

Capacity Building of Communities, Community Networks, and CSOs

Module - 5 **Organizational and Leadership Strengthening**

Community System Strengthening under NACP - V



Module - 5

Organizational and Leadership Strengthening



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75
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Foreword



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स्वास्थ्य और परिवार कल्याण मंत्रालय
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NACP Phase-V envisages "Keep beneficiary and community in center" of HIV/AIDS epidemic as one of the key guiding principles. This aims to maximum the benefits to its diverse target population in a friendly ecosystem, offering a basket of tailored integrated services across prevention-detection-treatment spectrum. The National AIDS Control Program acknowledges the collaboration and involvement of the communities, people living with HIV/AIDS and civil society organizations as key to elimination of HIV/AIDS related stigma and discrimination and strengthening the HIV response in the country. Under NACP V, Community Systems Strengthening (CSS) as an approach complements NACO's overall vision where every person who is highly vulnerable to HIV is heard and reached out to and every person living with HIV is treated with dignity with access to quality care.

Under CSS, the aim is to identify and build the capacity of the communities, community networks and community organisations to ensure greater meaningful involvement of communities (and their organisations) in planning, implementing, monitoring, and evaluation of NACP. It is expected that these individuals, groups and networks from the community will complement the program through mobilizing the community, increasing demand for NACP services and support in improving the quality of care. NACO, through the model of social contracting already partners with Non-Governmental Organisation (NGOs) and Community Based Organisations (CBOs) for provision of HIV services to our priority populations, and hence, it is envisioned that through further capacity building efforts more community-based organisations will be able to take this partnership to the next level.

The capacity building modules developed under CSS, are designed to equip community, community networks and community-based organisations with the necessary knowledge, skills and tools to augment the HIV response in India. I believe these modules will play a valuable role in increasing the capacities of our communities to work in partnership with the National Program towards achieving the goal of elimination of HIV as a public health threat by 2023.


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सत्यमेव जयते



Preface



राष्ट्रीय एड्स नियंत्रण संगठन
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NACP recognizes the need for community-engaged responses, not just as beneficiaries, but as key partners in action for improving health and well-being. It aims towards elimination of HIV/AIDS related stigma and discrimination. NACP Phase-V, therefore aims to institutionalize the community engagement and meaningful participation at the most granular level in the form of community system strengthening (CSS). CSS will catalase improved health outcomes specifically through strengthening targeted interventions (TI) program, advocacy and rapid response to reducing stigma and discrimination, enhancing treatment literacy, greater involvement of communities in decision making and finally developing structured systems of community-led monitoring (CLM).

Under CSS, creation of the community resource pool at the national and sub-national level is given priority wherein focus is to increase capacities of community, community networks and community based organisations. This is done with the objective to enhance engagement and participation of the community in all aspects of the national program from planning, implementation and monitoring. More recently, substantial contribution is added by the community when engaged through community advisory boards at the district level. While conducting Programmatic Mapping and Size Estimation. Through the principles of GIPA, NACP also recognizes the involvement of PLHIV and affected communities by enabling individuals and communities to draw on their life experiences; thus contributing to reducing stigma and discrimination. Communities also play a pivotal role in enactment of the HIV/AIDS Act 2017 by increasing awareness and creating accountability for furthering the HIV response in the country.

Aligned with the above, the modules have been developed for "Capacity Building of Communities, Community Networks and CSOs" under CSS as part of the Global Fund grant, 2021 – 24. It is intended to intensifies efforts for building capacity and human resources, with the aim of enabling communities and community actors to play a full and effective role alongside health and social welfare systems. The modules are useful not only for the HIV program but can also be referenced by the larger public health programs towards effective community engagement in the country.

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Message

The fifth phase of the National AIDS Control Programme, aims to attain the United Nations' Sustainable Development Goals 3.3 of ending the HIV/AIDS epidemic as a public health threat by 2030. This has warranted a focused and stronger attention to community involvement in the HIV response in India. Therefore, community system strengthening lays strong emphasis on building capacity and human resources, with the aim of enabling communities and community actors into full partnership with national health and social welfare systems.

There are new overarching strategies that are employed under NACP phase V which complement ensuring access to testing, treatment and care services. There is attention on developing new generation and integrated communication strategy for prevention, testing, and treatment of HIV and STIs. Focus is also laid on promoting launch and scale-up of social protection schemes by Central/State Governments to mainstream people infected and affected with HIV, including the vulnerable population, towards reducing inequalities and promoting inclusions. To reduce HIV related stigma and discrimination, emphasis is on accelerating the notification of State rules in context of the HIV and AIDS (Prevention and Control) Act, 2017, which is the primary legislation protecting and promoting the rights of people infected and affected with HIV. The community of key population and PLHIV will play an important role by spreading awareness, generating demand and supporting in creating an enabling environment for implementation of these strategies, especially by strengthening the process of grievance redressal mechanism.

These modules support in ensuring that information regarding the rights of the community, access to correct and relevant information regarding the programs under NACP and information on social welfare and protection schemes reaches our priority population. Under CSS, the creation of a community resource pool will complement the National level efforts to accelerate and sustain the national HIV response.

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Message

Under NACP phase V, NACO's vision for community system strengthening (CSS) is to ensure meaningful involvement of PLHIV and Key Populations to support the ongoing HIV interventions by building communities capacities and their systems. It is envisioned as an important strategy to improve the program's impact; effectiveness, efficiency, and accountability through better collaboration. It is envisioned for building capacities for reaching the unreached and hidden groups, dissemination of information, and creating an enabling environment for the reduction of stigma and discrimination.

One of the main components of CSS, is to identify and build the capacities of communities, community networks and organizations, it was envisioned to develop capacity building modules based on the needs of the community. As NACO has always involved the community through constant consultation and conversation, the same process has been followed for the development of the above. The topics covered were identified through the mechanism of community needs assessment and finalized through consultation meetings. The 6 thematic areas identified for the modules are: Advocacy; Community networks, linkages, partnerships, and coordination; Resources Mobilization; Demand Generation; Organizational and leadership strengthening; and CLM & Knowledge Management.

The modules for "Capacity Building of Communities, Community Networks and CSOs" are developed covering a range of topics that can be utilised by stakeholders like SACS and implementing partners working with community, community groups and organisations but also for the communities themselves to increase their knowledge and skills to contribute towards the National HIV program. I believe these modules will contribute to strengthening the roles of our priority populations to achieve the highest attainable standards of health, no matter who they are or where they live.


(Dr. Shobini Rajan)

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We strongly believe that the modules developed for "Capacity Building of Communities, Community Networks and CSOs" under CSS as part of the Global Fund grant (2021 – 24) under NACP V will intensify NACO's efforts towards meaningful engagement of the communities in the National HIV response in India.

We are grateful for the valuable guidance provided by Ms. V. Hekali Zhimomi (Additional Secretary & Director General, NACO). Ms. Nidhi Kesarwani (Director, NACO) provided her valuable experience in defining the content for the modules. Dr. Anoop Kumar Puri, (DDG – CST, IEC & MS, NACO), Dr. Uday Bhanu Das (DDG – PMR & Lab Services, NACO) Dr. Shobini Rajan (DDG – TI, BSD and STI, NACO), Dr. Chinmoyee Das (ADG – CST, SI & IT, NACO), Dr. Bhawna Rao (DD – IEC & MS & Lab Services, NACO) and Dr. Saiprasad Bhavsar (DD – CST, PMR & SCM, NACO) and SACS officials for their technical inputs and contribution in developing the modules.

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Contents

Table of Contents

1.0 INTRODUCTION, BACKGROUND AND OVERVIEW	17
2.0 PURPOSE OF MODULE: 5 ORGANIZATIONAL AND LEADERSHIP STRENGTHENING	18
3.0 OBJECTIVES OF TRAINING MODULE: 5 ORGANIZATIONAL AND LEADERSHIP STRENGTHENING	19
4.0 EXPECTED OUTCOMES	19
5.0 PRINCIPLES OF THE TRAINING PROGRAM	20
6.0 METHODS OF THE TRAINING PROGRAM	21
7.0 ETHICS OF THE FACILITATOR	21
8.0 SESSION 5.1 A COMPLIANCES AND LEGAL REQUIREMENTS FOR SETTING UP A CBO	23
9.0 SESSION: 5.1 B STATUTORY COMPLIANCES AND FISCAL REGIME	31
10.0 SESSION: 5.2 HUMAN RESOURCE MANAGEMENT AND KEY POLICIES	39
11.0 SESSION: 5.3 FINANCIAL MANAGEMENT	47
12.0 SESSION: 5.4 PROBLEM SOLVING AND DECISION MAKING	53
13.0 SESSION: 5.5 STAKEHOLDER ENGAGEMENT	61

ABBREVIATIONS

AIDS	Acquired Immuno Deficiency Syndrome
ART	Antiretroviral Therapy
CBO	Community Based Organization
CC	Community Champions
CSC	Care and Support Centers
CSS	Community Systems Strengthening
CEO	Chief Executive Officer
CSR	Corporate Social Responsibility
CHW	Community Health Worker
DIN	Director Identification Number
DAPCU	District AIDS Prevention and Control Unit
ESIC	Employees' State Insurance Scheme
FSW	Female Sex Worker
FCRA	Foreign Contribution Regulation Act
GST	Goods and Services Tax
HRM	Human Resource Management
HIV	Human Immunodeficiency Virus
H/TG	Hijra/ Transgender
HRG	High Risk Group
ICTC	Integrated Counselling and Testing Centres
IDU	Injecting Drug Users
IEC	Information, Education and Communication
KM	Knowledge Management
KP	Key Population
KRA	Key Result Area
KPI	Key Performance Indicator
MSM	Men Having Sex with Men
MCA	Ministry of Corporate Affairs
NACO	National AIDS Control Organization
NACP	National AIDS & STD Control Programme
NGO	Non-Government Organization
OST	Opioid Substitution Therapy
PLHIV	People Living with HIV
PAN	Permanent Account Number
PWID	People Who Inject Drugs
SACS	State AIDS Control Society
TI	Targeted Intervention
TAN	Tax Deduction and Collection Account Number
TDS	Tax Deduction At Source

CHAPTER - 1.0

Introduction, Background and Overview

India is one of the countries in the Asia Pacific region that have recorded significant decreases in new infections among the key populations (KP) and significant increase in providing access to treatment among people living with HIV infection. The strategies adopted by the National AIDS Control Organization (NACO) for prevention, treatment and care have predominantly worked because the National AIDS & STD Control Programme (NACP) has kept the key populations (KP) and people living with HIV (PLHIV) at the center of its response. Working with the key groups, consulting and respecting them as the stakeholders have supported immensely in advancing the response to combat HIV/AIDS and the social ramifications of the epidemic. India in its' fight to end AIDS is at a critical juncture as the fast-track targets and India's commitment to end AIDS by 2030, warrants focused and stronger response from the key players. The key players in this regard are the community members from the key populations such as the female sex workers (FSW), men having sex with men (MSM) and PLHIV. Participation and leadership of the key players from KPs in tandem with a well-integrated national program will take India towards achieving the global goals of ending AIDS by 2030. Towards this purpose the NACP V focuses on Community System Strengthening (CSS) and empowerment and calls for community engagement at different level including cadre of health delivery system, at both NACO and State AIDS Control Society (SACS) level. Community System Strengthening aims to achieve improved health outcomes of NACP specifically for strengthening targeted interventions (TI) program, reducing stigma and discrimination, enhancing treatment literacy, greater involvement of communities in decision making and finally developing structured systems of community-led monitoring (CLM).

One of the main approaches under Community System Strengthening is to develop the capacities of communities and Community Based Organizations (CBO) and Non-Government Organization (NGO). In the year 2021, NACO conducted a series of consultations with the community members and national level stakeholders. These consultations pointed out towards the capacity strengthening needs of the community. The national level consultation also brought out the thematic areas on which training could be imparted. Therefore, in order to develop the capacities of individuals and community-based organizations, module-based trainings have been envisaged. This module and other five modules have created to address the related learning needs of the Community Champions (CCs) and CBOs/NGOs in the field of HIV/AIDS prevention program.

CHAPTER - 2.0

Purpose of Module: 5 Organizational and Leadership Strengthening

In India, the KP focused CBOs and NGOs have played a key role in identifying, collectivizing and representing the community voices in a comprehensive manner. The capacity of CBO/NGO needs to be continuously built and strengthened towards the HIV program implementation, community linkages, networking. For effective delivery of programs the CBO/NGO have to perform these critical tasks by following the formal processes and laws of the land. This module focuses on India specific knowledge related to setting up an organization, processes to be followed and leadership related skills.

Target Audience of this module

The target audiences of this module are the Community Champions and CBOs/NGOs representing and/ or working for the Key Populations (KPs). The key populations who are defined under the Global Fund CSS framework are those groups that meet all three of the criteria below:

1. The population experiences increased risk or burden of disease due to a combination of biological, socio-economic and structural factors;
2. Access to health services that prevent, diagnose, treat, or care for these diseases is lower than for the general population; and
3. The population experiences human rights violations, systematic disenfranchisement, social and economic marginalization and/or criminalization.

Based on the above criteria, the KPs are defined by NACO as under:

Female Sex Worker (FSW)

Adult women who engaged in consensual sex in exchange for money/ payment in kind at least once as a means of livelihood in the last six months.

Men Having Sex With Men (MSM)

Adult men who had anal or oral sex with more than one male/hijra partner at least once in the last six months.

Hijra/ Transgender People (H/TG)

Sexually active adult person having more than one sexual partner in the last six months and whose self-identity does not confirm unambiguously to conventional notions of male or female gender roles but combines or moves between these.

People who inject drugs (PWID)

Adult men and women who use addictive substances for recreational or non- medical reasons, through injections, at least once in the last six months.

People Living with HIV (PLHIV)

People Living with HIV who require anti-retroviral therapy (ART) to live a healthy life.

The Community Champions and representatives of CBO/NGO may be from these KPs and some of them may also from the general population. They will constitute the training participants whose capacities will be strengthened under the CSS.

CHAPTER - 3.0**Objectives of Training Module: 5
Organizational and Leadership
Strengthening**

The master trainers need to bear in mind that the participants are Community Champions and the representatives of a CBO/NGO who have varying needs pertaining to this module. While Community Champions may have aspirations to start their CBO, representatives from CBO/NGO may be at various stages – of norming, storming and performing. Therefore, the objective of this training module are as under:

- 1. To strengthen knowledge of organization formation and operation.**
- 2. To develop and strengthen CBO leadership.**

CHAPTER - 4.0**Expected Outcomes**

It is expected that after the training, workshop participants will have better understanding of the organizational leadership and governance. The overall outcomes are as under:

1. Community Champions and CBO leaders are able to acquire the necessary knowledge of organization formation and operation.
2. Community Champions and CBO leaders are able to acquire the necessary knowledge on organization financial management.
3. Community Champions and CBO leaders are able to provide leadership in the development operation and management of programs, systems and services in the long run

CHAPTER - 5.0

Principles of the Training Program

The participants of the workshop will be CBO/NGO professionals, activists and community resource persons with varying experience and education. The approaches used for the module cannot be a mere class room lectures kind of one-way interaction; it has to be an approach that respects as well as incorporates their experience, pre-existing knowledge and motivates them to adapt the new learning. Hence, the adult learning approach known as the Andragogy will be utilized for developing these modules. According to Malcom Knowles, an eminent exponent of the adult learning enunciated following core principles of andragogy are:

1. Adults **need to know** why they need to learn something before learning it.
2. The **self-concept of adult** is heavily dependent upon a move towards **self-direction**.
3. **Prior experiences** of the learner provide a **rich resource for learning**.
4. Adults typically become **ready to learn** when they **experience a need to cope with a life** situation or perform a task.
5. Adult orientation to learning is life centered and they see **education as a process of developing increased competency levels to achieve their full potential**.
6. The **motivation for adult learners is internal rather than external**.

Andragogy reorients adult educators from “educating people to helping them learn”. The methods used may range from isolated instruction within a curriculum or integrated instruction. It may also encompass intentional and unintentional learning situations. The instructions need to be organized by task and present in a manner similar to how it will be used. The learner needs to know why the concept to be learned is important in order for the learner to remain motivated. Despite the learner ultimately having control of learning through self-directed means, the trainer needs to facilitate the opportunities for the learner to experience growth.

CHAPTER - 6.0

Methods of the Training Program

The module covers the subject in great details. The facilitator is required to study the content and if need be research it further and prepare themselves thoroughly. The facilitator can modify presentation to meet the regional need.

This module is further divided into sub-modules with the activities and direct instructions which can be used to explain concepts. During the activity, the facilitator is expected to explain the practical implications of that activity and link it with the content. The facilitator is expected to address specific topics of immediate concern and then expand to how it can be applied in real life situations as well as for various key populations. Much of the content will be applicable to the experiences of the learners therefore a facilitator is expected to engage in active learning, use the learner experience and incorporate key learning on the spot for the better understanding of participants. Facilitator may also engage in cross learning for example learning from the successes of a particular KP group and identifying key strategies that could be incorporated towards other key groups.

CHAPTER -7.0

Ethics of the Facilitator

Respect for participants

The workshop participants may come from different geographies, life experiences and diverse KP groups. The facilitator needs to be aware about this diversity and respect is the participants. The respect should translate into his/her/their way of verbal and non-verbal communication. A participant's agency should be fully respected by the facilitator.

Being non-judgemental

The facilitator should make him/her/themselves aware about the diversity of their workshop participants and must be non-judgemental towards them. No participant should be judged on the basis of their sexuality, gender identity, sexual behavior, being in sex work and their vulnerability to HIV/AIDS.

Equality towards participants

Over and above being sensitive to the diverse participants, a facilitator is also expected to treat all the participants equally. All participants need to be given equal opportunity participate and express their views. Participants can be of varied personality such as introverts and extroverts, sensors and intuiters, thinkers and feelers, judges and perceivers. People from all of these personality type needs be given equal opportunities to participate in the workshop.

Respecting confidentiality

Team building and group work creates a comfort zone for the participants in which participants may share their deeply personal insights and stories. The facilitator has to ensure that post training, they are not sharing these insights by naming any participant. Maintaining confidentiality of the participants and proceedings is an important ethic to be followed by the facilitator.

Module 5	Organizational and Leadership Strengthening
Module Objectives	1.To strengthen knowledge of organization formation and operation. 2.To develop and strengthen CBO leadership.
Expected Learning Outcomes	1.Community Champions and CBO leaders are able to acquire the necessary knowledge of organization formation and operation. 2.Community Champions and CBO leaders are able to provide leadership in the development operation and management of programs, systems and services in the long run.

CHAPTER - 8.0

5.1 A Compliances and Legal Requirements for setting up a CBO

Session: 5.1 A	Compliances and Legal Requirements for setting up a CBO
Learning objectives of this session	Participants learn about: 1. Registering a CBO as a legal entity, associated advantages and disadvantages 2. Different legal options and framework available for registering a CBO 3. Detailed process of registering a CBO
Duration	1 Hour
Tools	Handouts and Power Point slides
Methodology	Group work and Presentations

Instructions to Facilitators

This session will involve participative learning. The facilitator is expected to engage the participants to brainstorm and present their experiential understanding of compliances and legal requirements for setting up a CBO. This module has pre-decided content which the facilitator is expected to revise beforehand and if need be, refer to the resources mentioned. Activities are conducted before the knowledge sharing via presentation. The facilitator is expected to weave the activity learning in the content.

Activity: 1**20 Minutes****What is a CBO and the need for registering a CBO**

Ask the participants to divide themselves into five key population (PLHIV, MSM, FSW, PWID and H/TG) wise groups. Share a chart paper and pen. Ask them to write all the words, phrases that comes to their mind when they hear the word CBO. Also ask them to define the need of registering the CBO. Give them 10 minutes time. Ask them to select one presenter out of the group. After the five presenters from five groups presented their understanding, share the PPT and explain in details what does "Community based organization" means and why it is important to have a defined purpose and objective to register a CBO.

Facilitator's role:

The facilitator leads the discussion after the activity. Teams are asked to reflect on the output of each group. Following reflective questions can be posed:

- Was the defining process easy or difficult?
- What came first to your mind when you were defining CBO?
- Did everyone from the group agreed on the identified purpose and objective of forming a CBO?
- How did you handle the differences of opinion in the group?
- What did you learn from presentation of other groups?
- Do you wish to add or delete anything after the presentation of other groups?

Facilitator's Lecture Content**What is a Community Based Organization?**

- A public or private not-for-profit organization that is representative of a community or significant segments of a community and engaged in meeting that community's needs in the areas of social, human, or health services within its designated community.
- An organized body providing services that benefits a targeted/identified community and has a significant influence and an effective voice.

Purpose and objective of registering a CBO

- When a community exists for a certain period of time and develops an identity of its own, in terms of its mission, purpose, tasks, activities, goal, etc, then a legal form of registration helps strengthen that identity for the future.
- A legal form of registration helps provide credibility to the organisation. Most donors, be they governmental or non-governmental, prefer to provide resources to a legal organisation and not to an informal group of individuals. This is so because the obligations upon a legal entity can be ensured beyond the life of a single individual or a group of individuals and can also be enforced in the eyes of the law.
- A legal frame helps enhance the credibility of the organisation. It essentially implies that a registered organisation is likely to have a life of its own, continuity and stability over a long period of time.
- It also helps the group to consolidate their efforts in a structured framework under one umbrella.
- How and from where a CBO get registered.???? (at State or Country level)...



Sources: What is a CBO? - <https://www.lawinsider.com/dictionary/community-based-organization-cbo>
Need for registering a CBO- <https://cordindia.in/programs/community-based-organisations/>

Activity: 2**15 Minutes****Registration of a CBO- Advantages and Disadvantages**

Share the advantages and disadvantages of registering a CBO through a power point presentation. After the share ask the group if they would like to add any more advantages/disadvantages based on their community experience.

Lecture Content for the Facilitator**Advantages**

1. Registered CBOs obtain legal status in order to interact with the government and non-government donor partners and other stakeholders.
2. Members represent the organisation with authority.
3. A registered CBO can open a bank account and sign contracts in the name of the organisation.
4. A registered CBO can also qualify for financial assistance from government agencies and local, national and international donors.
5. It becomes eligible to take guidance and help from relevant registration authorities, contract funds and support from relevant departments.
6. A registered CBO can seek tax exemption from certain incomes, training opportunities, technical assistance, and concessions when obtaining vehicles, equipment and commodities.
7. A legal frame also helps provide a greater degree of possibility for longevity and continuity of the organisation.
8. The legal framework also provides limited liability for membership, particularly those who founded it and helped set it up in the beginning. Therefore, in the event of the organisation facing a loss or a problem, and to the extent that its leadership can be shown to be acting with bona-fide intentions, the loss or problem cannot be attached to the personal assets, reputation, or life of an individual or a group of individuals.

However, the above listed benefits are broad generalisations, which are not uniformly spread across all types of registrations and nor are all CBOs able to claim them.



Activity: 2

15 Minutes

Disadvantages

- 1. CBO need to stick to a pre-decided organisational structure and maintain conduct its activities in a systematic, planned manner which to some extent takes away flexibility.
- 2. Getting registered as a 'legal entity' also entrusts the CBO with the responsibility of meeting various statutory obligations under different laws and regulations. These obligations include reporting to the local government, keeping detailed financial records, setting up office space, purchase or selling of property, filing change reports of board members, annual audit amongst various other compliances. Those CBOs, who do not have the ability to organize human and financial resources to take care of statutory obligations are eventually rated low at the time of grant.
- 3. Registered organization is subject to public scrutiny, increased expenses to maintain compliance, resources to document and publish reports on a regular basis. CBO that made transition from being a community group to a CBO may not have the ability to bear these expenses.



Sources:
Advantages and Disadvantages of registering a CBO
<https://asianngo.org/magazine/post-magazine/article/article-detail/161/what-are-the-advantages-disadvantages-of-becoming-a-nonprofit-organization>

Activity: 3

15 Minutes

Legal Options and Framework available to register CBOs in India

Through power point presentation share the step-by-step guide of forming CBOs in India. Divide the participants into two large groups and asked them to discuss the various other ways to work in the community without forming a CBO. Ask them to present the same. Leave them with the ideas for them to ponder and come out with the best option for them in the local context.

Lecture Content for the Facilitator

In the Indian context, the agencies at the state level include the Charity Commissioner (for trusts), the Registrar of Societies (referred to in some states by different titles, including the Registrar of Joint Stock Companies), and the Registrar of Companies (under Section 8 of the Companies Act). At the national or federal level in India, regulatory bodies include the Income Tax Department and the Ministry of Home Affairs (only for not-for-profit organisations receiving foreign contributions). Facilitator then introduce the different forms and laws governing the different types of entities to the participants and can also discuss the advantages and limitations of each entity.



Activity: 3**15 Minutes****Public Charitable Trust**

A public charitable trust must register with the office of the Charity Commissioner having jurisdiction over the trust (generally the Charity Commissioner of the state in which the trustees register the trust). In general, trusts may register for one or more of the following purposes: relief from poverty or distress; education; medical relief; provision for facilities for recreation or other leisure time occupation (including assistance for such provision), if the facilities are provided in the interest of social welfare and public benefit; and for the advancement of any other object of general public utility, excluding purposes which relate exclusively to religious teaching or worship.

Society

Societies are governed by the Societies Registration Act 1860, which is an all-India Act. Many states, however, have variants of the Act. A society is one of the most democratic forms of organisation available (Government of India, 1860). It can have a broad membership, which elects periodically a governing body for managing the affairs of the society. This body is accountable to the members and may delegate some of its day-to-day functions to the full-time staff of the society. As per Section 20 of the Societies Registration Act, the different types of societies that may be registered under the Act include (but are not limited to) the following:

- i. Charitable societies;
- ii. Societies established for the promotion of science, literature or the fine arts, education;
- iii. Public art museums and galleries, and certain other types of museums.

Facilitator should also discuss the similarities and differences along with the advantages and limitations of the societies.

Co-Operative Societies

A co-operative is a form of organisation which is based on certain principles. It is the implementation of these principles in an organisational form that defines the practice of co-operatives. Thus, co-operatives can be seen as a form of organisation which is perhaps most appropriate and suitable for enhancing the economic status of the marginalised. It provides for the opportunity of equality of shareholding and right to decision-making for each member of the co-operative.

**Sources:**

Unit 1: Introduction to NGO Management 1 NGO Management: Foundation Course

©PRIAInternational Academy 2014 Certificate Programme NGO Management: Foundation

...certificate-programme-ngo-management. [https://pdf / PDF4PROhttps://pdf4pro.com](https://pdf4pro.com) › amp › view › certificate-program

Activity: 4**10 Minutes****Comparison between a Public Charitable Trust and a Society**

Present the comparison sheet through power point presentation and explain in detail the advantages and disadvantages. Share the comparison sheet with the champions to get more clarity on the need of forming a CBO as a takeaway.

Lecture Content for the Facilitator

Facilitator can summarise the comparison on the following points:

- Basic Documents
- Jurisdiction
- Formation
- Legislation
- Objects
- Members
- Registration
- Stamp Duty
- Board
- Statutory Regulations

Reflection

In this Module we tried to understand the meaning and the various legal requirements for registering a CBO, along with looking at the registration process in detail. This Module provides an overview and practical and basic knowledge regarding legal options available for registering a CBO in India. Finally, it details out all the phases of the registration process and the associated procedures. Prior to deciding whether to get a CBO registered under the law or not, one must be clear about the intentions of forming a CBO, and its purpose and objectives. Clarity of thought as to why one intends to start a CBO and what one will achieve by establishing it as a legal entity is important in order to meet the aspirations of the founders and the community the organisation is working in.

There are two types of CBOs that usually function in a country:

1. Registered CBOs
2. Non-registered CBOs

In principle, a CBO does not have to register itself to perform charitable, welfare or developmental activities. However, there are some specific activities which can be carried out only if a CBO is registered under the specific acts or laws governing CBOs (particularly related to fund-raising) in India.

It is entirely up to the governing board of a CBO to decide whether it wishes to get the organisation registered, or work as an unregistered organisation. The logical question that would follow is "Why should one register a CBO, when there is no such legal binding to do so?"



Activity: 4**10 Minutes****Need For Registration**

Once registered, a voluntary organisation becomes a 'legal entity' in its own right. It has a life of its own, independent of its members or founders and those working in it. Registration can take several forms.

(i) When an organisation exists for a certain period of time and develops an identity of its own, in terms of its mission, purpose, tasks, activities, staff, physical characteristics, etc, then a legal form of registration helps strengthen that identity for the future.

(ii) In relating to the environment, both to those who can provide services and to those who can utilise its services, a legal form of registration helps provide credibility to the organisation. Most donors, be they governmental or non-governmental, prefer to provide resources to a legal organisation and not to an informal group of individuals. This is so because the obligations upon a legal entity can be ensured beyond the life of a single individual or a group of individuals and can also be enforced in the eyes of the law.

(iii) In relation to other elements in the environment, including those that provide opportunities for collaboration or working together and those that look at the organisation as an instrument of a particular kind of change, acquiring a legal frame helps enhance the credibility of the organisation. It essentially implies that a registered organisation is likely to have a life of its own, continuity and stability over a long period of time.

**Sources:**

Comparison between a Trust, Society and a section 8 Company

<https://ngosindia.com/ngo-registration/difference-between-trust-society-and-company/>

Resource Materials

1. Handout of comparison sheet
2. Power Point presentation slides
3. Flip Charts, sketch pen and clips



Handout

Comparison Between a Public Charitable Trust and a Society

ASPECT	TRUST	SOCIETY
Basic Document	Trust deed – which contains objects of the trust (bye-law)	Memorandum of association/ Articles of association with rules & regulations
Formation	Easy	Simple
Jurisdiction	Deputy Registrar / Charity Commissioner	Registrar of Societies
Legislation / Statute	Relevant state Trust Act	Societies Registration Act 1860
Objects	Social benefits and charitable	Literary, charitable, scientific and resource oriented
Modification Of Objects	Alteration can be undertaken only by the founder. If the founder is deceased, alteration of objects is impossible	Easy legal procedures
Required Members	Minimum = 2 Maximum = No limit	Minimum = 7 Maximum = No limit
Registration	As Trust with the Registrar	As Society with Society with the Registrar
Stamp Duty	4% of trust property value will be executed in non-judicial stamp paper with the registrar	No stamp paper required for memorandum of association, and rules and regulations
Name	Very easy to choose	Very easy to choose
Management Board	Trustees	Governing body
Succession In Management	Appointment	Election
Meetings	No provisions	Annual meeting as per law. Governing body meeting as per the rules of society
Legal Status	Limited	Limited
Statutory Regulations	Nominal	Limited
Membership Transfer	Impossible	Easier
Member Admission	Not applicable	Governing body or general body control
Dissolution Or Take Over By State	Possible	Possible
Payment To Members	As notified in trust deed	Not restricted

CHAPTER - 9.0

Session: 5.1 B Statutory Compliances and Fiscal Regime

Session: 5.1 B	Statutory Compliances and Fiscal Regime
Learning objectives of this session	Participants learn about: 1. Statutory compliances applicable to CBOs. 2. Fiscal Regime with respect to CBOs.
Duration	30 Minutes
Tools	PowerPoint slides and handouts
Methodology	Presentations

Instructions to Facilitators

This session will involve experience sharing and learning. The facilitator is expected to engage the participants to brainstorm and present their experiential understanding of managing compliances related to CBOs. This module has pre-decided content which the facilitator is expected to revise beforehand and if need be, refer to the resources mentioned. The presentation will be followed by detailed discussion and experience sharing by CBO members. The facilitator is expected to encourage everyone to come out with their doubts and clarify all the doubts to the possible extent.

Lecture Content for the Facilitator

NGO/CBO Statutory Compliances

NGOs and CBOs are immune to all forms of taxation because they exist as a non-profit entity, but this is just a myth. The important compliances that an CBO is required to maintain to prove that the entity's existence is in accordance to the laws that governs the NGOs/CBOs/Society. Facilitator will use the PowerPoint slides to explain all the statutory compliance related requirements after establishing a CBO.

FCRA Registration

Under the Foreign Contribution (Regulation) Act, 2010 (FCRA) all not-for-profit organisations in India (e.g., public charitable trusts, societies and Section 8 companies) wishing to accept foreign contributions must ...?????????? (Incomplete) (Ministry of Law and Justice, GoI, 2010):

- (a) Register with the central government; and
- (b) Agree to accept contributions through designated banks

Furthermore, not-for-profit entities must report to the central government regarding foreign contributions received within 30 days of their receipt and must file annual reports with the Home Ministry. The entity must report the amount of the foreign contribution, its source, the manner in which it was received, the purpose for which it was intended, and the manner in which it was used. Foreign contributions include currency, securities and articles, except personal gifts under Rs. 1,000. Funds collected by an Indian citizen in a foreign country on behalf of a not-for-profit entity registered in India are considered foreign contributions. Moreover, funds received in India, in Indian currency, if from a foreign source, are considered foreign contributions. The NGOs get many opportunities to receive Foreign Funds for the missions once completing the registration process. Post which the registration with the FCRA department, Ministry of Home Affairs is essential. Without FCRA registration, NGO cannot receive any kind of foreign donation or funds. (Refer [handout link](#) for more information).

NGO Darpan / Niti Aayog Registration

The NGO (Non-Government Organization) Darpan is a portal that connects NGOs with key government ministries. The NITI Aayog and the National Informatics Center jointly launched the NGO Darpan. It enables the exchange of crucial information between volunteer organizations and non-government organizations (NGOs) and government agencies, ministries, and bodies. NGOs will be able to obtain important updates about government grants and other benefits by completing the NGO Darpan Registration online. Before going through the NGO darpan registration process and NGO darpan certificate download, let's have a quick look on what is NGO (Non-Government Organization).

Points to Keep in Mind:

- Applicants must only upload copies of the first page and the page with their signature when uploading Trust deeds.
- NGO portal help NGOs in gaining details regarding grants, help in tracking status of the application.
- This registration helps in applying for a scheme or grant available from the government.

Advantages of Niti Aayog Registration

- NGO Darpan Registration enables NGOs and other voluntary organizations (VO) to have greater interactions and participation with government departments.
- NGOs can receive a Unique Identification through the NGO Darpan Registration, which helps to improve the NGO's goodwill and reputation.
- NGO Darpan is a platform for coordinating critical information across Department and Ministry websites.
- The NGO Darpan Registration provides a continuous flow of information from the Ministry/Government to all NGOs across the country.
- An NGO can acquire all the latest information about new programs and projects through NGO Darpan. It also provides an update on the government's previous projects.

Documents required for NGO Darpan Registration

- Scanned copy of the Registration Certificate of the NGO. (in pdf or jpg format and size should be less than 2MB).
- Pan Card of the NGO.
- PAN and Aadhaar Card of 3 Members of NGO's executive committee.
- Working area of the organization
- In the case of Trust deeds, only the first page and the page with the signature on it should be scanned and uploaded.

Niti Aayog Registration Process

- Visit NGO Darpan website (<https://ngodarpan.gov.in/>)
- Click on Sign up and create a user ID
- Fill in all the necessary information regarding your NGO
- OTP will be sent to your registered number after the user uses the verification option and generate a new password
- All the details related to the registration of NGO need to provide
- If the user has multiple registrations, then it needs to be provided
- Select appropriate sector and fill achievement section
- Provide the address, and click on submit.
- After successfully completion of process, a UNIQUE ID number will be provide to the organization with in a week.

CSR Form 1

The Government of India has come out with a new registration for NGOs who are undertaking or desirous of undertaking CSR activities on behalf of the companies. Such registration is to be taken by filing Form CSR-1 electronically on the MCA portal. This registration can be taken by NGOs with effect from April 1, 2021. Form CSR-1 shall be signed and submitted electronically and verified by a practising CA or CS or Cost Accountant. On application, the MCA portal will automatically generate a unique CSR registration number.

The Ministry of Corporate Affairs has made available the Form CSR-1 on the MCA portal. As per the notification issued by the Ministry of Corporate Affairs to the effect that with effect from April 1, 2021, CSR funding will be available only to those NGOs that are registered with MCA. The purpose of this registration is to ensure effective monitoring of the CSR activities conducted by the NGOs in the country. However, the above mandatory registration requirement will not affect the CSR projects already approved before April 1, 2021. In this article, we will discuss filing procedure of Form CSR-1 with the corresponding provisions of Companies Act, 2013.

In simple words, we can say that: An NGO shall be allowed to receive CSR funds from a company if it fulfils all the following criteria: -

- It is a section 8 company or a registered public trust or society
- It is registered under section 12A and 80G of the Income Tax Act, 1961
- It has a track record of at least 3 years of undertaking charitable activities

It also means that the companies cannot spend CSR fundings through an unregistered NGO. It is also important to note that entities registered u/s 10(23(c) of the Income Tax Act are not eligible to file Form CSR-1.

Important points regarding filing of Form CSR-1

1. Form CSR-1 can be filed on MCA portal with effect from **April 1, 2021**.
2. Where the entity (Trust/ Society/ Section 8 Company) is established by any company or group of companies: **Maximum 5 CIN** of such companies can be provided in the Form.
0. Email ID of the entity shall be provided in Form CSR-1. The email-id shall be verified by One Time Password (OTP).
1. The facility of sending OTP shall be enabled only after successful pre-scrutiny of the Form CSR-1.
2. OTP can be sent to email ID against one form for maximum 10 times in a day. OTP shall be valid for 30 minutes. In case of failure, you need to download a fresh form on the same day or try OTP next day.
3. Details of Directors/ Board of Trustees/ Chairman/ CEO/ Secretary/ Authorised representative (AR) of the entity need to be provided in the form. It should be ensured that DIN or PAN of the above is valid and associated with the entity.
4. Maximum 10 rows shall be available for entering the particulars of Directors/ Board of Trustees/ Chairman/ CEO/ Secretary/ AR of the entity.
5. Mandatory attachments:
 - Copy of Registration Certificate of the entity.
 - Copy of PAN of the entity.



Source:

NGO Darpan Registration <https://ebizfiling.com/blog/ngo-darpan-registration/>

CSR Form 1 <https://www.taxwink.com/blog/form-csr-1-registration>

Visit the MCA portal by clicking the link:

<http://www.mca.gov.in/MinistryV2/companyformsdownload.html>

Fiscal Regime

Lecture Content for the Facilitator

PAN

Permanent Account Number (PAN) is a unique alphanumeric combination issued to all juristic entities identifiable under the Indian Income Tax Act 1961 (Government of India, 1961). It is issued by the Indian Income Tax Department under the sponsorship of the Central Board for Direct Taxes (CBDT). It is almost equivalent to a national identification number. It is a must to have a PAN number for all those who file their income tax returns, because from 2005 onwards it has been made obligatory by the Income Tax Department to quote the PAN on return of income as well as on all correspondence with any income tax authority in the country. After registration of CBO with respective Authority (it varies from state to state), the CBO must apply for PAN number. It is mandatory to apply for the PAN after registration of an CBO.

Opening of Bank Account:

Registration under section 12A of the Income Tax Act

The registration of CBO under Section 12A is necessary for getting some benefits of taxation. However, section 12A certificate is not a mandatory registration. The main reason for getting this registration under section 12A is to get the benefit of exemption from the Income Tax on the income of the NGO if all the rules and regulations laid down in this section are fulfilled.

The amendments made in the Finance Act 2020- 21, has made some changes for the already registered CBOs. The organizations registered under Sec. 12AA must reapply for the validity under the Income Tax Act to continue to enjoy the tax exemptions. Also, validity must be renewed every five years. Previously the validity was permanent.

Registration under section 80G of the Income Tax Act

Even the registration under this section is not mandatory. However, to give the benefit of 50% or 100% exemption on the donations to the donors, CBO should get the registration under section 80G of the Income Tax Act. It is indirectly an advantage to CBOs to raise funds.

This Act governs tax exemption for not-for-profit entities. Organisations may qualify for tax-exempt status if the following conditions are met (Government of India, 1961):

- The organisation must be organised for religious or charitable purposes;
- The organisation must spend 85 per cent of its income in any financial year (April 1st to March 31st) on the objects of the organisation. The organisation has until 12 months following the end of the financial year to comply with this requirement. Surplus income may be accumulated for specific projects for a period ranging from 1 to 5 years;
- The funds of the organisation must be deposited as specified in section 11(5) of the Income Tax Act;
- No part of the income or property of the organisation may be used or applied directly or indirectly for the benefit of the founder, trustee, relative of the founder or trustee or a person who has contributed in excess of Rs. 50,000 to the organisation in a financial year;
- The organisation must timely file its annual income return; and
- The income must be applied or accumulated in India.

As per the new amendment, the tax exemptions available to the CBOs are now revocable. The movable and immovable assets of the organization shall be valued at market price and taxed accordingly. This rule intends to have a check if there is a misuse of the tax exemption of charity. Also, the persons who are donating to the CBOs will come under scrutiny, there is an assumption that in future no exemptions may be granted for charity.

TAN

TAN or Tax Deduction and Collection Account Number is a ten digit alpha numeric number required to be obtained by all persons who are responsible for deducting or collecting tax. It is compulsory to quote TAN in TDS/TCS return (including any e-TDS/TCS return), any TDS/TCS payment challan and TDS/TCS certificates. Under the Income Tax Act, 1961, every person making payment or crediting income of specified types to another person is required to deduct a specific proportion of amount payable/creditable at the time of making payment or giving credit, whichever is earlier, and deposit the sum so deducted, i.e., TDS. Prior to making any such deduction, every such person shall have to apply to the assessing officer for allotment of a tax deduction account number (TAN) under Section 203A of the Income Tax Act. Any organisation deducting tax at source is required to quote the TAN in the following documents:

- All challans while depositing the tax so deducted;
- All certificates issued against the tax deducted;
- All returns furnished in respect of tax deducted at source;
- All other documents pertaining to such transaction as may be prescribed.

During the functioning at any point of time, if NGO/CBOs become liable to remove the tax from a source, it must first apply for TAN.

GST Registration

If the NGO/CBO is providing services like research activity or consultancy work etc. and if the gross revenue from such work crosses the basic exemption limit of GST, then they need to apply for the GST.

Professional Tax

Professional Tax is the liability of an NGO/CBO to deduct from the pay of an employee and deposit to the Government. It is a state government thing and thus different states of India having different rules and regulations for Professional Tax.

Retirement Benefit

Retirement benefits like Provident Fund, Gratuity, ESIC etc. are applicable to the NGO/CBO when it develops and the size of employees is more than the prescribed limit in these acts.

Shops and Establishment License

According to the Indian NGO laws, if a NGO employs any individuals in their office to carry out any work pertaining to the NGO, then the said NGO shall obtain a license under the Shops and Establishments Act.

Other Important Issues

Proprietary Interest

The trustees keep trust assets on behalf of the public charity fund. Thus, although trustees have legal title to the trust's assets, they hold those assets for the trust's beneficiaries. But they have no ownership interest in the assets. Representatives of the board of trustees or board of directors of a society or Section 8 business still possess the securities of their organization. But they may not have any financial interest in the assets whatsoever.

Dissolution

Indian charitable public trusts are usually irrevocable. If a trust becomes inactive due to its trustees' negligence, the Charity Commissioner may take measures to rekindle the trust. When it's too difficult to fulfil the goals, the official may apply the doctrine of Cy Pres to change them. The doctrine of Cy Pres means "as near as possible".

Facilitator's role:

The facilitator needs to deal with the topics very carefully. Facilitator has to be slow and shall clarify each and every doubt after introducing each compliance issue.



Sources:

NGO laws in India and its legal compliances...

<https://vakilsearch.com/advice/indian-ngo-laws-and-legal-compliance/>

Reflection

In this Module we tried to understand, other than the obligations of the law under which the CBO has been registered, it is governed by various tax laws. The CBO must obtain various registrations for obtaining benefits, as well as complying with the obligations set under various laws.

Handouts Reference Material: <https://www.sattva.co.in/insight/the-fcra-amendment-act-2020-a-ready-reckoner/>

CHAPTER - 10.0

5.2 Human Resource Management and Key Policies

Session: 5.2	Human Resource Management and Key Policies
Learning objectives of this session	Participants learn about: 1. Basic concepts and methods of Human resource management and how it builds organization's capacity. 2. Minimum policy needs of an organization. 3. Demonstrate an action plan that details specific human resource needs of the organization. 4. To assess and improve employee motivation and engagement.
Duration	1 Hour
Tools	Power point presentation, handouts
Methodology	Case studies, role play

Instructions to Facilitators

Facilitators should explain the concept and the need of a human resource management tool and process of an organization. The overall idea for the facilitator to ensure that the participants leave the workshop with a draft human resource action plan by the end of the session. Facilitators need to present the concepts and guide the participants to draft their own action plan by the end of the session. Distribute the best practices checklist and tell them that this can be used all through the session as a reference material. Tell participants to fill the same carefully as this will help them to develop the action plan based on the organization strength, opportunities and problems.

Activity: 1

15 Minutes

Basic Concept of Human Resource Management and your Organization

Facilitator should use their understanding and share the power point presentation to explain the basic concept of human resource management. The objective of the session would be to make them understand the basic importance of human resource management and how it is linked with the success and growth of the organization.

Facilitator's role:

Facilitator use PowerPoint slides to explain the concept of Human Resource Management. Following that participant work in their small groups for 10 minutes. Facilitators should explain to participants that they are to review and score their organization in Handout 1 and think about how human resources management is linked with other aspects of an organization's performance. They should look at the sub-headings under governance, administration, financial management, organizational management, program management, and project performance management. Following the group work, participants should debrief as a group for five minutes and discuss their responses on each aspect of an organization's performance.



Activity: 1**15 Minutes**

The facilitator leads the discussion after the activity. Teams are asked to reflect on the involvement of HR management in all sections.

Lecture Content for the Facilitator**Definition**

HRM is the philosophy, strategic approach, principals, policies, procedures and practices related to the management of an organization's employees.

- HRM systems and functions operate within the environment of an organization.
- That environment is influenced by several factors including:
 - The organization's culture, norms, and values.
 - The legal environment.
 - The society and community in which the organization operates.

The challenge for HR managers is to influence their resources so that they are continuously aligned to

- The organization and its strategy.
- The community in which it functions.

It is important to remember that HR is about managing people and positively influencing behavior

Key Elements of HR

- HR planning, job descriptions.
- Recruitment, retention.
- Salaries and benefits.
- HR policies and how they conform to labor laws.
- Time management.
- Performance management.
- Training and competency.
- Motivation and commitment.

HRM Approaches

- Align employee's personal values to the values of the organization
- Create an environment that contributes to a sense of belonging
- Contribute and influence employee goals by developing a culture of growth and development

**Sources:**

HRM Training Curricula

<https://www.usaid.gov/sites/default/files/documents/1864/Human%20Resources%20Management%20Training%20Curriculum.pdf>



Activity: 2

15 Minutes

Introducing the minimum HR and other Policy needs of an organization

The HR Policy creates the framework within which we all work as an organization. It is meant to serve as a guide to all those who engage with organization.

Facilitator to share the essential and desired policy checklist, Handout 2. Allow the participants to fill up the same based on the existing status of the organization. Post that share the following table in order to understand the gap viz-a-viz the present status of the organization.

Content for core HR Policy	Other Policies as part of HR Policy	Desired policy for possible good practice
Recruitment	Leave Policy including Maternity and Paternity Leave	Accounting and finance
Appointment	Communication Policy	Procurement Policy
Induction	Equal Opportunity and Diversity Policy- Non Discrimination	IT Policy
KRA/KPI	Substance Abuse Policy	Risk Management Policy
Salary Band	POSH Policy	Workplace Etiquette and Ethics Policy
Performance Appraisal	Grievance Redressal Policy	Awards and Recognition
Promotion	Whistle Blower Policy	
Increments	Child Protection Policy	
Capacity Building	Media Policy including social media	
Travel and Expenses	Code of Conduct for Board members and Employees	
Confidentiality	Work from Home Policy	
Separation and Exit	Employee PF and Gratuity Policy	
Retirement	Pandemic and other natural disaster	



Sources:

Human resources and Capacity Building in Humanitarian Organization

<http://www.jsi.com>

<https://www.crisil.com/en/home/our-businesses/sme-solutions/corporate-responsibility/voluntary-organisation.html>

Lecture Content for the Facilitator

Action Plan detailing HRM Practices

The action plans are designed to help participants and organizations to not only define an action, but also to define the steps required to implement it and how the change will be communicated and managed within the organization.

The action plan is broken down into 10 sections:

- Current Status
- Desired Status (goal)
- Proposed Change
- Change Leader
- Action Steps for Implementing Change
- Communication Strategy
- Team Involvement
- Monitoring Strategy
- Performance Indicator
- Timeline

Participants need to think through their organization's systems and develop actions to help them. In this first case, it might be strategic planning by making sure they include HR managers and develop HR plans that go along with their strategic or operational plans. Some participants may feel that their systems are solid. In this case, they would not necessarily develop an action. If participants are comfortable with their existing systems, they should either:

- Work on reviewing and revising actions
 - Help others, if they are willing, to better define what needs to be done to develop a system
 - Work with your group using the sample in worksheet 1 and 2 to help them not only to define actions but to also define the steps that would be needed to implement them.
- Ask participants to think through their organization's present status keeping in mind what they have learnt today. What could they do to improve these systems? Participants should spend 10 minutes developing their action plans. The sample action plan is given in Handout 1.



Sources:

HRM Training Curricula

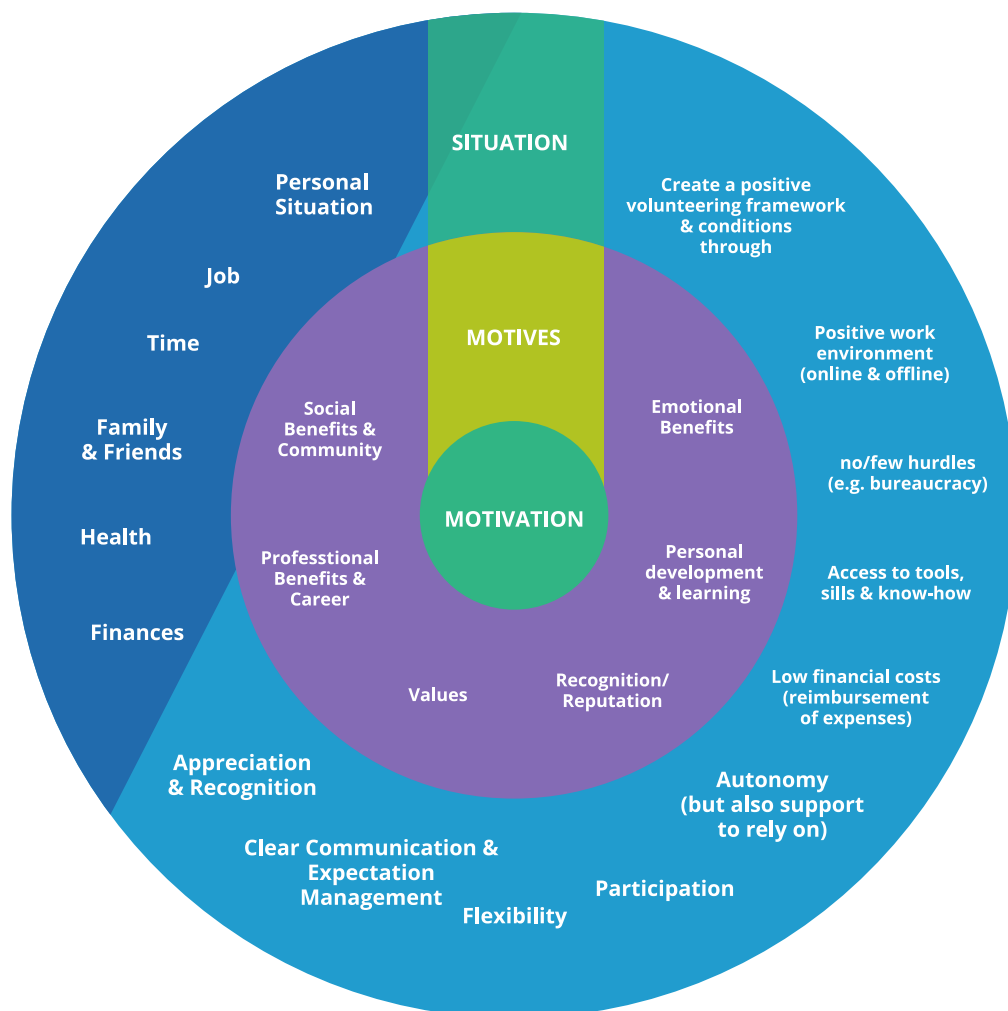
<https://www.usaid.gov/sites/default/files/documents/1864/Human%20Resources%20Management%20Training%20Curriculum.pdf>

**Activity: 3****15 Minutes****How to improve employee motivation and engagement?**

The facilitator to play the below videos to allow participants to understand why it is important to engage employee consistently, what would be the strategy and different methods of engaging employee for long term benefit. Ask participants what could be the other advantage in an organization if they engage employee meaningfully.

Video 1 : Why employee engagement matters 

Video 2: Employee Engagement Strategy 

Motivation Diagram for CBOs**Source:**

Six ways to motivate a volunteer community, 8 February 2018 by Veronika Krämer, Raimund Liebert and Anne Kierkegaard <https://diff.wikimedia.org/2018/02/08/volunteer-motivation/>

Lecture Content for the Facilitator

Facilitator to explain in this diagram in the context of CBOs for key Populations. For Example what could the CBO offer in respect to emotional and social benefits like counselling, protection, a listening ear and others. Or what other situation they could offer in relation to personal like health insurance to family, free education for children, social entitlement support. Or simple things like rewards and recognition, training for personal development to name a few.

Section	Subsection	Score (1-5)
Governance	Vision/Mission	
	Organizational Structure	
	Board Composition and Responsibility	
	Legal Status	
	Succession Planning	
Administration	Operational Policies, Procedures and Systems	
	Travel Policies and Procedures	
	Procurement	
	Fixed Assets Control	
	Branding/Marketing	
Human Resources Management	Job Descriptions	
	Recruitment and Retention	
	Staffing Levels	
	Personnel Policies	
	Staff Time Management	
	Staff Professional and Salary History Documentation	
	Staff Salaries and Benefits Policy	
	Staff Performance Management	
	Volunteers/Interns	
Financial Management	Financial Systems	
	Financial Controls	
	Financial Documentation	
	Audits	
	Financial Reporting	
	Cost Share	
Organizational Management	Strategic Planning	
	Workplan Development	
	Change Management	
	Knowledge Management	
	Stakeholder Involvement	
	New Opportunity Development	
	Communication	
	Decision Making	
Program Management	Donor Compliance	
	Sub-grant Management	
	Technical Reporting	
	Referral	
	Community Involvement	
	Culture and Gender	
Project Performance Management	NPI Project Implementation Status	
	Field Oversight	
	Standards	
	Supervision	
	Monitoring and Evaluation	
	Quality Assurance	

Worksheet 2: HRM Good Practices Checklist

Check off items that your organization already has in place. If you are uncertain, place a question mark in the space provided. If you know your organization does not have one of the items leave it blank. Use this checklist when you return to your organization's office to help guide your development of critical HR systems.

HRM essential requirements:

S.N.	HRM Checklist	
1.	Staff have appropriate timesheets and follow procedures for completing them	
2.	Biodata is complete and on file for all staff employed by the project	
3.	Staff salaries correspond to those recorded in the biodata form	
4.	All personnel are paid in local currency	
5.	A personnel manual exists	
6.	The personnel manual includes work schedule policies (hours, holidays, vacation, etc. for compliance)	
7.	The organization has a documented organogram	
8.	The organization has personnel policies and procedures that include Hiring	
8.1	Termination	
8.2	Compensation (salary and benefits)	
8.3	Work schedule	
8.4	Performance appraisals	
8.5	Equal opportunity employment and/or nondiscrimination	
8.6	Security/emergencies	
8.7	Confidentiality and use of personnel data	
9.	Staff members have up to date job descriptions	
10.	The organization uses a documented, rational system such as salary grades and ranges to determine salaries and pay increases	
11.	The organization reviews salary ranges on a regular basis	
12.	The organization has a strategy for staff retention	
13.	The organization has a documented performance appraisal process	
14.	The organization regularly conducts performance appraisals of all staff	
15.	The organization assesses employee engagement and strives to improve engagement	
16.	The organization does HRM planning in line with its strategic and operational plans	
17.	The organization assesses skills and supports the professional development of staff	

Handout 1Sample HRM Action Plan

Current Status	Desired Status	Proposed Change	Change Leader	Action Steps	Comm Strategy	Team	M&E	Indicators	Time
No formal performance appraisal system	A performance appraisal policy and tools that is implemented on an annual basis	Establish a performance appraisal policy and tools	HR Manager	Map out the supervisory structure Develop the performance appraisal tools Train staff to set performance goals and use the tools Train supervisors to conduct performance appraisal meetings Communicate performance appraisal events to prepare staff to set goals, set up meetings and conduct PA	Put together a PA team to review policy, tools and PA process	Name the position	1.Do monthly review of achievement of activities against plan. 2.Collect information on numbers of staff who have PA meeting set up with supervisor 2 weeks prior to PA review period 3.At end of PA review period review information on% of staff who had a Performance Assessment 4.Team review of sample performance objectives 1 per year to monitor the quality of objectives and decide on future training nee	% of staff who have completed PA (to be assessed the month following the PA period)	Frame As per the financial year

CHAPTER - 11.0

5.3 Financial Management

Session: 5.3	Financial Management
Learning objectives of this session	Participants learn about: 1.The need for financial management 2.Core principles of financial management. 3.Aspects of financial planning and budgeting. 4.Elements of Banking and accounting systems. 5.Financial policy and auditing.
Duration	1 Hour
Tools	Power Point Presentation, Flipcharts, Sketch pen
Methodology	Participative

Instructions to Facilitators

This session will involve participative learning. The facilitator is expected to engage the participants to brainstorm and present their experiential understanding of techniques of financial management. This module has pre-decided content which the facilitator is expected to revise beforehand and if need be, refer to the resources mentioned. Activities are conducted before the knowledge sharing via presentation. The facilitator is expected to weave the activity learning in the content.

Welcome and facilitator introduction

2 Minutes

- Facilitator welcome the group
- Facilitator sets tone by briefly explaining the topic, and reiterates the purpose and intention of the session
- Facilitator introduce himself/herself

Activity: 1

10 Minutes

Participants are asked by facilitator to share their attitudes about money and other commonly held perceptions through answering the following questions below. The facilitator records key words and phrases on a flip chart.

- (1) How we feel about managing money?
- (2) Is money an easy thing to talk about?
- (3) How do people often react when they talk about managing money?
- (4) What are some common feelings about money?



Facilitator’s role:

The facilitator leads the discussion after the activity. Then, facilitator motivates participants saying that:

- (1) It is normal to have fears associated with money.
- (2) Managing money well takes practice.
- (3) learn how to manage money to help you achieve your goals and avoid problems.

Lecture Content for the Facilitator

Why we need financial management?

- Financial management is not just about money, it is about how an organization uses its resources.
- Everyone in an organization is responsible for financial management in some way.
- In an organization with good financial management, there are no kings or queens. Everybody has to answer to somebody.
- Good financial management allows an organization to achieve its mission and avoid non-compliance.

Principles of financial management

Principles are values, principles are ways of behaving, codes of conduct

Principles of Financial Management	What it means
Transparency	Doing everything out in the open, providing people the information they need, when they need it. This does not mean disclosing prospective bidding or grant proposal in public even before they are materialized.
Clarity	Keeping records neat and well organized, making sure things are easy to find and read/understand.
Accountability	Doing what you said you would do, keeping your word

It is important to demonstrate these principles when you are managing money, so you have credibility.

Qualities of good financial management

- Robust financial system in place with accountability, transparency and clarity.
- Proper budgeting in time keeping needs in mind.
- Process and checks to procure and utilize resources efficiently.
- Supported by timely reporting.

Financial Planning and Annual Budgeting

- Budget is an estimate flows out of the managerial process. It's the amount of money to be received and to be spent for a specified purpose in a given time.
- Budget for each activity giving break up of sub-activities and related costs.
- The budget has to be verified and certified by the appropriate authority to ensure that;
 - the costs are realistic as compared to the activities,
 - the budget captures all the required costs for such activities only.

Actions for Budgeting:

- The whole team needs to be involved in budgeting process.
- Objectives of the program along with activity plans must be completed before starting the budgeting process.
- All expenses have to be reviewed against the budget on a monthly basis.

Components of a Budget

- How much total money the CBO plans to spend?
- Broadly how the money will be spent (line items)?
- When the money will be spent? Notice that there is a date at the top of the budget.
- A proposal will also include the purpose for spending the money and the activities that will achieve the purpose.

Banking and accounting systems: Ledgers

Ledgers are books that we use to document the money we have received and spent, the movement of money into and out from both our bank account and our cash safe.

Bank Book

- The bank book is a record of all transactions that involve money being put in or taken out of your bank account.
- It is filled out each time money enters or leaves your bank account.
- Bank reconciliation is a process of confirming that the balance in one's bank book is equal to the balance in the bank statement.

Cash Book

- The cash book is a record of all transactions in which physical cash is either received or spent.
- Cash is received either from your bank accounts or from any source whatsoever (e.g., association dues, sales of goods, cash donations).
- The cash book allows you to know how much cash you have, from where it came and where it went.
- Cash reconciliation refers to the process of confirming that the balance in the cash book is equal to the actual cash on *hand and with the receipts submitted*.

Reconciliation

Bank Reconciliation

A process of confirming that the balance in one's bank book is equal to the balance in the bank statement.

Cash Book reconciliation

- The cash book is a record of all transactions in which physical cash is either received or spent.
- Cash is received either from your bank accounts or from any source whatsoever (e.g., association dues, sales of goods, cash donations).
- The cash book allows you to know how much cash you have, from where it came and where it went.

Financial Policy

Policies are formal positions taken by an organization to support the implementation of its financial goals. This is a framework for financial management and guidance for conducting the financial affairs.

Auditing

Purpose:

- A process that can help organizations become more effective and efficient in the management of their fiscal resources.
- It's also a measure of fulfilment of financial policy.

How it is done:

By an 'external' third party, systematic examination and evaluation of the;

- financial systems, transactions, and accounts of an organization to check 'fairness',
- may also look at compliance adherences.



Activity: 2

12 Minutes

Divide the participants into 3 groups and discuss the opportunity and challenges to manage financial and other resources in a CBO they are associated/familiar with. Participants are to be given chart papers and colors.

Facilitator can summarise the group discussion on the following points:

- Appreciating and recognizing the importance of financial management.
- What are the existing challenges/ gaps in managing finance?
- Identifying various possible options to fill the identified gaps in organizational context.
- Evaluating feasibility of implementation.
- Implementation considerations.
- Efficacy measurement and learning strategy.

Reflection

Reflect on what this learning means to you and how can you apply it in your context of financial management.



Source:

Guidelines on financial procurement systems for NGOs/CBOs

<http://naco.gov.in/sites/default/files/NACO%20Guidelines%20on%20Financial%20&%20Procurement%20Systems%20for%20NGOs-CBOs.pdf>

Building NGO/CBO capacity [http://capacitybuildingunhabitat.org/wp-](http://capacitybuildingunhabitat.org/wp-content/uploads/Trainings%20and%20publications/capacity%20building%20for%20ngos/Financial%20Management/Financial_Management_Part_1.pdf)

[content/uploads/Trainings%20and%20publications/capacity%20building%20for%20ngos/Financial%20Management/Financial_Management_Part_1.pdf](http://capacitybuildingunhabitat.org/wp-content/uploads/Trainings%20and%20publications/capacity%20building%20for%20ngos/Financial%20Management/Financial_Management_Part_1.pdf)

Financial Management for CBO's Basic Level

https://www.fhi360.org/sites/default/files/media/documents/Financial%20Management%20for%20CBO's_Basic%20Level.pdf

Financial management CBO handbook https://pdf.usaid.gov/pdf_docs/PA00M1K1.pdf

CHAPTER - 12.0

5.4 Problem Solving and Decision Making

Session: 5.4	Problem Solving and Decision making
Learning objectives of this session	Participants learn about: 1. Defining a problem. 2. Various problem-solving techniques. 3. Steps involved in making a decision.
Duration	45 Minutes
Tools	Power Point Presentation, Flipcharts, Sketch pen
Methodology	Participative

Instructions to Facilitators

This session will involve participative learning. The facilitator is expected to engage the participants to brainstorm and present their experiential understanding of problem solving and decision-making techniques. This module has pre-decided content which the facilitator is expected to revise beforehand and if need be, refer to the resources mentioned. Activities are conducted before the knowledge sharing via presentation. The facilitator is expected to weave the activity learning in the content.

Understanding what comprises a Problem

Activity: 1

10 Minutes

Facilitator to ask the participants the following questions:

1. What is a problem?
2. Share any one experience of problem in their day to day life.

Facilitator's role:

Facilitator to list down all the answers coming from the participants and lead the group in a brainstorming session on possible ways/ techniques they used to solve their problems.

Definition of Problem as any question or matter involving doubt, uncertainty, or difficulty.



Source:

<https://www.dictionary.com/browse/problem>



Activity: 2

10 Minutes

Facilitator to ask the participants the following questions:

Questions

- 1. What are the problems faced by the organization in the last year?
- 2. What were the techniques used to resolve the problem?
- 3. Was there an alternate way to solve it?

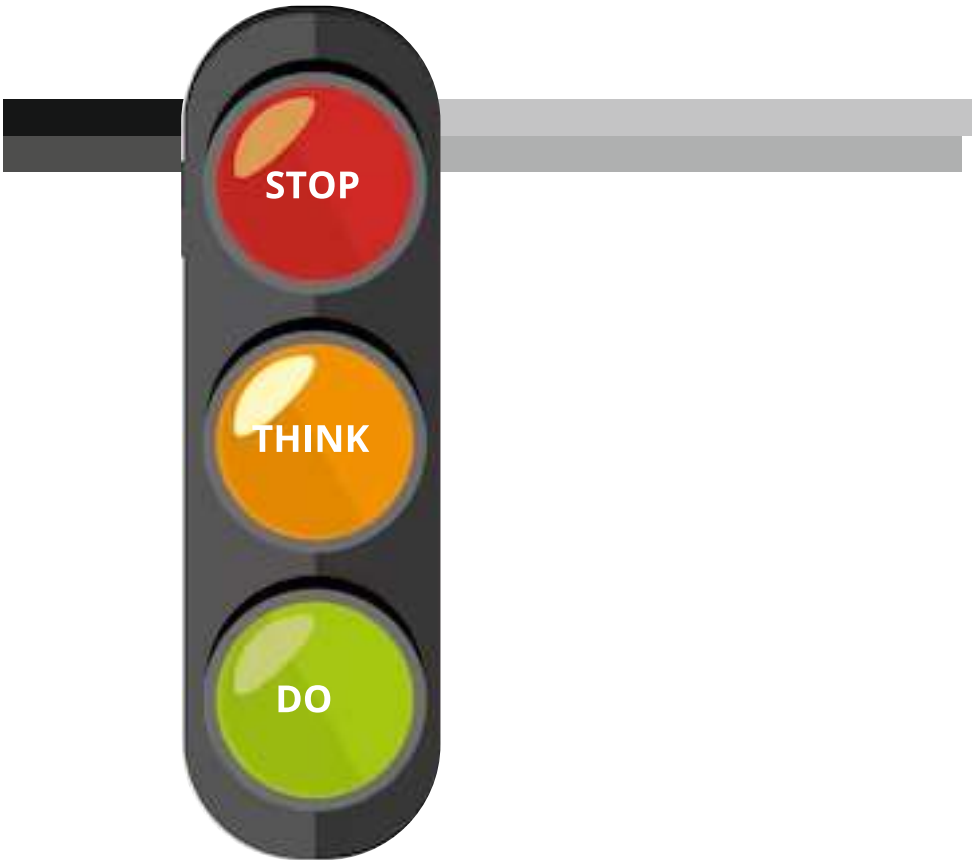
Facilitator’s role:

Facilitator to list down all the answers coming from the participants on a flip chart.
Lead the discussion and note down responses in the flip chart.
With the help of Annexure 1 the facilitator can explain the steps in problem solving.



Lecture Content for the Facilitator

Traffic Light Problem Solving Model



The traffic-light problem-solving model is a useful way to approach problematic situations. Sometimes people rush into 'solving' problems without thinking of the pros and cons of their actions. This model encourages people to stop, think and then act; thereby they make informed and well thought-out decisions in solving their problems.

Stop

Define the Problem: This is the most important step in the problem-solving model, and often requires the most time in counselling. This step involves gathering information and clarifying. It also involved breaking what seems to be a huge problem into its various parts or sub-problems (sometimes called partializing).

Think

Explore all Options: This step involves exploring all possible options to solve the problem (or, to start with, just one part of the problem, perhaps something that is reasonably achievable). Encourage the KP to brainstorm as many solutions to their problem as possible, even if they seem silly. Continue until all ideas are exhausted. It is important that you as counsellor do not have a preconceived idea on what the solution should be. Look at alternatives and consider the consequences of each idea generated from the above brainstorming. Ask clients to look at the pros and cons of each solution. Usually, the best solution is the one with the most advantages.

Do

Select an Option, Make a Plan and Take Action:

Encourage the KP to select the most effective option, according to whether it is practical, appropriate and realistic. Be patient and gently support the KP to make their choice.

Develop a Plan

Ask the KP to think about how they can put their choice into action. Ask who, what, when, how, and where questions so that the plan is specific, achievable, realistic and within a time-frame. It is sometimes helpful if the KP writes their plan down.

Take Action

Acknowledge that this step is usually the most difficult for people. To help build the KPs confidence, it can be helpful to start with an action where the KP has a relatively good chance of succeeding. Using role-play to 'practice' what the KP will do and say and to anticipate possible reactions can also be helpful. Reassure the KP that you will explore the outcome in the next session.

Evaluate

This is an important opportunity to see what worked, what didn't work and why. Reassure clients that if they don't succeed, to try, try again.

Problem Solving Steps

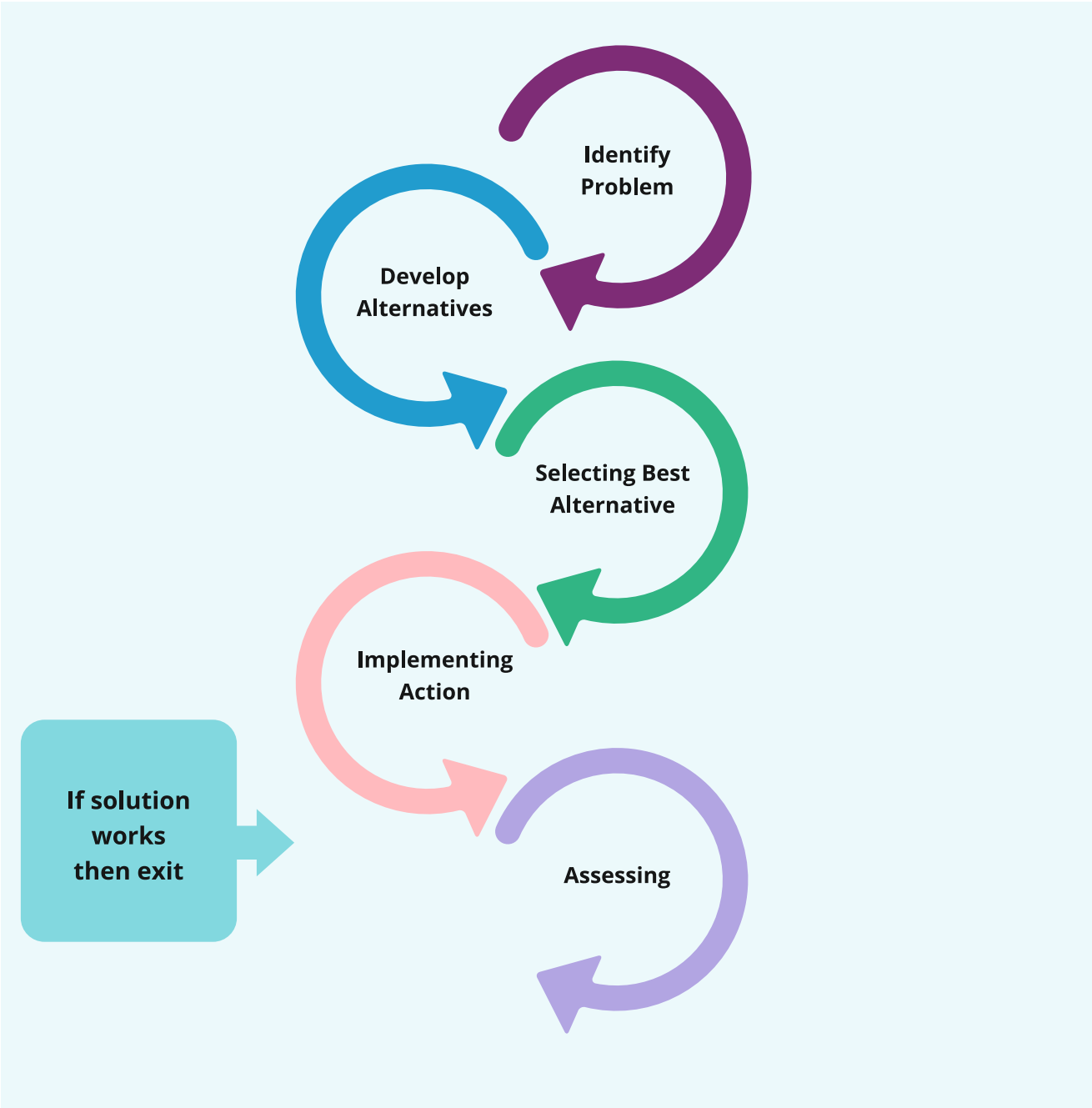
Step 1 Identify the problem

Step 2 Develop alternatives

Step 3 Select the best alternative

Step 4 Implement.

Step 5 Assess and evaluate



Source:
Leadership and Management of NGOs and CBOs: A Reference Book for Young and Seasoned NGO Leaders and Managers; SAfAIDS Leadership Master Class Series Book 1; SAfAIDS 2015

Steps involved in making a decision

Activity: 3

10 Minutes

Situation Cards

You are a 22-year-old woman who used to be in sex work and are recently married. Your husband has joined a new job. He wants to start a family and you want to wait till he settles in his job. You suggest to him to use condom but he does not agree.

You are a 22 years old man having a regular male partner. You suspect that your partner has STI and you and want to raise the issue of going to a doctor with him.

Your husband travels frequently for work. You both are positive. You are regular with your ART treatment. You are not sure that your husband is regular while travelling. You want to ask him about this.

You are a 27 years old man. You lost your father, a few years ago. Mother is alive. She is aware of your sexuality (gay) but not accepting it. You want to ask her to stop seeing alliance for you.

You want to buy a scooty as this will help you immensely in commuting to work and become better at your work. You have secured a bank loan as well. Just when you are about to buy your scooty, your sister's marriage is fixed. The boy's family have no demands and want an early marriage (in a month's time) as the boy will be joining his IT job in Dubai hence wants to apply for his wife's Visa as well.

You are working in a CBO which works with youth on the issues of HIV/AIDS prevention program. Two groups of youths are having fights with each other because of which only one group is attending regular life-skills program the other group does not want to share this space with the rival group.

You are heading a CBO where you are working with the KPs and also running a drop-in-center. Local community where your CBO's DIC is located has been pressurizing you to shift your DIC elsewhere as they do not want the local atmosphere to get "spoiled". Local corporator and political leaders have been calling you about this.

You are a representative of a PLHIV network. You have come across a family whose breadwinner, a man died without HIV treatment and his wife and children are left alone as their extended family has thrown them out of their family home. This person's wife has come to you for help.

Questions

Consider the situation

List the steps involved in making a decision

One member from the group can present the group's point to the participants.



Facilitator to lead discussion after the presentation. The facilitator can summarize the process of making decision with the help of the following tools

Lecture Content for the Facilitator

- a. **Self-awareness** - Having high self-awareness and self-esteem helps in making good decisions.
- b. **Clarified values** - Understanding and being sure of personal and family values is important for good decision-making.
- c. **Information** - Adequate and vital information and facts about all aspects of the issue gives one the opportunity to weigh the options and make an informed decision.
- d. **Clear values** - Clear values are important for determining how to most effectively use the opinions and values of others.



Source:
<https://www.fhi360.org/sites/default/files/webpages/cbo-manual/images/CBO-Manual.pdf>

Decision Making Process

Activity: 410 Minutes

Case Situation

One of Ash’s partners is Ravi, an effeminate male who is also married. His wife hears some gossip about his sexuality in their neighbourhood. She gets very disturbed. One day she confronts Ravi about his sexuality, which he strongly denies. After this incident, Ravi decides to visit the counsellor.

Questions

- List all the possible dilemmas that Ravi could be facing.
- What are the possible solutions that Ravi could come up with while discussing his problems with the counsellor?
- If Ravi is willing to bring his wife to the drop-in-centre (DIC), how should the counsellor handle the wife’s questions (and distress) without endangering Ravi’s right to confidentiality?



Remind participants of the pillars of counselling, and tell them that as Ravi is their client, his best interests need to be primary. Therefore, confidentiality is of utmost importance. He should not be negatively judged because he misguided his wife about his sexuality. When exploring strategies, they should encourage Ravi to come up with his own solutions, as each person’s situation is unique and externally imposed solutions, while appearing ideal, may not necessarily be the best for Ravi. They should however help Ravi weigh the pros and cons of each strategy.



Source:
18 Pehchan C4 Facilitator Guide: MSM with Female Partners

Lecture Content for the Facilitator

The decision-making process should include most or all of the following steps:

6. Stop and think. Take a 'time-out' period to distance yourself from any emotional distress which the challenge may be causing.
7. Define the problem.
8. Think about the situation.
9. Seek advice from others.
10. Consider family values and personal values.
11. Consider cultural practices and religious beliefs.
12. Consider options or alternatives available.
13. Imagine the consequences and possible outcomes of each option.
14. Consider the impact of actions on other people.
15. Choose the best alternatives.
16. Make the decision.
17. Act on the decision.
18. Accept responsibility for your actions

Understanding the Decision-making Process

Activity: 5

10 Minutes

Explain how this session will help participants understand the process of decision-making and understand the steps involved in the process. (See box.)

Divide participants into eight small groups. Give each group a printout of one case situation along with chart paper, and ask them to:

1. Discuss the given scenario.
2. Outline key steps to follow while taking a decision.
3. Look at possible decisions that can be taken (there can be more than one decision).
4. Write it on a chart paper that can be then presented to the larger group.

Ask each group to share their findings.

As they do so, emphasize the fact that life is full of challenges and the choices that one makes can have far-reaching consequences. Remind the participants that the choices people make are based on the values they hold, and it is useful to examine one's own values critically in order to make informed decisions. Remind the participants that it is important to accept responsibility for actions they take.



Ask the participants to close their eyes and think for five minutes on the following:

- Decisions that have been made for me in the past: If I had been able to make the decision myself, would I make a different one?
- Decisions that I have made for myself: On what values did I base those decisions? Would I change those decisions? Do I have any regrets?
- Decisions that I will have to make in the future.

Ask them to also focus on the consequences of the choices they have made and will make in the future

CHAPTER - 13.0

5.5 Networking and Relationship Management

Session: 5.4	Problem Solving and Decision making
Learning objectives of this session	Participants learn about: 1. Need to consciously networking. 2. Relationship management. 3. Steps for networking and relationship management - Public relations - Visibility - Social media management.
Duration	1 Hour
Tools	Power Point Presentation, Flipcharts, Sketch pen
Methodology	Participative

Instructions to Facilitators

This session will involve participative learning. The facilitator is expected to engage the participants to brainstorm and present their experiential understanding of techniques of networking and relationship management. This module has pre-decided content which the facilitator is expected to revise beforehand and if need be, refer to the resources mentioned. Activities are conducted before the knowledge sharing via presentation. The facilitator is expected to weave the activity learning in the content.

Welcome and facilitator introduction

2 Minutes

- Facilitator welcome the group
- Facilitator sets tone by briefly explaining the topic, and reiterates the purpose and intention of the session
- Facilitator introduce himself/herself

Activity: 1**10 Minutes****Why do we need to network consciously?**

4-6 volunteer participants are divided into two teams. Equip them with chart papers and sketch pens.

Team A (CBO) and Team B (CBO) having 2-3 members each. Both are newly formed with limited resources. Other participants represent various stakeholders in the ecosystem including donors, government, other non-profits etc.

Both the teams aspire to grow.

In this simulation, teams get 5 minutes to decide and next 5 minutes to act on building network and relationship with various stakeholders.

In next 5 minutes CBO teams and stakeholder debrief their experiences in the simulation exercise.

Facilitator's role:

The facilitator leads the discussion after the activity. Teams are asked to reflect on the output. Following reflective questions can be posed:

- What was the top of mind thought at the beginning for CBO teams?
- What were their priorities? Why?
- What were the approaches taken?
- Which of these approaches got good responses from stakeholders? Which did not?
- What could have been other ways?

**Lecture Content for the Facilitator****Why Network?**

- Helps in mobilizing resources outside the immediate control of CBO/NGO.
- Build and leverage complementing capacity outside CBO/NGO.
- Promote long-term partnership and collaboration for sustainability.
- More strength to the 'purpose' with shared missions and values.
- Easier and effective strategic alignment in the sector/ domain.
- Opportunity to learn from multidimensional viewpoints.
- Facilitates a healthy culture of trust and collaboration.
- Enables pushing rights related agenda.

Network and Networking

Network	Networking
A group of people or organisations that work together.	A group people or organizations with a common work, interest exchange ideas and information with each other in a formal or an informal manner, then it is networking.
Can be formal or informal.	Networking can happen between two networks and within the network members.

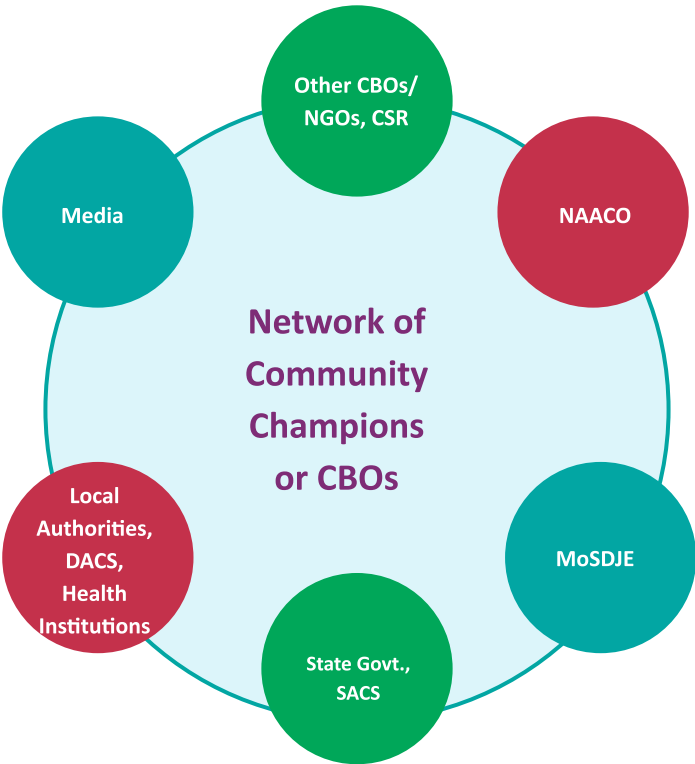
Examples of Networks in the field of HIV/AIDS Prevention in India

FSW	MSM	H/TG	PWID	PLHIV
All India Network of Sex Workers (AINSW)	Integrated Network of Sexual Minorities (INFOSEM)	National Transgender Kinnar Hijra Association (NATKA)	Delhi Network of Positive People (DNP+)	
National Network of Sex Workers (NNSW)	CONNECT network of the Humsafar Trust	National Network of Transgender Persons (NNTP)	Indian Drug Users Forum (IDUF)	National Coalition of People Living with HIV/AIDS (NCPI+)
Taaras Coalition of Sex Workers Organisations in India				Assam Network of Positive People

Steps for building Network

- Engaging with individuals, CBOs, stakeholders interested in fields similar to your area of work.
- Taking initiative to engage in networking activities with other organizations.
- Participation in non-profit sector, civil society and CSR events.
- Creating a database of contacts (Individuals, CBOs, Foundations, Companies and Government).
- Exchanging information with network partners.
- Conducting regular online and offline networking activities.
- Network can be formalized and work in a coordinated manner to push rights-based agenda.
- In order to achieve the goals of 95-95-95, Community Champions and CBOs need to engage in networking with stakeholders.

Networking with Stakeholders



Activity: 2

15 Minutes

What is Relationship Management?

Three participant groups, having minimum three members in each groups are formed. They are provided with small postcard size papers. They are asked to deliberate on the following question and write one sentence / phrase on the paper against each question.

- Can relationships be managed ?
- What are the advantages they see in managing relationships?
- What are the cautions and considerations regarding managing relationships?



Lecture Content for the Facilitator

What is Relationship Management?

- Relationship management (RM) is a structured process to build trust and reputation.
- Strengthens the relationship with community, donors, partners and governments.
- Develops communication channels between the organization and beneficiaries.
- Increases public acceptance for the organization's mission.
- Maintain public interest and engagement with the organization towards the mission.
- Establish and maintain an enabling climate for fund raising and retain donors.
- Inform and motivate organizational staff involved (employees, volunteers, board members).

Lecture Content for the Facilitator

Steps for networking and relationship management

1. Public Relations

Importance of Public Relations (PR) strategy

PR strategy plays a vital role in efficient management. It can be used to attract social attention and funds.

- Strategy for Fund raising campaigns.
- Lobbying and liaising with governments and other key stakeholders.
- Public and media advocacy on issues and positioning.

Ways to manage Public Relationship with donors and other significant partners

- Show appreciation for each contribution.
- Respond to queries promptly.
- Report results highlighting how their donations have made a difference.
- Create targeted days of appreciation.
- Share success stories and pictures regularly.
- Keep them posted with activity or event alerts.
- Invite them to write for your organization's work.
- Communicate and adhere to timelines promised to the partners.
- Personalized thank you letters from the community.

2. Visibility

Ways for Enhancing visibility of the CBO

- Partner with other entity to reach a new audience.
- Participate in popular events as well as align with another cause/movement. Show support to rights of another marginalized group or a cause.
- Be friendly with the local media and maintain relationship with them.
- Re-use and re-purpose all good things previously shared with public.
- Free-webinars on topics of general interest.
- Differentiate in the clutter with consistency in visibility, content of relevance and confidently putting forward the mission of the organization.

3. Social Media Management

Advantages of using Social-Media

- Significantly increases an organization's reach.
 - Helps to spread the word about an organization's mission.
 - Its either free or very minimal charges are involved.
 - Attracts new donors and keeps existing donors engaged.
 - Helps to develop a network of volunteers.
 - Promote and facilitate link to organization's donor page.
 - Opportunity to create participative and engaging audience through interactive content.
- Designing Social Media Strategy to enhance Visibility

Designing Social Media Strategy to enhance Visibility

1. Set out clear goals and objectives for social media. Example, organizations reach, engagement, conversion into action.
2. Identify and define target audience for each social media platform.
3. Review your time and resources available for social media and concentrate on selective platforms.
4. Plan your content topic that resonate well with the mission of organization. Entertaining, inspirational, and educational gets more attention.
5. Plan your medium of content for each platform for example, photographs, charts and graphs, articles, or audio visual content.
6. Mix both self-produced and user generated content (example, testimonials of beneficiaries etc.).
7. Measure and review progress and impacts regularly.
8. Be consistent, showcase impact and include a call for action.

Activity: 4

13 Minutes

Present Challenges and Possible Solutions

Divide the participants into 3 groups and discuss the various challenges, current methods they use and any good practices that they established to network, relationship and management of social media. Participants are to be given chart papers and coloured pens.

Facilitator can summarise the group discussion on the following points:

- Appreciating and recognizing the importance of networking and relationship management.
- What are the existing challenges/ gaps in building networks?
- Identifying various possible options to the identified gaps in organizational context.
- Evaluating feasibility of implementation.
- Implementation considerations.
- Efficacy measurement and learning strategy.



Source:

The Networked Nonprofit https://ssir.org/articles/entry/the_networked_nonprofit#

This Is How You Should Be Networking Your Nonprofit

<https://www.forbes.com/sites/kellyhoey/2018/12/04/improving-the-art-of-networking-worthy-charity-charitable-nonprofit-causes/?sh=7838e1d27c2b>

What role does PR play for NGOs? <https://reputationtoday.in/what-role-does-pr-play-for-ngos/>

Donor Relationship Management <https://www.bridgespan.org/insights/library/nonprofit-management-tools-and-trends/donor-relationship-management>

How Nonprofits Can Use Social Media To Increase Donations And Boost Visibility-

<https://www.forbes.com/sites/allbusiness/2021/03/06/how-nonprofits-can-use-social-media-to-increase-donations-and-boost-visibility/?sh=3a201fbb2bb7>



Reflection

Reflect on what this learning means to you and how can you apply it in your context of networking and relationship management.

Notes

Notes



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