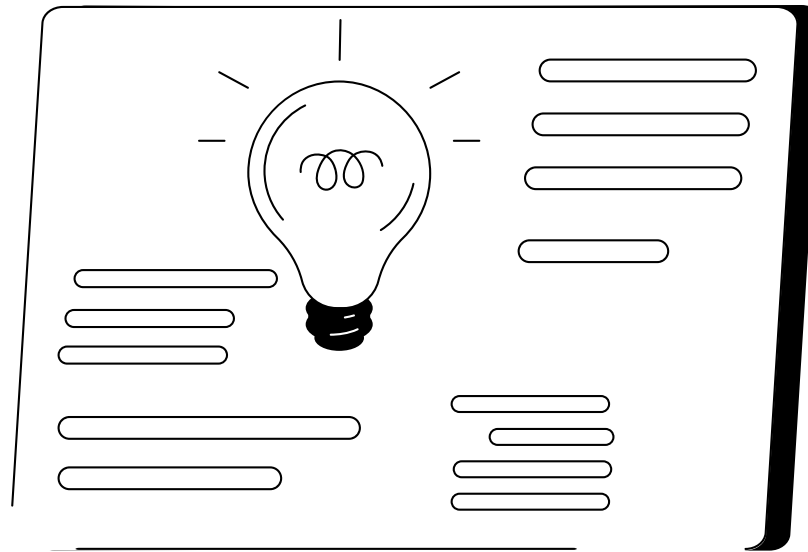
PROPOSAL WRITING

WHAT IS A PROPOSAL?

This is the document that starts at the project initiation stage. It answers the following questions:

- *What is your general project idea?*

- *Is the project idea feasible?*

- *What do the beneficiaries think about the concept?*

- *Is there potential funding for the project/Is the project aligned with funding opportunities?*

WHAT IS THE ROLE OF A PROPOSAL?

A proposal is a marketing tool!

A snapshot of the project planning process!

A basis for project evaluations!

TIPS FOR SUCCESSFUL PROPOSALS (Do's) ✓

Being able to communicate your ideas in a cohesive and marketable format effectively.

Maintaining a reasonable level of organisational transparency.

Legitimately representing or serving the target group.

Having realistic project activities and budgets.

Having a good track record for delivering outputs in a timely manner.

TIPS FOR SUCCESSFUL PROPOSAL WRITING

DO'S

- Read the application guidelines, and highlight the key points to help guide your application package.

- Trim any unnecessary information.

- Break up long sentences or paragraphs to increase readability.

- Have an online presence, either social media or website.

- Use the template provided by the funding agency.

- Explain any terminology used throughout the document.

- Align the overall tone of the proposal.

DON'TS

- Don't wait until the last minute to start writing. Prepare your material before the deadline to allow you to ask questions and double-check your work.

- Don't make assumptions about the guidelines or requirements; ask a question to the funding agency.

- Don't submit a proposal on an issue without looking at the funding announcement's objectives. Make sure it aligns with the call.

- Don't frame the proposal in terms of your organisation's needs. The money needs to solve a dire social problem, not an administrative problem.

- Don't avoid research. Always try to undertake a needs assessment of your beneficiaries to show that your organisation understands what needs to be done and that the project is well thought out, practical, and able to deliver. Ensure our beneficiary needs are entrenched throughout the proposal.

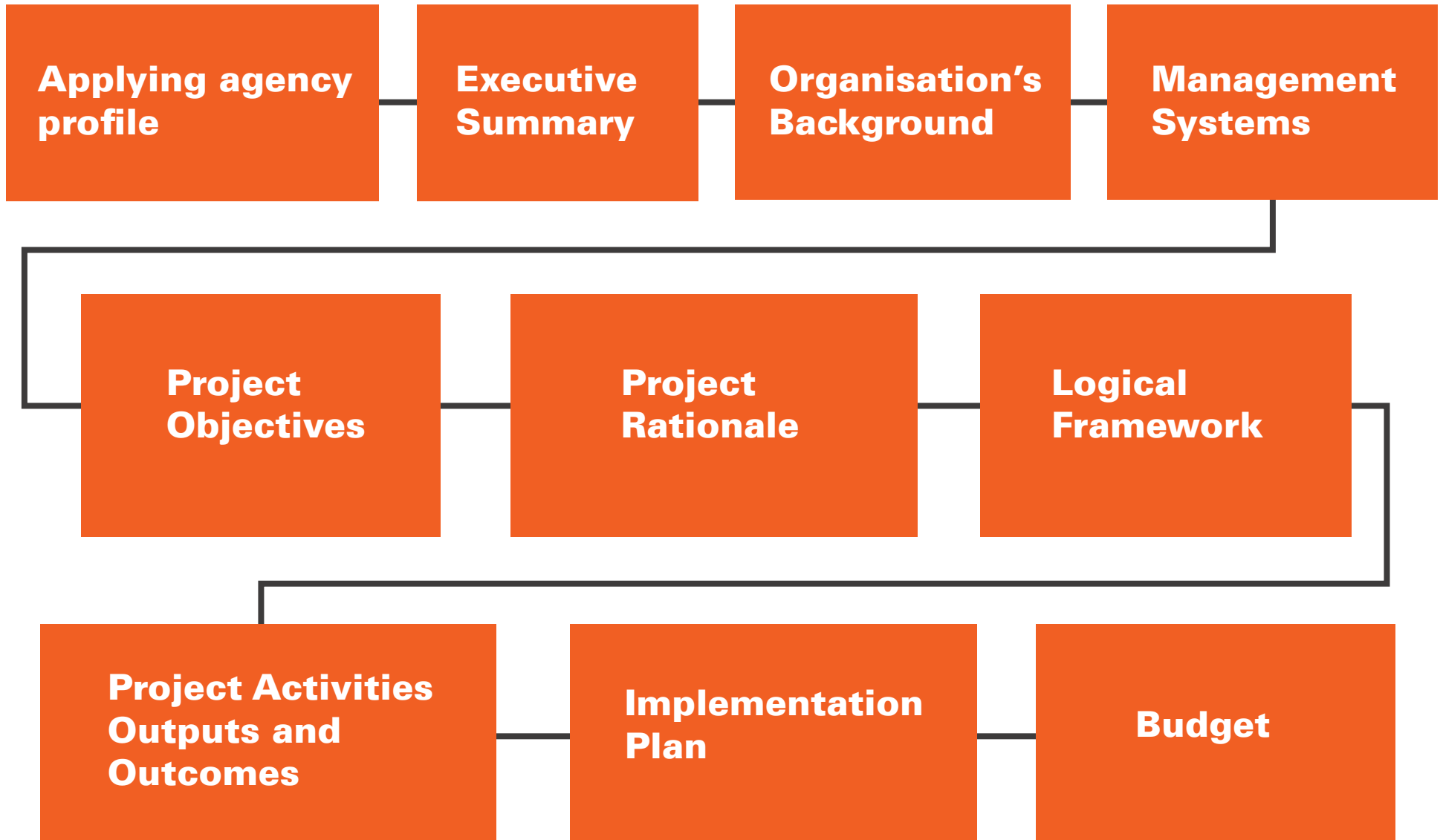# TIPS FOR SUCCESSFUL PROPOSAL WRITING (cont'd)

DO'S

- Have proofread (utilising the Microsoft Word Read Aloud feature or have someone else read it).

- Show the project flow: how the funding agency's contribution will impact the beneficiaries.

DON'TS

- Don't boast; prove it in words and numbers.

- Don't overstate or estimate your budget. Make sure your ask is justified and justify any abnormalities, such as excessive equipment.

- Don't 'trauma dump' on the funding agency.

- If you work for multiple agencies, do not submit the exact same proposal for the same funding announcement.

WHAT IS IN A PROPOSAL?

Applying agency profile	Executive Summary	Organisation's Background	Management Systems

Project Objectives	Project Rationale	Logical Framework

Project Activities Outputs and Outcomes	Implementation Plan	Budget

INCLUSIVE EVENT DESIGN

Why is this Important?

While your intervention may be targetted to a particular group/audience, people are not the same. It is important to consider that to ensure that attendees at physical or virtual events feel accommodated for and included.

Points To Consider:

- **A checklist**

  The needs assessment of the intervention: who is planning it? Are beneficiaries part of the planning and/or execution process? Is this something you think they want, or something they asked you for?

- **Venue & timing**

  Central locations (one bus locations)
  Dates and Times: for example, you create a half day workshop for young mothers, but you realise at 2:30 p.m., they are all trying to leave even though the workshop ends at 4 p.m.
  What do you think is happening?

- **Agenda settings**

  Is it always appropriate to begin with a word of prayer?
  - Does everyone share the same faith? Did you ask?

Ground rules

Making it clear that the space is an anti-discriminatory space. This can be done by making an opening statement that makes it clear that opinions that express hate or anger towards a marginalised group will not be tolerated.

Inclusive language use: While language is always evolving, it is important to be mindful of the words you say and the impact that it can have on others.

Examples of exclusionary language/statements are: "crippled by"; "handicapped".

Discussant/panel composition: how did you decide on the panel? Do they look the same? Was that intentional?

Communications products/materials: who is doing what in the photos and videos you are using (are all the women cooking? Are men only represented in "leadership" positions? Does everyone look the same?)

Have participants consented to be photographed? How did you ensure consent was received?

Are photos accompanied by text that is easily legible by text-to-speech software?

Support mechanisms: psychosocial support, counsellors, prayer rooms, private rooms that can be used for other reasons (pumping, breastfeeding, etc), child-minding spaces.

Catering/food options: What could a vegan eat? What could someone with gluten intolerance eat? Would they have to go buy food because of your options?

Implications for inclusivity

Budget: additional service provision can cost money, but it goes a long way in making people feel fully accommodated for. These people can then become long-serving volunteers, private donors or your biggest supporters.

Preparation:

Monitoring and Evaluation: gender-disaggregated data, accounting for other underrepresented groups in your reporting and feedback data.

COMMUNITY MOBILIZATION

WHAT IS COMMUNITY MOBILIZATION?

Community mobilization is a process that aims to engage all sectors of the community to prompt individual, family and community action. It uses a variety of community engagement approaches to raise awareness and empower individuals and groups toward those actions, creating an enabling environment and effecting positive change. Community mobilization can include activities such as door-to-door outreach, public meetings, health fairs, participatory theatre and other activities. Importantly, mobilization efforts are community driven, and community members are active participants in defining the problem, generating solutions and evaluating the outcomes of those solutions.
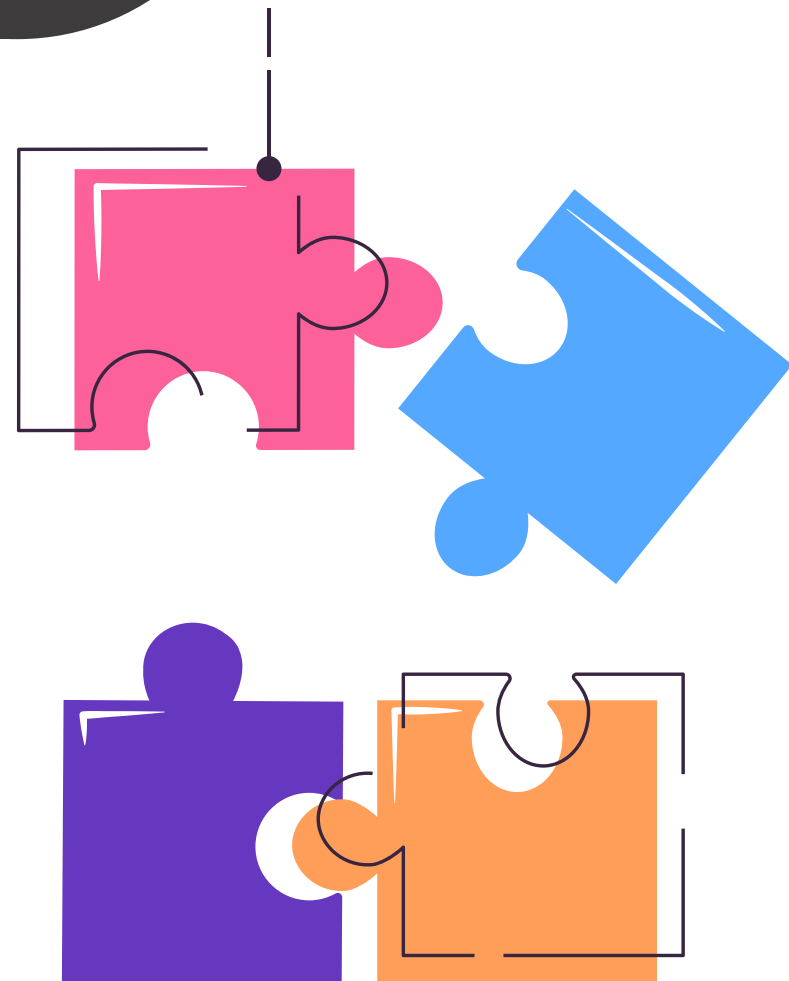
WHY COMMUNITY MOBILIZATION IS IMPORTANT

Community mobilization increases the capacity of a community to identify and address its own needs while generating local solutions to problems. For instance, because of its participatory approach, community mobilization ultimately strengthens and enhances the ability of a community to work together towards a common goal. Through its emphasis on prompting reflection and dialogue about current barriers and facilitators, coupled with actions individuals and communities can take to achieve their goals for improved health and wellness, it also contributes to the sustainability of any given action.

Understanding how communities perceive and comprehend a problem is necessary to design adequate interventions. Engaging with community members is crucial to building trust and credibility so that messages are accepted, and protective actions more likely to be taken.

Working with localized community groups, using existing structures, is highly recommended as the emergency efforts will build on an established network and trusted relationships and better ensures sustainability of emergency preparedness efforts. In Sierra Leone, during the Ebola response, emergency communication teams worked with the Village Development Committee, Family Member Committees and many youth groups.

Especially in the cases of contagious diseases, such as Ebola, integrating community mobilization into the emergency response allows for mobilizers to provide information regularly about what is happening in the community, the roles of emergency responders and, importantly, feedback information to the community about the status of the emergency and of loved ones who have been affected by the consequences of the emergency.
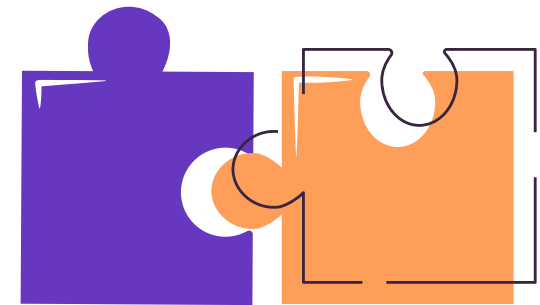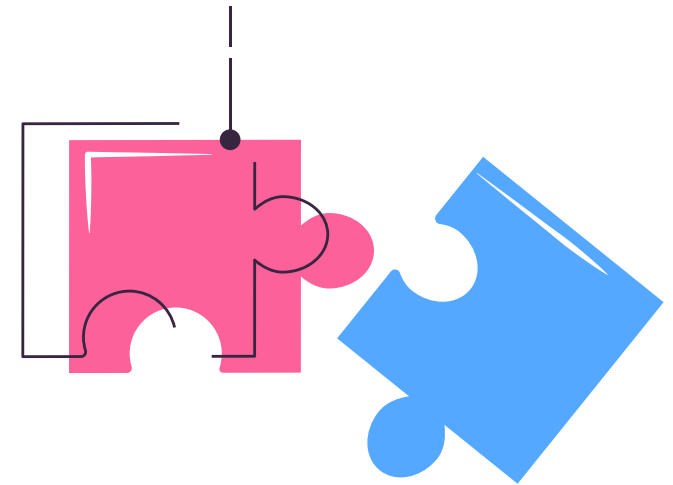
*For further information on this section, please visit the link below:*

https://sbccimplementationkits.org/sbcc-in-emergencies/lessons/unit-3-community-mobilization/#:~:text=Community%20mobilization%20can%20include%20activities,participatory%20theatre%20and%20other%20activities

EFFECTIVE CSO GOVERNANCE

What is Governance

Good governance is a key factor to ensure the growth and sustainability of civil society organisations (CSOs). Below are some definitions of governance:

• "Governance refers to a system of oversight, exercise of authority, or control within an NGO."[1]

• "Good governance is a transparent decision-making process in which the leadership of a nonprofit organisation, in an effective and accountable way, directs resources and exercises power on the basis of shared values."[2]

• 'Governance' is the way in which an organisation distributes powers, rights, and accountability.[3]

• "Governance is the activity performed by an entity (such as a board, a city council, or a legislature) that holds authority within a system. In an organizational system such as a nonprofit, authority is granted to the board of directors by the state when the organization is incorporated. The board is authorized to make decisions and set policies that define how the organization will carry out its mission; it is also held accountable for the actions that follow those decisions and policies. The board then governs the organization-that it, it directs and guides the organization from its position of authority."[4]
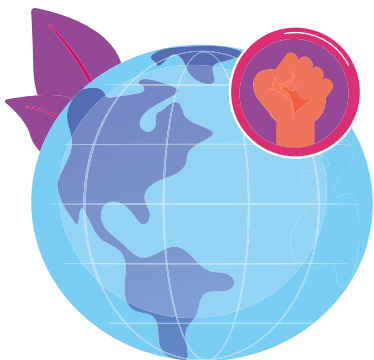
Effective governance can ensure that your organisation has a strategic direction and that the people who are supposed to benefit from the organisation's activities are getting as much support as they can. It can protect your organisation from being used by individuals for their private gain, and ensure it is accountable to the public, members, beneficiaries, donors and, where appropriate, to the state. Accountability is particularly important for organisations working with or on behalf of disadvantaged people, and which raise funds on that basis.[3]

One common form of governance is to place ultimate responsibility for the actions of the organisation in the hands of a board of management – a group of people who are elected or appointed to oversee the work of the organisation. This body – and these people – are ultimately responsible for everything that is done in the name of the organisation.[3]

Governance is a group action. Individual board members do not govern the organization; rather meeting as a group confers governing status to the board as a whole. Governance implies the exercise of power and authority over the organization on behalf of the community it serves.[4]

What is a Board of Directors?

CSOs are directed and controlled by a governing body, or a board of directors. You may also encounter names such as board of governors or board of trustees. The board has a legal, moral, and fiduciary responsibility for the organisation.[5]

A board is a group of external people who collaborate to provide technical, managerial, and financial support to an organisation. The board is ultimately responsible for governing the organisation and holds legal responsibility for the organisation and its operations. The board helps develop, support, and defend the organisation's mission. Board members ensure that the organisation is responsive to the needs of its stakeholders. It is important that both the organisation and the board members themselves have a clear understanding of the board's roles and responsibilities and the nature of its interactions with senior management.[6]

The board should comprise individuals who are willing to dedicate time and resources to the organisation. Members should have a broad range of qualities and expertise, including professional skills, management experience, and recognition among the public. The board members should complement each other and the organisation's staff.[5]

What are the Governing Documents of a Board?

Three documents form the basis for CSO governance: articles of incorporation, bylaws, and the mission statement. These documents, along with the minutes of board meetings, budgets, financial statements, and policy statements, communicate how the organisation is governed, individual responsibilities, the organisation's past, and the organisation's future plans.
The articles of incorporation is a legal document that is filed with the appropriate government agency to register the organisation as a CSO. Incorporating a CSO, according to the statutory authority of the country, may protect the CSO and its members from unhappy consequences, such as liability for the organisation's debts. Tax advantages are commonly available to registered CSOs.

Law prescribes the form and content of articles of incorporation. Although requirements vary from country to country, typical items required in articles of incorporation for a CSO include:

- Name of the organisation

- Duration of the organisation (usually perpetual)

- Purpose for which the organisation is formed

- Provision for conducting the internal affairs of the organisation

- Names and address of the incorporators

- Address of the initial registered office and name of the initial registered agent of the organisation

- Provision for distribution of the assets of the organisation on dissolution

The stated purpose of the organisation should be broad enough to enable the organisation to evolve as necessary to serve its constituency. Articles of incorporation outline the organisation's form. A set of bylaws, developed by the organisation's constituents and approved by the board, supplements the articles by prescribing detailed rules for governing the organisation.

Bylaws often begin with a restatement of the name and purpose of the organisation as written in the articles of incorporation. Bylaws are internal documents, a set of rules that enables each organisation to conduct its affairs. It is important they be written clearly and in language that is easily understood by all organisation stakeholders. Typical items addressed in the bylaws are:

- *The frequency, notice, and quorum requirements for organisational meetings.*
- *Voting qualifications, proxies, and procedures for approval of board items.*
- *The number and term for members of the board, scope of authority, method of nomination and election to the board, and provision for filling vacancies.*
- *List of board officers, method of nomination and election, terms of office, powers, duties, and succession.*
- *Membership and authority of standing committees.*
- *Title and scope of authority for the executive director/chief of staff.*
- *Record-keeping and financial reporting responsibilities.*
- *Amendment procedures for the bylaws and provisions for dissolution of the organisation.*

It is wise to stop short of having too much detail in the bylaws to allow flexibility and avoid the necessity of frequent amendments.

For example: A new public health CSO wants to raise funds on behalf of a community hospital and decides on an annual banquet as a fundraiser. Over time, this event declines in popularity and the organisation decides to hold an annual campaign instead of holding the banquet. If the bylaws specifically mandate the existence of the banquet committee, the organisation would have to work through an amendment to make the operational change. It is better for the board to have the authority to abolish the old committee and establish a new one so that it may proceed with the new project.

Writing and gaining approval for a set of bylaws takes thought, time, and the involvement of the organisation's constituents. Bylaws should be written with an emphasis on fair treatment and transparent governance. Review the bylaws of several CSOs before attempting to write a new set of bylaws.

The mission statement is a communications tool—it guides the board and staff and explains the nature of the CSO to

those outside the organisation. Therefore, it needs to be concise and memorable.

The mission statement is generally more specific than the CSO's purpose that appears in the articles of incorporation. Some mission statements are a single sentence, some a short paragraph, and some bulleted statements. The mission statement expresses the group's values. Writing a mission statement forces CSO stakeholders to think through their priorities and carefully align behavior with beliefs.

A mission statement should clearly and concisely answer all three questions shown in the following formula.

Who does the CSO serve? + How are they served? + Where are they served? = a complete mission statement.

WHAT ARE THE BOARD'S MAJOR ROLES AND RESPONSIBILITIES?
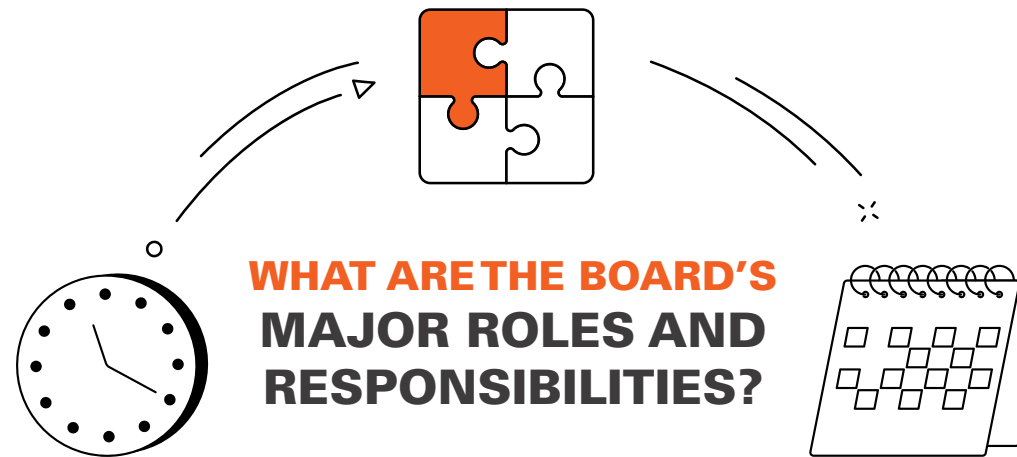
Governance. The board's primary function is governance, or serving as a supervisory and complementary body in the structure and operation of an organisation, with legal responsibility for its performance. The board's governance responsibilities protect the interests of the organisation and its stakeholders. Governance activities can include policy decision-making and oversight of the organisation's financial and administrative operations.

The board presides over the establishment and implementation of organisational policy, strategic planning, budgeting (including the approval of annual budgets), and the preparation of business plans and other important administrative resolutions. The board helps set strategy and policy objectives, provides feedback on the manner in which the organisation's staff intends to meet these objectives (in terms of planned activities, programs, etc.), and evaluates the organisation's performance (both financially and in terms of its impact in the community). The board also ensures compliance with laws and regulations, including regulations set by donors. The board is not intended to manage an organisation but rather to guide it to achieve its mission through sound strategic plans and rational policies.

The board's governance function is collective in nature, and decisions should ideally reflect the contributions of all board members. The executive director should prevent the opinion or contribution of any one

board member from dominating the rulings of the board; no board member should be given special consideration or privileges. Board members should bear in mind that their decisions are to be objective and that personal interests are not to be advanced by their membership on the board.

Support. The board also supports the organisation, working to guarantee its overall success. The board seeks to strengthen the organisation by using, for example, the expertise of individual board members or connections in the community. The supportive functions of the board also include:

- *Encouraging, facilitating, and promoting fundraising efforts: For example, the board may help the organisation hold a fund drive each year or arrange for high-profile speakers to appear at benefit events.*

- *Advising management and providing technical input according to the board members' individual experience and professional capabilities: For example, an accountant on the board may suggest certain types of financial management reports to better inform donors about the organisation's performance.*

- *Performing tasks related to the organisation's mission, including advocacy activities to promote the organisation to stakeholders and the general public: For example, an influential board member may assist in recruiting a popular musician to give a concert at the organisation's health fair.[8]*

In addition to the roles described above, the board also has a number of obligations and responsibilities. These range from participating in meetings to providing fundamental support for the organisation's mission. The most important are to support the organisation and ensure that its presence in the community is positive and influential. (The responsibilities of individual board members are discussed later.)

Figure 1 shows ten basic responsibilities of a board.

Figure 1. Ten Basic Responsibilities of Nonprofit Boards

1. Determine the organisation's mission and purposes
2. Select the chief executive
3. Support and evaluate the chief executive
4. Ensure effective planning
5. Monitor and strengthen programs and services
6. Ensure adequate financial resources
7. Protect assets and provide financial oversight
8. Build a competent board
9. Ensure legal and ethical integrity
10. Enhance the organisation´s public standing

Source: Richard T. Ingram. Ten Basic Responsibilities of Nonprofit Boards. 2nd edition. Washington, DC: BoardSource, 2009.

01 | Determine the Mission and Purpose

The board is ultimately responsible for ensuring that the organisation is responsive to its stakeholders and that its mission is focused on the needs of the community. The board should be involved in the strategic planning process, especially in developing the organisation's mission statement, which expresses its overall purpose. In the case of nonprofit providers of health services, this means the board protects the interests of the organisation's patients and members of the community it serves.

02 | Select the Chief Executive

The board is responsible for reaching consensus on the chief executive's responsibilities and undertaking a careful search to find the most qualified person for the position.

For more information on this section, please refer to:
GUIDE TO EFFECTIVE CSO GOVERNANCE
by Karen Johnson Lassner (Principal Program Associate Management Sciences for Health)