

Discussion Session B: PVO Training and Information Needs

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In this panel discussion, USAID sought feedback on its PVO research and training agendas for the purpose of developing more targeted training and associated materials, both to assist the PVO seeking grant funding and to meaningfully assist PVOs in general with their training needs. Summaries of suggested training areas by topic area follow individual panel members' presentations. The session participants divided into small groups, which also provided training recommendations to PVC-ASHA.

Suggested Training for New Applicants

(Dan Norell)

The following training needs were identified as having value for new applicants:

- Include in the RFA the dollar amount offered, the number of organizations that have applied in the past, and the acceptance rate.
- Communicate the requirements for USAID approval of PVO accounting systems for grants and for cooperative agreements with NGOs so as not to incur long wait times for assessments and approvals (e.g., of an NGO's accounting system).
- At the DIMP (Detailed Implementation Plan) Workshop, enable helpful dialog between USAID and grantees on the realities of the project and how the project context has changed since application. Also, discuss how to develop a collegial relationship with the USAID Technical Officer to get updates. By being a colleague instead of a "cop" and working shoulder to shoulder with the PVO, USAID can foster better relationships.
- Share information on trends, such as those related to USAID Global Development Alliance (GDA), private sector's increasing role in development, value chains in microenterprise development thinking, and competitiveness and trade capacity development. What are the "winds of change" within the Agency that could, for instance, help grantees foster closer relationships with the private sector?"
- How can PVOs facilitate good governance through their interaction with civil society in developing countries? Given the new emphasis by USAID on democracy and governance, what programming tools do PVOs need to foster an improved, enabling environment in the countries in which they work?
- Offer training on the new paradigm where corporations, small enterprises, and microenterprises are now sponsoring this work—how do grantees form effective alliances with PVOs and government?

Suggested Training Needs—Implementation Phase

(Alton Byers)

Based on The Mountain Institute's experiences and analysis, the following types of training would be helpful:

- More training in fundraising, fund-leveraging, and fund-matching skills. Recent changes in traditional funding sources and within USAID makes this kind of training more important than ever before. Likewise, learning how to better access the private sector (business and private individual), establish endowments, and strengthen other funding mechanisms would be helpful.
- More coaching on PVO-to-PVO partnerships and networking, particularly with regard to partner selection, budget clarification, contract mechanisms, and conflict management. A daylong workshop on partnership would be useful.
- Organizational development, both traditional (e.g., financial management, strategic planning, fundraising, HQ support for field) and new (e.g., adaptive management). Such training could help PVOs chart new organizational directions as a result of changing global priorities and needs.
- More evaluation training and performance monitoring. PVOs need to move beyond assumptions and popular hypotheses; include applied research as part of the threat analysis and project design phase; establish baseline data and M&E systems capable of measuring change over time; and better identify the linkages between the intervention (e.g., training) and desired result (e.g., improved conservation). However, these skills, while intuitively obvious to the scientist through years of applied research and field work, are proving to be not so simple for the field practitioner used to the “process” models of previous decades.
- More opportunities for PVOs/NGOs to get together to share experiences through thematic workshops—perhaps one of the best mechanisms for learning. This would be a step in the right direction. Note that the capacity to measure project impacts is also more important than ever to today’s donors and, in a way, represents another component of PVO sustainability.

Ongoing Training Needs for Grantees

(Charles Patterson)

PVOs need ongoing training to:

- Better understand both the larger and more specific contexts of the program and its mechanics. In other words, while newer grantees definitely need USAID 101, they likely also need USAID 201 and 301 and need it more frequently. Questions pertaining to foreign aid budget for development work, origin and purpose of the USAID-PVC partnership, and differences between the many funding vehicles (e.g., cooperative agreements, grants, RFPs, RFAs, etc.) need elucidating.
- Know more about how to partner with businesses. While this kind of partnering is a good idea, it is not so easy for the average PVO to carry out. Periodic meetings need to occur where PVOs can share best practices and other ideas.
- Understand how to better set objectives and evaluate results. Many NGOs that PVOs are working with cannot show whether sub-intermediary results, such as changes in farmer practices, are sufficient to achieve intermediary results (e.g. changes in productivity and sales) and even whether these changes ever achieve larger objectives, such as increased income. No reliable mechanism exists to measure changes occurring in sexual, social, and industrial practices and their effect on larger desired outcomes. Has the logic of the logical framework been abandoned? What are the best alternatives for evaluating intermediate results?

- Develop better project designs and methods. USAID needs to help PVOs figure out the ends and the means to achieve better designs and methods through incorporation of best practices, innovations, and improvements. What are the best ways of keeping abreast of these?
- Learn how associations of local NGOs can advocate with their local and national governments to effect changes in legislation and government application of the law.

The following summarizes presentations by topic area:

Funding/Financial Management/Organizational Development

The PVO presenters noted that fund leveraging has become more difficult during the past several years and requested training on how to better access private donors and endowments. They suggested that the training take the form of a “funding refresher course.” This should include an overview of types of funding, including explanations of the differences among DA, Emergency Funds, OE, etc. Additionally, this training should include a review of funding mechanisms, such as RFAs. Similarly, the presenters indicated a need for information on the general USAID budget context, such as how much annual funding is allocated for the type of work performed by PVOs. The presenters said it would be beneficial to have general financial management training, including training on the differences in accounting requirements for grants vs. cooperative agreements, and training on sustainability strategies, strategic planning, and support for field operations.

Partnerships/Networks

In terms of partnerships, the PVO presenters requested an explanation of USAID’s rationale for partnering with private businesses. In addition, they expressed a need for more guidance and clarification concerning expectations, deliverables, budget issues, and USAID’s role in resolving potential partnership conflicts. The PVO presenters also indicated a need for training on the lessons for establishing partnerships and how to work more closely with corporations.

In the area of networks, the presenters expressed a need for advocacy training, with a specific focus on how to influence local and national changes in legislation and government regulation. Furthermore, they noted an overall need for training on how to have enhanced alliances between PVOs

Monitoring & Evaluation

Finally, the PVOs indicated a need for further planning, and monitoring and evaluation training. In terms of planning, they requested clarity on the differences among the logical framework, results matrices, and planning matrices. The presenters also requested training on how to make the DIMP process more collegial.

For M&E, the PVO presenters indicated that the establishment of baseline data is still a difficult process for many PVOs. Additionally, they expressed the need for training on how to better capture, refine, and share best practices. Specifically, the PVOs requested that the Agency’s Development Experience Clearinghouse (DEC) be reorganized to provide best practices more easily, such as by sector.

Small Group Recommendations

Session participants broke into small groups to come up with a list of training and workshop suggestions for USAID, as well as suggested delivery mechanisms. A representative list follows:

- Communicate basic requirements (e.g., a handbook) to help newer grantees get their “ducks in a row” as far as organizational requirements—i.e., all those things that must be in place before seeking a grant, so as to come to the table appropriately.
- Provide mentoring opportunities, where an “older” PVO is willing to take on a younger PVO for mentoring purposes. Could have a list of potential mentors on the website? Mentoring workshops?
- Consider email alerts for different things.
- Provide training for new grantees during first cycle of grant (i.e. evaluation, monitoring, and results reporting).
- Create systems to monitor product development.
- Provide best practices for the specific type of project being evaluated.
- Allow for the development of short-term, mid-term, and long-term plans, as well as iterations of these.
- Provide training to truly “start up” projects. There is so much to learn, and the established systems are complex and difficult to navigate.
- At the Annual PVO Conferences, include separate sessions for those PVOs that are not yet funded; these sessions could possibly be led by new grantees.