



# Pilot Beneficiary Group Capacity and Programme Assessment Report and Capacity Development Plan



**BNTF 10 Beneficiary Groups**



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## ACRONYMS AND ABBREVIATIONS

BC	Beneficiary Country
BMC	Borrowing Member Country
BNTF	Basic Needs Trust Fund
BNTF 10	10th Phase of the Basic Needs Trust Fund Programme
CC	Climate Change
CDB	Caribbean Development Bank
CSO	Central Statistical Office
DRR	Disaster Risk Reduction
FAQ	Frequently Asked Question
IA	Implementing Agency
ICT	Information and Communications Technology
KB	Knowledge Base
MTE	Mid-Term Evaluation
NGO	Non-Governmental Organisation
PB	Participatory Budgeting
PC	Participating Country
PWD	Person with Disability
SO	Strategic Objective
SPC	Strategic Partnership Consultant
SDG	Sustainable Development Goal
UN	United Nations



# EXECUTIVE SUMMARY

**Launched in 1979, the Basic Needs Trust Fund (BNTF) programme is the main vehicle utilised by the Caribbean Development Bank for pursuing direct poverty reduction in the Caribbean region. The BNTF responds to the needs of the poorest and most vulnerable segments of society through a community development modality that aims to improve their lives and livelihoods and overall community resilience. It achieves these improvements through capacity-building projects that enhance basic economic and social infrastructure and services as well as opportunities for economic activity through skills training and institutional development support.**

Community capacity-building is a transformative strategy aimed at addressing poverty and enhancing community resilience. It encompasses a broad scope, including the understanding of the multidimensional nature of poverty and the importance of resilience in the face of shocks and stresses. Community capacity-building empowers communities by helping them with skill development, leadership fostering and inclusive decision-making, which prompts them to actively engage in poverty reduction and resilience building.

From February to April 2023, the BNTF conducted a pilot beneficiary group and programme assessment targeting 32 beneficiary groups in Guyana, Jamaica and Saint Lucia. This pilot exercise aimed to gather data on the capacity needs of beneficiary groups in the participating countries, to enhance the management and operations of these groups and, thereby, improve the residents' quality of life. The findings of this exercise were used to identify gaps in the organisational, financial and human capacity of the groups and design an appropriate capacity development plan to address priority needs. Areas for existing and potential synergies and alignment of activities with the United Nations Sustainable Development Goals (SDGs) were also identified, for project efforts to contribute towards national and international goals.

In general, the groups exhibited capacity development needs in all the principal areas of investigation under the assessment. Jamaica has a significantly higher proportion of groups that had a proper legal structure, in comparison to Guyana and Saint Lucia. However, all groups seemed to require capacity building in several key areas, such as proposal writing, community engagement, mobilisation of resources, and awareness of SDGs and BNTF projects in their areas. This has implications regarding the level of readiness of the organisations to align with international and national priorities in the achievement of the SDG 2030 agenda.

Besides the training provided under the capacity development plan, recommendations were made to assist in the development of stakeholder engagement plans for community groups, conduct training workshops on establishing organisational policies and procedures, facilitate the creation of local knowledge bases, implement a communications awareness drive on BNTF and SDGs, and leverage ongoing projects as model projects for other groups in the beneficiary countries.



# INTRODUCTION

## PURPOSE

This report presents the findings and analysis of the pilot beneficiary group capacity and programme assessment conducted under the Basic Needs Trust Fund (BNTF) project of the Caribbean Development Bank (CDB). It comprises the pilot beneficiary group capacity and programme assessment report and the resulting capacity development plan. The report focuses on the key results of the assessment to identify capacity gaps in the beneficiary groups and formulate an appropriate capacity development plan to address these gaps.

## PROGRAMME BACKGROUND

Launched in 1979, the BNTF programme is the main vehicle utilised by the CDB for pursuing direct poverty reduction in the Caribbean region. The BNTF responds to the needs of the poorest and most vulnerable segments of society through a community development modality that aims to improve their lives and livelihoods. It achieves these improvements through projects that enhance basic economic, environmental and social infrastructure and services as well as opportunities for economic activity through skills training, capacity building and institutional development support. Priority areas are education, human resource development and livelihoods enhancement, basic community access and drainage, and water and sanitation systems. The BNTF provides a safety net for communities and helps to address urban migration.

The programme is distinguished by its community-targeted, demand-led participatory approach, which engages vulnerable communities in sustained and people-focused development interventions. For the BNTF outcomes to be achieved, beneficiary communities are included as partners in the process to create greater project ownership, and their capacity is built to continue efforts to improve the quality of life of locals beyond the project's end. The BNTF's overall strategy also seeks to align programmatic efforts with the country-level strategic sector priorities defined by each participating country (PC). PCs targeted under the current tenth phase (BNTF 10) are Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines, and Suriname.



While the community-driven approach of the BNTF is well-founded, the BNTF 6 mid-term evaluation (MTE) found that the effectiveness of the implementation varied according to the stage of development of communities. The BNTF approach requires a degree of community organisation, which tends to make the process longer and can affect the ability of the BNTF to address community needs on time. Since some communities are ready for action while others are not, the BNTF recognised the need to develop realistic and appropriate strategies for a range of conditions while being grounded in the participatory approach that is the foundation of the social orientation of the programme.

Community capacity building focuses on empowering the members of a community, including the poorest and the most disadvantaged groups, to develop skills and competencies to improve their lives and contribute to inclusive local development. In this way, communities can become more organised, cohesive and resilient against economic, environmental and social challenges. To achieve this state of preparedness, the PCs need to provide dependable and community-level data to inform the design of a capacity development plan relevant to the country.

Planned initiatives are aimed at enhancing the organisational and technical capacity of community-based organisations to improve their access to financing, planning and implementation of poverty reduction interventions as well as the sustained impacts within beneficiary communities. In addition, initiatives would address needs such as limited knowledge around areas like the United Nations (UN) Sustainable Development Goals (SDGs).

The BNTF is underpinned by the central theme of ‘leaving no one behind’ and strives to contribute to the achievement of the UN 2030 Agenda for Sustainable Development, adopted in 2015. The 2030 Agenda is a worldwide call to action for countries to aspire towards achieving peace and prosperity for people and the planet, now and into the future, through global partnerships.

The 17 SDGs target certain action areas. These SDGs are interrelated, as actions under one outcome tend to improve other outcomes, such as ending poverty, improving health and education and spurring economic growth. They also focus on cross-cutting areas such as climate change and the preservation of oceans and forests, where one country’s actions may have impacts on the world at large. In seeking to address poverty and improve access to basic services and opportunities for vulnerable groups,

the BNTF programme directly supports the achievement of the 17 SDGs, in particular, SDG 1: No Poverty. BNTF 10 accomplishes this by integrating relevant SDGs into its strategic planning for projects to amplify the PCs’ human development outcomes.

Strengthening resilience among the most vulnerable groups—such as the youth, women, seniors, children and persons with disabilities (PWDs)—is a central tenet of BNTF 10. In particular, building social resilience, environmental resilience and economic resilience are the three strategic objectives (SOs) of the CDB’s Strategic Plan 2020–2024. These SOs align directly with the CDB’s mission of ‘Reducing poverty and transforming lives through resilient, sustainable and inclusive development’ and guide the development of the project. Accordingly, the programme translates the bank’s strategic intent by designing and implementing sub-projects to improve the quality of life of the most vulnerable populations across nine beneficiary countries (BCs). Presently, the BNTF is transitioning from having one-off sub-projects in a community to implementing a more integrated and comprehensive targeted approach to poverty reduction.

## INTERVENTION

From February to April 2023, the BNTF conducted a pilot beneficiary group capacity and programme assessment targeting 32 beneficiary groups in Guyana, Jamaica and Saint Lucia. This pilot exercise under BNTF 10 aimed to gather data on the capacity needs of beneficiary groups in PCs, to enhance the management and operations of beneficiary groups and, thereby, improve the residents’ quality of life. The findings of this exercise were used to identify gaps in the organisational, financial and human capacity of the groups and design an appropriate capacity development plan to address priority needs. Areas for existing and potential synergies and alignment of activities with the UN SDGs were identified for project efforts to contribute towards national and international goals.

During this activity, data were gathered via focus group discussions and consultations, where the CDB team facilitated the completion of an assessment form by collaborating with representatives from each group. Results were then collated and analysed, and a summary presentation of the key highlights was shared with the target audiences and key stakeholders.



# LITERATURE REVIEW

## INTRODUCTION

Poverty is multidimensional, extending beyond income and encompassing social, political and environmental aspects. The wide-ranging impact of poverty underscores the need for innovative and comprehensive approaches to reduce it, focusing on community capacity building as a means to effectively address the associated challenges. It also highlights the importance of resilience, which reflects a community's ability to withstand shocks and stresses, offering a foundation for adaptive poverty reduction strategies.





Community capacity building plays a key role in empowering communities and driving their development. Key components such as community engagement and social capital are vital contributors to effective poverty alleviation strategies. Additionally, community-based approaches are vital to tackling these issues, as they acknowledge communities as reservoirs of local knowledge and solutions.

## POVERTY, RESILIENCE AND THE SDGs

Poverty signifies a lack of resources, capabilities and opportunities needed for a decent standard of living, including access to food, water, education, healthcare and shelter (Alkire et al., 2011). Resilience refers to the ability of individuals, communities or systems to withstand shocks, adapt to changes and swiftly recover from adverse events or stresses (Adger, 2000).

In the context of poverty reduction, resilience is crucial because impoverished communities face a myriad of challenges. Building resilience involves strengthening communities' capacity to rebound from setbacks, reduce vulnerability to future shocks and improve long-term well-being. Strategies aimed at poverty reduction include enhancing education, healthcare access, livelihood diversification, sustainable agriculture and social safety nets. These strategies enable communities to better navigate crises without sliding deeper into poverty.

Poverty and vulnerability share a symbiotic relationship as poverty heightens vulnerability by limiting access to critical resources and services. Impoverished individuals and communities struggle to prepare for or effectively respond to various shocks, perpetuating the cycle of poverty. Vulnerability, on the other hand, can lead to poverty as recurring crises erode assets and livelihoods, pushing communities further into destitution. Mitigating this two-fold scenario requires comprehensive approaches that alleviate immediate financial hardships while bolstering community resilience to future shocks, ultimately contributing to both poverty reduction and enhanced societal resilience.

Poverty reduction is a fundamental objective of the UN SDGs, which aim to eradicate extreme poverty and ensure a decent standard of living for all by 2030. One key strategy in achieving this goal is increasing the capacity of the communities to address their needs and challenges on their own. Strengthening democratic institutions at all levels to provide inclusive participation in decision-making is a principle of the SDGs under the 1987 Earth Charter and also a practical approach that can lead to more sustainable poverty reduction outcomes.

Increased community capacity plays a crucial role in achieving the SDGs, by fostering local ownership and accountability. When the capacity of a community is enhanced, it can take the lead in identifying its specific needs and priorities. This bottom-up approach ensures that development efforts are tailored to the unique circumstances of each community, making interventions more effective and sustainable. Furthermore, a community with enhanced capacity is better equipped to mobilise resources, leverage local knowledge and engage in partnerships with government agencies, non-governmental organisations (NGOs) and the private sector, which are essential for achieving the SDGs.

Conversely, when communities lack the capacity to engage in development, the results can be detrimental. Insufficient community participation and ownership can lead to the imposition of top-down development solutions that may not address the root causes of poverty and the unique challenges present in each community. This can result in wasted resources and unsustainable projects that fail to achieve the desired outcomes. Moreover, a lack of community capacity can perpetuate a cycle of dependency, where communities continue to rely on external assistance instead of building resilience and self-reliance.

Building community capacity for poverty reduction involves a multifaceted approach. It includes providing access to education, healthcare and essential services, as well as promoting local leadership and governance structures. Empowering marginalised groups, such as women and youth, is also crucial for inclusive development. Capacity-building efforts should focus on enhancing skills, knowledge and awareness related to sustainable practices, economic opportunities and environmental conservation. By investing in building the capacity of a community, we not only accelerate progress toward the SDGs but also foster a sense of ownership and empowerment that can drive lasting change.

## COMMUNITY CAPACITY BUILDING

Community capacity refers to a community's ability to mobilise its resources, skills and knowledge to identify, plan and implement actions that address its needs and aspirations effectively (Flora, 2008). It is a dynamic, multidimensional concept with several components, including social, human, economic and political aspects. The social dimension comprises social capital, trust, leadership, social networks and cultural assets. The human component encompasses the skills, knowledge and education of community members, while the economic facet involves financial resources and access to economic opportunities. The political aspect relates to a community's ability to engage in decision-making and advocate for their interests. Effective community capacity building involves strengthening these components to empower communities in addressing poverty and enhancing resilience.



Engaging community members in the decision-making process, from identifying their needs to planning and implementing interventions, ensures that solutions are contextually relevant and sustainable. It also acknowledges and fosters a sense of ownership and empowerment, which can motivate individuals and communities to take an active role in poverty reduction efforts. Community engagement facilitates the exchange of local knowledge and expertise, enhancing the effectiveness of interventions. Additionally, involving marginalised or vulnerable groups in decision-making helps address inequalities and ensures that poverty reduction strategies are inclusive and equitable.

Numerous models have been developed to guide community capacity-building efforts for poverty reduction and resilience building. Some examples of these models are given below:

Figure 1

### COMMUNITY CAPACITY BUILDING MODELS

#### COMMUNITY CAPITALS FRAMEWORK (CCF)

Emphasises the various forms of capital within a community, including human, social, cultural, physical, financial and political capital. The CCF highlights how these forms of capital can be leveraged to address poverty and build resilience.

#### ASSET-BASED COMMUNITY DEVELOPMENT (ABCD) APPROACH

Focuses on identifying and mobilising the existing assets, skills and resources within a community to drive poverty reduction initiatives. This approach shifts the focus from deficits and needs to strengths and assets, empowering communities to take control of their development.

#### WORLD BANK'S COMMUNITY-DRIVEN DEVELOPMENT (CDD) APPROACH

Promotes community involvement in project planning and decision-making, which enhances ownership and accountability (World Bank, 2009). These models and frameworks offer valuable insights into effective community capacity building strategies and underscore the importance of community engagement in poverty reduction efforts.

Community capacity and resilience aids communities in recovering swiftly from setbacks and striving towards long-term sustainability, which play a vital role in poverty reduction. An illustrative instance (Manyena, 2006) of community resilience can be found in the response of the Tohoku, a Japanese fishing community, to the devastating 2011 earthquake and tsunami. Despite the severe destruction caused by the disaster, the community's profound social bonds, local knowledge and resourcefulness facilitated the rapid reconstruction of physical infrastructure and the restoration of its sense of identity and economic well-being.

“Enhancing resilience at the community level encompasses a range of strategies and interventions. These include crafting disaster preparedness and response plans, building adaptive infrastructure, improving livelihoods and promoting economic diversification within communities to significantly reduce vulnerability to external shocks.”

Social capital, which comprises the networks, relationships and trust within a community, plays a pivotal role in fortifying resilience. Robust social ties empower communities to mobilise resources, share vital information and offer mutual support during challenging circumstances. Community-based organisations, local leadership and traditional institutions can function as platforms for nurturing social capital and coordinating resilience-building endeavours.

Empirical evidence and case studies highlight the transformative potential of community-led initiatives in addressing poverty and fostering resilience. For example, in Saint Vincent and the Grenadines, the CDB used its Community Disaster Risk Reduction Fund, which provides project grants, to support seven communities in fostering resilience to disaster and climate change impacts. When the La Soufriere volcano erupted in December 2020, these communities were able to activate pre-existing mechanisms to reduce damage and improve recovery response.

Another example is that of Hurricane Katrina in the United States. In the aftermath of the hurricane, communities with strong social networks rebounded more swiftly due to the support, information exchange and resource-sharing facilitated by these connections (Norris et al., 2008). Similarly, local cooperatives and self-help groups contribute to building resilience by pooling resources and knowledge for collective benefit. Another example is the Self-Employed Women's Association (SEWA, 2021) in India, which empowered millions of women in the informal sector during the COVID-19 epidemic through skill development, social protection and collective bargaining, enhancing their economic well-being and resilience.



The critical skills gained through capacity building are essential for communities to thrive and sustain development investments over the long term.

These skills empower communities to efficiently manage resources, effectively engage with stakeholders and ensure the maintenance of project outcomes over the long term. Skill development for communities should include the following aspects:

### 01 PROPOSAL WRITING

Proficiency in writing project proposals is vital for communities seeking external funding or support. A well-crafted proposal outlines a community's needs, objectives and the intended use of resources, making it easier for the community to secure grants, donations or partnerships. Communities that can articulate their goals and strategies through compelling proposals are more likely to attract the necessary resources for their development projects.

### 02 RECORD KEEPING

Effective record-keeping is crucial for tracking progress, managing finances and ensuring accountability within a community. By maintaining detailed records of income, expenditures, project activities and outcomes, communities can demonstrate transparency and responsible stewardship of resources. Accurate records also facilitate reporting to donors and government agencies, which can lead to continued support.

### 03 EFFECTIVE ENGAGEMENT

Building strong relationships and partnerships with various stakeholders, including government agencies, NGOs and businesses, is essential for sustainable development. Effective community engagement involves active participation, open communication and collaboration. Communities that excel in engagement can harness external expertise and resources, making their projects more resilient and adaptable to changing circumstances.

### 04 PROJECT MANAGEMENT

Project management skills are crucial for planning, executing and monitoring development initiatives. Communities that can create realistic project timelines, efficiently allocate resources and adapt to unexpected challenges are better equipped to ensure the success and sustainability of their projects. Project management skills also enable communities to respond to emerging needs and opportunities effectively.

### 05 CONFLICT RESOLUTION

Conflict is an inevitable part of community life, and the ability to resolve conflicts constructively is essential for maintaining cohesion and momentum. Training in conflict resolution equips community members with the skills to address disputes, differing opinions and power struggles in a way that fosters unity and collaboration. Effective conflict resolution ensures that development efforts remain on track and do not unravel due to internal discord.

By mastering these skills, communities can secure funding, maintain transparency, build partnerships, manage projects efficiently and address internal conflicts.

## POLICY AND INSTITUTIONAL SUPPORT

National policies and institutions hold a central position in creating a supportive environment for community capacity building, allocating vital resources and providing a regulatory framework that empowers communities to take control of their development processes.

State policies significantly shape the success of community-driven initiatives by emphasising decentralisation and local governance. These policies grant communities decision-making authority over resource allocation, infrastructure development and service provision, enabling them to identify their needs and execute projects effectively (Narayan, 1999).

Concurrently, it is essential to have strong local government institutions, equipped with the capacity to engage with communities and support their initiatives. The establishment of specialised units or departments for community development within governmental structures ensures that communities receive the necessary assistance and resources.

Effective collaboration between government bodies, NGOs and communities is pivotal for the success of community capacity-building endeavours. NGOs often possess the expertise, resources and established community networks required for implementing development projects. Government institutions, on the other hand, provide the legal and administrative support necessary for these initiatives to flourish. The participatory budgeting (PB) approach implemented in various countries exemplifies the power of such partnerships. Governments partner with local NGOs and civil society organisations to facilitate the PB process, ensuring transparent and accountable resource allocation. These partnerships empower communities to address their immediate needs, fostering poverty reduction and resilience.

## CHALLENGES AND LIMITATIONS

Community capacity building, while a potent tool for poverty reduction and resilience enhancement, faces several challenges and limitations that require attention to ensure the sustainability and effectiveness of such initiatives. Common challenges encompass resource constraints, where many impoverished communities lack the financial means and materials to initiate projects. Social and cultural barriers rooted in traditional norms and beliefs can hinder community engagement, especially issues like gender equality and sustainable livelihood practices. Additionally, capacity gaps may arise as communities often lack the technical expertise and knowledge essential for successful project planning, implementation and monitoring. Moreover, weak or corrupt local institutions can undermine community-driven efforts by impeding transparency, accountability and equitable resource distribution.

Sustainability is a paramount concern in community capacity-building efforts as projects heavily reliant on external funding and resources may struggle once that support diminishes. To mitigate this challenge, it is crucial to promote income-generating activities within communities, nurture self-reliance and ensure that projects are designed for lasting impact. For example, sustainable agriculture programmes should prioritise practices that enhance soil quality and crop yields over time, reducing vulnerability to food insecurity (Mukherjee, 2015). Furthermore, scalability and equity also pose significant issues in capacity building. While community-driven



initiatives can prove highly effective at the local level, expanding them to reach larger populations is a complex endeavour. Maintaining service quality and ensuring equitable resource distribution during programme scaling demands meticulous planning and coordination. Equity concerns also arise when certain segments of communities—specifically, marginalised or vulnerable groups—are excluded from decision-making or do not receive equitable benefits from development projects.

## FUTURE DIRECTIONS AND RECOMMENDATIONS

Encouraging local innovation, fostering partnerships and promoting adaptive strategies can help surmount the obstacles faced by community capacity-building initiatives, ultimately enhancing their impact on poverty reduction and resilience.

As the field evolves, several trends and recommendations offer valuable insights for policymakers, practitioners and researchers. Some of these are listed below:

### 01 LEVERAGE TECHNOLOGY

Embracing technological advancements such as mobile applications and data analytics can enhance communication, information access and project monitoring. Technology can be integrated into processes while ensuring equitable access.

### 02 CROSS-SECTOR COLLABORATION

Future efforts should prioritise cross-sectoral collaboration, recognising the interconnectedness of poverty reduction and resilience building. Collaboration between governments, NGOs, businesses and communities can lead to holistic solutions, facilitated by supportive policies and funding mechanisms.

### 03 GENDER INCLUSIVITY AND EQUITY

Prioritising inclusion and equity is essential to ensuring that community capacity building benefits all segments of society. Actively involving marginalised groups in decision-making and promoting social justice within projects are critical.

### 04 IMPACT MEASUREMENT

Rigorous impact assessment methodologies should be conducted to understand long-term outcomes and sustainability and inform programme refinement.

### 05 CLIMATE CHANGE ADAPTATION

Given the increasing impact of climate change on vulnerable communities, future initiatives should involve climate resilience strategies. Resources should be allocated for climate-resilient development, and research on innovative adaptation techniques should be supported.

### 06 LOCAL GOVERNANCE

Empowering local governance structures and promoting community-led decision-making is central to effective capacity building. Decentralisation and devolution of power can help ensure genuine community participation in setting development priorities.

### 07 KNOWLEDGE SHARING

Practitioners should actively share the best practices and lessons learned, accelerating the effectiveness of capacity building. Researchers can contribute to this by documenting success stories and failures.



### 08 INVEST IN EDUCATION

Education and skill-development programmes should be developed to empower individuals with the knowledge and capabilities needed for income-generating activities, to improve community resilience.

### 09 CIVIL SOCIETY ENGAGEMENT STRATEGY

An inclusive stakeholder engagement strategy must be formulated to outline a structured approach to facilitating the involvement of civil society organisations in the design and implementation of CDB's interventions.

## CONCLUSION

Community capacity building is a transformative strategy for addressing poverty and enhancing community resilience. It encompasses a broad scope, including the understanding of the multidimensional nature of poverty and the importance of resilience in the face of shocks and stresses. Community capacity building empowers communities by helping them with skill development, leadership fostering and inclusive decision-making, which prompts them to actively engage in poverty reduction and resilience building.

Community-based approaches to poverty reduction highlight the value of local knowledge and solutions, leading to more effective and sustainable outcomes. Resilience-building efforts at the community level must recognise that communities are at the forefront of various challenges, emphasising strategies like disaster preparedness and sustainable agriculture. Despite its potential, community capacity building faces challenges related to sustainability, scalability and equity, requiring adaptive and context-specific solutions. However, by adopting a holistic and collaborative approach, community capacity building empowers communities to become architects of their development, ultimately working towards a more equitable and sustainable future.



# METHODOLOGY

## ASSESSMENT

The BNTF 10 pilot beneficiary group capacity and programme assessment was conducted on 32 community groups between February and April 2023 across 3 BCs: Guyana, Jamaica and Saint Lucia. The assessment included 565 participants from 28 communities. Community-level data and information were collected on the groups' capacity levels, including organisational readiness, stakeholder participation and engagement, implementation of activities, and resource mobilisation, as well as awareness and actions related to the BNTF and SDGs. Demographic data were also collected for a better understanding of the beneficiary profiles.

A beneficiary group and programme capacity assessment survey (Appendix 1) was administered to the executive members of BNTF beneficiary groups across the BCs. These included 12 groups from Jamaica, 11 from Guyana and 9 from Saint Lucia. The survey implementation schedule can be found in Appendix 2. These groups were selected for the process through stratified random sampling.

The survey questionnaire was prepared online using the KoboToolbox data collection platform, and the responses were recorded electronically, using a mobile phone, computer or tablet. The survey was administered in person at focus group sessions to allow trained personnel, either a community liaison and/or monitoring and evaluation officers, to guide the respondents throughout the process. One questionnaire was completed per group.

Ethical considerations were incorporated into the process using a participant consent form (Appendix 3), which was signed by the participants before the consultations. The form provided information on the purpose of the study, the intended procedure, the benefits and risks of participation in the study, and confidentiality practices. Contact information for the researchers was also given in the event of any questions or concerns. In addition, the participants were informed of their option to exit the session at any time.

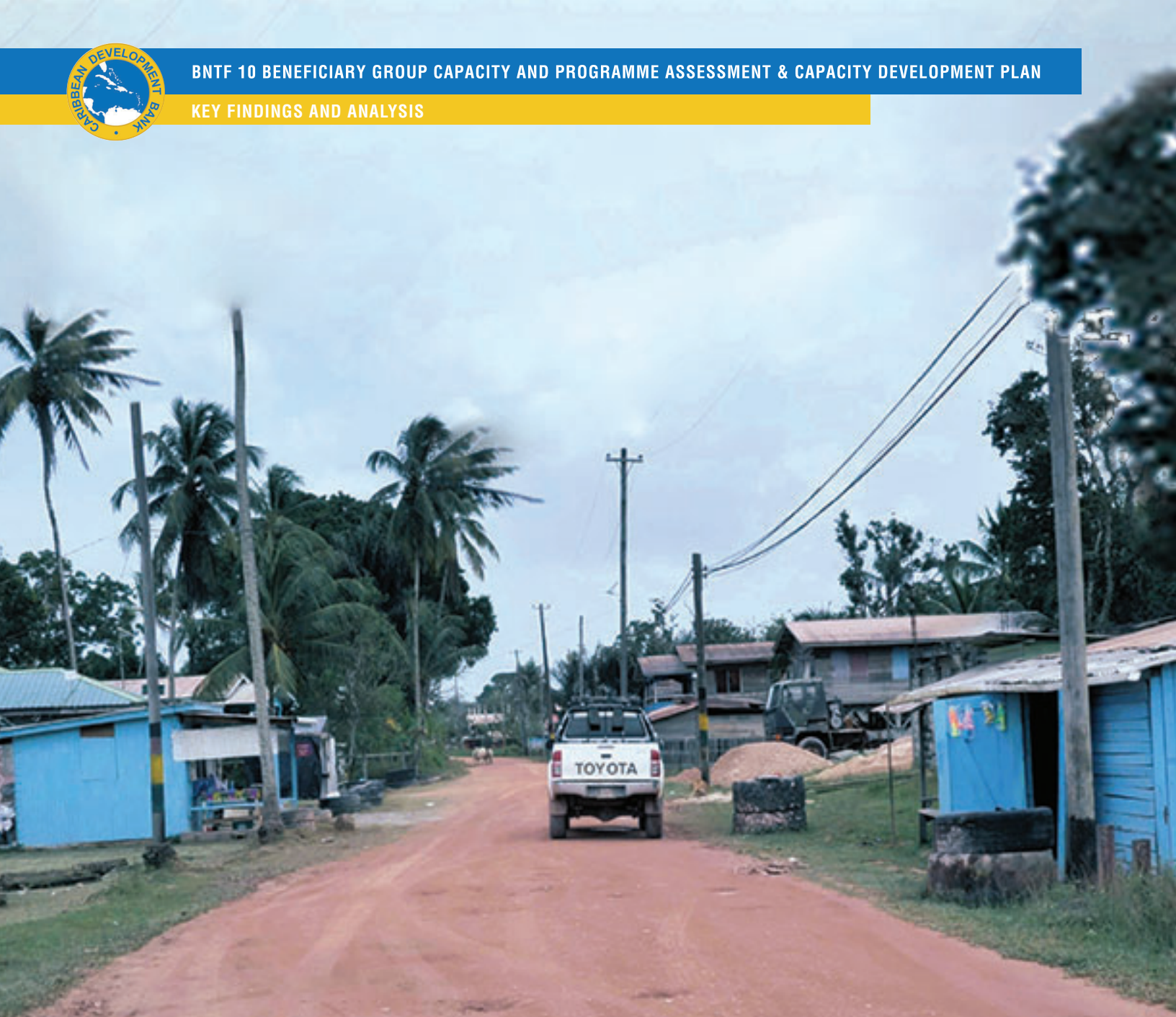
## ASSESSMENT REPORT

This report was developed by combining a literature review, desk review of data, data analysis and expert judgement. It was based on the findings from the pilot BNTF 10 beneficiary group capacity and programme assessment dataset. The report also reflects information garnered from the documents listed below. Additional details were provided at the inception meeting held with the CDB Community Development Specialist, Mr Richardo Aiken.

- BNTF 10 Beneficiary Group Capacity and Programme Assessment Pilot Concept Note
- Terms of Reference and the CDB contracting document
- MTE of the BNTF Seventh and Eighth Programme Cycles, Feb. 2016
- CDB Strategic Plan Update 2022–24
- BNTF 10 Staff Report, Apr. 2021
- Press Release 1 - CDB assesses Jamaica and Guyana communities for regional aid
- Press Release 2 - Saint Lucia - May 24, 2023

The assessment dataset was extracted from KoboToolbox, and quantitative and qualitative data analyses were performed on a majority of the fields of investigation to generate information and derive meaningful insights. Data visualisations were created to synthesise information easily and discover trends. Key findings are presented in the following section, along with proposed recommendations based on identified gaps. A capacity development plan was also crafted to formalise the intent for improved capacity and prioritise capacity needs.





# KEY FINDINGS AND ANALYSIS

The results and analysis presented in this section comprise the major findings of the BNTF assessment exercise. A standard rating of high (60% and higher), medium/average (30%–59%) and low (1%–29%) are used for this analysis. Unless otherwise stated, the findings stated apply to groups within all three countries.



## ORGANISATION DULY CONSTITUTED, LEVEL OF ACTIVITY AND ESTABLISHED GUIDELINES

According to the CDB, legal registration in this study refers to whether 'the community group meets the legal requirements for registered Community-Based Organisations and/or Non-Governmental Organisations as per the established government regulations in the country of operation.' Notably, among the surveyed groups, 56% had undergone the process of legal registration, indicating a commitment to formalising their status and adhering to legal requirements.

However, a significant portion of the groups (44%) were not registered and were operating without formal legal recognition. It should be noted that Jamaica had a higher-than-average percentage of legally registered groups at 83%.

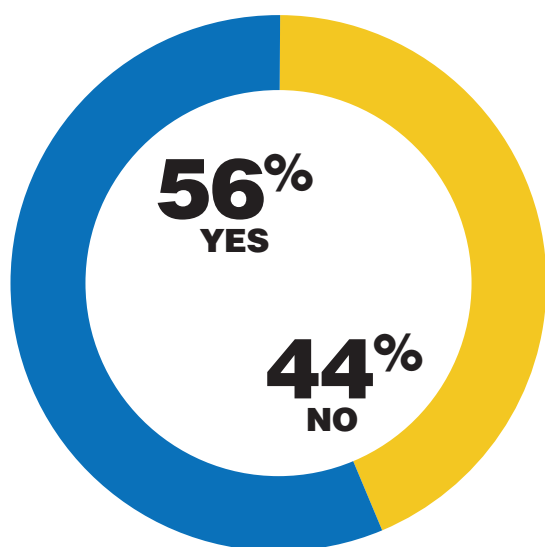


Figure 2

### GROUPS LEGALLY REGISTERED

Almost half of the surveyed groups did not have vision or mission statements. While 53% of the groups had successfully formulated and adopted an agreed-upon vision statement, 47% lacked an agreed vision statement, indicating a need for greater cohesion and strategic alignment. Without a shared vision and mission, it may become challenging for members of a group to align their efforts and work towards common goals, potentially impeding the group's progress and success in achieving the intended outcomes. The lack of this vital stage of planning provides an opportunity for improvement in terms of establishing shared objectives among a group's members. Again, Jamaica was the exception, with 75% and 84% of the Jamaican groups having formulated vision and mission statements, respectively. This may be related to how easily information is accessible to these groups and suggests a much higher level of organisation for the Jamaican groups surveyed.

Figure 3

### GROUPS WITH VISION STATEMENTS

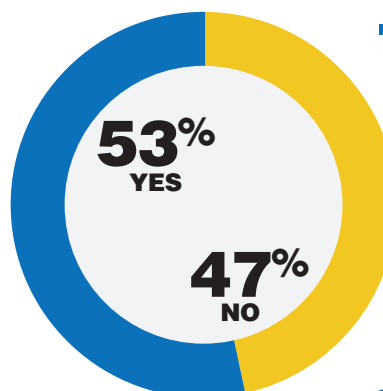
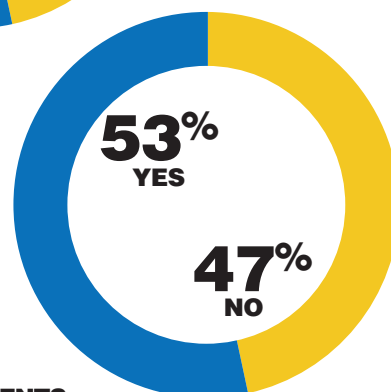


Figure 4

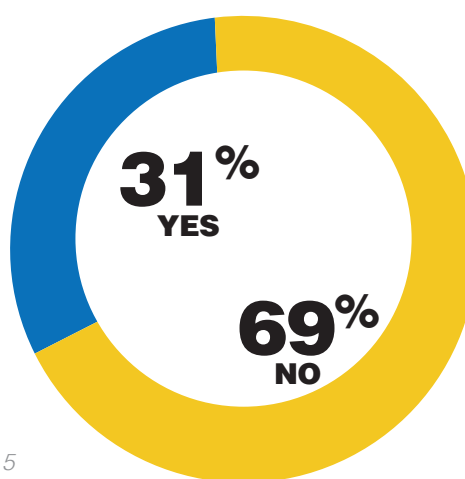
### GROUPS WITH MISSION STATEMENTS



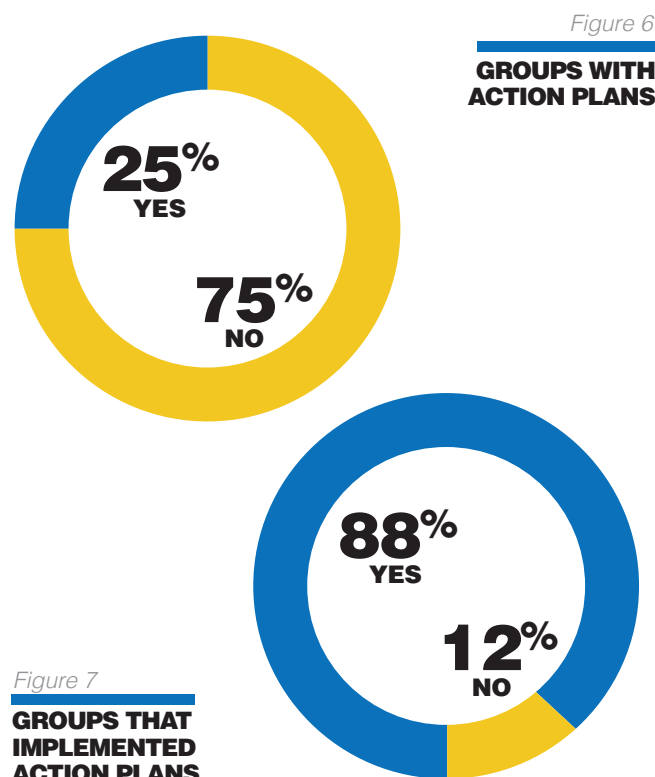
In terms of legal documentation, more than 90% of the groups had no guiding legal documents. Overall, 69% of the groups indicated that they did not have a constitution to guide their operations, while 31% reported having a constitution that had been ratified by their members, revealing that only a minority of the groups had gone through the formal process of collectively approving and adopting governing rules and principles. This suggests that many groups are operating with a lack of governance structures and processes.

Figure 5

### GROUPS WITH CONSTITUTIONS



In addition, a low percentage (25%) of the groups indicated they had an existing action plan in place that formalised a strategic roadmap for their activities and goals. This finding implies that a sizeable portion of these groups were operating without a clear and organised framework for achieving their objectives. This raises concerns about their ability to set specific goals, track progress and ensure the effective allocation of resources and efforts towards their mission. The absence of an action plan can lead to inefficiencies, decreased accountability and challenges in measuring success.



Of the groups with action plans, an overwhelming majority (88%) indicated that they had implemented activities from the plan. This indicates a strong commitment to translating their strategic intentions into concrete actions and outcomes. It also suggests that these groups possessed the capacity and determination to execute their plans effectively. Conversely, 13% indicated that none of their planned activities were implemented. While this percentage is relatively small, it raises questions about the underlying factors contributing to the lack of execution. These groups must reflect on their actions and address these barriers to ensure that their action plans are not left unexecuted.

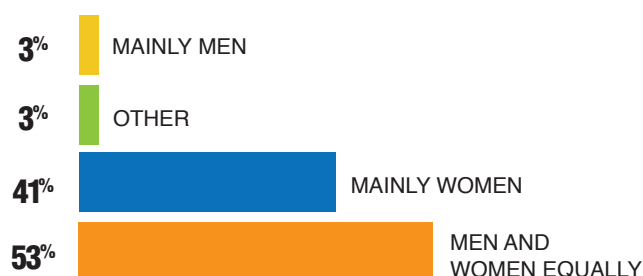
## DECISION MAKING AND PARTICIPATION

When the dynamics of decision-making were investigated within the groups, a marked difference was found in the distribution of decision-making authority between men and women. While 53% of the groups reported that decisions were made jointly by both men and women, more than 40% of groups indicated that women predominantly took the lead in decision-making. Data shows that

all groups with mainly male decision-makers were found only in Saint Lucia. This finding may reflect a shift in Jamaica and Guyana towards greater gender equality in leadership roles and the empowerment of women in these communities. This directly supports the achievement of SDG 5: Gender Equality and suggests a balanced and inclusive approach to group decision-making. The presence of 'other genders' making decisions in 3% of the groups also highlights the importance of equality and inclusivity of vulnerable or marginalised groups through diversity in decision-making.

*Figure 8*

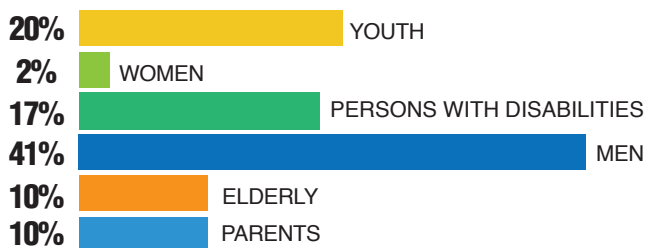
### DECISION MAKING BY MEMBERS



Similarly, the strong involvement of women and the comparably weaker involvement of men were reflected in the groups that were least likely to participate in community projects, with men being the least involved at 41%, in contrast to women at 2% of the groups. Findings suggest that some potential barriers may hinder men's engagement in community projects, ranging from time constraints due to employment especially outside the community to specific cultural and social influences.

*Figure 9*

### LEAST LIKELY TO PARTICIPATE IN COMMUNITY PROJECTS



Youth at 20% also exhibit a relatively low rate of participation in community projects, indicating a potential gap in involving younger members of the community in these projects. PWDs follow closely, with 17% not participating, suggesting that additional efforts may be needed to make community projects more accessible and inclusive for this demographic. Both elderly individuals and parents have a similarly low participation rate of 10%, indicating that even though these groups may face unique challenges, such as caregiving responsibilities for parents, there is still room to encourage their involvement in community initiatives.





## STAKEHOLDER ENGAGEMENT AND INVOLVEMENT

A significant percentage (69%) of the groups reported having an official membership list, suggesting that these organisations maintain a structured record of their members. The ability to easily reach out to the membership base plays a central role in ensuring successful communication, participation in planning and executing group activities, mobilising resources and accountability. Among these groups, 31% did not have a listing, which may potentially pose challenges in terms of organisation, communication, and proper administration of membership requirements and benefits. However, although the groups generally had a membership listing, 50% of the groups had not determined the number and type of stakeholders with interest in the community. Without having an idea of the interests of the various groups within the community, successfully serving the needs of community members and engaging and sustaining new and existing members is more challenging.

Figure 10

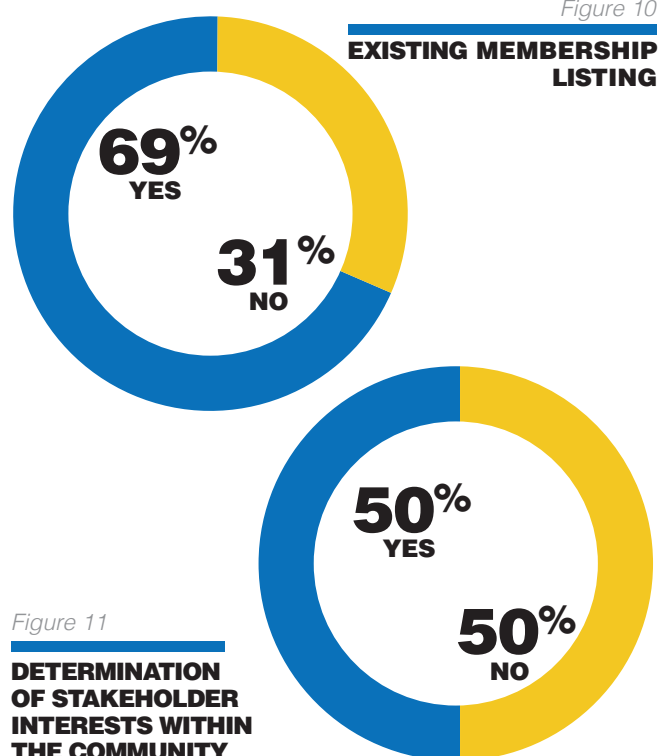


Figure 11

### DETERMINATION OF STAKEHOLDER INTERESTS WITHIN THE COMMUNITY

The data also revealed that in almost one-third (31%) of the groups, the primary stakeholder of the group was not a member. This points to an external influence shaping the group's activities. It is possible that decisions and resources were influenced by external parties or that the groups operated in a more collaborative or decentralised manner. The other 69% may benefit from more committed internal leadership or decision-making, as the primary stakeholder is part of the group. This scenario can foster a stronger sense of ownership within the group.

Furthermore, 69% of the groups did not identify the media as a key stakeholder, in contrast to 31% that responded affirmatively. This suggests that many groups do not actively engage the media for publicity, advocacy or information dissemination purposes. Thus,

they would not be able to capitalise on the benefits of media coverage to spread awareness of their activities and attract new members. Lack of visibility also detrimentally reduces their chances of attracting more investment partners. However, the absence of media as a key stakeholder does not signify a complete lack of engagement, as the groups may still interact with the media without considering them a key stakeholder.

Figure 12

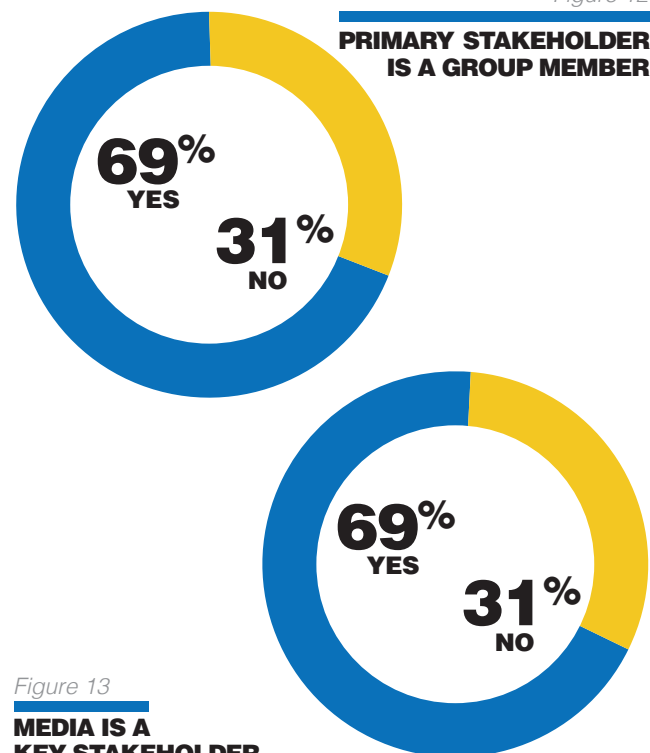


Figure 13

### MEDIA IS A KEY STAKEHOLDER

The investigation of the methods of communication used by the groups revealed that the most popular (38%) method was community-wide meetings. This may reflect the commitment to engage with their communities on a broad scale, fostering face-to-face interactions to facilitate dialogue. Social media followed next, with 32% of the groups using online platforms, which might indicate the increasing importance of digital channels in contemporary communication strategies, enabling groups to connect with a wider and often more diverse demographic. Street meetings were less popular (16%), with the least popular methods being stakeholder workshops (7%) and others (7%).

Figure 14

### METHODS OF COMMUNICATING WITH THE COMMUNITY

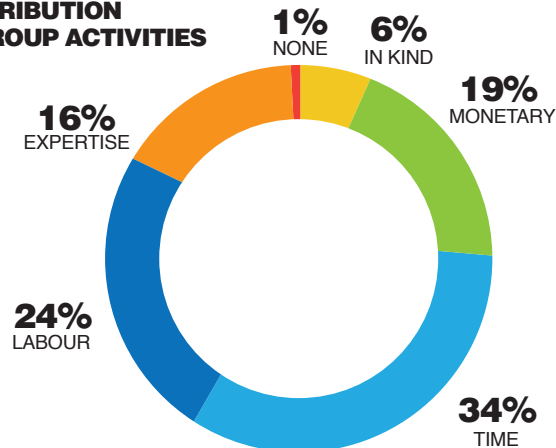


## KEY FINDINGS AND ANALYSIS

In terms of community members contributing to the group activities, the most common form of contribution was time (34%). This may highlight the willingness of persons in the community to support the groups' initiatives, highlighting a strong sense of community involvement.

Figure 15

### COMMUNITY CONTRIBUTION TO GROUP ACTIVITIES



Labour and monetary contributions made up 24% and 19% of all community contributions respectively. This suggests that community members invest not only their time but also their money in the group, which is crucial for conducting projects, covering expenses, acquiring resources and ensuring project sustainability.

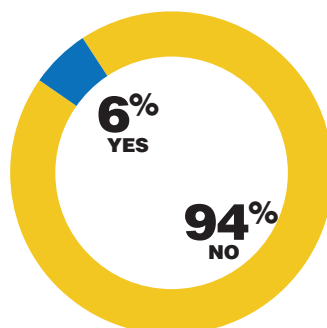
Expertise (16%) was also provided as a means to advance the objectives of the organisations. In-kind contributions were low at 5%, encompassing a wide range of support, from providing resources for school-related events to food and transportation. Only 1% of groups reported receiving no community contributions. This collaborative spirit and multifaceted support are vital for the effectiveness and sustainability of community-based initiatives.

## DEVELOPMENTAL ISSUES

When surveyed about skills in writing project proposals, only 6% of the groups reported feeling comfortable, indicating that a very small fraction of the groups possesses the expertise required to effectively craft proposals. Inevitably, this affects the level of funding and resources received since the number of successful proposals may be limited by their abilities.

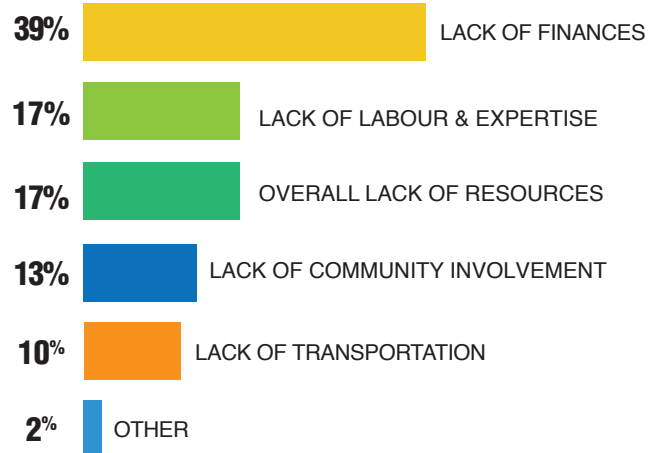
Figure 16

### MEMBERS COMFORTABLE WITH PROPOSAL WRITING



## CHALLENGES DURING PROJECT IMPLEMENTATION

Figure 17



The investigation of the challenges that the groups experienced during project implementation discovered that the biggest setbacks lay in the lack of resources in general. Lack of finances (39%) was the most recurring challenge, indicating that revenue inflows might have been insufficient to sustain projects throughout their lifetimes. This underscores the importance of securing adequate funding for project success, as financial constraints can impact various stages of a project. Alternatively, it may point to the extent of challenges faced by communities, which might outstrip funds immediately available.

Following this, a lack of overall resources and a shortage of labour and expertise were cited by 17% of the groups, indicating that resource limitations—whether in terms of materials, equipment or skilled personnel—posed substantial hurdles to successful project implementation. A lack of community support and involvement by 13% of the groups highlights the need for effective engagement and mobilisation strategies to garner local backing and participation in projects.

Transportation challenges were also an issue faced by 10% of the groups. These challenges may hinder the movement of resources and personnel to project sites or the ability to attend group events or meetings. This could be due to limited access roads, people not being able to afford private cars, and irregular and inadequate public transport systems in the area.

## ABILITY TO MOBILISE RESOURCES TO COVER EXPENSES

In the collection of membership fees, 81% of the groups reported receiving low to no support in this exercise, which raises questions about the groups' potential for financial sustainability and their ability to fund their activities. Only 3% of the groups reported receiving good support, pointing to a higher level of commitment among these groups' members and stability of fees as a significant revenue source, while 16% of the groups reported receiving average support.

For fundraising events, almost half (47%) of the groups reported receiving low to no support, indicating a low level of engagement in these initiatives. These groups' ability to generate financial





resources through events is limited and may signal the need for strategies to boost member participation and commitment to fundraising efforts. However, 53% of the groups reported having good to average support, suggesting a high-level buy-in and enthusiasm within these groups for the fundraising activities, which positions them well for financial success.

In attempting to attract external funding, 62% of the groups indicated low to no support received. Based on survey feedback, the contributing factors to this outcome include inadequate expertise in writing effective project proposals, limited knowledge of funding opportunities and inability to meet funding agency requirements such as legal registration of the group. Conversely, 37% of the groups reported receiving good to average support in this context.

Figure 18

### ABILITY TO RAISE RESOURCES TO COVER EXPENSES

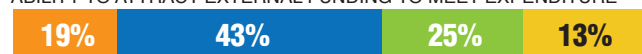
#### SUPPORT IN COLLECTING MEMBERSHIP FEES



#### SUPPORT IN FUNDRAISING EVENTS



#### ABILITY TO ATTRACT EXTERNAL FUNDING TO MEET EXPENDITURE



Organisations must strike a balance between internal and external funding sources to effectively meet their budgeted expenses and achieve their objectives. The relatively low levels of support in both internal and external funding strategies highlight the need for tailored approaches to boost member participation and optimise the effectiveness of fundraising initiatives to ensure the financial stability and sustainability of these groups.

### BNTF PROJECT SUSTAINABILITY

There was some awareness of the BNTF among the groups, with the majority (69%) of them being moderately aware of the existing BNTF projects in their area. Only 12% of the groups

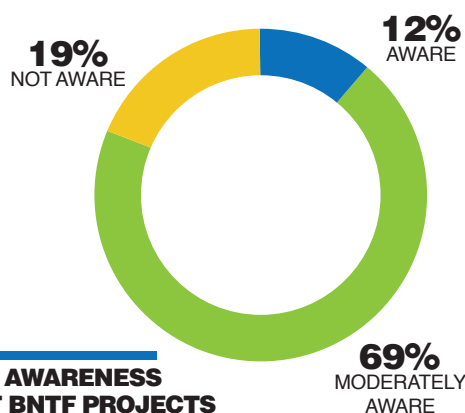


Figure 19

### COMMUNITY AWARENESS OF CURRENT BNTF PROJECTS

indicated they were fully aware of these projects, whilst 19% of the surveyed groups were completely unaware. Saint Lucia was the only country in which 100% of groups were either aware or moderately aware of the BNTF, whereas Jamaica had the lowest level of awareness, with 42% of its groups being unaware of the BNTF. Additionally, 41% of the surveyed groups had never collaborated with the BNTF on any past projects. This may impede the degree of sustainability of BNTF projects since stakeholder awareness and participation levels are relatively low.

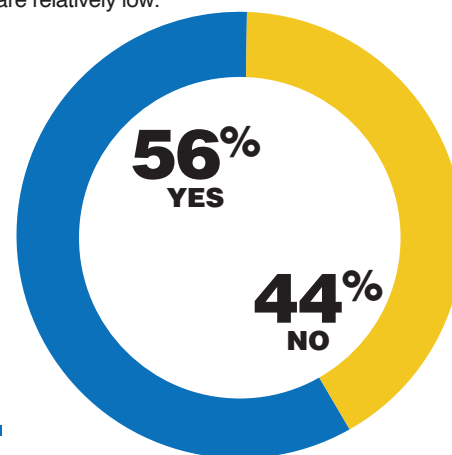


Figure 20

### GROUPS HAVE PREVIOUSLY COLLABORATED WITH BNTF ON PROJECT IMPLEMENTATION

### COLLABORATION ON SDGS

There was also a general lack of awareness of the SDG 2030 agenda, with 72% of the groups being unaware of the international plan of action agreed on by their countries. The groups in Guyana exhibited the lowest level of awareness, with only 18% being aware of this agenda, while in both Jamaica and Guyana, only 33% of the groups were aware of it. If the BNTF wishes to align SDG achievement with the execution of BNTF initiatives, the awareness regarding the SDG 2030 agenda must be improved at the ground level so that group plans, proposals and activities reflect this alignment. Many (63%) of the surveyed groups indicated that the organisation had ongoing projects directly in support of the achievement of the SDGs. This can be leveraged for an easier transition moving forward since the intent of the BNTF is to directly align project efforts with the SDGs outcomes.

Figure 21

### AWARENESS OF SDG 2030 AGENDA



Figure 22

### GROUPS WITH CURRENT PROJECTS SUPPORTING SDGS



Regarding resources allocated towards attaining the SDGs, the majority of the groups (63%) devoted the highest level of resources, or 51%–100%, to Goal 4: Quality Education. This indicates a strong level of commitment towards ensuring inclusive and equitable education and promoting learning opportunities for all. This was followed by 39% of the groups allocating resources to Goal 6: Clean Water and Sanitation and 36% to Goal 12: Responsible Consumption and Production. A significant portion of the groups (75%) reported assigning the lowest level of resources, or 0%, towards Goal 14: Life Below Water. This low resource allocation may have occurred because the groups did not have marine-related areas on their agenda, might not have been located close to marine habitats or did not rely heavily on marine resources. Other areas with the lowest resource allocations were Goal 7: Affordable and Clean Energy and Goal 12: Responsible Consumption and Production. Notably, more than 50% of the surveyed groups selected 'Not Applicable' for 12 out of 17 SDGs.

Figure 23

### GROUPS' RESOURCES DEVOTED TO SDGS

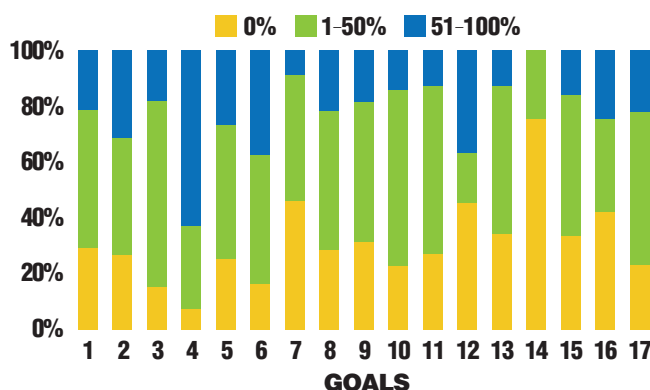
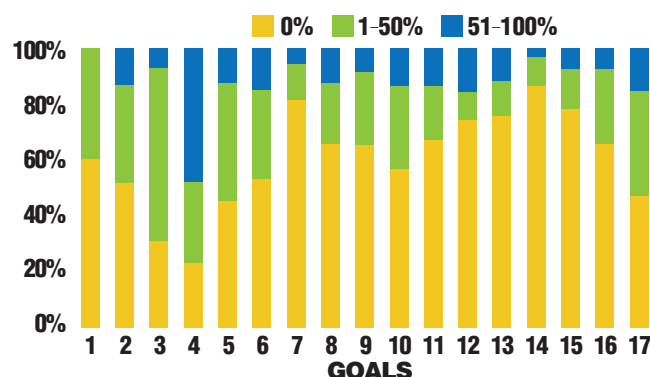


Figure 24

### GROUPS' ACTIVITIES FOCUSED ON SDGS

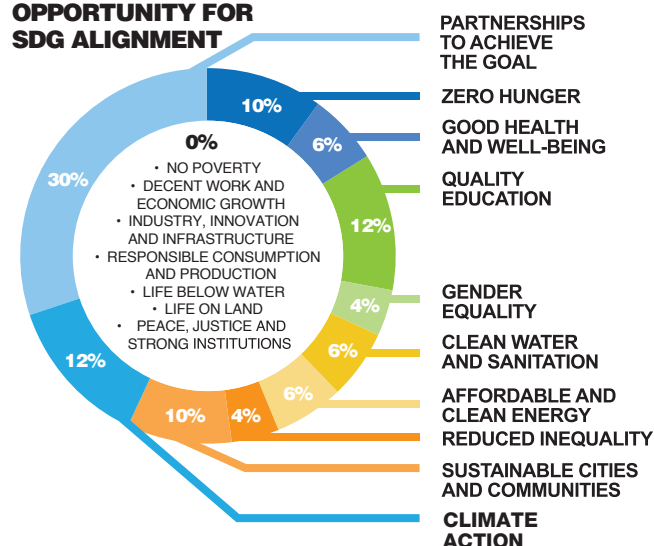


Accordingly, regarding activities that primarily focused on attaining the SDGs, the greatest percentage of the groups (48%) indicated having the highest level of activity, or 51%–100%, centred on Goal 4: Quality Education. This may have taken place because many of the surveyed groups seemed to be focused on

initiatives to improve schools and the quality of life for low-income students, for example, school feeding programmes. This was followed by markedly lower activity levels by groups at 17% for Goal 6: Clean Water and Sanitation and 15% for Goal 2: Zero Hunger. These figures point to a greater need for more concentrated efforts towards SDG awareness and the alignment of group activities with global outcomes. Similarly, an overwhelming majority of the groups (89%) reported having the lowest activity levels, or 0%, for Goal 14: Life Below Water. Other significantly low activity levels were recorded at 79% for both Goal 7: Affordable and Clean Energy and Goal 15: Life on Land. Again, it should be noted that more than 50% of the groups selected 'Not Applicable' for 11 out of 17 SDGs.

Figure 25

### OPPORTUNITY FOR SDG ALIGNMENT



The greatest opportunity for alignment with SDGs was found to be Goal 17: Partnerships to Achieve the Goal by 30% of the groups. These activities would require significant collective efforts and cooperation in tackling complex global challenges. Other notable opportunities included SDG 4: Quality Education and SDG 13: Climate Action, each mentioned by 12% of the groups. These responses highlight the emphasis on education as a driver of sustainable development and climate change as an issue requiring pressing concerted action. SDG 2: Zero Hunger and SDG 11: Sustainable Cities and Communities were also identified as opportunities for alignment by 10% of the groups. These focus on advancing work towards providing for basic human needs and increasing urban sustainability.

While some SDGs were not identified as areas of opportunity for alignment, note that this may reflect varying degrees of relevance to the groups' specific missions and activities, as opposed to a lack of commitment to the goals. These organisations and their activities recognise the importance of partnership, education, climate action and addressing basic human needs as key avenues for contributing to the global agenda of sustainable development. Their willingness to collaborate and adapt their activities to support the SDGs reflects a commitment to positive change and progress in their communities.





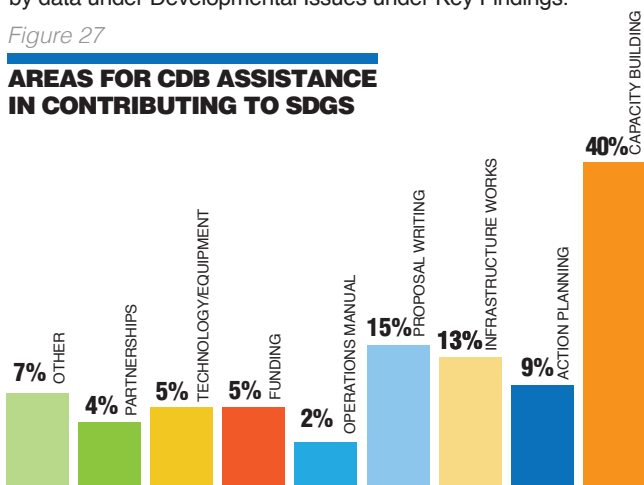
Figure 26

**CURRENT INTERVENTIONS : SDG ALIGNMENT**

In general, when asked about existing interventions that can contribute to the achievement of SDGs, the groups revealed that the percentage of current interventions under each SDG was either extremely low or zero. The highest number of groups (25%) indicated that they had current initiatives related to SDG 2: Zero Hunger. About 21% of the groups also indicated that they had interventions under SDG 3: Good Health and Well-being and 17% under SDG 17: Partnerships for the Goals. This may be in part due to the limited awareness of the SDG, its targets and work areas.

When asked about the areas in which CDB can assist the groups in achieving the SDGs, 40% of the groups indicated their preference for capacity-building efforts. Training topics cited were community engagement, climate change and renewable energy, climate-smart agriculture, information and communications technology (ICT) training, financial planning, gender, conflict resolution, event planning, agro-processing and youth empowerment. Capacity-building is optimal since knowledge transfer typically has long-term benefits for the groups. When people are trained, they may train their peers and create a positive sustainable impact from the training. Of the groups, 15% stated that they preferred training in proposal writing, which is supported by data under Developmental Issues under Key Findings.

Figure 27

**AREAS FOR CDB ASSISTANCE IN CONTRIBUTING TO SDGs**

Of the groups, 13% wished for assistance in infrastructural works—construction of a perimeter fence, computer lab, pedestrian walkway, road access, structures to prevent erosion, access to potable water, classrooms, regularisation of electricity, community centre and water system upgrade—that have wide-ranging benefits for the community.

**SUMMARY OF FINDINGS**

Overall, the assessment revealed weaknesses in technical and organisational capacity, with the need for greater emphasis on capacity-building interventions to strengthen community resilience. Levels of awareness and alignment with the BNTF programme and UN SDGs were also extremely low, signifying an opportunity to increase engagement with these groups on training and resilience projects in the future. The country-specific findings are presented below:

**GUYANA**

- + Lack of legal registration of groups and documentation
- + Little to no strategic planning documents
- + Need for technical and operational skill development, such as proposal writing, taking minutes, marketing and communication, and technology
- + High level of gender inclusivity
- + Requires more effective communication methods
- + Low level of awareness of BNTF and SDGs

**JAMAICA**

- + High level of legal registration of groups
- + Lack of legal documentation
- + Little to no strategic planning documents
- + Need for technical and operational skill development, such as proposal writing, taking minutes, marketing and communication, and technology
- + High level of gender inclusivity
- + Effective communication and use of ICT
- + Low level of awareness of BNTF and SDGs

**SAINT LUCIA**

- + Lack of legal registration of groups and documentation
- + Little to no strategic planning documents
- + Need for technical and operational skills development, such as proposal writing, taking minutes, marketing and communication, and technology
- + Relatively lower level of gender inclusivity than its counterparts
- + Requires more effective communication methods
- + Higher level of awareness of BNTF and SDGs





# RECOMMENDATIONS

Recommendations developed from the findings pinpoint various action items that can be implemented under the BNTF programme to address the gaps identified in the existing and future BCs. These recommendations are aligned with the strategic direction and operational priorities of the CDB for 2022–2024, which are underpinned by the theme of ‘building resilience’.

Resilience is being targeted as the primary pathway adopted to support borrowing member countries (BMCs) in realising sustainable and inclusive economic growth, as illustrated in Figure 28. Sustainable growth necessitates development in several priority areas, directly and indirectly, to capitalise on the multiplier effect and create synergistic development within countries. Thus, development is treated as an interrelated ecosystem, where a benefit in one area redounds in others. This outlook was used in the formulation of the CDB’s resilience framework, which identifies five key dimensions of change. All proposed initiatives are expected to support one or more of these SOs.





Figure 28

## CDB INDICATIVE STRATEGIC FRAMEWORK 2022–24

### TRANSFORMING LIVES

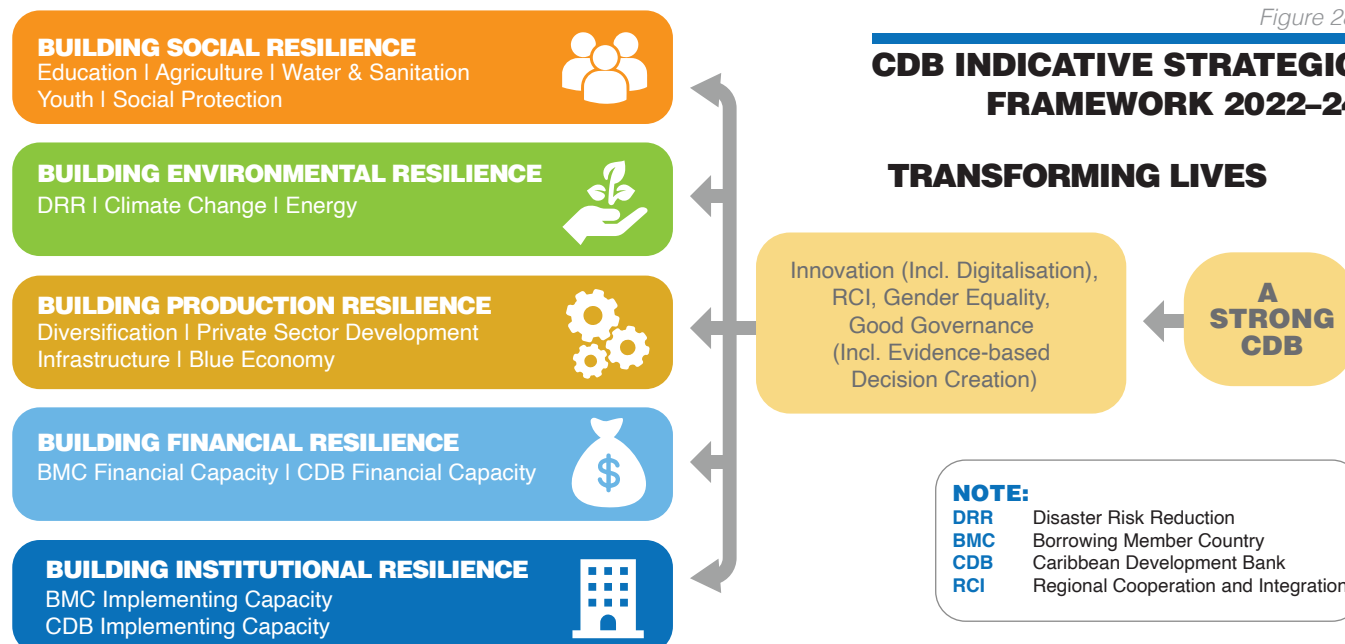
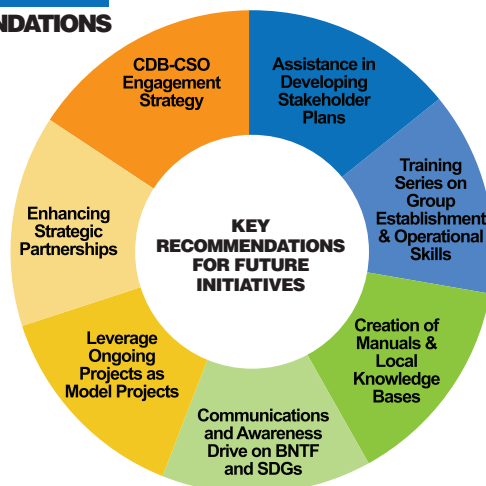


Figure 29

### KEY RECOMMENDATIONS FOR FUTURE INITIATIVES



### ASSISTANCE IN THE DEVELOPMENT OF STAKEHOLDER ENGAGEMENT PLANS

While findings of the assessment demonstrated a generally high engagement rate for women, other vulnerable or marginalised groups, such as the youth, elderly and PWDs, scored relatively low in participation rates. In addition, it was discovered that only half of the groups had documented their number and type of stakeholders of interest. The engagement of media as a key stakeholder to increase group visibility was also very limited. Further investigation should be conducted on the interests of the stakeholders, particularly the vulnerable sectors in the community and the factors contributing to their low engagement levels. The findings of such an investigation can be used to assist groups in crafting a tailored stakeholder engagement plan to increase the participation of the various local stakeholders.

Tailoring outreach and advocacy efforts is critical in addressing the specific needs, interests and obstacles faced by each demographic group to promote broader community engagement. More effective engagement leads to more funds and resources being provided to the group. Higher stakeholder participation rates enhance community resilience by improving overall awareness of key topics, support resource mobilisation efforts and greater idea generation, and reduce implementation time for activities. Resilience emphasises the need for inclusive strategies to engage all segments of the population, with particular attention to the marginalised groups. The outcome of successfully engaging with community stakeholders supports SDG 10, to reduce inequality by ensuring all people have equal voices and opportunities for participation in organisations.

### The CDB's Dimensions of Change: Environmental Resilience, Social Resilience and Crosscutting Theme—Evidence-based Decision-Making

Under the 'Environmental Resilience' pillar, the CDB has committed to improving climate resilience in vulnerable sectors. The bank acknowledges that natural hazards, disasters and emergencies have a disproportionate impact on poor and vulnerable populations—particularly, women, children, elderly and PWDs. The CDB is dedicated to ensuring gender equality in its development activities by assisting BMCs in strengthening the enabling environment to achieve resilience outcomes. This initiative may help the surveyed groups address the disparities in participation rates among different demographic groups, such as the youth, elderly and PWDs.

The 'Social Resilience' objective focuses on strengthening communities, and this includes ensuring that all segments of the population, especially vulnerable and marginalised groups, are actively engaged in projects and have equal opportunities for participation. Addressing these disparities is a key component of enhancing social resilience within communities.

“A dire need exists for information specific to the region that thoroughly captures the situational context, in order to assist in providing customised analysis and solutions for BMCs.”

Fragmented provision of data and information from communities within the region impedes the ability of the groups to analyse their specific development challenges and make informed decisions. Determining the needs and interests of stakeholders will allow the groups to engage in evidence-based decision-making by crafting appropriate outreach strategies, improving target settings and tracking progress towards the attainment of those targets.

## TRAINING SERIES ON GROUP ESTABLISHMENT AND OPERATIONAL SKILLS

### 01 ESTABLISHING ORGANISATIONAL POLICIES AND PROCEDURES

A training programme should be developed and implemented to assist community groups with the processes and procedures required to formally establish their group. The training programme should include the development of a constitution and group governance guidelines, obtaining legal registration, setting a vision and mission statement, goal setting, and agreeing on a monitoring and evaluation approach to tracking implementation.

### 02 TECHNICAL, TECHNOLOGICAL, ADMINISTRATIVE AND OPERATIONAL SKILLS

Significant gaps in technical, administrative and operational skills should be closed through targeted workshops in each BC. These fundamental skills were discovered in the assessment to be areas in which the BNTF could provide training and education to improve community capacity. The priority areas identified under the assessment findings include proposal writing, goal setting and development of an action plan, resource mobilisation strategies, effective community engagement, communication and the use of ICT. Community capacity building in these areas will enhance resilience through the strengthening of social capital in the community.

This empowerment can have a ripple effect by kick-starting a ‘Train the Trainer’ type of model, allowing the project to have far-reaching positive impacts. This initiative also supports SDG 17: Partnerships for the Achievement of SDG Goals.

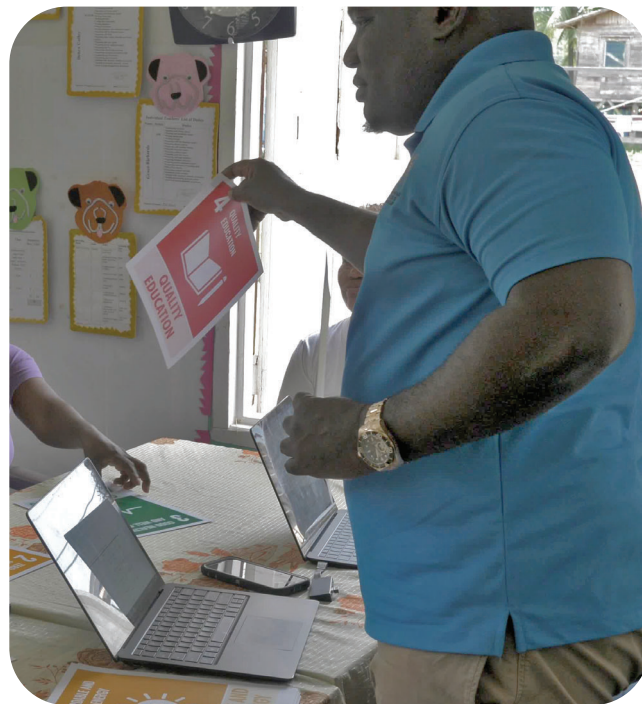
### 03 SOCIAL MEDIA, MARKETING AND COMMUNICATION SKILLS

An opportunity to transition groups to modern ways of doing business and contemporary marketing strategies has been catalysed from this beneficiary assessment. To build interest in them and conduct fund-raising, communities must receive training in communication skills—such as creating awareness and special purpose videos; conducting positive, high-impact interviews; performing photography and video editing; and ensuring effective public speaking. Such skills build the groups’ capacity to document and tell their stories, as well as more effectively engage with traditional and social media.

## The CDB’s Dimensions of Change: Social Resilience, Production Resilience and Crosscutting Themes—Digital Transformation

Establishing a training programme for community groups resonates with the ‘Social Resilience’ objective, which is centred on fortifying communities through transformative education and training. By furnishing communities with training and support, these groups can bolster their resilience and readiness to confront various economic, environmental and social challenges. Providing training in areas such as group establishment, goal setting and strategic planning, and effective community engagement and communication, the initiative strengthens social capital within communities and prompts them to come together to effect change. This initiative also fosters national and regional collaboration and knowledge exchange, thereby facilitating a network amongst communities.

Enhancing technical and operational skills, as well as resource mobilisation strategies, is critical for strengthening ‘Production Resilience’. By addressing gaps in these areas, the initiative builds the capacity of the communities and imparts them with the ability to raise funds and attract resources, withstand disruptions in production and implementation processes, and successfully pivot in the face of operational challenges.



Digital transformation is presently changing the way we do business around the world. Training in ICT skills and technology utilisation is essential for communities to embrace the future. This capacity-building training series, which uses digital transformation to further the SO of the bank, addresses the crosscutting issues in community development. A multi-targeted programme that integrates digital tools and platforms to enable remote learning expands and deepens the knowledge accessibility for groups, enabling them to make more informed decisions.

## CREATION OF MANUALS AND LOCAL KNOWLEDGE BASES

### 01 KNOWLEDGE BASES

Once the groups have been duly constituted and their members trained, this invaluable organisational and technical knowledge now residing in pockets across each PC should be stored and shared amongst local communities through the formation of local knowledge bases (KBs). A KB refers to a type of self-serve online library of information. In this context, it includes topics related to the fundamental procedures, processes and skills required for day-to-day operations. A simple KB can take the form of a website or blog with pre-written posts that provide valuable advice in the form of articles or frequently asked questions and direct users to additional sources of information. It is relatively low-cost and can be maintained by members of the community after undergoing appropriate ICT training provided by the bank.

A KB can function as a public good since the entire community, along with other local communities, stands to benefit from it. Knowledge sharing promotes community resilience by sustaining the benefits of training; improving the mobilisation and support for new groups in getting off the ground; and enabling existing ones to effectively plan in alignment with SDGs, monitor implementation against outcomes, find the best practices for mobilising local resources and carry out more activities. Facilitating knowledge transfer also supports the achievement of outcomes under SDG 17.

### 02 MANUALS/BOOKLETS

The bank could supplement the avenues for long-term access to information by creating relevant manuals and booklets for distribution to groups. Manuals or booklets can focus on fundamental processes and skill areas that have best practices or generally accepted methodologies, such as proposal writing, recording minutes or how to undertake strategic planning as a group. Shorter information-sharing booklets can also be created as a quick how-to guide to keep on hand with general tips or sources of information. Creating a KB in each country's community groups may require a level of 'hand-holding' through several training sessions to accompany the absorption of the material.

### The CDB's Dimensions of Change: Social Resilience, Institutional Resilience and Digital Transformation

Establishing a local KB and providing access to information through publication materials to the BMC community groups aligns with the 'Social Resilience' objective, which seeks to strengthen communities through transformative educational opportunities. These KBs can serve as valuable resources for community members to learn and discuss ideas, facilitate knowledge sharing and support the establishment and growth of community organisations. This initiative therefore enhances the capacity of the people in communities to respond to challenges.

The 'Institutional Resilience' objective involves strengthening the capacity of institutions to adapt and respond effectively to change. Local KBs can be considered institutional tools that empower communities with knowledge and resources. By promoting the creation of these KBs, institutions are strengthened through human capital, where people can better work

together to self-sustain and effectively plan and implement projects in their communities. Digital tools and platforms play a crucial role in the creation and maintenance of local KBs. They enable the storage and dissemination of information through websites, blogs or online libraries. This aligns with the 'Digital Transformation' objective, which emphasises the use of technology to enhance capacity-building, knowledge dissemination and ICT training, making knowledge more accessible and cost-effective for communities.

## COMMUNICATIONS AND AWARENESS DRIVE BY THE CDB

Effective communication is crucial in building trust, engaging stakeholders and achieving successful project outcomes. With many groups lacking awareness of the existing BNTF projects and the SDG 2030 agenda, it becomes challenging to engender in them a cohesive approach to planning and implementing projects that serve both goals. An intensive communication awareness drive should be implemented targeting beneficiary groups to considerably improve knowledge and awareness of the programme and SDG outcomes and indicators. Communities need to be highly engaged, directly and indirectly, to embed the need for incorporating BNTF and SDG priorities into their action plans. Physical and online knowledge materials providing guidance on the aims, targets and indicators for both goals should be made available to the groups for reference during their planning process.





### The CDB's Dimensions of Change: Social Resilience, Institutional Resilience and Digital Transformation

Effective communication is a key element of building social resilience. Engaging communities and beneficiaries through a communication awareness drive ensures they are well-informed about BNTF projects and the SDG 2030 agenda. This knowledge empowers communities to actively plan, discuss and participate in BNTF and SDG projects that strengthen their resilience, aligning with the 'Social Resilience' objective's focus on community empowerment.

An intensive communication awareness drive enhances institutional adaptability by ensuring that all stakeholders, including institutions and community groups, have a clear understanding of BNTF and SDGs. This facilitates efforts to coordinate resources and projects to achieve national and local developmental plans, as well as promote the bank and improve service delivery. Effective communication is also vital for building trust with community groups, engaging stakeholders and achieving successful project outcomes.

Digital tools and platforms play a significant role in conducting a communications awareness drive. Online knowledge materials and resources can be made available to beneficiary groups, enabling broader access and engagement. This aligns with the 'Digital Transformation' objective's focus on leveraging technology for communication and knowledge sharing.

### LEVERAGE ONGOING PROJECTS AS MODEL PROJECTS

Many groups indicated in the assessment that their ongoing projects directly support the achievement of various SDGs. The initiatives can be used in efforts, moving forward, to train group members on the practices and procedures involved in planning and implementing projects to international standards, including strategic planning, legal requirements and data collection to track SDG indicators. The projects can be highlighted by the BNTF as local model projects to assist other groups in understanding how they should design and execute their activities to align with SDG needs. Additionally, they can be used as a demonstration of the best practices to help guide other community groups in the country to develop potential BNTF projects. This initiative will also support SDG 17 to strengthen the means of implementation of the SDGs through innovative capacity building.

### The CDB's Dimensions of Change: Social Resilience, Institutional Resilience, Production Resilience, Environmental Resilience, Financial Resilience and Digital Transformation

Leveraging ongoing projects as model projects aligns with the 'Social Resilience' objective by promoting community empowerment since the model projects can serve as examples of successful community-driven initiatives to motivate other executives and group members to work toward strengthening their social capital within their communities.

The 'Institutional Resilience' objective involves enhancing institutions' capacity to adapt and excel in times of change. By highlighting ongoing projects as model projects, institutions can learn from the best practices in project planning and execution

and resolve challenges at any stage of their operation—whether it is setting up a group, accessing funds, mobilising resources in areas with low participation rates, cash flow planning and more—improving their institutional resilience.

The 'Production Resilience' pillar focuses on economic sustainability and productivity. Leveraging the highlighted knowledge and best practices may allow groups to increase their overall productivity and effectiveness through improved project planning, effective project execution, better monitoring of strategic targets, legal compliance and data collection towards evidence-based decision-making.

'Financial Resilience' involves sound financial management. Model projects can demonstrate effective resource mobilisation and financial management strategies, contributing to financial resilience.

Leveraging ongoing projects aligns with the 'Digital Transformation' objective by using technology and data collection for tracking SDG indicators. Digital tools can be integrated into these model projects to improve data management and reporting.



### ENHANCING STRATEGIC PARTNERSHIPS

In recognition of the significance of SDG 17, which emphasises the importance of 'Partnerships for the Goals', the BNTF faces the need to actively engage a diverse array of stakeholders to achieve its development objectives. A recent Maxwell Stamp Business Case Report (2016) underscored that while the BNTF has previously engaged in project-specific partnerships, these have often been ad-hoc in nature. To enhance funding levels, operational efficiency and programme effectiveness, the report recommended that partnership development become an integral part of the BNTF's operating model.

Under the guidance of the BNTF strategic partnership consultant (SPC), significant strides were made in 2023 towards cultivating partnerships. These collaborations involved sharing financial and technical resources with international financial institutions,

co-creating employment opportunities with corporate entities for beneficiaries of livelihood projects and initiating discussions for potential partnerships in BNTF Cycle 11. The partnerships have played a pivotal role in addressing knowledge gaps, building capacity and promoting effective development practices.

However, capacity challenges exist at the implementing agency (IA) level, as described in preliminary assessments by the SPC. IAs often lack expertise in partnership development, including understanding partnership-building principles, initiating and nurturing partnerships, and aligning their projects with potential partners' interests. Strengthening capacity within IAs is essential to their ability to identify suitable partners, define specific areas for collaboration and leverage partnerships effectively for development.

Further compounding the capacity challenges are competing priorities and tight deadlines, especially during the final year of a BNTF cycle. Team members' focus on meeting portfolio deadlines often diverts their attention from partnership development. To overcome this, it is recommended that partnership discussions begin as early as possible in the year preceding the next BNTF cycle. This approach allows adequate time for IAs, the CDB-BNTF team and potential partners to identify collaborative opportunities, align priorities and seamlessly integrate partnership development into strategic planning.

### CDB-CSO ENGAGEMENT STRATEGY

The involvement of the Central Statistical Office (CSO) in the CDB's developmental work can play a pivotal role in enhancing deliverables and ensuring sustainability. Expanding on the work of the pilot programme, the CSO can support programme strategy by providing accurate and reliable data to enhance programme design through evidence-based planning. With timely and accurate data provided by the CSO, policymakers and programme practitioners can tailor their strategies to better fit the current needs and realities of the BNTF PCs. This evidence-based approach allows for more targeted interventions, making resource allocation more efficient and effective. Thus, formal guidelines on the incorporation of CSO feedback into programme design should be developed by the CDB.



In addition, the involvement of a neutral body like the CSO can add a layer of transparency to the CDB's developmental initiatives. By regularly publishing data and reports on project progress and outcomes, the CSO can ensure that a larger cross-section of stakeholders, including the general public, are kept informed about the details of a project. This transparency can foster trust among the populace and can also hold IAs accountable for their performance, ensuring better utilisation of resources and reducing the chances of misuse or misappropriation.

Consultations with CSO leaders on development priorities and the CDB's strategic plan should also be facilitated to enrich the perspectives and information available to IAs. The CSO, with its expertise and data analysis on various sectors in each country, can provide valuable insights into the developmental needs and progress of priority areas for each BMC.

The CSO can also play a role in determining the sustainability of projects by analysing trends and forecasting future needs and challenges. By providing a forward-looking perspective, the CSO can help the CDB in the design of projects that are not just beneficial in the present but also equipped to manage future contingencies, ensuring that the benefits of development are sustained over time.

In conclusion, the CSO's involvement in developmental work offers a data-driven approach that enhances the efficiency, transparency and sustainability of projects. Its expertise can bridge the gap between policy and implementation, ensuring that development initiatives deliver maximum impact for the intended beneficiaries.



# CAPACITY DEVELOPMENT PLAN

## PURPOSE

This capacity development plan for beneficiary groups addresses the capacity development needs based on the BNTF assessment's findings. The plan seeks to outline priority areas for the BNTF, to focus its actions through several types of skills training. This training would enhance the competencies of community groups to effectively plan and execute poverty reduction projects and, ultimately, increase the overall resilience of BMCs in the region.

Apart from the implementation of the assessment report's recommendations in conjunction with the plan, the CDB should use this opportunity to engage in meaningful dialogue with the communities assessed to develop a practical and long-term pathway for assistance based on their specific country and community needs. In doing so, the communities will gain a sense of ownership in the developmental process and have a stronger commitment to project maintenance.



## CAPACITY DEVELOPMENT PARTNERS

### 01 LOCAL AUTHORITIES

Bringing local authorities from the community into the process would help sustain the CDBs capacity development impact in the BMCs by promoting deeper engagement between the Community-Based Organisations (CBOs) and the responsible authority and facilitating knowledge-sharing and networking. The authorities could also work with the bank to develop training material and/or courses to educate their target groups, as well as consult with the groups to provide guidance and technical support if needed.

### 02 NATIONAL STATE ACTORS

Apart from local authorities, the bank may want to collaborate with the national state actors that may have planned or are running other ongoing projects in these communities. The bank would be able to build on any developmental works planned or already completed and avoid duplication of efforts, thereby using funds more effectively. In addition, state actors are needed to bridge the gap between communities performing on-the-ground work in projects and government entities that have requirements to fulfil under national and international frameworks, including the UN SDGs. This way, they can explore synergies that may be exploited by jointly developing projects that serve national policies, BNTF programming and local needs.

## PRIORITY AREAS

Based on the data, several critical areas provide opportunities for skill enhancement in each BC. In designing and implementing a comprehensive capacity-building strategy for each country, greater dialogue and research may be required between the CDB and the communities to select the best-fit solutions moving forward. Further engagement will help to provide a qualitative, in-depth understanding of the issues faced by the groups and their communities and allow the CDB to collaborate in crafting recommendations based on similar practices.

In addition, a long-term sustainability and resilience reduction strategy such as this requires the establishment of training indicators and long-term performance monitoring and evaluation for progress. If progress is not being achieved as expected, the strategy should allow for adaptive management and close collaboration with target groups.



Within each country, the areas identified for development by the data are given in Table 1 below.

Table 1: Capacity Development Areas

	PRIORITY AREA	JAMAICA		GUYANA		SAINT LUCIA	
		HIGH	LOW	HIGH	LOW	HIGH	LOW
01	Legal Registration of Groups		✓	✓		✓	
02	Development of a Constitution	✓		✓		✓	
03	Goal Setting & Vision/Mission Statements		✓	✓		✓	
04	Action Planning and Monitoring Progress	✓		✓		✓	
05	Proposal Writing Skills	✓		✓		✓	
06	Resource Mobilisation Strategies	✓		✓		✓	
07	Effective Communication and Use of ICT		✓	✓		✓	

## LEGAL REGISTRATION OF GROUPS

01

### Guyana and Saint Lucia

The surveyed groups exhibited a diversity of organisational structures and levels of formality, where many of the groups partnering or wishing to partner with the BNTF were not legally registered. Legal registration can bring benefits such as access to funding, legal protection and increased credibility. It also comes with administrative and financial planning and responsibilities, which require capacity building and knowledge. Providing capacity building in this area will result in support, resources and guidance tailored to the specific needs and goals of these groups and ultimately increase their likelihood of receiving grants from funding agencies. Additionally, for these groups, the registration may be a matter of registering with local government authorities, which may not necessarily be legal entities. Therefore, the bank can consider collaboration with the registrar of companies in each country and outreach activities with the BNTF communities to sensitise the executives and interested parties to the requirements.



## DEVELOPMENT OF A CONSTITUTION

02

### Jamaica, Guyana and Saint Lucia

Constitutions that have been ratified by their members serve to provide a group with fundamental principles, purpose and structure by outlining the rules of the procedure by which a group is governed. It therefore provides a foundation for an efficient organisation. With so many groups operating without a constitution, there is a high likelihood of troubled decision-making, reduced accountability and organisational instability within these groups, leading to conflicts. Having a ratified constitution within these groups will provide a solid foundation for governance and operation. Strengthening the groups' capacity in the drafting and development of constitutions should help them enhance their organisational efficiency, transparency and effectiveness.

## GOAL SETTING AND VISION AND MISSION STATEMENTS

03

### Guyana and Saint Lucia

Having an action plan within a group can serve as a vital tool for effective strategic management and goal achievement. The majority of the surveyed groups lacked this fundamental element, which provides an ideal area for improvement. Developing action plans may assist these groups in creating attainable short-range goals to make meaningful progress towards their long-term objectives. This training area should also focus on selecting and monitoring indicators to track implementation progress, identifying risks and potential impacts early on, and crafting appropriate mitigation strategies.

## ACTION PLANNING AND MONITORING PROGRESS

04

### Jamaica, Guyana, Saint Lucia

Having an action plan within a group can serve as a vital tool for effective strategic management and goal achievement. The fact that the majority of surveyed groups lacked this fundamental element provides an ideal area for improvement. Developing action plans may assist these groups in creating attainable short-range goals to make meaningful progress toward their long-term objectives. This training area should also focus on selecting and monitoring indicators to track implementation progress, identifying risks and potential impacts early on, and crafting appropriate mitigation strategies.

## PROPOSAL WRITING SKILLS

05

### Jamaica, Guyana and Saint Lucia

The ability to articulate project proposals is crucial in attracting resources and partners as a community group. A majority of the groups expressed discomfort with writing project proposals, pointing to the critical need for capacity-building in this area. Many groups may have valuable projects and ideas on the horizon, but they may be continually out of reach, hampered by their inability to effectively communicate their plans. Enhancing these skills can empower these organisations to better communicate their strategic intent, expected objectives and implementation activities to secure funding, ultimately increasing the impact of their initiatives. Addressing this capacity gap should be a priority to enable these groups to reach their full potential and contribute to their communities or causes more effectively.

## RESOURCE MOBILISATION STRATEGIES

06

### Jamaica, Guyana and Saint Lucia

To improve the financial sustainability of the groups, training can be provided on funding strategies and methods of mobilising resources to meet project needs and cover organisational expenses. This should include strategies to improve the collection of membership fees, as this seems to be a considerably untapped revenue source by most groups. Successfully hosting fundraising events is another area of priority to increase the engagement of community members and enhance the groups' fundraising capacities. Another key area is the ability to obtain external funding, which can be partially covered through training in proposal writing. The continuity of the organisations rests upon the need for thoughtful financial planning to ensure they can efficiently attract resources to pursue their objectives and maintain their operations well into the future.

## EFFECTIVE COMMUNICATION AND USE OF ICT

07

### Saint Lucia

Robust communication skills and the use of ICT are needed to effectively reach the groups' target stakeholders. By doing so, the groups can take a more proactive role in shaping public perception and increasing awareness of the organisation and its activities. The right message will help stimulate the public to action and can highlight the diverse strategies and priorities of the organisation after the development of stakeholder engagement plans, which target each interest group. Members can be trained in successful communication techniques, utilisation of popular ICTs and constructive media engagement. Training in ICT is particularly necessary as some vulnerable target groups, such as the youth, primarily use digital methods of communication, and their engagement is vital to ensuring the sustainability of the organisations. Capacity building under this skill is aligned with SDG 17 as it enhances the use of enabling technology.



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## APPENDIX 1: BENEFICIARY GROUP CAPACITY AND PROGRAMME ASSESSMENT SURVEY QUESTIONNAIRE



### Basic Needs Trust Fund 10 Cycle Beneficiary Group and Programme Assessment Questionnaire

#### Note/Instructions

The assessment form must be administered to the executive members of the beneficiary group

The assessment process should **ONLY** be done with active (**met within the last 12 months**) and partially active organizations (**met within the last 18 months**).

The objective of the survey is to provide data that will inform interventions geared at improving the capacity of BNTF 10 Beneficiary Groups' operations and implementation activities, as well as fill knowledge gaps related to the SDGs.

This assessment form has two (2) sections and eleven (11) sub-sections; please ensure that all relevant questions in each section are completed by ticking the appropriate responses provided or stating the answers where necessary. If not applicable, please select the option provided

**INFORMED CONSENT:** please share the content of the assessment form with the group before conducting the assessment and if interviewees agree, the consent form should be signed before continuing the survey.

Supporting documents must be acknowledged as seen and reviewed to inform the assessment process.

The administration should take a minimum of 1 hour and 45 minutes.

#### **CHECKLIST:**

1	Minutes Book (Exec. & General)	
2	Constitution	
3	Financial statement/ records	
4	Membership Listing	
5	Action Plan & Budget	
6	Attendance Registers (Exec. & General)	
7	Minutes of the higher tier group	
8	Correspondence File	
9	Stakeholder & CBO Listings	
10	Community Initiative Matrix	
11	Proof of Registration	
12	Record of Projects	
13	Advocacy Plan	
14	Asset Listing/ Inventory	
15	Listing of Community Issues	
16	Stakeholder Analysis	
17	MOUs/ TORs.	



### **SECTION 1: ORGANISATION DULY CONSTITUTED**

#### **(i) Organisation's Level of Activity**

1. Please state the following

(1a) Group name:  
.....

(1b) Group mailing address:  
.....

(1c) Group contact number:  
.....

(1d) Other forms of contact (e.g. website and social media):  
.....

2. Please state address of meeting place (if there is no formal meeting place, please provide details):  
.....

3. Please state tenure of meeting place:

a. own ☐ b. rent ☐ c. lease ☐ d. approved usage (verbal) ☐ e. approved usage (written) ☐

Other, please state  
.....

4. Does the group has an office space? (Separate from the meeting place)

a. Yes ☐ b. No ☐

5. If the response to Question 4 is yes, please state the address:  
.....

6. Please state the status of your group?

a. Active (met in the last 12 mths) ☐ b. Partially active (Met in the last 18 mths) ☐

7. Is your group legally registered?

a. Yes ☐ b. No ☐





8. How are decisions taken within the group?

a. mainly men b. mainly women c. both men and women equally d. other, please state.....

**(ii) Established Guideline - Stated Purpose/Objective of Group**

9. Is there an agreed vision statement for your group?

a. Yes ☐ b. No ☐

10. If the 'YES' was the selected response for Question 9 above, please state the vision statement:

.....  
.....

11. Is there an agreed mission statement for your group?

a. Yes ☐ b. No ☐

12. Does your group have agreed objectives?

a. Yes ☐ b. No ☐

13. Does your group have special interests/focus?

a. Yes ☐ b. No ☐

14. If the YES was the selected response for Question 13 above, please state the special interest:

.....

15. Is the largest (monetary) key stakeholder a member of the group?

a. Yes ☐ b. No ☐

**(iii) Group Duly Constituted**

16. Does the group have a constitution ratified by its members?

a. Yes ☐ b. No ☐



**17.** If the response to question 16 is YES, move to question 18. If No, Is the document in the process of being established or ratified?

a. Yes ☐ b. No ☐

*Kindly provide responses to the following questions in relation to the group's constitution:*

**18a.** Effective date: .....

**18b.** Is the constitution available to the public?

a. Yes ☐ b. No ☐

**19.** Does the group have any other legal documents (TOR or an Article of Association/Incorporation or rules)?

a. Yes ☐ b. No ☐

**20.** If a TOR is in place, kindly provide responses to the following questions.

**20 a.** Effective date: .....

**20b.** Is the TOR available to the public?

a. Yes ☐ b. No ☐

**21.** If Articles of Association/Incorporation or Rules exist, kindly provide responses to the following::

**21a.** Effective date: .....

**21b.** Are Articles of Association/Incorporation or Rules available to the public?

a. Yes ☐ b. No ☐

**21c.** Are the group's activities consistent with Articles of Association/Incorporation or Rules?

a. Yes ☐ b. No ☐





**(iv) Stakeholder Engagement and Involvement**

**22.** Does the group have a membership list?

a. Yes ☐ b. No ☐ IF 'No' answer question 27 & 28 then go to question 30

**23.** Has the group determined and documented the number and type of stakeholders with interest in the community?

a. Yes ☐ b. No ☐ If 'No' is selected, go to question 27

**24a.** Please state the number of primary/key stakeholders:

.....

**24b.** Please state the number of secondary/other stakeholders:

.....

**25.** What percentage of primary stakeholders are represented in the group?

a. None ☐ b. 1-25% ☐ c. 26-50% ☐ d. 51 – 75% ☐ e. 76-100% ☐

*Total number and name of stakeholders attending meetings*

**26.**

Name the key stakeholders and or other interest groups that are members of the group	Sex	Name of stakeholder/other interest group	Name of representative	Position in interest group (eg. President)	Attended four (4) of the last six (6) meetings (Yes/No)
1.					
2.					
3.					
4.					

**27.** Which is the largest stakeholder group in your community?

Name ..... Address .....



28. Is Media a part of your stakeholder groups?

a. Yes ☐ b. No ☐

29. Is the largest primary/key stakeholder a member of the group?

a. Yes ☐ b. No ☐

30. Who is the most influential primary/key stakeholder in your community?

.....

31. Is the most influential primary stakeholder a member of the group?

a. Yes ☐ b. No ☐

32. Please state the number of registered members of the group

	17 yrs. and under	18-25yrs	26-35 yrs.	36-45 yrs.	46-55 yrs.	Over 55 yrs.
Male						
Female						

33. Elected Executive

Position	Name	Address	Contact Number	Email Address
Immediate Past President/Chairperson				
President/Chairperson				
Vice president/chairperson				
Secretary				
Assistant Secretary				
Treasurer				
Assistant Treasurer				
Public Relations Officer				
Assistant Public Relations Officer				

(v) Meetings and Engagements (executive, general membership and the wider community)

34. Do you have schedule group meetings?

a. Yes ☐ b. No ☐ move to Question 50





34b. Please state the day and time of scheduled executive meetings

.....

35. Please state the day and time of scheduled meeting with the general membership

.....

36. If your response was 'NO' to Question 35 please state how frequently the following meetings are held?

Executive meeting: .....

General ..... membership ..... meeting: .....

37. Are meetings characterized by setting objectives, evaluation tasks, and determining the next steps?

a. Yes ☐ b. No ☐

39. Was the last Annual General Meeting (AGM) held as per the constitution?

a. Yes ☐ b. No ☐ move to Question 57

40. Which of the fora listed below were used to engage local (select all that apply)?

a. Social Media ☐ b. Street Meetings... ☐ c. Stakeholder Workshops ☐

d. Community-wide meetings ☐ e. Other, please state.....

**(vi) Recording System Established and Maintained**

41. Kindly populate the table below to reflect group's establishment and maintenance of recording system

Type of Record	Is the record available? (Yes/No)	Quality of the documents (very good/good/fair/poor/very poor)	Where are the documents stored?	Is the record accessible? (Yes/No)
Minutes Book				
Attendance Register				
Outgoing				



Correspondence File				
Incoming Correspondence File				
Stakeholder Listing				
Stakeholder Analysis				
Income/ Expenditure Records				
Annual Budget and Plan				
Financial Statement				
<b>Type of Record</b>	<b>Is the record available? (Yes/No)</b>	<b>Quality of the documents (very good/good/fair/poor/very poor)</b>	<b>Where are the documents stored?</b>	<b>Is the record accessible? (Yes/No)</b>
Membership Listing				
Asset Inventory				

## SECTION 2: OPERATIONS OF THE STRUCTURE

### (vii) Group's Operations within Local Governance Framework

42. Is there a higher tier group/organisation that this group reports to at an agreed time?

a. Yes ☐ move to question 45    b. No ☐ Move to question 49

43. If the response to Question 44 is 'YES', state the name of the higher tier group/organisation

.....

44. How many of the last three meeting of the higher tier group/organisation was your group present?

a. 1 ☐ b. 2 ☐ c. 3 ☐ d. 0 ☐

47. Has the group's executive ensured that the issues raised at meetings are agenda items at the higher tier meetings?

a. Yes ☐ b. No ☐

45. Has the executive of this group ensured that the issues raised at higher tier group meetings are agenda items at your meetings?





a. Yes ☐ b. No ☐

**(viii) Identifying Community Issues and Advocacy**

**46.** Are group's issues raised at the fora with other interest groups and relevant stakeholders?

a. Yes ☐ b. No ☐

**47.** Have any actions been taken to address the issues identified?

a. Yes ☐ b. No ☐

**48.** Does the group have an action plan?

a. Yes ☐ b. No ☐

**49.** If the response to Question 48 is 'YES' please state the main issues identified in the action plan

.....

and actions proposed .....

**50.** Has the group implemented any activities from the action plan?

a. Yes ☐ b. No ☐

**51.** Participation on group activities

Target Group	Total Number	Level of Support – 60% and above of target group total number	Level of Support – Average – 30% - 59% of target group total number	Level of Support Low – 1% to 30% of target group total number	0% - No support from target group
Member's attendance at general membership meetings					
Members' Participation in planned group activities					
Target Group	Total Number	Level of Support High	Level of Support	Level of Support Low –	0% - No support from



		– 60% and above of target group total number	Average – 30% - 59% of target group total number	1% to 30% of target group total number	target group
Members' participation in planning and implementation of special projects					
Wider community participation in group interventions					

52. Indicate type of community contribution to group activities

- a. Monetary ☐ b. Time ☐ c. Labour ☐ d. Expertise ☐ e. None ☐  
 f. Other, please state .....

(ix) Demonstrate ability to raise resources to cover Organisational Expenses

53. Resource Mobilisation

Resource Area	Good support 60% and of the targeted audience	Average support 30% - 59% of targeted audience	Low support Below 30% of the targeted audience	No support/no considered currently
Collection of membership fees				
Fundraising events				
Ability to attract funding to meet Budgeted/planned expenditure from external sources				

54. Indicate formal sources of group's financing?

- a. Membership due ☐ b. Commercial activities ☐ c. Fundraising ☐  
 d. Other, please state .....

55. Indicate other financing sources (select all that apply)





- a. project grant ☐ b. government subvention ☐ c. Cash contributions ☐ d. In-kind contribution ☐  
 e. Sponsors ☐ f. None ☐ g. Other, please state .....

56. Does the group have an MOU any government agency?

- a. Yes ☐ b. No ☐

**(x) Addressing Developmental Issues**

57. Are group members comfortable with writing project proposals?

- a. Yes ☐ b. No ☐

**58. Project Listing**

Menu of Projects	Presently Pursued	being	From 2020 to present	Two years prior to COVID 19
Projects specific to group's Action Plan				
Group's involvement in wide community project(s)				
Livelihood Enhancement				
Environmental Protection				
Other, please state				
Community Care				

59. Please state any challenges experienced during project implementation

60. If the group is not implementing projects currently, why is this so?

**(xi) BNTF Project Sustainability**

61. Kindly rate the level of community awareness in relation to the current BNTF project?

- a. Very aware ☐ b. Aware ☐ c. Moderately aware ☐ d. Not aware ☐



61. Have your organisation collaborated with BNTF to implement a project?

a. Yes ☐ b. No ☐

62. What is the estimated value of community contribution to the BNTF 10 sub-project?

a. In-kind \$

.....

b. Financial \$.....

c. Other, please state.....  
\$.....

63. How can community awareness be increased around the BNTF sub-projects?

.....

64 a. What group is least likely to participate in community projects?

.....

64b. Which of the following groups are among the least likely to participate?

a. youth ☐ b. women ☐ c. Persons living with disabilities ☐ d.

Other, please state .....

#### (xii) Sustainable Development Goals

65. Is your organisation aware of the 2030 Agenda?

a. Yes ☐ b. No ☐

The Sustainable Development Goals (SDGs), also known as the Global Goals, were adopted by the United Nations in 2015 as a universal call to action to end poverty, protect the planet, and ensure that by 2030 all people enjoy peace and prosperity. The 17 SDGs are integrated—they recognize that action in one area will affect outcomes in others, and that development must balance social, economic and environmental sustainability. Countries have committed to prioritize progress for those who're furthest behind. The SDGs are designed to end poverty, hunger, AIDS, and discrimination against women and girls. The creativity, knowhow, technology and financial resources from all of society is necessary to achieve the SDGs in every context.

70. What Goals are relevant to the work of your organisation?

.....

71. What percentage of your activities primarily focuses on each of the relevant Goals?

Goal	Not Applicable	None	1-25%	26-50%	51-75%	75-100%
No Poverty						



Zero Hunger						
Good Health and Well-Being						
Quality Education						
Gender Equality						
Clean Water and Sanitation						
Affordable and Clean Energy						
Decent Work and Economic Growth						
Industry Innovation and Infrastructure						
Reduced Inequalities						
Sustainable Cities and Communities						
Responsible Consumption and Production						
Climate Action						
Life Below Water						
Life on Land						
Peace Justice and Strong Institutions						
Partnerships for the Goals						

**72.** What percent of resources are devoted to the relevant goals?

<b>Goal</b>	<b>Not Applicable</b>	<b>None</b>	<b>1-25%</b>	<b>26-50%</b>	<b>51-75%</b>	<b>75-100%</b>
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No Poverty						
Zero Hunger						
Good Health and Well-Being						
Quality Education						
Gender Equality						
Clean Water and Sanitation						
Affordable and Clean Energy						
Decent Work and Economic Growth						
Industry Innovation and Infrastructure						
Reduced Inequalities						
Sustainable Cities and Communities						
Responsible Consumption and Production						
Climate Action						
Life Below Water						
Life on Land						
Peace Justice and Strong Institutions						
Partnerships for the Goals						

73. Where do you see the greatest opportunity to align your activities to the goals of/ or additional goals of the SDGs .....



**74.** Do you have existing interventions that can contribute to the achievement of goals under the SDGs?

a. Yes ☐ b. No ☐

If yes, which, .....

**75.** Which goals, that you currently don't target, can be included in your programmes to support the achievement of Agenda 2030?

.....

**76.** Which Government Ministries do you need support from on a routine basis?

.....

**77.** Which Government Ministries do you need support from to support the achievement of goals towards the SDGs?

.....

**78.** Where can CDB assist in your targeted approach to contribute to the achievement of the SDGs?

.....



## APPENDIX 2: SURVEY IMPLEMENTATION SCHEDULE

### Implementation Schedule: Jamaica – February 2023

Date	Departure Time	Morning	Evening	Expected Return Time
Thursday, February 16, 2023	6:45 a.m.	Mount Salem Infant School, St. James @10 a.m.		5:00 p.m.
Friday, February 17, 2023	9:00 a.m.	Top Quarter Road, Clarendon @11:30 a.m.		5:30 p.m.
Monday, February 20, 2023	8:00 a.m.	Mendez Town Lowe River Primary @11 a.m.	Mount Moriah Primary @3:00 p.m.	8:30 p.m.
Tuesday, February 21, 2023	6:45 a.m.	Kendal Primary School @11 a.m.	Grange Hill Primary School @2:30 p.m.	10:00 p.m.
Wednesday, February 22, 2023	8:30 a.m.	Georgia Road, St. Thomas @11:00 a.m.		4:00 p.m.
Thursday, February 23, 2023	8:00 a.m.	Frankfield Primary School @10 am	Albion Primary School @2:30 p.m.	7:00 p.m.
Friday, February 24, 2023	8:00 a.m.	Old Harbour Primary School @9 am	Pisgah Primary School @2:30 p.m.	9:00 p.m.

### Implementation Schedule: Guyana – February to March 2022

Date	Region	Project
Monday, February 27, 2023	2	Onderneeming Primary School  Special Needs Education  Anna Regina Roads
Tuesday, February 28, 2023	2	Mainstay  Moshobo
Wednesday, March 1, 2023	9	Nappi Water Supply
Thursday, March 2, 2023	9	Surama Water Supply
Friday, March 3, 2023	Travel to Region 4	
Saturday, March 4, 2023	Region 4 and 6	Hope and Back Bush
Monday, March 6, 2023	10	Kwakwani Nursery School
Tuesday March 7, 2023	Public Holiday	
Wednesday, March 8, 2023	Travel to Kato	
Thursday, March 9, 2023		Kurubaru Water Supply
Friday, March 10, 2023	Travel to Georgetown	



**Implementation Schedule: Saint Lucia – April 2023**

<b>Date</b>	<b>Time</b>	<b>Project Name</b>	<b>Lead Group/ Organization</b>	<b>Group Being Assessed</b>	<b>Location</b>
<b>Mon. April 17</b>	9:00 a.m.	Greening Opportunity for Livelihood Development	National Skills Development Centre	NSDC Management Committee	Bisee
<b>Mon. April 17</b>	1:00pm	Rehabilitation of Vieux Fort Comprehensiv e Food, Nutrition and Health Lab	Vieux Fort Comprehensive Secondary School	Parent Teacher Association (PTA)	School room
<b>Mon. April 17</b>	3:30pm	Retrofitting of Pre-K Classroom	Soufriere Primary School	(PTA)	School room
<b>Tues. April 18</b>	11:00a m	Retrofitting of Pre-K Classroom	Bishop Gachet Combined Primary School	(PTA)	School room
<b>Tues. April 18</b>	2:00pm	Retrofitting of Pre-K Classroom	Babonneau Primary School	PTA, Management Committee	School room
<b>Wed. April 19</b>	11:00a m	Artsacpe multifunctional space, Arts Business Capacity Strengthening	Cultural Development Foundation (CDF)	Monitoring Committee (PMC)	CDF Conference Room
<b>Wed. April 19</b>	5:00 p.m.	Crownlands Road extension	Castries South East Constituency Council	Castries South East Constituency Council	Castries South East Constituency Council Office
<b>Thurs. April 20</b>	9:00 a.m.	Renovation to La Bayee ECDC	Early Childhood Development Unit/ Ministry of Education	Staff and Parents of the ECDC	La Bayee ECDC
	3:30 p.m.	Choiseul Music Room	Choiseul Music Committee	Choiseul Music Committee	Reunion Primary School
<b>Fri. April 21</b>	10:00 a.m.	Music Studio (Phase 3)	Cultural Development Foundation (CDF)	CDF and Management Committee Partners	CDF Conference Room
	5:00 p.m.	Introduction to Aquaponics	La Ressource Development Committee/Department of Fisheries (Ministry of Agriculture)	La Ressource Development Committee	Vieux Fort Secondary School
<b>Mon. April 24</b>	2:00pm	Goodlands Community	Goodlands PMC	Residents	SSDF Conference room or Mag's Residence
<b>Tue. April 25</b>	10:30a m	Min of Equity	Community Development	Ministry Representatives	SSDF Conference room



## APPENDIX 3: PARTICIPANT CONSENT FORM



**STUDY TITLE:** Basic Needs Trust Fund Beneficiary Group and Programme Capacity Assessment Study

**INTERVIEWER Name and designation**.....

**Contact Number**.....

**Email Address**.....

**Purpose of the Study:** The Caribbean Development Bank's Basic Needs Trust Fund is conducting a survey of all beneficiary community groups targeted for its 10<sup>th</sup> cycle supporting poverty reduction projects across the Caribbean. The purpose of this research is to provide data that will inform interventions geared at improving the capacity of BNTF 10 Beneficiary Groups' operations and implementation activities, as well as increase knowledge and actions related to the SDGs.

**Procedure/methodology of the study:** A survey questionnaire will be administered to each beneficiary group in a focus group session made up of executive committee members. Each session should last one hour and forty-five minutes. The findings from the surveys will be used to develop a capacity development/improvement plan to help the groups' better their operations and implementation of activities to improve the lives of the residents living in your community. The survey will also review the level of awareness among the group of the Sustainable Development Goals (SDGs), with the intention of providing information of these goals.

**Risks:** Some questions may make you feel uncomfortable. If they do, you can skip the question – or ask the interviewer to move on to the next question. **You can also quit the study completely at any time.**

Your information could be accidentally leaked to people not connected with this study. We will do everything we can to make sure this doesn't happen.

Note that we cannot guarantee that others in the group discussion will keep what you say private. When you sign this form, you agree to not talk about what was said in the group with anyone not part of the group. Everyone in the group will have agreed to this – but we cannot guarantee that everyone will keep their promise.

**Benefits from Participation:** You will not benefit from individually from participating in the research, however the group will be provided with a summary of the findings and will also be have access to opportunities to better your skills as a group as well as enhance your knowledge of the SDGs.

**Confidentiality:** We will not share any information that we collect that can identify you individually unless we legally have to. A summary of the survey findings will be made available



to national development agencies and other key partners of the CDB to guide activities to respond to the needs of groups operating at the community level.

**For Questions:** If you have any questions about the research or your participation in the study, feel free to contact Mr. Richardo Aiken at 246 826 63280 or [richardo.aiken@caribank.org](mailto:richardo.aiken@caribank.org) or George Yearwood at 246 539 1739 or [George.yearwood@caribank.org](mailto:George.yearwood@caribank.org)

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### Subject Consent

I have read this consent form completely. I have been encouraged to ask questions and have received helpful answers. I understand that:

- My participation is voluntary
- I may quit at any time without penalty

I confirm that the researcher has explained the elements of informed consent to the participant.

The interviewee knows that their participation is voluntary, and that they do not need to answer all questions. The purpose of the research as well as the risks and benefits have been explained. The procedures as well as the time commitment have been outlined. The participant understands issues of confidentiality.

By signing this form, I agree to not share what is said in the group discussion with anyone not part of the group.

I voluntarily agree to participate in this study

Participant's Signature ..... Date .....

Researcher's Signature .....Date.....





## CONTACT INFO

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### BASIC NEEDS TRUST FUND CARIBBEAN DEVELOPMENT BANK

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