

Chapter 8 Strengthening the groups and their self-management ability

8.1 Objectives and procedural outline

The next step after forming the groups and making the initial activity plan (Chapter 6), is for the groups to begin activities to increase their ability in self management (managing the group by themselves), to learn environment-friendly farming techniques and to elevate their environmental awareness. These are also the basic elements necessary for accomplishing the project's goal. These activities are implemented according to the following flowchart.

Step 1: Begin group activities following the Initial Activity Plan

- Confirm the Initial Activity Plan that was validated through the project's technical counsel; program and coordinate the activities.
- Carry out the programmed activities with regularity on the group farmland (basically once a week).



Step 2: Continuation of the group activities

- Carry out the regular activities on the group farmland for the members to learn organizational strengthening, farming and conservation techniques, and environmental awareness.
- Carry out special activities (lectures, workshops, tours and work exchanges) to reinforce organizational strengthening, farming and conservation techniques, and environmental awareness creation.
- Monitor and do follow-up on what members learned in the monthly meetings and through practicing on the group farm, technical transfer, observation and consultation.



Paso 3: Semiannual workshop

- Monitor, by the group and project, the activities that were carried out during the first period (first 6 months).
- Revise the Initial Activity Plan (or Annual Activity Plan) with the technical counsel of the project.



Step 4: Follow-up in group activities

- Same as Step 2.



Step 5: Annual evaluation and annual planning for the following year

- The group and project evaluate together the activities that were implemented during the second 6-month period.
- The Annual Activity Plan (AAP) is made for the following year with a perspective for sustainable farming in line with the group farmland use plan, with technical advice from the project.

(Return to Step 2 and repeat the cycle.)

This Chapter explains how to plan and carry out activities for strengthening the group organization. First, a group is given an explanation about the theory and practice of selecting the themes for organizational strengthening, and a general long-term plan (curriculum) for group strengthening activities is established,

which will last for the project’s entire period (section 8.2). Next, the methods for implementing each activity are explained (section 8.3). Activities in environmental awareness creation and technical assistance are carried out parallel to the group strengthening activities; these are explained separately in Chapters 9 and 10 respectively.

8.2 Selection of themes and establishment of curriculum

8.2.1 Selection of themes

When working to strengthen an organization, themes should be selected that are necessary and appropriate to the group and inline with the project’s purpose. The general themes for strengthening a group can be classified as follows: (A) Work methodology and values for creating a group without conflicts; (B) Ability to administer and coordinate group work; (C) Economic self-management by the group. The table categorizes some of the issues that need to be learned for organizational strengthening.

The issues that group members should learn for strengthening their organization may vary between projects depending on the focus and emphasis of the project’s philosophy as applied to its activities. In such case, other issues than those listed here may need to be identified, their priority for introduction decided upon, and included in these activities.

Table 8-1 Possible themes to be learned for organizational strengthening by category

Category	Sub-category	Suggested themes
A) Values for creating a group without conflicts	A-1. Motivation for creating a group	- Importance of community participation - Group integration / cooperation
	A-2. Attitudes for making unity and managing conflicts	- Values for group work - Relationships among group members - Decision making with consensus - Self respect - Leadership
	A-3. Contribution of women and men	- Equality in participation by men and women - Different roles between the genders
B) Administration and coordination of group activities	B-1. Managing group goods and labor	- Functions of directors and responsibility of each member - Acquisition and benefit of legal personality - Importance of record and good use of the group’s goods
	B-2. Planning and monitoring with participatory method	- Management of monthly meetings - Management of semiannual / annual workshops
C) Economic self-management of group	C-1. Administration of economic activities	- Management of production record and treasury record - Sales of products and services
	C-2. Acquisition of fund	- Reinvestment - Acquisition of outside funds (environmental business plan)

8.2.2 Establishment of the curriculum

It is hoped that a recently formed group will continue to strengthen its organization by going through the three stages shown below and reach the level of being “self-sustainable”.

First stage: *Establishing a group’s fundamental base.*

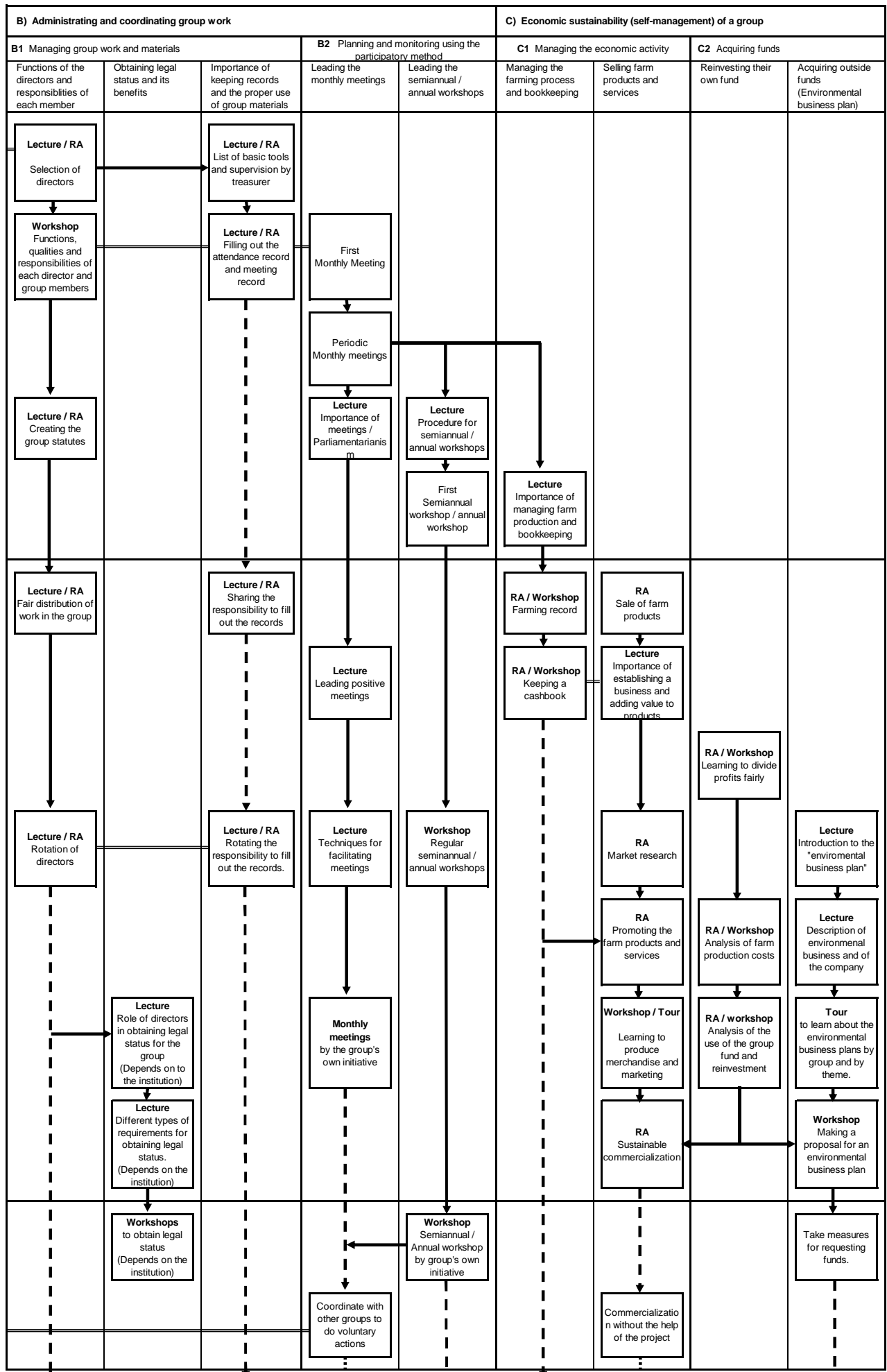
Second stage: *Developing group activities.*

Third stage: *Developing a social network.*

After selecting the themes, a general curriculum of the organizational strengthening activities is made for the group, and each of the selected issues are thoroughly analyzed according to the three stages mentioned above. Figure 8-1 shows a model curriculum that covers the issues listed in Table 8-1 and which was developed based on the experiences of Alhajuella Project. The activities corresponding to each issue are placed in accordance with the group’s stage of organizational development. Also, the lines and arrows joining the activities help to clarify their order and the relationship and priority of the different activities. This model includes up to the establishment of a collaborative network among the groups, which will hopefully be accomplished at the end of the third stage. Furthermore, the most effective method that is recommended for learning each issue is indicated for each activity (the methods are explained in the section 8.3).

It is important to remember that, according to previous experiences in forming groups for community development, it generally takes 5 years for a newly organized group to reach the third stage (the stage of “developing a social network”). However, for a group to be able to continue functioning on its own, it is said that the group may need another 2 years of receiving some type of support. Therefore, at the beginning of the project, the final goals that you plan to achieve by the end of the project period, as well as the mechanism for doing follow-up, need to be defined.

Every project should create its own curriculum for organizational strengthening according to the emphasis and focus of its philosophy. It would be recommendable to create the curriculum at the beginning of the project even though it may require various modifications later on. In this way you can clarify the goal of the activities with a long-term vision for organizational strengthening that will last for the entire project period.



8.3 Implementation of activities

8.3.1 Preparation needed for the activities

Once the long-term general curriculum for organizational strengthening has been established, the planned activities are carried out in order. The coordinators should consider making the following preparations: decide upon the activity (prioritize the activities’ order of execution and decide on the dates), select the implementation scheme for the activities, coordinate the place and participants, prepare the tools and material needed, invite instructors (when necessary), and take budgetary measures, etc.

This section 8.3 explains the methods for carrying out the activities and also the implementation scheme for each issue. The materials required for each method (equipment, supplies and cost) are given in section 8.5.

8.3.2 Methods of implementation of the activities

Once the organizational strengthening issues have been selected, the methods to use to help members learn these issues need to be chosen taking into account the advantages, disadvantages and other pertinent matters of each method. Table B-2 compares the characteristics of seven basic methods, namely: “1) Lecture / class”, “2) Participatory learning workshop”, “3) Educational tour”, “4) Work exchange”, “5) Regular activities for learning”, “6) Monthly meeting”, and “7) Semiannual and annual workshops”.

Table 8-2 Methods for learning organizational strengthening

<i>I. Methods for learning new ideas</i>	
1) Lecture / Training Class	<p>Description: Listen to a presentation of ideas on a certain issue by a lecturer.</p> <p>Instructors: A lecturer is needed who knows a certain issue well.</p> <p>Participants: The number depends on the capacity and convenience of the room / hall.</p> <p>Advantages: The issues can be presented in an organized manner in one single session.</p> <p>Disadvantages: The participants may become passive because of the one-way communication from the lecturer.</p> <p>Other points to consider: The lecturer needs to animate the interaction with and/or among the participants. Audiovisual material can be used. If it is a large venue or there are many participants, sound equipment will be needed. It will be difficult to obtain electricity in the rural communities.</p>
2) Participatory learning workshop	<p>Description: Learning in a group through practical experiences (analysis visualization, dynamics, social-drama, simulation, etc.) and interaction (working in a group, discussion, debate, presentations, etc.)</p> <p>Instructors: One facilitator and assistants according to the need of the activity.</p> <p>Participants: From 8 to 25 people (not too many or too little) to insure good interaction in the group.</p>

Advantages: Participants can grasp the concepts based on their experiences.

Disadvantages: Not many themes can be covered in one session.

Other points to consider: The results of the workshop depend on the facilitator's abilities. An entertaining methodology does not necessarily signify the participants' comprehension and the hoped for action will be achieved. The activity should be focused on the message that is being conveyed so that the participants can grasp it with the indirect aid of the facilitator.

II. Methods for learning from successful experiences of other groups

3) Educational tour

Description: Visit other places that the groups do not go to habitually so that they can learn about the accomplishments and work methods of groups in other areas.

Instructors: People who can explain about the place being visited.

Participants: The number of participants will depend on the availability of transportation. If only one group is going on the tour, then most of the members could participate. If several groups are going, then only a limited number from each group could participate.

Advantages: The tour participants can be directly impacted and motivated by what they see on the tour.

Disadvantages: High expenses in case of a long distance tour.

Other points to consider: You should be familiar with the successful cases before taking the groups to visit them. Group members should take turns going on the tours so that everyone has an equal opportunity. Those that go on a tour should explain what they saw to the rest of the group once they return. (The tour is not a "pleasure trip".)

4) Exchange of group activities

Description: The groups help each other in carrying out a certain activities and exchange ideas about their experiences.

Instructors: Instructors are not needed, but the members of the recipient group (the group that receives the support from other groups) should explain their activities, their experiences in group organization and the techniques they learned on the group farm.

Participants: The number could be very large depending on the means of transportation used between the groups.

Advantages: The recipient group can become activated by the visit. The groups can analyze their own strengths and weaknesses by comparing themselves with each other. A social network can be formed among the groups.

Disadvantages: It is hard to coordinate among groups that are distant from each other.

Other points to consider: The work exchange could be coordinated among communities whose group members are able to travel to other groups so that they can create unity among the groups and continue with this practice even after the project ends. This activity has a much greater impact on participants if in addition to the work exchange there is also time for technical transfer and group strengthening activities. These should be coordinated with the extension workers and the organization coordinators.

III. Methods for learning by practicing on the farmland

5) Regular activities for learning (RA)

Description: Give orientation for specific techniques and team works, and follow-up practice directly. This method is the base of all the activities because it functions as a space for learning group works through practice.

Instructors: Project personnel

Participants: Group members. Depending on the topic, you may focus on specific persons, such as the group directors or facilitators (i.e. keeping records, procedure and coordination of requests, reflection of implemented activities, etc.)

Advantages: What was learned in the lectures, workshops, study tours and exchanges can be applied.

Disadvantages: The results could depend on the ability of the personnel assisting the group.

Other points to consider: It can be complemented by previously implemented trainings (lectures, workshops, study tours and exchanges). However, the assimilation may result limited if one does not carry out the reflection after training in an adequate manner.

6) Monthly Meetings

Description: Confirm (monitor) the activities that were done the month before, coordinate the activities for the following month, and discuss the group's situation in order to improve it in a participatory manner. Work to strengthen the group's ability in self-management by fomenting the active participation of members in the regular meetings.

Instructors: In the beginning, the project personnel guide the procedure of the meeting and the conversation. Later, the members learn how to conduct the meeting following on the agenda.

Participants: Most of the group. Make sure that the quorum is met (half the group plus one).

Advantages: It serves as a regular opportunity to strengthen the group's organization, and allows a continuous monitoring of different aspects of the group (planning and executing activities, communication and unity within the group, group administration).

Disadvantages: Recently formed groups could see the monthly meetings as an additional burden in the beginning phase.

Other points to consider: Prepare beforehand the specific issues to be addressed in the meeting by the group, taking into consideration their level of organization and the issues addressed in the previous meeting. In addition, this is an important opportunity to carry out reflections after trainings.

7) Semiannual and annual workshops

Description: Confirm (monitor) the activities that were done and determine the coming activities by year. Work to strengthen the group's ability in self-management by fomenting the active participation of members in the monitoring and planning in the workshops.

Instructors: In the beginning, the project personnel guide the workshop procedure and the conversation. Later, the members learn how to facilitate the workshop.

Participants: Most of the group. Make sure that there is quorum (half the group plus one).

Advantages: It functions as regular opportunity for the group's organizational strengthening. The members can develop logical opinions when the same method is repeated.

Disadvantages: The workshop can be long when various topics are discussed and the members give their opinion without order.

Other points to consider: An impartial environment needs to be established and maintained in order for each participant to express her/his sincere opinion. It takes time to see a change (the workshops are not held frequently).

8.3.3 Development outline by theme

In this section, an explanation is given on the general flow, and some of the important points, for carrying out the activities of each category given in the model in Figure 8-1. In the Annex, there is a list of manuals, including some of the workshop manuals created by Alhajuela Project, which can be used as reference for carrying out each group strengthening activity.

Figure 8-1 is a “model curriculum” with recommendations for the methods that would be most effective for teaching each issue. However, the methods may be substituted for others that may be more appropriate depending on the preparation, budget and participants. For example, a tour could be replaced with a lecture/class using videos; also a lecture/class could take the form of a workshop that includes exercises in the same issue.

The individual methods such as a lecture, workshop or tour may be combined into a training program lasting several days. An effective training program can be planned by considering the location (a facility with lodging or in the community itself), the time and the participants to be invited (from one group or various groups). On the other hand, if you prefer to do each activity separately by group or by issue, it would be recommendable to make use of the monthly meetings to do the activity thus making efficient use of time and place.

Sub-categories A1, A2, A3

The objectives of these Sub-categories are for members to understand the significance and advantages of doing group activities and also to learn the attitudes and way of thinking that of an active group member. In the first stage, soon after beginning regular group activities, tours are taken to observe other established groups in order to help the members’ comprehension of group activities. Later, talks and workshops are held to teach the basic knowledge of each issue and then assistance is given to put into practice in the regular activities (on the group farm) what was learned. In the second stage, relatively advanced contents are taught to members for each issue and assistance is given to put into practice in the regular activities what was learned. Also, in this stage, (work) exchanges are repeatedly held between groups to broaden their perspective and foment understanding of group activities and how a group member should be. Finally, at the third stage, it is hoped that, besides the internal activities of the group, the group will be capable of planning and carrying out exchanges and activities with other groups and inhabitants outside the group.

Sub-category B1

The objective of Sub-category B1 is to learn group administration, control of equipment, and the basic practice of keeping records. In the first stage, almost at the beginning of the regular activities, the directors of the group are selected. Also, a list of the group’s tools is made for their collective control and the method of control and

responsible person are decided upon. Later, the practice of keeping records (Activity Attendance List and Minutes of the Meeting) is introduced and assistance continues to be given (through OJT during regular activities) so that each member can fulfill their responsibility and adopt the record-keeping practice. In the second stage, assistance is given so that the group can adopt the rotation of responsibilities among its members.

Chapter 6 “Forming Groups” gives an explanation of the way to select the group directors, since they will probably be chosen during the process of forming a group. Chapter 10 “Introduction to the Techniques” can be referred to for the collective management of the group’s tools, and Chapter 12 “Monitoring” for the content of the Minutes of the Meeting.

Sub-category B2

The objective of Sub-category B2 is to learn the techniques for creating group consensus and for group administration during the monthly meetings and semiannual and annual workshops. The first step in this sub-category is to hold the first monthly meeting after beginning the regular activities (see Figure 8-1).

At the beginning, the project staff leads the monthly meetings, asking and requesting the group members’ opinions in order to coordinate the activities. When the members become accustomed to the procedure of the monthly meetings, someone from the group can begin to facilitate the meeting in an orderly manner. The “facilitators” do not necessarily have to be key persons or directors of the group, although some of them could have the necessary qualities of a facilitator. Table 8-3 shows the general process for transferring the initiative of leading the monthly meeting from the project to the group. Furthermore, the community facilitators can also serve in transferring to the group what they had learned in a training session.

Table 8-3 General process for transferring the initiative of leading monthly meetings

Initiative of the Group	Step	Initiative of the Project
<ul style="list-style-type: none">- Lead the religious invocation at the beginning of the meeting.	1	<ul style="list-style-type: none">- Plan the date and hour.- Prepare the agenda.- Lead almost every part of the meeting- Prepare the report form.- Fill out the report / minutes form.
<ul style="list-style-type: none">- Take turns in offering the prayer.- Fill out the report form.	2	<ul style="list-style-type: none">- Normalize and facilitate the meeting procedure.- Help to fill out the report / minutes form.- Review the filled out form.
<ul style="list-style-type: none">- Take turns in the responsibility for filling out the report form.- Prepare the form for visualizing the matters in front of the group.	3	<ul style="list-style-type: none">- Continue to facilitate the meeting procedure.

<ul style="list-style-type: none">- Begin to facilitate the meeting procedure.	4	<ul style="list-style-type: none">- Help the group’s facilitators giving follow-up to the facilitating process.
<ul style="list-style-type: none">- Take turns as facilitator.- Prepare the agenda before starting the meeting.- Plan the date and hour and invite the project team.	5	<ul style="list-style-type: none">- Support the group in rotating the meeting facilitators.
<ul style="list-style-type: none">- Lead the meeting.- Present the plan to the project team to coordinate the activities.	6	<ul style="list-style-type: none">- Attend the meetings as a participant or observer.

The first semiannual and annual workshops can be held at an opportune moment during the first period, depending on the time that the group has been with the project. Once the group members are able to facilitate the monthly meetings, they can successively begin to facilitate the semiannual and annual workshops.

The monthly meetings and semiannual and annual workshops are not only a method for organizational strengthening, but they are also an opportunity for doing monitoring and planning by the project. This methodology is covered in detail in Chapter 12 “Monitoring / Planning”.

Sub-categories C1, C2

The objective of these sub-categories is to learn the sale of farm products in a planned manner and fund management and reinvestment through the group’s regular activities and occasional workshops. Since these are relatively complicated issues, the actual process is started in the second stage (see Figure 8-1) where the group activities will have advanced to a certain degree. In the third stage, it is hoped that the group will have the achieved the ability to sell their products with continuity and to reinvest the group fund in their activities. The details of this stage are explained in Chapter 11.

8.4 Other important issues for development of the activities

Other important issues for development of the activities will be explained in the following:

- 1) Understanding a group’s level and achievements

Each group has a different situation and its organizational development likewise differs. Some groups may have had experiences of being organized before, and others may have members that have experiences of

working in a group. Under such circumstances, there is no need to do initial group-strengthening activities with other groups that have no organizational experience. Therefore, it would be recommendable to measure the current level of each group in each issue to avoid unnecessary investments in activities.

Also, the reaction to the same training may vary among groups in regards to their level of understanding and their posterior development, so that the investments needed for the next step would also vary. Therefore, in order for the investments to be adequate to each group, it is important that the project stays informed of the current state and achievements of each group during the entire period of project implementation.

The issues that need to be strengthened in a group can be analyzed using various tools, such as the following:

- Results of the baseline study;
- PRA, especially the Problem Tree, the Analysis of Problems and Solutions;
- Monitoring results during regular assistance given to the group;
- Monitoring results of monthly meetings, especially the observation of conduct, attitudes, opinions and their changes in each member;
- Monitoring results of semiannual and annual workshops, especially the analysis of group characteristics and the sustainability (maturity) indicators;
- Evaluation survey after a training session.

The above-mentioned tools are used to analyze the current organizational level of a group, and the results are compared with the suggested flow of organizational strengthening activities (curriculum) shown in Figure 8-1 to identify the needs and priorities for strengthening each group. The activities that have been identified and prioritized in the model can be adjusted (carried out separately, combined or omitted) by the project.

2) Selecting the instructors

The methods 1) lecture or class, 2) participatory workshop, and 3) educational tour shown in Table 8-2 require instructors (lecturers or facilitators) who are specialized in the theme for implementing the training. The instructors can be selected from among the following candidates: project personnel, personnel from government institutions, NGO personnel, professionals from private companies, and members from the farmer groups. The following table makes a comparison of these potential instructors.

Table 8-5 Comparison of Instructors from different organizations

Instructor's Origin	Advantages	Disadvantages
Project	Coordination is easy because they are part of the project. They know the target groups.	Lack of knowledge on certain issues.
Government institutions	The personnel have knowledge in complementary issues which increases their capacity as an instructor.	Coordination has to be done by official letters. (Slows down the coordination.) Personnel may not be available if their function isn't to be an instructor. Some do not have transportation.
NGO's / Private companies	They may be professional in giving training courses.	The cost could be relatively high. The area of specialty of each instructor in an organization needs to be known to select the appropriate person.
Farmer groups	They can explain an issue based on their own experiences. They speak the language of the participants.	They need to be identified beforehand through institutions that work with farmer organizations.

8.5 Inputs needed

(Single methods)

Activity	Personnel	Time	Material and Expense
1. Lecture / Class	Instructor; Project personnel as coordinator	Maximum 90 min. per class	Transportation and daily allowance: \$30-50 / day / instructor (if needed)
2. Workshop (in the community)	Moderator and assistants; Project personnel as coordinator	Approx. 1-3 hours per workshop	Transportation and daily allowance: \$30-50 / day / instructor (if needed); Manila paper, markers, adhesive tape, index cards or cut paper. Food: \$20 for the group
3. Educational tour	Instructor; Project personnel as coordinator	1 day tour (more days depending on the distance)	Food: \$5 / day / person (plus lodging)
4. Exchange	Project personnel as coordinator	1 day of work	Food: \$50 / day (depends on the number of participants)
5. Regular activities	Project personnel	Variable	Variable
6. Monthly meeting	Project personnel	Approx. 1-2 hours x 12 times / year	Manila paper, markers, adhesive tape, 2 copies of the form, carbon paper, attendance list, copy of the AAP, and the report from the previous meeting
7. Semiannual and annual workshops	Project personnel (a multidisciplinary team of 2-3 people)	1 day x 2 times / year	Manila paper, markers, adhesive tape, index cards or cut pieces of paper, copy of the AAP and FUP, Food: \$20 / day

(Program = combination of single methods)

Activity	Personnel	Time	Material and Expense
Training program with overnight stay	Instructor; Project personnel as coordinator	3-5 days per program	Allowance: \$5 / day / participant, Transportation and allowance \$30-50 / day / instructor (if needed), Lodging (depending on the venue)