



Final Technical Report

Improving Business Acumen in Fisher Cooperatives in Saint Lucia, Caribbean.

Project ref. N° CAR-4.1-B17c

Region: Caribbean

Country: Saint Lucia

Date: March 5th, 2013

A project implemented by: Celestial Self Development Centre



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Abbreviations and Acronyms

ACP - African, Caribbean and Pacific Group of States
BEEQ Inc- Business Environment, energy and Quality Consultants Inc.
DOC – Department of Cooperatives
DOF – Department of Fisheries
FD- Fisheries Department
FO- Fisheries Officer
DF Department of Fisheries
NAFCOOP- National Association of Fishermen's Cooperatives
OECS – Organisation of Eastern Caribbean States
SLFCS – Saint Lucia Fisher Folk Cooperative Society
TORs – Terms of Reference
RFU - Regional Funding Unit
NFO – National Fisher Folk Organisation
ECCB – Eastern Caribbean Central Bank



Improving Business Acumen in Fisher Cooperatives in Saint Lucia, Caribbean.



Acknowledgements

The consultants are truly grateful to all the stakeholders, including the DOC, DOF, Management and Board of the various cooperatives interviewed and the various participants in the training workshop. Without the enthusiastic participation, guidance and feedback this project would not have been as successful as it has been.

We are particularly grateful to the members of the project steering committee and the staff of the department of cooperatives for setting aside their normal duties to support the project, including contacting stakeholders, arranging site visits, providing feedback on our reports as well as the workshop, and providing advice and guidance through all phases of the project. Their tremendous support and feedback throughout the project was truly a motivating factor which was most valuable to us.

Executive summary

The approach to the project took the form of an initial desktop review and consultation with the DOF and the DOC as well as the National Fisher Folk Cooperative Organisation. This was followed by planning of the organisational assessment phase of the project. Once this was done we sought to present our findings to the major stakeholders. This was then followed by the design of a training program geared at addressing major weaknesses as well as engaging stakeholders in such a way that they felt empowered to utilize the newly gained skills and knowledge to implement real change. The project methodology was based on close collaboration between the department of cooperatives, the DOF and the NFO.

As per the TOR, the purpose of the project was to:

1. Analyze services provided to fishers/public and make recommendations on improvement in the delivery of these services, particularly ways to improve and reduce cost of fishing inputs to members and other fisher folk.
2. Train Cooperative members (2 persons per Cooperative) in the management of Cooperatives to realize bulk purchasing and distribution to Cooperatives island-wide

During the inception phase the aim was to allow the team to meet with the various relevant Government officials and partners involved in the project, with the specific objective of:

- a) Raising these partners awareness of the project,
- b) Establishing mechanisms for effective communication as well as initiating good relationships, and
- c) Obtain useful information, guidance and getting their endorsement and full collaboration.

During the inception phase particular efforts were made to ensure that the partners understood the aims of the project to avoid unreasonable expectations and to initiate the process of identifying the strengths and potential weaknesses of the sector.

Two team members one from Celestial and the other from BEEQ Inc then undertook site visits and consultation meetings with the stakeholders. The Team was also accompanied by Mr. Christopher Lamontagne of the DOC. In addition the various cooperative development officers assigned to these cooperatives also attended the meetings. The cooperatives and the DOC were very helpful in scheduling, attending and participating in these meetings.

Once the organizational assessment phase was completed the findings were presented in a validation workshop held at the department of Fisheries. The result of the organizational assessment was also used to identify the training needs of the stakeholders. The training was highly interactive and was facilitated with due regard to the needs of the participants as well as utilisation of adult learning techniques.

The areas of training were Governance, Credit Management, Inventory management, and Membership development and management. All organizational and logistic details for the training program was undertaken after consulting with all stakeholders. We received significant support from the DOC and the DOF in the identification and mobilization of the stakeholders.

The organizational assessment also revealed that there was significant national support from all the cooperatives for the joint procurement of supplies and that there was commitment on the part of all to move the process forward. In this regard one outcome of the project was the establishment of a special committee with representatives from four selected cooperatives (Choiseul, Soufriere, Castries and Vieux Fort) with technical input from the DOC and the DOF to design and plan the implementation of the joint procurement. However there is a need to improve overall credit and inventory management at all the cooperatives to ensure that the benefits of the organisations accrue to all the members.

In keeping with the requirements of the project a number of project visibility activities were pursued. In this regard a draft press release was produced for publication by the consultants. The final version of the release, which was vetted by the DOF and Sandra Grant, Regional Manager for the Caribbean ACP Fish II programme was sent to all media outlets on January 16th 2013. This was published in two newspapers and aired on one television station prior to the workshop.

In addition, a second press release was prepared and sent out to all media houses after the completion of the workshop on February 5th 2013 and was published in one newspaper.

The final copies of the press releases as well as links to the published articles can be found in Annex 9.

1. BACKGROUND

There are currently nine functional Fishermen Cooperatives in Saint Lucia: (1) Gros Islet, (2) Castries, (3) Anse la Raye/Canaries, (4) Soufriere, (5) Choiseul, (6) Laborie, (7) Goodwill/Vieux Fort, (8) East Coast/Micoud, and (9) Dennery; and most of these institutions are run by a Manager and Board of Directors. These Cooperatives perform a critical role within the fisheries sector which includes the procurement and supply of inputs to its members.

These Co-operatives are guided by The Cooperative Societies Act of 1999 regulated by the Department of Cooperatives. There is also currently a draft bill which is expected to replace the current act as this is in keeping with decisions of the OECS governments with leadership from the ECCB to strengthen the regulatory framework for the financial services sector in the sub region.

Fisher-folk Cooperatives do not engage in the marketing of fish, they mainly provide fishing inputs for their members, other fishers and the public. Most Cooperatives have fuel stations and are able to sell to the general public. The profit margin on this commodity is small and as such it is important that good management systems are instated to ensure profitability.

It is also recognised that the sustainability of these fisher folk cooperative will depend to a great extent on the business decisions they take in the near to medium term. One such initiative which they must be considered is bulk purchasing so that procurement costs can be reduced and hence resale at a more affordable rate.

The sale of supplies and fuel is one of the major functions carried out by cooperatives to support the sector. This is being implemented in an environment where they can purchase supplies duty free for resale to their members. In addition they are allowed to supply fuel up to a threshold determined by cabinet duty free. However in spite of this competitive advantage there are situations where some Cooperatives sell inputs to their members at a cost higher than what is available at competitive stores, thereby leaving members no choice than to buy from the competing business. This is seen by both the DOF and the DOC as an area which is of concern as it threatens the sustainability of the cooperatives and the livelihood of the fishers.

There was once an umbrella body called the National Association of Fishermen's Cooperatives (NAFCOOP), which failed as management lacked the business acumen to operate profitably. In light of the need to enhance coordination, efficiency and advocacy for the sector a decision was taken to re-establish an umbrella organisation. This entity has been named the National Fisher Folk Organisation. One of the initiatives which this entity is seeking to pursue is the joint procurement and distribution of supplies on behalf of the fisher folk cooperative sector.

2. APPROACH TO THE ASSIGNMENT

The approach to the project took the form of an initial desktop review and consultation with the DOF and the DOC as well as the National Fisher Folk Cooperative Organisation. This was followed by planning of the organisational assessment phase of the project. Once this was done we sought to present our findings to the major stakeholders. This was then followed by the design of a training program geared at addressing major weaknesses as well as engaging stakeholders in such a way that they felt empowered to utilise the newly gained skills and knowledge to implement real change.

3. COMMENTS ON THE TOR

From the Celestial's team's perspective the terms of reference (TOR) were well conceived and appropriate. The phases of the project were executed according to plan, with support from the Department of Fisheries and the Department of Cooperatives. The consultation exercises were also very well attended and the project received overwhelming support from the beneficiaries. The result is that the exercise yielded meaningful outcomes and promoted a shared vision which must be built upon if it is to realize its full objectives.

4. ORGANISATION AND METHODOLOGY

The project methodology was based on close collaboration between the department of cooperatives, the DOF and the NFO. The team's main objective from the outset of the project and throughout its duration was to successfully carry out institutional analysis. This assessment was based on the review of existing documents combined with discussions and informal consultations with stakeholders. It also involved the design of an organizational assessment checklist and visits to all the cooperatives to have one on one interactions with all board representatives and key staff.

Once the outcome of the organizational assessment was known we then presented our findings to the stakeholders. This was followed by organizing a two-day training session for stakeholders

4a. Delivery of the TOR's

As per the TOR, the purpose of the project was to:

1. Analyze services provided to fishers/public and make recommendations on improvement in the delivery of these services, particularly ways to improve and reduce cost of fishing inputs to members and other fisher folk.
2. Train Cooperative members (2 persons per Cooperative) in the management of Cooperatives to realize bulk purchasing and distribution to Cooperatives island-wide

The results to be achieved by the consultant as per the Terms of Reference were:

- a) Agreed work-plan and preliminary examination of the topic under investigation
- b) Analysis of the current service provided by Cooperatives
- c) Training module and manual developed and printed
- d) 20 Fishermen Cooperative members trained in the management of Cooperatives, in particularly bulk purchasing and distribution
- e) Training modules and manual submitted to the DOF and RFU along with Final Technical Report.

Table 1 – Table showing deliverables of key activities from the TOR by consultant

Key activities from the TOR	How delivered through the assignment
<p>1. Brief with ACP Fish II and the Saint Lucia Department of Fisheries (DF), directly responsible for the coordination of this project;</p>	<ul style="list-style-type: none"> • The Team Leader and Key Expert 2 held a meeting with the Department of Fisheries, the Department of Cooperatives and the National Fisher Folk organisation visited the offices of the Department of Fisheries. During that meeting we obtained much needed feedback on the state of the sector issues, challenges as well as feedback on ongoing initiatives which would benefit from the project. • In consultation with the Department of Fisheries and the Department of Cooperatives a project Technical Team consisting of the Mr. Seon Ferrari, Petronila Polius, Mr. Christopher Lamontagne and Mr. Alva Lynch. The Technical Team served as a point of contact as well as provided much needed support and feedback during the project implementation. • During that meeting we also undertook a detailed review of the TOR's and agreed on the project deliverables. • The Team also attended a consultation meeting which was being facilitated by the DOC to brief the members of the Fisher Cooperatives present on the project objectives and outputs and to gain their support and feedback.
<p>2. Consult with the DF and the Department of Cooperatives (Registrar) on current issues and capacity in business management of Cooperatives;</p>	<ul style="list-style-type: none"> • The technical team met with the Registrar of Cooperatives and members of her team to discuss current issues in the sector and to establish a mechanism for us to work closely with her department during the project Implementation. We also received some key documents and data from the department especially as it related to the financial performance of the sector including their audited

	<p>financial statements.</p> <ul style="list-style-type: none"> • We also ensured that we secured commitment from the department as well as mechanisms for communicating throughout the project implementation.
<p>3. Meeting with Regional for the Caribbean, ACP Fish II programme</p>	<ul style="list-style-type: none"> • The team met with Sandra Grant to clarify the requirements of the TOR and to provide guidance on the way forward.
<p>4. In collaboration with the DF conduct a situation analysis of services provided by the Cooperatives, specifically in terms of purchasing and distribution;</p>	<ul style="list-style-type: none"> • The team developed an organizational checklist and sought input from the DOC and the DOF prior to its finalisation. This checklist once finalized was used as the main tool to obtain feedback on the performance of the various cooperatives. In this regard we conducted a series of one on one meetings with the board and key staff of the cooperatives. We also took the opportunity at these meetings to review the purchasing document and distribution documents, inventory management procedures as well as stock storage and management. These institutional assessments took place from November 26th – December 11th 2012. All of the cooperatives attended and participated meaningfully in this exercise. • We then developed an organizational assessment report on the Fisher Cooperative Sector in general. This was then compiled and the findings presented to the Stakeholders at validation workshop in the DOF conference room on Friday 11th January. • This session was also used to agree on the areas of focus for the upcoming training program.
<p>5. In collaboration with the DF, identify training participants, develop training modules and manual for participants in the management of Cooperatives based on the outcome of 3;</p>	<ul style="list-style-type: none"> • The Team worked closely with the project steering committee especially the DOC to identify and contact participants for the training program. We also developed the training module and facilitate all other aspects of the training delivery. All training materials were printed and distributed during the training sessions.

<p>6. Use the agreed ACP Fish II formats for training Evaluation and provide a summary recommendations for its improvement based on the participants' feedback;</p>	<ul style="list-style-type: none"> • In keeping with ACP Fish requirements we ensure that we distributed training assessment forms. The forms were completed by the participants and the results compiled. A total of 27 persons participated in the training program. The results of the participant's feedback on the assessment can be found in the training report presented in Annex 5.
<p>7. Prepare and submit Final Technical Report in accordance with the ACP FISH II Programme guidelines.</p>	<ul style="list-style-type: none"> • The Final Technical Report will be submitted upon approval of the draft.

4b. Conduct and details of the Assignment including visibility activities.

4b.1 Inception meetings and report

The aim of this inception phase was to allow the team to meet with the various relevant Government officials and partners involved in the project, with the specific objective of (a) raising these partners awareness of the project, b) establishing mechanisms for effective communication as well as initiating good relationships, c) obtain useful information, guidance and getting their endorsement and full collaboration. Particular efforts were made to ensure that the partners understood the aims of the project to avoid unreasonable expectations and to initiate the process of identifying the strengths and potential weaknesses of the sector.

This first meeting was also an opportunity for the partners to review the TOR's in detail and share their views on how the assignment should be carried out. The Team obtained much needed feedback as well as a high level of enthusiasm and support for the project. At the onset there was recognition that it was a very useful intervention however more was needed. Notwithstanding there was the general view that if the outcome was built upon the sector would benefit significantly.

We then followed up with a meeting with the National Fisher Folk Organisation to obtain a better understanding of the role and challenges as well as opportunities which this project presented.

The team then met with the Fisher Cooperatives present at a session which was being facilitated by the DOC on the non- financial cooperatives. At this meeting we presented them with information on the project objectives, proposed activities and outputs. It also served as a useful exercise which would allow us to obtain feedback and support from the persons present for the project.

The team attended another meeting on DOC premises, which provided an opportunity to agree upon the logistics of the field mission required in order to visit the various cooperatives. The team members contacted the various key stakeholders in order to schedule and undertake meetings to start gathering information, including technical aquaculture data, background social and economic information, maps, and GIS data required for the mapping assignment. The inception report was completed within the deadline.

4b.2 Organisational Assessment

Two team members one from Celestial and the other from BEEQ Inc undertook site visits and consultation meetings with the stakeholders. The Team was also accompanied by Mr. Christopher Lamontagne of the DOC. In addition the various cooperative development officers for the cooperatives also attended the meetings. The cooperatives and the DOC were very cooperative in scheduling, attending and participating in these meetings.

The findings of the assessment were presented in a validation workshop held at the department of Fisheries. The result of this survey was also used to identify the key area for training as well as the area of focus. The organizational assessment revealed that there was significant national support from all the cooperatives on the joint procurement of supplies and that there was commitment on the part of all to move the process forward. One outcome of the project was the establishment of a special committee with representatives from four selected cooperatives (Choiseul, Soufriere, Castries and Vieux Fort) with technical input from the DOC and the DOF to design and plan the implementation of the joint procurement.

The Organizational Assessment report is presented in Annex 8.

4b.3 Design and Facilitation of the Training program

All organizational and logistic details for the training program was undertaken after consulting with all stakeholders. We received significant support from the DOC and the DOF in the identification and mobilization of the stakeholders. The Team is pleased to report that the Department did an excellent job in identifying and mobilizing those representatives of the cooperatives and the sector in general that were essential to the quality and success of the training program. As well as those persons best place to utilise the skills and knowledge gained.

All other logistics aspects including venue, breaks, transportation allowance, preparation of manuals, evaluation of training etc were facilitated by Celestial Self Development Centre in close collaboration with the DOC and the DOF. The training was highly interactive and was

facilitated with due regard to the needs of the participants as well as utilization of adult learning techniques.

The main areas of training were Governance, Credit Management, Inventory management, and membership development and management.

5. Conclusions and recommendations

The organizational assessment made it possible to identify the major issues and challenges facing the Cooperative sector generally and to identify possible solutions. What is also clear is that the challenges are similar and that there exist tremendous opportunities for collaboration at the national level to address these challenges. It also highlights the need for a national plan in collaboration with the DOC and DOF to address the challenges faced by the sector.

The issues of governance, credit management, inventory management and membership development and management in the sector demonstrates the need to foster more collaboration and cooperation among cooperatives in the delivery of services and benefits to the membership.

The efforts at pursuing a joint procurement of supplies must be pursued more aggressively and brought to fruition in the near future. In this regard the existing expertise in the sector with technical input from the DOF and the DOC must be harnessed by the NFO as a matter of priority to ensure that this goal is achieved.

The management of the Cooperatives has become more challenging and therefore the need for more sophisticated monitoring tools and strategies. It also requires that the skills and knowledge of the staff of the department of cooperatives be enhanced to better equip them to fulfill their mandate. What must be noted is that the staff are very supportive and do endeavour to execute their mandate to the best of their ability. The implementation of a coaching and mentoring program to enhance the level of governance and professionalism in the sector is also a desirable goal.

The income of the various cooperatives are either stagnant or declining whilst their operating cost are on the increase. This places tremendous pressure on the stakeholders to improve the revenue generation potential of the cooperatives. The fact that the fishers are becoming aged also means that there is a need to address the issues of membership and organizational growth and sustainability. Against the backdrop of the government commitment to increasing food security as well as the growth of the tourism sector which requires fish it is a desirable course of action to address these challenges with support from government as well as donor agencies.

The strategy put forward by consultants sets out the following solutions:

- Strengthen the capacities of the DOC to monitor the operations of the cooperatives in terms of trained human resources (i.e. demonstrating an appropriate knowledge of governance, internal controls, the legal framework and monitoring),
- Strengthen the capacity of the cooperatives to be managed in accordance with good management practices through training , capacity development and the introduction of minimum operational procedures
- Create and develop a strategic plan for the sector and seek the required funding to implement it through internal and external resources.
- Create a more favorable legal, economic and technical environment to foster the development of the fisher cooperative sector in Saint Lucia
- Develop and implement a focus intervention aimed at attracting, educating and providing improved benefits to members. A national approach to developing this strategy should be pursued and technical support provided by the DOC and the DOF in its implementation.

ANNEXES

Annexes (to include ALL technical outputs):

Annex 1 - Terms of Reference

ACP FISH II – STRENGTHENING FISHERIES MANAGEMENT IN ACP STATES

REGIONAL FACILITATION UNIT CARIBBEAN OFFICE, BELIZE

PROJECT CAR-4.1-B17c

TERMS OF REFERENCE

Table 2: Table Showing TOR for Project

Assignment title	Improving Business Acumen in Fisher Cooperatives in Saint Lucia.
Beneficiary country	Saint Lucia
Work plan activity	Activity Number 4.1, Project No. B17c
Administrative Supervisor	RFU Manager and Co-ordination Unit
Technical Supervisors	RFU Manager and Saint Lucia Department of Fisheries representatives
Background information and rationale	<p>Fisher-folk Cooperatives perform a critical role within the fisheries sector which includes the procurement and supply of inputs to its members. There are currently nine functional Fishermen Cooperatives in Saint Lucia: (1) Gros Islet, (2) Castries, (3) Anse la Raye/Canaries, (4) Soufriere, (5) Choiseul, (6) Laborie, (7) Goodwill/Vieux Fort, (8) East Coast/Micoud, and (9) Dennery; and each run by a Manager and Board of Directors. These Co-operatives are guided by legislation under the jurisdiction of the Department of Cooperatives. The Department of Fisheries provides a range of technical assistance to these cooperatives as key partners in the development of the fisheries sector. An umbrella organization has been established recently, known as the Saint Lucia fisher-folk Cooperative Society Ltd. (SLFCS), which is made up of representatives from all the Coops with members from one being the Chair. The SLFCS represents the interests of stakeholders within the fishing sector.</p> <p>Fisher-folk Cooperatives do not engage in the marketing of fish, they mainly provide fishing inputs for their members, other fishers and the public. Most Cooperatives have fuel stations and are able to sell to vehicles. It is important that these co-ops come together to do bulk purchasing so that procurement costs can be reduced and hence resale at a more affordable rate. There was once an umbrella body called the National Association of Fishermen's Cooperatives (NAFCOOP), which</p>

	<p>failed as management lacked the business acumen to operate profitably. There are situations where some Cooperatives sell inputs to their member at a cost higher than what is available at competitive stores, thereby leaving members no choice than to buy from the other business. If the cooperative movement in Saint Lucia is to be successful this time, the cooperatives need to operate in a way that not only provides services demanded by the members, but provides them in such a way that the organization remains financially viable. Whilst the current group of cooperative managers and leaders may understand some of the services which need to be provided to members, they often are not sufficiently aware of the requirements of business management, to provide services at a profit and thereby secure the long term financial viability of the cooperative itself.</p> <p>Furthermore, the expertise of Fisher-folk cooperative managers and leaders in business planning and management is weak and this has curtailed their ability to effectively represent and respond to the interests of their members and the overall sector. Due to lack of funding there has been no consistent support in the area of business planning/ management for fisher cooperatives. Consequently, these cooperatives experience regular problems in effectively managing and developing their organization and ensuring the survival of the institution into the long term. With the national Administration confirming their continued faith in the role and future of Fishers Co-operatives, there is an urgent need to address this situation and provide skills and mechanisms for cooperatives to plan and operate effectively over the long term.</p>
<p>Purpose of the assignment</p>	<p>The purpose of project is to:</p> <ol style="list-style-type: none"> 3. Analyze services provided to fishers/public and make recommendations on improvement in the delivery of these services, particularly ways to improve and reduce cost of fishing inputs to members and other fisher folk. 4. Train Cooperative members (2 persons per Cooperative) in the management of Cooperatives to realize bulk purchasing and distribution to Cooperatives island-wide
<p>Activities of the Consultant</p>	<p>The consultant will:</p> <ol style="list-style-type: none"> 8. Brief with ACP Fish II and the Saint Lucia Department of Fisheries (DOF), directly responsible for the coordination of this project; 9. Consult with the DOF and the Department of Cooperatives (Registrar) on current issues and capacity in business management of Cooperatives; 10. In collaboration with the DF conduct a situation analysis of services provided by the Cooperatives, specifically in terms of purchasing and distribution; 11. In collaboration with the DF, identify training participants, develop

	<p>training modules and manual for participants in the management of Cooperatives based on the outcome of 3;</p> <p>12. Print training documents in preparation for the workshop;</p> <p>13. With assistance from the FD, facilitate, organize and make all logistical arrangements for a 2-day training workshop, including lunch, break, and training materials specifically designed for participants;</p> <p>14. Execute the training programme at the Department of Fisheries training room for an indicative number of 20 participants;</p> <p>15. Use the agreed ACP Fish II formats for training Evaluation and provide a summary recommendations for its improvement based on the participants' feedback;</p> <p>16. Prepare and submit Final Technical Report in accordance with the ACP FISH II Programme guidelines.</p>						
<p>Expected outputs</p>	<p>f) Agreed work-plan and preliminary examination of the topic under investigation</p> <p>g) Analysis of the current service provided by Cooperatives</p> <p>h) Training module and manual developed and printed</p> <p>i) 20 Fishermen Cooperative members trained in the management of Cooperatives, in particularly bulk purchasing and distribution</p> <p>j) Training modules and manual submitted to the FD and RFU along with Final Technical Report.</p>						
<p>Qualifications and experience of the Consultant</p>	<p>This training will be undertaken by a Business Management Specialist (Agribusiness Management). The Specialist should have expertise in developing and executing training programmes in Agribusiness management and/or small business enterprises. Experience working in the Caribbean and knowledge of the Caribbean agriculture/fisheries environment will be a distinct advantage. The selected consultant should be able to demonstrate a successful history of consultancy engagements in a field related to this Terms of Reference.</p>						
<p>Location and travel</p>	<p>Based in Saint Lucia. Travel within country will be required</p>						
<p>Expected Starting date and duration</p>	<p>Start date: September 2012</p> <p>The assignment should be completed between September and November 2012.</p>						
<p>Reports</p>	<table border="1"> <thead> <tr> <th data-bbox="453 1783 660 1868">Name of report</th> <th data-bbox="660 1783 1075 1868">Content</th> <th data-bbox="1075 1783 1404 1868">Time of Submission</th> </tr> </thead> <tbody> <tr> <td data-bbox="453 1868 660 1989"> <p>Inception Report (IR)</p> </td> <td data-bbox="660 1868 1075 1989"> <p>Plan of work for the project</p> </td> <td data-bbox="1075 1868 1404 1989"> <p>No later than 5 days after initial consultation with the</p> </td> </tr> </tbody> </table>	Name of report	Content	Time of Submission	<p>Inception Report (IR)</p>	<p>Plan of work for the project</p>	<p>No later than 5 days after initial consultation with the</p>
Name of report	Content	Time of Submission					
<p>Inception Report (IR)</p>	<p>Plan of work for the project</p>	<p>No later than 5 days after initial consultation with the</p>					

			FD
	Draft Final Technical Report (DFTR)	Description of activities completed, achievements, problems encountered, including training documents and evaluation by participants.	Submitted within 10 days from training workshop
	Final Technical Report (FTR)	Revised DFTR (taking into account comments from the RFU, CU, and Fisheries Administration) with recommendations and suggestions, together with final invoices.	Within 10 days of receiving comments from RFU, CU and Fisheries Administration.
Format of Final Technical Report	<p>Format</p> <ul style="list-style-type: none"> • MS Word Style • Pages numbered <p>Structure</p> <ul style="list-style-type: none"> • Title Pages, Table of Contents, List of Annexes, List of Tables, List of Figures, List of Photographs (if appropriate), Abbreviations and Acronyms • Executive Summary (1 to 2 pages) • Body of Report (up to 20 pages) • Conclusions and Recommendations (each recommendation must be preceded by a conclusion) linked to the main content <p>Annexes</p> <ul style="list-style-type: none"> • Annex 1 – Terms of Reference • Annex 2 – Programme and people met (including contacts) • Annex 3 – Complete Training booklet and manual (this will be the standalone document which may be re-printed in full by the FD) • Annex 3 – Training schedule • Training Evaluation Reports from participants • Other technical outputs as appropriate <p>Please refer to the ACP Fish II guidelines for reports available at: http://acpfish2-eu.org/index.php?page=templates&hl=en</p>		
Estimated cost	EUR.... 9.980		

	Please note that this is a Global price contract already including fees, per diems, international and national travel expenses and incidentals.
Payment schedule	A 40% advance may be paid on the signing of contract to support the operational activities. The balance will be paid on approval of the Final Technical Report once the Consultant submits the final invoice together with two copies of the FTR.

Annex 2 - Itinerary, institutions and individuals consulted

Table 3 – Table showing Consultation Meetings with individual Fisher Folk Cooperatives

NAME OF CO OPERATIVE	SCHEDULE		LOCATION	Persons in Attendance
	Date	Time		
Castries	26/11/2012	10:00 am	Castries Fisheries Co-op Office	
Goodwill/Vieux Fort	4/12/2012	2:30 pm	NHC office – La Resource, next to the Plain View Combined	Please refer to Fig. 1
Micoud	4/12/2012	5:00 pm	Micoud Fisheries co-op office	Please refer to Fig. 2
Gros-Islet	7/12/2012	5:00 pm	Gros-Islet Co-op Office	Please refer to Fig. 3
Anse La Raye	10/12/2012	10:00 am	Anse La Raye Co-op office	Please refer to Fig. 4
Soufriere	10/12/2012	1:30 pm	Soufriere Fisheries Co-op office	Please refer to Fig. 5
Choiseul	11/12/2012	9:00 am	Choiseul Fisheries Co-op office	Please refer to Fig. 6
Laborie	11/12/2012	2:00 pm	Laborie Fisheries Co-op Office	Please refer to Fig. 7
Dennery	11/12/2012	5.00 pm	Dennery Fisheries co-op office	Please refer to Fig. 8
Saint Lucia Fisher Folk	10/01/2013	10:30 am	Castries Fishermen Co-op office	Please Refer to Fig. 9
DOF, DOC & Saint Lucia Fisher Folk	11/01/2013	10:00 am	Department of Fisheries, Castries	Please Refer to Fig.10

Meeting Register

DATE: Tuesday 4th December, 2012

Name of Fisheries Co-op :

Start time: _____
End time: _____

Goodwill fishermen's Co-op

Persons Attending			
	Name	Title/Position	Signature
1	Kayrianna Toussaint Charley	Operations Supervisor	<i>[Signature]</i>
2	FRANCIS BOURNE	President	<i>[Signature]</i>
3	MOSES MONDESIR	SECRETARY	<i>[Signature]</i>
4	Charlene Lamontagne	Construction Officer (by Rep.)	<i>[Signature]</i>
5	LINUS JUBARTITE	Finance	<i>[Signature]</i>
6	Joyce PRESIDENT	Vice President	<i>[Signature]</i>
7	Wayne Berthelmy	Co-op dept	<i>[Signature]</i>

Figure 1– Meeting register consultation with Goodwill/Vieux Fort Fishermen’s Cooperative



Meeting Register

DATE: Tuesday th December, 2012

Name of Fisheries Co-op: Gros-Islet

Start time:	
End time:	

Persons Attending			
	Name	Title/Position	Signature
1	David Mc Donald	President Gros-Islet Co-op	<i>[Signature]</i>
2	Emma Michaud	Gros-Islet Co-op	<i>[Signature]</i>
3	ELVIS KING	SECRETARY	<i>[Signature]</i>
4	Hamish Mc Donald	Co-operative officer	H. Mc Donald

Figure 3 – Meeting register for consultation meeting with Gros-Islet Fishermen Cooperative

Register

Name	Position	Signature
Timothy George	Member	
Bernard Melius (Nelson)	Member	
Peter Foster		
Gregory DeWitt	Secretary/Treasurer	
Christopher Hamilton	Comp. Off.	
Christopher Ewen	President	

80 marks

Figure 4– Meeting register for consultation with Anse la Raye Fishermen Cooperative

Name
Rose Dennis
Victor Haynes
Julian Alexis

Figure 5– Meeting Register for consultation with Soufriere Fisherman Cooperative



Choiseul



Meeting Register

DATE: Tuesday 11th December, 2012

Name of Fisheries Co-op :

Start time:	10:17
End time:	

Persons Attending			
	Name	Title/Position	Signature
1	CHRISTOPHER JAMES	PRESIDENT Choiseul co-op	<i>[Signature]</i>
2	Theresa Theodor	Manager Choiseul co-op	<i>[Signature]</i>
3	CHRISTOPHER LAMONTAGNE	COOPERATIVE Dept.	<i>[Signature]</i>
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			

Figure 6– Meeting register for consultation with Choiseul Fishermen Cooperative

Laborie



Meeting Register

DATE: Tuesday 11th December, 2012

Name of Fisheries Co-op :

Start time:	
End time:	

Persons Attending			
	Name	Title/Position	Signature
1	Robert Stevens	Dept. of Co-operatives	
2	Ruddy Sohn	President, Laborie Fishers	
3	Christophe Lamontagne	Dept. of Co-operatives	
4	Marylene Hargreaves	Secretary, Laborie Fishers	
5	Seago Walstead	P.R.O.	
6			
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19			

Figure 7– Meeting register for consultation with Laborie Fishermen Cooperative

Dennery



Meeting Register

DATE: Tuesday 11th December, 2012

Name of Fisheries Co-op :

Start time:
End time:

Persons Attending			
	Name	Title/Position	Signature
1	<i>Harold McDonald</i>	<i>Co-operative Officer III</i>	<i>H. McDonald</i>
2	<i>Patrick Augustin</i>	<i>Member</i>	<i>Augustin</i>
3			
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19			

Figure 8– Meeting register for consultation with Dennery Fishermen Cooperative

Meeting Register

DATE: Friday 11th January, 2013

Start time:	
End time:	

Persons Attending		
Name	Title/Position	Signature
Rufus George		
Sarita Peter	Ag. Deputy Chief fisheries officer	<i>[Signature]</i>
Petronila Polius	Fisheries EXT officer	<i>[Signature]</i>
Seon Ferrari	Fisheries Officer DO Fisheries	<i>[Signature]</i>
Sherill St. Catherine	Ag. Deputy Chief Fisheries Registrar	<i>[Signature]</i>
Wayne Barthelmy	Co-operative officer	<i>[Signature]</i>
Hannah McDonald	Co-operative director	<i>[Signature]</i>
Christopher Lamontagne	Co-operative Officer	<i>[Signature]</i>
HORACE WATSON	President of SFCO	<i>[Signature]</i>
RYAN WANCOTT	CELESTIAL	<i>[Signature]</i>
AKVA LYNCH	CASTRIES FISHERMENS COOP	<i>[Signature]</i>
JHELEN DETERVILLE	CELESTIAL	<i>[Signature]</i>
Kate SIMON	Fisheries Assistant	<i>[Signature]</i>
Hannah McDonald	Co-operative officer	<i>[Signature]</i>
YVONNE EDWIN	Fisheries Assistant	<i>[Signature]</i>
Georgette Leader-Gold	Celestial	<i>[Signature]</i>

Figure 10 – Meeting register for Validation workshop with DOF, DOC and Saint Lucia Fisher Folk

Annex 4 – Training Schedule

ACP FISH II Project

“Improving Business Acumen in Fisher Cooperatives in Saint Lucia” Training Workshop

AGENDA DAY ONE

DATE	TIME	SESSION	RESOURCE PERSON
23/01/2013		Arrival	
	08.30 – 09.00	Registration	
	09.00 – 9:40	Opening Prayer Participants introduction Remarks by ACP Fish II Project Coordinator	
	09.40 – 10.00	Introduction to the training	
	10.00 – 10.30	Corporate governance as per the Cooperative Society’s Act	
	10.30 – 11.00	TEA BREAK	
	11.00 – 11.30	Board Functions and Board and Management Accountability	
	11.30 – 12.00	Responsibilities of Credit Union Stakeholders	
	12.00 – 12.30	Compliance, ethics & sustainability reporting	
	12.30 – 13.00	Preventing and combating fraud and corruption	
	13.00 – 13.45	LUNCH BREAK	
	13.45- 14:15	Inventory Control	
	14.15- 14.45	Inventory Costing	
	14.45-15.30	The Supply process	
	15.30 – 16.00	Maintaining Inventory Accuracy	
	16:00 – 16: 30	Summary	

ACP FISH II Project

**“Improving Business Acumen in Fisher Cooperatives in Saint Lucia”
Training Workshop**

AGENDA DAY Two

DATE	TIME	SESSION	RESOURCE PERSON
23/01/2013		Arrival	
	9.00 – 9:40	Prayer Ice-Breaker	
	09.40 – 10.00	What is Credit Management	
	10.00 – 10.30	Developing a credit Policy	
	10.30 – 11.00	TEA BREAK	
	11.00 – 11.30	Major concepts in credit Management	
	11.30 – 12.00	Credit Sanction	
	12.00 – 12.30	Debt Collection Strategy	
	12.30 – 13.00	Techniques and Skills required for debt collection	
	13.00 – 13.45	LUNCH BREAK	
	13.45- 14:15	Importance of membership growth to cooperatives sustainability	
	14.15- 14.45	Membership benefit and growth	
	14.45-15.30	Membership Recruitment	
	15.30 – 16.00	Managing active recruitment	
	16:00 – 16: 30	Summary/Evaluation	

Annex 5 – Training Evaluation Reports from Participants

Sample Evaluation form

Training Evaluation Form

(To be completed by participant)

Please indicate your impressions of the items listed below:

1. What are the three most important **things [or topics]** you learned during this training?

2. Was an appropriate **amount of material** covered during the two days? If not, was too *much* material covered or too *little*?

3. To what extent do you expect this training will make a **difference** in the way you do your job?

1	2	3	4	5
No Difference				Tremendous Difference

Comments:

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
1. The training met my expectations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I will be able to apply the knowledge learned.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The training objectives for each topic were identified and followed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. The content was organized and easy to follow.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. The materials distributed were pertinent and useful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. The trainer was knowledgeable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. The quality of instruction was good.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. The trainer met the training objectives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Class participation and interaction were encouraged.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Adequate time was provided for questions and discussion.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. How do you rate the training overall?					
Excellent	Good	Average	Poor	Very poor	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
12. What aspects of the training could be improved?					
13. Other comments?					

THANK YOU FOR YOUR PARTICIPATION!



Table 1a – Frequency table for Evaluation results by participants

Part A

Q3

Code	Response Item	Frequency	Percent
1	No Difference	0	0%
2		0	0%
3		0	0%
4		6	33%
5	Tremendous Difference	11	61%
6	No Response	1	6%
	Total	18	100%

Part B

Q1

Code	Response Item	Frequency	Percent
1	Strongly Agree	10	56%
2	Agree	6	33%
3	Neither Agree nor Disagree	0	0%
4	Disagree	0	0%
5	Strongly disagree	0	0%
6	No Response	2	11%
	Total	18	100%

Q2

Code	Response Item	Frequency	Percent
1	Strongly Agree	12	67%
2	Agree	4	22%
3	Neither Agree nor Disagree	0	0%
4	Disagree	0	0%
5	Strongly disagree	0	0%
6	No Response	2	11%
	Total	18	100%

Q3

Code	Response Item	Frequency	Percent
1	Strongly Agree	10	56%
2	Agree	5	28%
3	Neither Agree nor Disagree	1	6%

	4	Disagree	0	0%
	5	Strongly disagree	0	0%
	6	No Response	2	11%
		Total	18	100%
Q4	Code	Response Item	Frequency	Percent
	1	Strongly Agree	13	72%
	2	Agree	3	17%
	3	Neither Agree nor Disagree	0	0%
	4	Disagree	0	0%
	5	Strongly disagree	0	0%
	6	No Response	2	11%
		Total	18	100%
Q5	Code	Response Item	Frequency	Percent
	1	Strongly Agree	13	72%
	2	Agree	2	11%
	3	Neither Agree nor Disagree	1	6%
	4	Disagree	0	0%
	5	Strongly disagree	0	0%
	6	No Response	2	11%
		Total	18	100%
Q6	Code	Response Item	Frequency	Percent
	1	Strongly Agree	16	89%
	2	Agree	0	0%
	3	Neither Agree nor Disagree	0	0%
	4	Disagree	0	0%
	5	Strongly disagree	0	0%
	6	No Response	2	11%
		Total	18	100%
Q7	Code	Response Item	Frequency	Percent
	1	Strongly Agree	11	61%
	2	Agree	5	28%
	3	Neither Agree nor Disagree	0	0%
	4	Disagree	0	0%
	5	Strongly disagree	0	0%
	6	No Response	2	11%
		Total	18	100%
Q8	Code	Response Item	Frequency	Percent
	1	Strongly Agree	11	61%

	2	Agree	4	22%
	3	Neither Agree nor Disagree	1	6%
	4	Disagree	0	0%
	5	Strongly disagree	0	0%
	6	No Response	2	11%
		Total	18	100%
Q9	Code	Response Item	Frequency	Percent
	1	Strongly Agree	12	67%
	2	Agree	4	22%
	3	Neither Agree nor Disagree	0	0%
	4	Disagree	0	0%
	5	Strongly disagree	0	0%
	6	No Response	2	11%
		Total	18	100%
Q10	Code	Response Item	Frequency	Percent
	1	Strongly Agree	12	67%
	2	Agree	4	22%
	3	Neither Agree nor Disagree	0	0%
	4	Disagree	0	0%
	5	Strongly disagree	0	0%
	6	No Response	2	11%
		Total	18	100%
Q11	Code	Response Item	Frequency	Percent
	1	Excellent	12	67%
	2	Good	4	22%
	3	Average	0	0%
	4	Poor	0	0%
	5	Very poor	0	0%
	6	No Response	2	11%
		Total	18	100%

Table 1b– Table showing data collection from evaluations for Q1, Q2, Q3B, Q10 & Q11 by participants

Part A					
ID#	Q1	Q2	Q3b	Q10	Q11
001	(1) Interactive and facilitate information sharing. (2) Misconceptions/differing interpretation of approaches. (3) Absence of-	It was very compact; a lot of information was given which sensitized too many other relevant issues. Therefore, good strategy in presentation	Assist in guiding policies, best practises to influence mandatory adoption from a regulatory perspective.	no response	no response
002	(1)Governance(2) Inventory Management (3) Credit Management	Appropriate amount of material	My department "co-operative" will use some of the teachings and findings of this project to develop our annual work program	Greater attendance of manager and senior board members of those fisheries co-operatives	Have training opportunities funded by ACP 11 and organized by Celestial Self Development Centre
003	(1) Developing credit policy(2)The need for effective policy management policy (3)Evaluating credit policy (4) Membership development	Yes	I will be able to give more assistance to the co-operatives	The training was too compact. It should have been three days or more.	no response
004	(1)Credit management (2) Governance (3) Inventory management	Yes	no response	no response	Very timely training and information will be put into effect.
005	(1)Credit management (2) Inventory Management (3) Governance	Yes; more time to go into details and explanation for concerns and question	no response	no response	no response

Improving Business Acumen in Fisher Cooperatives in Saint Lucia, Caribbean.

006	(1) Some techniques for improving business accountability (2) Documentation and information (3) Feedback, good governance and responsibility	Yes. Not too much, created awareness to initiate other developmental areas for training	As a regulator, it will be discussed at society level to adopt best practices to improve	More time, uncontrollable factor	Kudos, I was definitely enlighten
007	(1) Inventory management (2) Co-operative growth (3) Membership	I was please with the material and relevance to my input to the society of St. Lucia and the fishing community	no response	no response	no response
008	(1) Good governance of co-operative society(2) Inventory management (3)Credit management	The amount of material covered was quite appropriate	no response	Appropriate enough	Need another two day session.
009	(1) Importance of credit management (2) Developing credit policy (3) Effective debt collection strategy	Yes	no response	no response	no response
010	(1) Credit management (2) Membership benefits (3) Inventory control	From a novice point of view, its invaluable yet a lot to engulf at one time	I believe it is timely; again the training highlighted areas of avoidance and also areas to strengthen our membership base and other areas	Management and training of supervisory committee	Can there be follow-up training sessions and assessment drives. More training from ACP11 funded projects executed by Celestial Self Development Center.
011	(1) good governance (2) Inventory management (3)Credit management	Yes	no response	no response	no response
012	(1) Credit management (2) Inventory control	yes- but needed more time for absorption and hand on practical sessions	I acknowledge that the trainers are well versed and knowledgeable but we all learn at paseand levels.	More practical sessions	Time was too short

Improving Business Acumen in Fisher Cooperatives in Saint Lucia, Caribbean.

013	(1) The importance of good governance (2) Inventory management	I think the content was sufficient but the time was inadequate. However it was eye opening and left sufficient space for internal discussion	N/A	no response	no response
014	(1) The proper method of stock taking and maintaining (2) Method of credit management (3) Techniques to apply for effective debt collection	A fair amount of material was covered. Enough was discussed that will assist attending co-operatives in a positive way to handle many of their problems.	This programme was timely and relevant to the co-operatives welfare.	To everything, there is always room for improvement; but I cannot at this point highlight any.	Time well spent. It is now time for implementation.
015	(1) Better business management skills (2) A more in-depth way of handling debt and credit (3) Better staff and management relationship	Yes. Two day were not enough	I strongly suggest we have another training session (s), it was well received.	no response	no response
016	(1) Credit Management (2) Developing credit	N/A	N/A	no response	no response
017	(1) Inventory management (2) Co-operative growth (3) Membership benefits, growth and recruitment	Absolutely, the handouts are so helpful, they can definitely be use later in the co-operatives	I think there is a need for further invention such as these for the co-operatives by both the Department of Fisheries and Department of Co-operative.	Maybe a third day for more group work and sharing. The group work was very informative, and fun.	no response
018	(1) The importance of good governance and the link to good credit management (2) the importance of membership benefits (3) developmental growth at the co-operatives	Too much in two days. Should have one day for credit management and one or two days for membership benefit and growth	Often times training supply us with knowledge but the follow-up and evaluation maybe lacking.	Time allocated	no response

Annex 6 Photographs of Training



Photo 1, 2 & 3- Participants during Module 1 Governance





Photo 4- 8 — Groups working on Group Exercise during Module 1 on Governance



Photo 9 & 10 – Participants taking part in after lunch energizer Alphabet Farm.



Photo 11 & 12 – Participants during afternoon session Module 2 on Inventory Management

Day Two



Photo 12 & 13 – Participants listening attentively during Module 3 – Credit Management



Photo 14 & 15 - Participants working in groups and making group presentations



Photo 16-18 – Participants enjoying after lunch energizer during day two




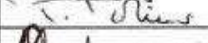


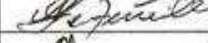





Annex 7 – Copies of Daily Attendance lists



DAILY ATTENDANCE LIST

**“Improving Business Acumen in Fisher Cooperatives in Saint Lucia”,
Caribbean**

Project ref. N° CAR-4.1-B17c
Wednesday 23rd January 2013, Department of Fisheries, Vieux Fort

Last Name	First Name	Position	Signature
✓ Estephen-George	Nadine	Cooperative Officer	
✓ Polius	Petronila	Fisheries Extn officer	
✓ Toussaint-Charley	Kayrianna	Goodwill F/Men Coop	
✓ FELIX	FELIX	Secretary, Fisher Folks	
✓ LA FEUILLE	IGNATIUS	SECRETARY	
✓ DEROSG	TRAVIS	Purchasing officer	
✓ IN PIERRE	Hardin	FISHERIES Extension officer	
✓ Jordan	Telvin	Accounts Supervisor	
✓ DESIR	MICHAEL	Fisherman (Supervising)	
✓ Deterville	Gregory	Secretary	

Celestial Self Development Centre,
Castries Saint Lucia



DAILY ATTENDANCE LIST

**“Improving Business Acumen in Fisher Cooperatives in Saint Lucia”,
Caribbean**

Project ref. N° CAR-4.1-B17c

Wednesday 23rd January 2013, Department of Fisheries, Vieux Fort

Last Name	First Name	Position	Signature
✓ Leon	Christiani	Manager	<i>[Signature]</i>
✓ FERDINAND	BOYSNE	Newsman	<i>[Signature]</i>
✓ Juliana Alexi		Manager	<i>[Signature]</i>
✓ DENIS	Moses	fisher	MOSES DENIS
✓ HAYNES	VICTOR	FISHER	<i>[Signature]</i>
✓ Emmanuel	Shanna	Fisheries Biologist	<i>[Signature]</i>
✓ Leon	Cherian	Statistician/Accountant	<i>[Signature]</i>
✓ Althea Jean-Bacsa	Althea	Deputy Registrar/Rep	<i>[Signature]</i>
Michelle	Michael	Farmer	<i>[Signature]</i>
✓ Christopher	Christopher	Cooperative office	<i>[Signature]</i>

Celestial Self Development Centre,
Castries Saint Lucia






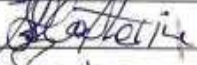

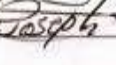


DAILY ATTENDANCE LIST

**“Improving Business Acumen in Fisher Cooperatives in Saint Lucia”,
Caribbean**

Project ref. N° CAR-4.1-B17c

Wednesday 23rd January 2013, Department of Fisheries, Vieux Fort

Last Name	First Name	Position	Signature
✓ KING	ELVIS	Secretary, Gros Islet	
✓ Michaud	Emmee	Gros Islet	
MONDESIR	Martin	Supervisory committee	
Charles	Philbert	Grac	
✓ BARTHELEMY	WAYNE	Dept of Cooperatives	
✓ ST Catherine	STERILL	Dept of Cooperatives	
✓ WALTERS	HORACE	President FISHERFOLK	
✓ JOSEPH	PETER	President, Accueil	

Celestial Self Development Centre,
Castries Saint Lucia



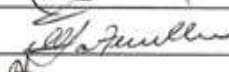


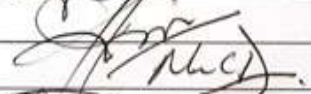
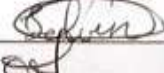


DAILY ATTENDANCE LIST

**“Improving Business Acumen in Fisher Cooperatives in Saint Lucia”,
Caribbean**

Project ref. N° CAR-4.1-B17c

Thursday 24th January 2013, Department of Fisheries, Vieux Fort

Last Name	First Name	Position	Signature
Deterville	Gregory	Secretary	
Esthephen-George CHICOT	Nadine Felix	Cooperative Officer Secretary (Trade Fair)	
LA FEUILLEE	IGNATIUS	Secretary (closing fish)	
DEROSG	TRAVIS		
TOUSSAINT-CHARLERY	KAYGIANNA	OPERATIONS SUPERVISOR GOODWILL	
JOHN DESIR	RUDY MICHAEL C.	PRESIDENT Fisheriman (Supervisor)	
Jordan FERDINAND	Telvin ALOYSIUS	Accounts Supervisors TREASURER	

Celestial Self Development Centre,
Castries Saint Lucia



DAILY ATTENDANCE LIST

**“Improving Business Acumen in Fisher Cooperatives in Saint Lucia”,
Caribbean**

Project ref. N° CAR-4.1-B17c

Thursday 24th January 2013, Department of Fisheries, Vieux Fort

Last Name	First Name	Position	Signature
Leon	Christiane	Manager	
JOSEPH	Peter	President	
ALEXIN	Julian	MANAGER	
ROYNER	VICTOR	FISHER	
DONIS	MARIN	BOARD MEMBER	
Hadin J. PIERRE	Hadin	FISHERIES EXTENSION OFFICER	
POLINA	Petronila	FISHERIES EXT. OFFICER	
Jean-Claude	Althea	Deputy Registrar	
Leon	Cherian	Statistical Assistant	
Emmanuel	Shanna	FISHERIES BIOLOGY	

Celestial Self Development Centre,
Castries Saint Lucia



DAILY ATTENDANCE LIST

**“Improving Business Acumen in Fisher Cooperatives in Saint Lucia”,
Caribbean**

Project ref. N° CAR-4.1-B17c

Thursday 24th January 2013, Department of Fisheries, Vieux Fort

Last Name	First Name	Position	Signature
Lamontagne Michaëlle	Christybee	Cooperative Office manager Gros-Islet	Lamontagne
KING	ELVIS	Secretary Gros-Islet	[Signature]
BARTHÉLEMY	WAYNE	Dept of Co-operation	[Signature]
WALSTERS	HORACE	Pres. Castries; Fishersfolk Coops	[Signature]

Celestial Self Development Centre,
Castries Saint Lucia

Annex 8- Organisational assessment report

Organisational Assessment Report

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INTRODUCTION

This organizational assessment is part of the output of a consultancy assignment, “Improving Business Acumen in Fisher Cooperatives in Saint Lucia” it is funded by the ACP Fish II – Strengthening Fisheries Management in ACP States. One Component of the assignment was conducting a situational analysis of services provided by the cooperatives specifically in terms of purchasing and distribution. (See Annex 1 for TOR)

As a first step in the Capacity Building Initiative, Celestial Self Development Centre decided to conduct an organizational assessment of all of the fisher cooperatives on the islands.

This assessment is not an evaluation, in its objectives, spirit or methodology, rather the aim is to:

1. Assess the degree of support that currently exists for the joint procurement of supplies;
2. Identify aspects of the operations of these organizations that work best, in order to explore the possibility of joint procurement and distribution of needed supplies, as well as provide opportunities for sharing tools, information, and lessons learned;
3. Detect those aspects that most need strengthening and offer reflections for further analysis and ideas for possible future actions, and
4. Offer suggestions on how to strengthen these organizations both individually and collectively, in areas where they confront common challenges.

ASSESSMENT METHODOLOGY

The assessment consisted of four facets including the preparation of this report:

1. A review of documentation relevant to the operations of the fisher cooperatives.¹

1 The Documentation reviewed included:

- Bye-laws, articles of incorporation, and board minutes (2008-2009)
- Organizational Chart
- Annual reports (2008 and 2009)
- Numerous funding proposals and reports
- Internal evaluation exercise (2006)
- Fundraising planning documents and list of donors
- Brochures and publications
- Procedures manual
- Audits (institutional and project), and financial statements (2006-2009)

2. Interviews with board members, and volunteers.2
3. A week-long site visit over the period (November 26th – December 11th 2012) that included half day meetings with board, and volunteers (a full list of those interviewed is included as Annex 2). The visit included the opportunity to meet board members, staff and, to determine the organizational challenges, opportunities and the overall strengths and weakness of the organization. Elements of the administrative and financial management systems were reviewed, as were internal planning and monitoring documents.
4. Preparation of this report. As agreed, the Draft Report was reviewed with the Department of Fisheries and the Department of Cooperatives before being finalized. Amendments were made based on the feedback, and the report finalized. .

ORGANIZATIONAL ASSESSMENT

SUMMARY OF KEY ELEMENTS:

- **Review of institutional documentation**
- **A week-long site visit at the Fisher Cooperatives' offices, and with Interviews with board members, staff and volunteers of each of the fisher cooperatives**
- **Review of elements of the administrative and financial management systems**
- **Preparation of final report**

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- Financial management tools, forms and excel spread sheets
 - 2010 Operational Plan
 - Draft Strategic Planning Report (February 2010)
 - Preliminary results of Assessment by business students from Getulio Vargas (March 2010).

2 A listing of Board members and volunteers interviewed per organization is presented in Annex

BRIEF ORGANIZATIONAL HISTORY AND GENERAL PROFILE

The Fishing industry in Saint Lucia provides a major portion of the fresh and frozen fish currently consumed in the island for the local and tourism markets. However, the island is not yet self sufficient in seafood production and at present the bulk of imports are of exotic seafood (e.g., smoked salmon, shrimp, and scallops) and smoked/salted cod and herring. This is a challenge to the government who continues to strive for self-sufficiency. In a situation where underemployment and unemployment are still pressing problems, the fishing industry is seen as an important vehicle for providing income and sustenance to rural coastal communities. This is against a backdrop of considerable increases in fish consumption, due to both expansion of the tourism sector and increased local demand for fish, partly due to the adoption of healthier lifestyles by the local population. In light of government's commitment to continue to make Tourism a major focus for development, particularly with constraints facing banana production on the international market. It is envisaged that, given the rate of population increase (1.6 percent) and continued growth in the tourism sector, annual demand for fish products may exceed the 4,000-ton mark within the next 5 to 10 years.

The Government of Saint Lucia has made considerable advances in developing the fishing industry. The presence of a Department of Fisheries staffed by 20 technical staff and supported by 4 administrative staff, 6 ancillary staff and 9 data collectors, has enabled the development and maintenance of a variety of resource assessment and management programmes and the provision of extension support services to fishermen and fishing communities. The Fishing sector is also supported through the establishment and development of fisher cooperatives regulated by the DOC. The Government provides technical and regulatory support to 9 fishermen's cooperatives, with membership ranging from 30-150 persons. These organizations benefit from duty-free concessions on all fuel used by members for fishing. Duty-free concessions are also extended to fishermen; boat owners and processors, covering all imported fishing equipment and materials. These cooperatives provide a range of services to their members including access to supplies, credit, natural resources, information, education and training. They also facilitate their participation in decision making-processes. Through practices like group purchasing and marketing, fishers can also gain market power and get better prices on inputs and other necessities. These fishers as owners and managers of the Cooperatives also develop much needed skills when they serve as volunteers in the management of their cooperatives. Cooperatives and producer organizations are central in building fishers skills, providing them with appropriate information and knowledge, and helping them to innovate and adapt to changing markets. Another powerful contribution of cooperatives and producer organizations is their ability to help small producers voice their concerns and interests, and ultimately increase their negotiating power.

The boards of directors of the Fisher Cooperatives are elected by their membership at their annual membership meetings. The board members of fisher cooperatives are members who operate on a voluntary basis. It must be noted however that although these board members are not paid some cooperatives do provide members with a stipend for attendance at meetings. Generally the board membership is almost identical in their composition and generally meet once a month. There are however some cooperatives which are not very functional and where board members do not fulfil their mandate as defined in the byelaws.

ORGANIZATIONAL CHALLENGES AND OPPORTUNITIES

The scope of the organizational assessment exercise encompassed all fisher folk cooperatives in Saint Lucia. The overall objectives of this organizational assessment are as follows:

- The development of an understanding of current management practices in the sector with a particular focus on the reporting frameworks, managerial capacities, and the extent to which there was a member centric model of operation;
- An assessment of the current organizational culture of the sector specifically as it relates to compliance with the cooperatives principles, the Cooperatives Act , Regulations and their respective byelaws as well as , accountability for performance and results;
- The engagement of key stakeholders to develop an understanding of the extent of their support for a joint procurement system for the purchase of supplies for members and their expectations in this regard.
- An understanding of the operating environment of the fisher folk cooperatives and the extent to which they were well placed to respond to international and external challenges as well opportunities and treats.

Organizational Assessment Project Team

Thecla Deterville (brief profile)

Mrs. Deterville's experience as a trainer spans over twenty years. As Human Resource Director for Courts (St. Lucia) Limited she planned and executed training programmes in all area related to the business. She had for a number of years been a facilitator of the Entry Level Skills Programme under the auspices of the St. Lucia Chamber of Commerce, Industry & Agriculture. As the individual responsible for Human Resource Planning for Courts she attended many Regional HR Conferences and Annual Conferences organised by the American Society for Training and Development (ASTD). Her experiences in management at Courts (St.Lucia) spans the following positions, Credit Manager, Credit Comptroller, Operations Manager, Human

Resource Director, Human Resource & Corporate Affairs Director, Operations Director and General Manager for three years prior to retirement. In some of these capacities she had responsibility for staff development and training and was instrumental in establishing and overseeing the Human Resource Department with responsibility for organizational development. She has also had extensive experience in strategic planning having served as a policy and decision maker on a number of boards including the Board of Directors of Courts (St. Lucia) Limited; Bank of Saint Lucia; National Development Corporation; The Sir Arthur Lewis Community College; St. Lucia Chamber of Commerce, Industry & Agriculture.

In 2008 following early retirement from Courts (St. Lucia) Limited Mrs. Deterville started Celestial Self Development Centre, where she offers services as a Trainer/Facilitator and Business Consultant. Currently she is the Lead Consultant on the European Union Special Framework Project (Community-Based Eco-Agro Tourism Project) with its overall objective to reduce poverty and create alternative economic activity. Under this project she had the responsibility for Coaching & Mentoring as well as training in six areas including; Culinary Creativity, Craft Development, Effective Communication and Public Speaking, Environmental Management; Permaculture and Train the Trainer.

Geraldine –Lendor-Gabriel (brief profile)

The CEO of BEEQ Investments Inc. Mrs. Geraldine Lendor- Gabriel has served the Cooperative Credit Union Movement at both the regional and national level. She provided over ten years of services to the credit union cooperative sector in a voluntary capacity. She served on the Board of the Saint Lucia Civil Service Cooperative Credit Union, Supervisory Committee of the Civil Service Cooperative Credit Union (including as Chairperson), Treasurer of Saint Lucia Cooperative League, Internal Audit Committee of the Caribbean Confederation of Credit Unions (including as Chairperson). Mrs. Lendor- Gabriel co-authored a manual for the Supervision of Credit Unions for the Saint Lucia Cooperative League.

Methodology and Approach

Celestial Inc. applied a structured methodology to guide the organizational assessment process. This approach consistent of five (5) distinct activities which ensured that we adopted a logical and sequential structure for the planning, organization and execution of the analysis. The stages of the exercise were as follows:

Stage 1 – Initiate and mobilize: This stage included those tasks necessary to solidify mutual understanding of the project scope, objectives, deliverables and timing. In this regard we met with representatives of the Department of Cooperatives, the Department of Fisheries and the Fisher Folk Organization, Ms. Sandra Grant, regional project manager for the Caribbean to define the project scope, communication channels, obtain an indication of their expectations of the project,

on-going initiatives which could impact on its implementation, as well as synergy that could be explored.

Stage 2 – Probe: This stage was the primary data collection component of the methodology. In this regard the consulting team first designed and circulated an organizational assessment checklist which would serve as the primary document to guide the collection of the information required. (See Appendix 1).

Stage 3 – Assess: Having collected and synthesized data and information, and having developed insight into the particular challenges and opportunities facing the fisher cooperatives sector the Celestial team prepared a preliminary assessment of the organisational culture, performance and results and identified potential high potential improvement opportunities for further exploration (especially in areas where there existed significant opportunities for a sector wide response).

Stage 4 – Clarify: This stage involved the presentation of our findings to a cross section of the stakeholders. This session included the presentation of a working draft of a set of findings and potential improvement and opportunities, and submission of those findings to stakeholders. This formed the basis for the development of this Draft Organizational Assessment Report.

Stage 5 – Report: In the final stage of the engagement, the assessment team work to position the cooperatives for successful realization of the improvement opportunities. This included the delivery of the Final Organizational Assessment Report to key stakeholders as well as the, the preparation of an implementation roadmap and plan, and the communication of findings and results to the organization, its leadership and stakeholders.

Findings and Opportunities

Organisational capacity can be seen as a function of many different factors that exist within an organisation. Individual capabilities, ways of organising, cultural norms and physical assets, capacity and commitment of membership all combine to enable an organisation to work towards its mission. It refers to the ability of the organisation to effectively manage its programmes to achieve the stated goals and objectives with minimum external assistance. It also speaks to the ability of the organisation to sustain itself as a going concern.

Findings and opportunities are organized and presented below:

FISHER COOPERATIVES SAINT LUCIA , December 2012			
Themes & Competency Areas	Rating	Findings	Recommendations
Theme A: Direction	2.2		
1 Basic competencies organisational purpose (statements & status of vision, mission, values)	2	<p>All organizations had bye-laws; however most of them require updating.</p> <p>There is also a need for greater standardization of the byelaws especially as it relates to roles and responsibilities of the board and committees, goal and purpose of these agencies, mechanism for membership etc.</p> <p>Generally, there was not a shared vision among board members. There was however</p> <p>A common understanding by board members of the mission of the organization.</p> <p>However, the mission of the organisation was not fully understood by the staff, as most of them staff simply view it as another job.</p> <p>Understanding of the mission and philosophy of the Cooperative Movement by board needs improvement.</p> <p>Understanding of the mission and philosophy by members and the general public is generally weak.</p>	<p>Review of byelaws with a view for greater standardisation and alignment of mandate across the sector.</p> <p>Review of byelaws with a view for greater standardisation and alignment of mandate across the sector.</p>

FISHER COOPERATIVES SAINT LUCIA , December 2012			
Themes & Competency Areas	Rating	Findings	Recommendations
		Understanding of the mission and philosophy by funders is very good	
2 Governance (activities and development plans)	2	<p>All of the Cooperatives have a management board. While most of the Board operates but not all are fully active.</p> <p>The byelaws are very comprehensive in terms of defining the roles and responsibilities of the board. However the level of understanding of the responsibilities of the board among board members needs improvement. In a number of cooperatives, board members simply see it as a position of privilege.</p> <p>Many bye-laws are not current and in most cases needs review to make them more functional. Many of them are dated and do not allow the organisation to undertake important initiatives which are critical to their sustainability.</p> <p>Procedures for recruiting new board members adequate but procedures for orientation of new board members inadequate.</p> <p>There are no procedures for evaluating board members;</p>	<ul style="list-style-type: none"> ➤ 5 year plan to guide annual plans by all cooperatives with mechanisms for monitoring and evaluation implemented, membership involvement and consultation in the development of these plans. ➤ Member needs survey should be undertaken and plans instituted to improve membership benefits. ➤ Emphasis must be placed on addressing members pension (some provide but at least the option of collaborating

FISHER COOPERATIVES SAINT LUCIA , December 2012			
Themes & Competency Areas	Rating	Findings	Recommendations
		<p>Procedures for Board rotation are adequate however the pool for selection is limited.</p> <p>Need to consider greater role for supervisory committees however both must understand their role if there is to be minimal conflict, mechanism to resolve board committee conflicts should be considered in new act/byelaws.</p> <p>Board's understanding of financial reports, understanding of finances , method of reviewing auditor's report are generally good although there is room for improvements in some cooperatives.</p> <p>Board members make sufficient cash donations annually.</p> <p>22. Board members give time/expertise.</p> <p>23. Board members review/approve long-range plan.</p> <p>24. Members recognize the need to improve membership recruitment however there is a general absence of a clear strategy, and members demonstrated dedication to this initiative.</p> <p>Board members sense of accomplishment</p>	<p>with NIS to address ought to be given serious consideration)</p> <p>➤ Greater uniformity in membership benefits and responsibilities.</p>

FISHER COOPERATIVES SAINT LUCIA , December 2012			
Themes & Competency Areas	Rating	Findings	Recommendations
		<p>is generally good.</p> <p>There is need to improve reporting to the Department of Cooperatives and the conducting of business in accordance with the Cooperative Act.</p> <p>Staff input into Board decision-making needs improvement.</p> <p>There is a need to improve board functioning and capacity throughout the sector.</p>	
3 Strategic focus (scope, perspective)	1	<p>There have been no strategic plan for guiding the development and growth of this sector.</p> <p>None of the fisher's cooperatives engages in business planning sessions and they have no business/strategic plans to guide the growth and expansion of the organisation.</p>	<ul style="list-style-type: none"> ➤ Need for the DOC/ DOF/ member cooperatives and other critical stakeholders to devise and implement strategies which will focus on membership growth and leadership development. ➤ Collaboration between DOF and DOC in relation to the development and implementation

FISHER COOPERATIVES SAINT LUCIA , December 2012			
Themes & Competency Areas	Rating	Findings	Recommendations
			<p>of plans for the sector development.</p> <ul style="list-style-type: none"> ➤ 5year development plan. Meeting every 2 years to review with a view to develop next 5 years plan in the 5th year
4	Culture (norms & principles accommodating action)	3	<p>The Various fisher cooperatives have either expanded their membership base to include consumers in their jurisdiction. They have also seen the need to expand the benefits that they provide to their membership, and activities both in terms of diversity of products & services and increase of portfolio on the basis of borrowed funds.</p> <ul style="list-style-type: none"> ➤ Model as provided by Laborie Fisher Folk can be studied with the view to replicate as appropriate. ➤ Initiative with Goodwill and National Farmers should be encouraged, and expedited
5	Qualifications (Board, management's skills accommodating direction & monitoring)	3	<p>The Management has demonstrated the capacity to effectively manage growth/expansion. The systems , governance and resources to support growth and expansion limited</p>

FISHER COOPERATIVES SAINT LUCIA , December 2012				
Themes & Competency Areas		Rating	Findings	Recommendations
			<p>Management staff have the capacity to develop and to better contribute to the organisational development but need training</p> <p>Important decisions especially as it relates to debt management are not given the level of leadership required by the board</p>	

Theme B: Management		1.6	Five of five areas assessed	
1	Human resources (skills inventory, motivation, appraisal, development)	2	<p>-Clarity of reporting relationships between board , management and staff is generally good</p> <p>Some have Current and accurate written job descriptions however there are others who do not.</p> <p>Communication among staff members and Communication between staff and board generally good</p> <p>. Communication among staff, board and members needs improvement in, most of the cooperatives.</p> <p>Staff's understanding of the function and duties of the Board good</p> <p>Staff participation in planning generally weak and needs improvement</p> <p>Appropriateness of staff size to meet the organisations operational needs good and there are no programming</p>	<ul style="list-style-type: none"> ➤ Identification of cadre of members with leadership potential and training provided ➤ Improvements of reporting requirements to the department of cooperatives ➤ Improvement in financial reporting framework with resultant reduction in auditing fees. <p>Training for cooperative officers/ supervisory</p>

			<p>challenge</p> <p>Staff experience in relationship to the job assignment generally good however training have not been given to the staff.</p> <p>Opportunities for staff training and personal development inadequate</p> <p>Systems for and recognizing and motivating staff and volunteers weak</p> <p>. Written personnel manual and policies generally absent</p> <p>System of annual performance reviews does not exist</p> <p>. Benefit package for staff not competitive however capacity for the organisations to pay more at this stage is not possible.</p> <p>Performance appraisal and staff development systems does not exist (policy and procedures manual have to be developed.</p> <p>The level of motivation among managerial staff as well as operational staff is high.</p>	<p>committees in fraud detection and prevention</p> <p>Trainer of Trainers program to assist in educating members and volunteer staff on the mission and operations of Fisher Cooperatives.</p> <ul style="list-style-type: none"> ➤ General Education drive at community and national level of the role , benefits of membership in a fisher cooperative
2	Decision making capacity (internal & external affairs)	2	<p>Knowledge of credit management as well as risk, portfolio & delinquency management is weak.</p> <p>Knowledge of financial management including accounting standards, financial ratio analyses, adjustment, and liquidity management) is limited</p> <p>Networking among cooperatives is exhibited to a limited level but needs strengthening at the level of the Board</p>	<ul style="list-style-type: none"> ➤ Development of an operations manual to guide all cooperatives ➤ Training of staff in operating procedures ➤ Adoption of one software and capacity

			and needs to be better institutionalised	<p>development in its use and implementation.</p> <ul style="list-style-type: none"> ➤ Development of model documents to guide all cooperatives Training for board and committee members. ➤ Training of staff/board/volunteers to focus on service delivery/the customer experience. ➤ Internal Controls of these organisations must be strengthened to ensure that the resources of the organisations benefit all members
3	Resources (policies, procedures, and responsibilities)	2	<p>- The cooperatives have is no business plan with forecasted budget and forecasted portfolio growth for the next year. Long-term business plans are not in place;</p>	

			<p>- Obligations and responsibilities are well defined; TOR observed at management level as well as operational & support staff level.</p> <p>- There is no clear lending policy including description of products, lending principles, instructions for member assessment, evaluation & monitoring, delinquency management, etc.</p> <p>Board policy paper with delegation of powers for loan approval between management and board.</p> <p>No policy for collection of information/feedback from clients, record tracking is kept</p> <p>-There are no HR policy documents in place;</p>	
4	Growth (capacity, portfolio, outreach)	1	<p>The growth profiles of all the cooperatives are on the decline.</p> <p>Understands who currently patronizes organisation</p> <p>Lacks a full Understanding of the persons the organisation wants as patrons (Target markets)</p> <p>There is generally a lack of marketing of products and services.</p> <p>In some instance the installation of signage critical</p> <p>Low profit margins hampering efforts at attracting new members as their ability to provide benefit to members impacts their ability to attract members</p> <p>There is no strategy to address aging fisher folk population</p> <p>Including mechanisms to make fishing</p>	<p>The opening of bonds is a very good initiative which has been adopted by some cooperatives and should be pursued by others. PR needs to compliment this initiative since without this it is very likely to be ineffective.</p> <p>➤ Promotion of best practice and a recognition program at least every 2 years for</p>

			<p>more attractive to the youth</p> <p>There is a low level of involvement / membership of non boat owners among the membership generally.</p> <p>Geographical expansion is being pursued but with no clear strategy</p> <p>The membership of the cooperatives are aging and the ability to attract new members from the fishing community is limited.</p> <p>There is no clear strategy to address membership growth and development</p> <p>.</p>	<p>model members/ volunteers /cooperatives.</p>
5	Controls (systems and their implementation)	1	<p>The Internal audit/ supervisory committee is not always put in place and in many instances where they exist they are not functional.</p> <p>Generally the internal control systems need improvement as many of these cooperatives have suffered significant loss due to poor controls.</p> <p>Work of operational and support staff is cross-checked however there are areas where improvements are needed especially in areas where possibilities of loss due to poor management or pilferage is high.</p> <p>.</p>	<ul style="list-style-type: none"> ➤ Institute DOC staff training in auditing, fraud prevention. ➤ Need for submission of monthly financial reports to the DOC

Theme C: Operation		2.0	Five of five areas assessed	
1	Management information	1	There is a need to improve the use of the information management systems.	➤ Annual budgeting process promoted.

	<p>systems (scope & use related to portfolio & accounting)</p>		<p>Some cooperatives utilise a manual book keeping system whilst others have QuickBooks based accounting software. The organisations with the QuickBooks systems do not have the capacity to use it.</p> <p>No management accounts are prepared, which can guide the decision making process.</p> <p>It is not uncommon to find that bank reconciliations are not done on a monthly basis.</p>	<ul style="list-style-type: none"> ➤ Computerized accounting budgeting reporting systems instituted. VAT has provided an opportunity for capacity development imitative should be pursued ➤
2	<p>Products & services (financial & non-financial, terms, procedures)</p>	3	<p>.</p> <p>The Fisher Cooperatives have been able to provide a reasonable service to their members. However the service could be improved in terms of availability of supplies, and price competitiveness. Duty free status has not been fully utilized so that most products are purchased on island and sold to members at uncompetitive prices.</p> <p>All fisher cooperatives have expressed support for a joint procurement of supplies to better enable them to meet member’s needs in a more affordable way.</p> <p>The range of services and benefits provided to members vary from cooperative to cooperative.</p>	<ul style="list-style-type: none"> ➤ Establishment of sub-committee by national fisher folk with representation Soufriere, Laborie, Choiseul to develop a procurement plan. ➤ Bye-in mechanism critical/ MOU between NFO and Cooperatives may be required. ➤ Establish model inventory management system for all cooperatives.

		<p>The cooperatives are unable to provide the full range of services which are considered beneficial to their members and which they would like to provide, especially health and pension benefits.</p> <p>Retirement benefits are an important consideration which must be explored.</p> <p>Measures to communicate programs and initiatives to membership should be improved.</p> <p>Initiatives to attract new members are being pursued in most cooperatives but not sufficiently structured and sustained, and HR capacity to do so is limited</p>	
	Facilities	<p>Space for productions/ exhibits/ activities at present level are adequate in most cases.</p> <p>Space for expanded productions/ exhibits/ activities are available in most cases.</p> <p>Space for current administrative staff are adequate in most cases.</p> <p>Storage facilities are adequate in most cases. However this must be considered in the procurement plan.</p> <p>The image the facilities to communicate to constituents are adequate in most cases.</p> <p>Improved signage could result in improved image, membership and sales</p> <p>Ambience or space for staff and volunteer is generally good. The degree of</p>	

			<p>organizational control of facilities in some instances need immediate attention. Issues of security exist for some and in the long term there is a need to ensure minimum operational requirements with respect to this.</p> <p>Tenure and rights over the facilities may need to be addressed to ensure that all cooperatives can undertake required developmental work with minimal delays.</p> <p>Generally the equipment and general facilities of the cooperatives are adequate with the exception of Dennery, Micoud and Laborie. However all of them have indicated that they have plans or are in the process of implementing these improvements.</p>	
3	Networking (relations w. authorities, clients, partners)	2	<p>There is at least one cooperative which has been able to develop significant relationships/ strategic alliances with a financial cooperative. This model has assisted it in improving its cash flow as well as that of its members, as well as in adopting good governance practices. It is an option which is being considered by one other cooperative. This creation of networks with credit unions and other like cooperatives have been seen as an important mechanism which can strengthen the fisher cooperatives. However there is not a clearly defined plan, with set target dates aimed at pursuing this agenda.</p>	<ul style="list-style-type: none"> ➤ Establishment of sub-committee by national fisher folk with representation Soufriere, Laborie, Choiseul to develop a procurement plan. ➤ Buy-in mechanism critical/ MOU between NFO and Cooperatives may be required. ➤ Establish uniform model inventory management system for all cooperatives.

Theme D: Program Performance		2.0		
1	Sustainability (operational, financial)	2	<p>The financial and operational sustainability of these organisations are at risk. Most of them have very low profit margins and are unable to pay their members dividend and patronage refund. This reduces members' support and belief in the cooperatives. It also makes it difficult for them to attract new members.</p>	
2	Quality (portfolio in arrear & at risk)	2	<p>The cooperatives generally have a high level of their receivables at risk. Receivable levels are high and the capacity of the persons to pay these high levels of debt is doubtful. Additionally appropriate policies and systems to improve collection do not exist. In many cases the board lack the desire to address this debilitating situation.</p> <p>In some cases the cooperatives have had to write off large amounts of debt, yet the boards have not changed their policies to avoid a repeat of the situation. Additionally in some instances attempts by the board to address this situation is met with resistance by some board members and the general membership.</p> <p>A set of internal lending rules have not been worked out in most of the cooperatives.</p> <p>Lending is not carried out using defined and well-structured terms and</p>	

			<p>conditions, Lending Operating skills have been developed based on experience.</p> <p>There is insufficient theoretical knowledge for a number of products purchased for sale. This means that the staff ability to sell and cross sell products are limited.</p>	
4	Risks (identification and mitigation)	2	<p>Procedures to mitigate client & credit risks have not been adequately addressed by most of the cooperatives.</p> <p>There is an absence of policies to guide delinquency management and generally the credit policy and credit management is weak resulting in high levels of delinquency and poor cash flows</p>	
5	Fund management (cash & liquidity mgt., yields)	2	<p>The organization's liquidity levels are low and this affects their ability to provide services especially fuel for their member. There is no strategy to address the needs for additional funds to meet operational needs and long term growth of the cooperatives.</p>	

Theme E: Impact and outreach		2.25	Two of five areas assessed	
1	Income generation (performance, ratio, drop out of clients)	2	<p>The income levels of the cooperatives are either declining or showing low levels of growth. Most have shrinking profit margins and have not been able to pay dividends and patronage. No tracking records are observed on income generation. Fin-Dev's management agrees that changes of income are important indicators to be tracked.</p>	

2	Jobs (creation, sustaining)	3	Their operations have improved the capacity of the fisheries sector to create jobs created which can be sustained throughout the year.	
3	Outreach (market share, poverty focus)	1	Not enough focus is placed on the cooperatives' outreach activities especially as it relates to attracting new members. The cooperatives play a critical role in providing their members with credit as well as much needed supplies.	Need for setting outreach targets.
4	Customer care (satisfaction)	2	Mechanism to address queries, complaints, etc. of the membership and the general public are non existent. This means that issues may exist without it being brought to the board/ management attention. Effectiveness in representing the organisation to the government, to members requires improvement. At the moment there is a heavy reliance of the DOC/ DOF for this. There is therefore a need for membership /organizational led advocacy; in this regard there is a greater role for the fisher folk organisation. This will also result in greater cohesion in the sector in relation to issues affecting member cooperatives.	
5	Impact assessment (scope of policy and system)	1	Organizations engaged in the Fisher Folk Cooperative sector have neither a policy nor a system to track impact. Significant policy decisions are taken without the proper communication and	A policy and system need to be elaborated for impact tracking of decision making.

			involvement of persons affected at the level of the cooperatives.	
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Conclusions

The Organisational Assessment has clarified that the Cooperatives have a number of organisational weaknesses which are common across the sector and which needs to be addressed if they are to achieve their mandate. However the Cooperatives have a number of organisational strengths on which to build and grow, that would also comply with the development objectives of the government. However, several constraints exist, both strategic and operational, to sustain such a growth. The following table summarises both strengths and opportunities, the latter divided into identified capacity areas requiring action in the immediate future (in yellow) and capacity areas requiring urgent attention (in red):

<u>Key Strengths</u> Dimensions: 4 & >4	<u>Action required</u> Dimensions: >2 & 4	<u>Urgent attention</u> Dimensions: 2 & <2
Theme A: Direction – Score: 2.00 (5/5)		
<ul style="list-style-type: none"> • Vision & Mission statement • Core values • Commitment to good governance 	<ul style="list-style-type: none"> • Policies & procedures manual • Byelaws reviewed and amended and to the extent possible standardised • 	<ul style="list-style-type: none"> • Strategic & business plan with long-term targets & financial ratios for each cooperative • 5 year development plan for the sector • Board development plan/ competencies of the Supervisory Committees (SC) • Competencies of Cooperative development officers to better supervise • Strategy to guide the development of the sector with input from both DOC and DOF

Theme B: Management – Score: 2.00 (5/5)		
<ul style="list-style-type: none"> • Leadership abilities • Commitment to the Cooperative philosophy vision and mission • Fixed assets/inventory / Debt management system • Growth management capacity • Management reports • Reports to the DOC 	<ul style="list-style-type: none"> • Model procedures for all cooperatives • HRD policies & procedures, including appraisal system • Training of staff, management and board in corporate governance • Management , Supervisory committees as well and Board trained in good governance • Training of staff of cooperative department in 	<ul style="list-style-type: none"> • MIS (software) to integrate with appropriate accounting system and to improve reporting ability including VAT • Lending policies & procedures • Job descriptions for staff • Operating procedures for cooperatives
Theme C: Operations – Score: 2.0 (5/5)		
<ul style="list-style-type: none"> • Lending policies & procedures • Inventory Management • Internal & external relations • Staff motivation • Accounting system • Staff management • Procurement and provision of benefits 	<ul style="list-style-type: none"> • Member benefits redefined • Accounting standards/best practices • Inventory Management/ best practice 	<ul style="list-style-type: none"> • <i>Joint procurement of supplies</i> • <i>Model inventory management procedures</i>
Theme D: Performance – Score: 2.0 (2/5)		
<ul style="list-style-type: none"> • Financial Management • Improved Financial sustainability 	<ul style="list-style-type: none"> • Operational and financial sustainability • Efficiency • Good governance 	<ul style="list-style-type: none"> • Control strategies & procedures related to cash, inventory and debt management & business risks
Theme E: Impact and Outreach – Score: 2.0 (2/5)		
<ul style="list-style-type: none"> • <i>Social & economic targets related to the market & clients (depth of outreach)</i> 		<ul style="list-style-type: none"> • <i>Impact assessment system</i> • <i>Indicators for client satisfaction</i> • <i>Income generation indicators</i>

The assessors recommend that Fisher Cooperatives adopt a more structured approach to exploit the identified opportunities of the organisation to address its constraints and embark on a growth & expansion path that would strengthen its ability to fulfil its mission. Such an approach should be captured in a SMART sector development and organisational capacity development plan (CDP), giving priority to the above-indicated capacity areas for urgent attention & immediate action, respectively.

It is recommended that Fisher Cooperatives focus on actions necessary to put in place:

- A sector development plan identifying long-term (5years) operational targets & financial ratios;
- Strengthen the capacities of the board to provide leadership that is capable of overseeing implementation and initiate new initiatives for the growth and development of the sector;
- Train the supervisory committee and ensure that they are fully operational with oversight from the staff of the Cooperative department;
- Strengthen the capacities of the staff of the cooperatives
- Strengthen the capacities of the staff of the DOC and the DOF in organisational monitoring and assessment;
- Develop and institute policies & procedures to guide credit management, inventory management, membership development and benefits, risk mitigation, and corporate governance.
- MIS with integrated appropriate accounting system inclusive of VAT.

We the undersigned, confirm by our signatories that we have conducted this Organizational Assessment of the fisher cooperatives in Saint Lucia during November-December 2012, on the basis of desk/document studies and consultations with members, staff & management, and that the findings and organizational development target, set above have been discussed and agreed in principle.

Appendix 1 – Copy of Organisational Self-Assessment Checklist

ORGANISATIONAL SELF-ASSESSMENT CHECKLIST

Name of Organisation:	
Address:	
Phone # (primary Contact):	
Email Address :	

\$ _____

In the last fiscal year, what was your total annual income?

	STRONG	ADEQUATE	WEAK	N.A.
ORGANISATIONAL PURPOSE				
1. Concise, written mission statement(byelaws) is it current				
2. understanding of mission and philosophy by board				
3. understanding of mission and philosophy by staff				
4. Understanding of mission and philosophy by constituencies/gen. public				
5. understanding of mission and philosophy by prospective funders				

	STRONG	ADEQUATE	WEAK	N.A.
PROGRAMS				
1. Sense of vision and continuity provided by capable leadership				
2. Annual program planning process				
3. Written annual program plan				
4. Formal communication of annual program plans to staff				
5. Formal communication of annual program plans to board/volunteers				
6. Method for review/evaluation of prior year's program				
7. Method for determining whether programs meet member needs				
8. Written multiyear program plan				
9. Adequacy of equipment/general facility				
Nature / adequacy/ effectiveness of member services				
10. Member support of programs.				

	STRONG	ADEQUATE	WEAK	N.A.
GOVERNANCE				
1. Understanding of the responsibilities of the board				
2. Written board member job descriptions				
3. By-laws; current, functional, used				

4. Procedures for evaluating short-term/long-term objectives				
5. procedures for recruiting new board and committee members				
6. Procedures for orientation of new board members				
7. procedures for evaluating board members and/or board rotation				
8. structure and operations of board committees				
9. frequency of board meetings				
10. attendance at board meetings				
11. procedure for meeting notice and preparation				
12. effective use of time at board meetings				
13. board minutes kept				
14. staff input into Board decision-making				
15. Understanding financial reports presented to Board				
16. Board's understanding of finances				
17. method of reviewing auditor's report				
18. board represents community served				
19. board's understanding of Board/staff relationships				
20. Board's understanding of fundraising				
21. Board members make sufficient cash donations annually				
22. Board members give time/expertise				
23. Board members review/approve long range plan				
24. Board members recruitment of new audience members				
26. Board members sense of involvement				
27. Board members sense of accomplishment				
28. Role of advisory committees				
29. reports submitted to Department of Cooperative				
Conducts business in accordance with the Cooperative Act				
STAFF	STRONG	ADEQUATE	WEAK	N.A.
1. Clarity of reporting relationships				
2. Current and accurate written job descriptions				
3. Administrative leadership				
4. Communication among staff members				
5. Communication between staff and board				
6. communication among staff, board and members				
7. Staff's understanding of the function and duties of the Board				
8. Staff participation in planning				
9. Appropriateness of staff size reprogramming challenge				
10. Staff experience in relationship to the job assignment				
11. time available to perform jobs satisfactorily				
12. Opportunities for staff training and personal development				

Improving Business Acumen in Fisher Cooperatives in Saint Lucia, Caribbean.

13. Systems for recruiting/using/thanking staff & volunteers				
14. Written personnel manual and policies				
15. System of annual performance reviews				
16. Benefit package for staff				
17. Salary scale for staff				
18. Employment status of workers (employee or independent contractor/volunteers)				
19. Staff Morale				
20. Office equipment				
21. Other personnel issues				
22- Environment				
MARKETING	STRONG	ADEQUATE	WEAK	N.A.
1. Understanding of who currently patronises organisation				
2. Understanding of who organisation wants as patrons (Target markets)				
3. Understanding of competition and annual review of their activities				
4. Tracking of actual sales per year				
7. Effective marketing/promotional materials				
9. Marketing/promotional Budget				
MEMBERSHIP	STRONG	ADEQUATE	WEAK	N.A.
Quality of service provided to member				
Increasing membership				
Range of service				
Effective ways of communication programs and initiatives to members				
what initiatives are being pursued to attract new members				

PUBLIC/COMMUNITY RELATIONS	STRONG	ADEQUATE	WEAK	N.A.
1. Consistency and clarity of organisational image communicated to public				
2. Mechanism for handling of public queries, complaints, etc.				
3. Annual public relations plan				
4. Effectiveness in representing the organisation to:				
: to the government				
: to members				

FINANCIAL MANAGEMENT	STRONG	ADEQUATE	WEAK	N.A.
1. Annual budgeting process				
2. Computerized accounting/budgeting/reporting systems				
3. Board mechanism for reviewing monthly statements				
4. System of regular cash flow monthly statements				

5. Ability of organisation to manage cash flows				
6. Formalised cost controls				
7. Ability of organisation to pay accounts payable within 30 days				
8. annual financial audit (with management letter) by CPA				
9. Board system for reviewing audit				
VAT compliance				
10. System of internal controls				
11. Ability of organisation to manage debt repayment of notes/loans outstanding				
12. Line of credit for the organisation				
14. Size of staff in relation to tasks				
15. Experience of staff in relation to job assignments				
16. Staff's understanding of financial systems				
17. Monthly bank reconciliations				
Cost of Staff as a percentage of sales				
Staff cost				
18. Other Financial Management issues				

FACILITIES	STRONG	ADEQUATE	WEAK	N.A.
1. Space for productions/exhibits/activities at present level				
2. Space for expanded productions/exhibits/activities				
3. Space for current administrative staff				
4. Space for expanded administrative Staff				
5. storage facilities				
6. Image facilities communicates to constituents				
7. Ambience of space for staff and volunteers				
8. Degree of organization's control of facility				
9. Length of lease agreement				
10. Other Facilities issues				

COMMUNICATION/DECISION MAKING	STRONG	ADEQUATE	WEAK	N.A.
1. Communication within the organisation is open, candid, timely				
2. Decision making process is well-informed, timely				
Communication with the DOC				
communication with other cooperatives				
Communication with DOF				
Communication with members				
3. Other communication/Decision Making issues				
INVENTORY/ PROCUREMENT	STRONG	ADEQUATE	WEAK	N.A.
type of products sold to member				

prices competitive				
Overage/ shortages management				
challenges faced deterioration, obsolescence, damage, fraud				
determining , when to order, from whom, how much				
Record management				
Internal controls				
Key inventory benchmarks like fill rates, backorders, aging, etc.				
Current inventory management processes				
Liquidation procedures and strategies				
Inbound freight management				
Processes for imported inventory				
Inventory planning procedures				
Current software applications and reporting				
	Total number of staff currently working at organisation	Roles		
PAID STAFF/VOLUNTEERS/INTERNS				
Full-time (30 or more hrs/week)				
Part-time (between 2 and 30 hrs/week)				
OCCASSIONAL VOLUNTEERS				

STRENGTHS AND OPPURTUNITIES

What key achievements/highlights/successes has the organisation reached in the past?

In which areas does it perform best?

What are immediate needs/priorities?

Does the organisation have any plans to scale up?

If it received more funding, how would it use it?

Observations / Issues	Recommendation	Overall Rating				
		S	A	NI	W	NA

Annex 9 – Press Releases and published articles



ACP Fish II is funded by the European Union



16th January, 2013

PRESS RELEASE

ACP FISH II – STRENGTHENING FISHERIES MANAGEMENT IN ACP STATES Improving Business Acumen in Fisher Cooperatives in Saint Lucia, Caribbean.

FOR IMMEDIATE RELEASE

The ACP FISH II project Strengthening Fisheries Management in ACP States, Improving Business Acumen in Fisher Cooperatives in Saint Lucia is currently being implemented by Celestial Self Development Centre, Sans Souci, Castries.

There are currently nine functional Fishermen Cooperatives in Saint Lucia: Gros Islet, Castries, Anse la Raye/Canaries, Soufriere, Choiseul, Laborie, Goodwill/Vieux Fort, East Coast/Micoud, and Dennery; and most of these institutions are run by a Manager and a Board of Directors, comprising volunteers. These Cooperatives perform a critical role within the fisheries sector which include the procurement and supply of inputs to their members. The Saint Lucia Fisher Folk Cooperative Society Limited is the umbrella organization and was established to enhance coordination, efficiency and advocacy for the fisheries sector. One of the initiatives which this entity is seeking to pursue is the joint procurement and distribution of supplies on behalf of the fisher folk sector island wide.

The Fisheries Cooperatives are at varying stages of development, in-terms of strengths and levels of organization. Some are well organized with physical infrastructure, some serve as marketing agents for their members, and have a wealth of experience in managing financially viability entities. These skill sets are not common to all, thus the timeliness and relevance of this



Improving Business Acumen in Fisher Cooperatives in Saint Lucia, Caribbean.

intervention in institutional strengthening and capacity building among the primary fisheries groups.

Purpose of this project

The purpose of this project is to:

- a) Conduct a situation analysis of services provided by the Cooperatives, specifically in relation to purchasing and distribution.
- b) Provide training for fisher folk in Saint Lucia in practical guidelines and principles of business management, planning and operating profitable, efficient, and productive fisheries enterprises.

Locally the project is being coordinated jointly by the Fisheries Department and the Department of Co-operatives, and entails organizational assessments and training. The two day training will be conducted on Wednesday 23rd and Thursday 24th January 2013 at the Department of Fisheries Conference Room, Vieux Fort from 9:00 am to 4:30 pm. Topics to be covered are Governance, membership benefits, inventory management control and credit granting and management.

What are the objectives of the ACP Fish II Programme?

The overall objective of the programme is to contribute to the sustainable and equitable management of fisheries in the ACP regions, thus leading to poverty alleviation and improving food security in ACP States. It specifically focuses on strengthening fisheries sectoral policy development and implementation, thus ensuring sustainable and equitable management of fisheries in the region

This project is funded by the European Union

The European Commission is the EU's executive body.

"The European Union is made up of 27 Member States who have decided to gradually link together their know-how, resources and destinies. Together, during a period of enlargement of 50 years, they have built a zone of stability, democracy and sustainable development whilst maintaining cultural diversity, tolerance and individual freedoms. The European Union is committed to sharing its achievements and its values with countries and peoples beyond its borders".

For further information on the ACP Fish II Programme, please visit: <http://www.acpfish2-eu.org> or ACP Fish II Programme Regional Manager for the Caribbean Region, Sandra Grant; E-Mail: s.grant@acpfish2-eu.org; Telephone: 011(501) 223 2974/Fax: 011(501) 223 2975.





5th February, 2013

PRESS RELEASE

ACP FISH II – STRENGTHENING FISHERIES MANAGEMENT IN ACP STATES Improving Business Acumen in Fisher Cooperatives in Saint Lucia, Caribbean.

FOR IMMEDIATE RELEASE

The Department of Fisheries (DOF) and Department of Cooperatives (DOC) of Saint Lucia, With the financial support of the EU funded ACP Fish II Programme under the technical guidance of consulting firm Celestial Self Development Centre, recently held a training workshop for local fisher cooperatives with the overall aim of improving the business acumen of all fisher cooperatives in Saint Lucia.

The 2 day workshop, was held on 23rd and 24th January 2013 at the Department of Fisheries, Vieux Fort from 9:00 am to 4:30 p.m., in attendance were twenty five (25) participants representing fishermen cooperatives from, Gros Islet, Castries, Anse la Raye/Canaries, Soufriere, Choiseul, Laborie, Goodwill/Vieux Fort, East Coast/Micoud as well as representatives of the Department of Fisheries and the Department of Cooperatives.

The objectives of the Workshop were threefold: ; 1) to encourage institutional strengthening and capacity building among the primary fisheries groups ; 2) to provide training in monitoring and evaluation of inventory systems to foster joint procurement of and 3) expose participants to selected fishery cooperatives realities in Saint Lucia such as the need for accountability and good governance,

The workshop forms part of a larger global Programme to strengthen fisheries management, Improve food security and alleviate poverty in 78 African, Caribbean and Pacific (ACP) member states. . It specifically focuses on strengthening fisheries sectorial policy development and implementation, thus ensuring sustainable and equitable management of fisheries in the region.

The training programme was well received by all participants. A team comprising four cooperatives with experience in the procurement of supplies was convened with the objective of bringing to fruition the goal of assisting the Fisher folk umbrella body is beginning the process of





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joint procurement of supplies for members. It is expected that this initiative will result in the fisher folk realizing benefits of scope and scale making them more viable business entities.

Participants considered the intervention timely and useful and saw it as the beginning of a process to raise the profile of fisher folk in Saint Lucia.

This project is funded by the European Union the European Commission is the EU's executive body.

"The European Union is made up of 27 Member States who have decided to gradually link together their know-how, resources and destinies. Together, during a period of enlargement of 50 years, they have built a zone of stability, democracy and sustainable development whilst maintaining cultural diversity, tolerance and individual freedoms. The European Union is committed to sharing its achievements and its values with countries and peoples beyond its borders".

For further information please contact:

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For further information on the ACP Fish II Programme:

Please visit: <http://www.acpfish2-eu.org>



Links to published articles

http://www.thevoiceslu.com/features/2013/january/17_01_13/ACP.htm

http://www.thevoiceslu.com/feat_business/2013/february/09_02_13/ACP.htm

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