

ANNEXES

to

Acceleration Program for Growth-Oriented Women Entrepreneurs

Operations Manual

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SECTION 1: STARTING AN ACCELERATION PROGRAM

ANNEX 1: ACCELERATION PROGRAM FLYER

Join the
**Women Innovators Network
in the Caribbean (WINC)**
for the
Acceleration Program 2017

Are you ready to propel your business to a new level?

- ▶ Build and leverage your skills to grow your business substantially.
- ▶ Further develop your self-confidence and inner strengths to support your business changes.
- ▶ Connect with like-minded women entrepreneurs and expand your network.

Take part in this transformative eight-month program for Caribbean women entrepreneurs by the World Bank's infoDev program for innovation and entrepreneurship.

To apply to the WINC Acceleration Program, visit: <https://www.surveymonkey.com/r/WINC-AP2>

For further details, please visit: <https://www.facebook.com/WomenInnovatorsNetworkCaribbean>

Part of the Entrepreneurship Program for Innovation in the Caribbean (EPIC), fostering growth entrepreneurs in the region.
Supported by:



What

This Acceleration Program will equip you with the knowledge and skills to innovate within your business and the self confidence to make these changes, as you ready your business for substantial growth.

Over eight months, you will benefit from a comprehensive suite of support services:

- 8** Peer-learning sessions covering topics critical for business growth.
- 5** One-on-one mentoring sessions according to your needs.
- 7** Sessions addressing specific business knowledge gaps and personal challenges that may be constraining your own growth.
- 2** Motivational sessions by successful women entrepreneurs.

This is part of the Entrepreneurship Program for Innovation in the Caribbean (EPIC) and implemented by the World Bank's infoDev program for innovation and entrepreneurship. Funded by the Government of Canada, EPIC is a seven-year program that supports growth-oriented entrepreneurs in the region.

For Whom

The WINC Acceleration Program is for women entrepreneurs in the Caribbean whose main objective is to fast-track the growth of their businesses.

To apply, you must meet the following requirements:

- You own at least 50% of a registered business that has been in operation for at least two years.
- You are an executive decision-maker in this business.

- You work at least 3 days per week in this business.
- Your business shows evidence of past growth.
- You have a scalable business model and realistic plans for year-on-year annual growth in revenues based on product / service; market opportunity; and team.
- You are committed to innovating within your business.

Where

The Acceleration Program will be delivered by certified facilitators in 9 Caribbean countries: Antigua & Barbuda, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, St. Kitts & Nevis and Trinidad & Tobago.

When

All 9 WINC Acceleration Programs will commence in November 2017.

For updates on each country's program, check:

<https://www.facebook.com/WomenInnovatorsNetworkCaribbean>

What Now?

Entrepreneurs will be selected to participate in the WINC Acceleration Program through a competitive process. For eligibility criteria and to apply, visit: <https://www.surveymonkey.com/r/WINC-AP2>.

Please note:

- each participant will be required to make a contribution towards the cost of her participation in the program
- programs not attracting a critical mass of suitable participants may be cancelled.

Your Facilitators

Country	Name	Company's name	Telephone	Email
Antigua and Barbuda	Sandra Baptist	PACCS Inc.	(268) 726-1084	info@sandrabaptist.com
Barbados	Donna Every	Arise Consulting Inc.	(246) 262-4911	donnaevery1@gmail.com
Belize	Danalyn Myvett	Belize Centre for Training & Development	(501) 633-9404	bctdinfo@gmail.com
Dominica	Ginny Riviere	Gns Services	(767) 245-0217	gns3003@gmail.com
Grenada	Aine Brathwaite	AJ Business Solutions	(473) 440 5000	ainebraf@gmail.com
Guyana	Valrie Grant	GeoTechVision	(592) 226 4332	valrie@geotechvision.com
Jamaica	A. Cecile Watson	Gr8way Consulting Ltd.	(876) 322-6979	acwatson@gr8wayconsulting.com
St. Kitts and Nevis	Telojo "Telly" Valerie Onu	Quintessence Consulting Inc.	(869) 660-0535	tonu@qconsultinc.com
Trinidad and Tobago	Georgina Terry	Business & People Development Associates Ltd.	(868) 683-4082	georgina.terry@bpdassociates.com
Trinidad and Tobago	Glenda Joseph-Dennis	Caribbean Fashion Industry Consulting Ltd.	(868) 470-5578	glendajo@carifc.org

ANNEX 2: APPLICANT SCORING CRITERIA AND EXPLANATORY NOTES

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)
Criteria	Time dedicated to own business (days/week) - this is applicant's business of focus for the Acceleration Program; pre-requisite of 3 days per week	Evidence of past growth in the last 2 years in: sales revenues, products or services in portfolio, employees, customers, and geographic reach	Realistic projected growth anticipated in the next 12 months in: sales revenues, products or services in portfolio, employees, customers, and market opportunity	Evidence of innovation in the past 2 years	Perceived benefit(s) from being part of Acceleration Program	Criteria Score	Overall impression weighting	Final Score	Comments	RANKING (in ascending order from highest ranking score which should equal "1" to lowest ranking score)
Weight	20%	30%	25%	25%			(1 or 0)			
Guide for scoring	5 = 5 or more days per week; 3 = 4 days per week; 1 = 3 days (equiv. to 24 hours) per week	5 = increase in one or more of the parameters with a clearly justified explanation; 3 = little or no increase in any of the parameters but with a clearly justified explanation; 0 = No growth evident in any of the parameters with no justified explanation	5 = Significant increase in one or more of the parameters, with an explanation that appears realistic; 3 = Some increase in any of the parameters with an explanation, the realism of which is questionable; 0 = no increase planned; increase with unrealistic plans	5 = Clear evidence of significantly improved and/or introduced past innovation with an appropriate explanation; 3 = Some evidence of past innovation with an appropriate explanation; 0 = No evidence of past innovation	Score "1" if expectations are clearly aligned with what AP can provide; Score "0" if there is a risk that the expectations of participant will not be met	Out of 5	Score "1" if satisfied that this candidate should be included in the shortlist; Score "0" if candidate should not qualify for shortlist	Out of 5		

Explanatory notes:

Pre-requisites:

- **Applicant owns 50% or more of her business**
- **The applicant is responsible for leading her business, including developing its strategy, as evidenced by the position she occupies in her business**

(a) Time dedicated to own business: The applicant should demonstrate full commitment to her business. People who work in their business full time are ideal in that it is rarely possible to grow a business with only part time work.

(b) Evidence of past growth in the last 2 years: Evidence of past growth is an indicator of market validation of products / services and desire of company offering.

(c) Realistic projected growth anticipated in next 12 months: If these values appear feasible compared to past growth, then these projections are probable and hence realistic.

(d) Evidence of innovation in past 2 years: Evidence of past innovation increases the likelihood of future innovation and hence probable differentiation for competitiveness.

(e) Perceived benefit(s) from being part of Acceleration Program: If there is poor alignment between the expectations of the applicant and what the Acceleration Program can deliver, the applicant should not proceed further in the process of selection.

(f) Criteria Score: This is a total of the weighted scores entered for each previous criterion and is automatically calculated in the spreadsheet to produce a value.

(g) Overall impression weighting: If there is a reason that has not been captured in one of the criteria, for rejecting this applicant, a "0" will nullify the score and result in a Final Score (h) of "0".

(h) Final Score: This score is automatically calculated in the spread sheet and = the score in (f), unless the applicant has been rejected (see explanation in (g)).

(i) Notes / observations: Noteworthy comments or those to be raised during an interview with the candidate.

(j) Scorer 1 Ranking: These values are manually entered by the Scorer, from the highest value in (h) to the lowest. This column enables the various Scorers to compare their assessments and agree on the final shortlist of candidates.

ANNEX 3: SESSION PLAN TEMPLATE

Session Plan for XXXXXX: Date: XXXXX

TITLE of session		Purpose:		Goal: participants are able to –		
DAY 2: AP TRAINING						
Time (from X to X)	Period (Mins)	Who	Training method	Training Activities		Materials
TEA / COFFEE BREAK						
LUNCH						
TEA / COFFEE BREAK						

ANNEX 4: AGREEMENT BETWEEN AP FACILITATOR AND PARTICIPANT

AGREEMENT

BETWEEN

NAME OF FACILITATOR (hereinafter referred to as "Facilitator")

AND

NAME OF PARTICIPANT (hereinafter referred to as "Participant")
(jointly referred to as "the Parties")

OF THE
[NAME OF THE PROGRAM]
ACCELERATION PROGRAM (AP)

TO BE HELD INFROMto20..

The Parties hereby agree as follows:

1. DURATION OF THE AGREEMENT

This Agreement shall be for a period of up to nine (9) months to coincide with the starting and completion dates of the AP, viz. from ---- 20.. to ---- 20.. in [NAME OF CITY & COUNTRY].

2. ROLE AND RESPONSIBILITIES OF THE PARTICIPANT:

The Participant is responsible for:

- a. Attending and fully engaging in all AP discussion sessions and activities viz:
 - 8 peer learning sessions;
 - 5 one-on-one mentoring sessions;
 - 4 technical workshops to be delivered by topic experts;
 - 3 personal development sessions;
 - 2 motivational sessions of sharing their success stories by entrepreneurs from the local community .
- b. Ensuring that she is present, on time, and mentally engaged for the full duration of each of the AP sessions, including attending all mentoring sessions on the dates and times as agreed upon with her mentor.
- c. Completing "homework" for those peer-learning sessions that require reflection on own business, and submitting this in time to the Facilitator.
- d. In case of an emergency, informing the Facilitator if she cannot attend any of the proposed sessions. The Participant agrees to abide by the decision of the Facilitator on whether she will be allowed to continue with the program.
- e. Should such a situation arise, flagging in a timely manner with her Facilitator, any concerns she may have about her further participation in the program while being open, frank and, honest.
- f. Valuing and respecting the time and contributions of all those involved in the AP.
- g. Treating "confidential information" presented during the AP as "confidential". (This clause survives the termination of this contract.)
- h. Providing timely feedback at the end of each AP session using the templates supplied.

The Participant understands that failure to comply with the above conditions may result in the discontinuation of her participation in the AP.

3. ROLE AND RESPONSIBILITIES OF THE FACILITATOR

The Facilitator’s main responsibility is to deliver the AP such that the unique learning and development needs of each participant is addressed. Using her experience, knowledge and contacts, the Facilitator supports the Participants in identifying and negotiating key development challenges while actively encouraging Participants’ networking. The Facilitator will document contact sessions, which may include image taking. Content with respect to images becomes the copyright property of the Facilitator.

4. LIMITATIONS ON LIABILITY

Given the program’s focus on reflective learning, participants are encouraged to listen, fully engage with the discussions, and apply their key learnings. However, the Participant must use her own judgment in applying suggestions and ideas to her own business and she shall not hold others (members of her group or others involved in the delivery of the AP) responsible for the implications of any actions she takes as a result of the AP.

5. PARTICIPATION FEE

Through the support of local sponsors, a scholarship will be awarded to each selected participant for up to 95% of the cost of participating in this AP. Whilst the program is valued at approximately US\$/person, the Participant will be required to invest [\$ SPECIFY AMOUNT IN LOCAL CURRENCY] herself as participant fees for the full eight month business development and mentoring program. Payment of the Participant’s fees is to be as follows: [TO BE CUSTOMIZED BY FACILITATOR].

6. SETTLEMENT OF DISPUTES

Where there are disputes that cannot be resolved between the Participant and the Facilitator, the SPONSOR’S team may be approached to assist in finding a resolution ([CONTACT EMAIL ADDRESSES]).

7. NOTICES AND COMMUNICATIONS

All notices given in accordance with this Agreement shall be communicated by email.

8. TERMINATION OF CONTRACT

Subject to earlier clauses, either party may terminate this Agreement by giving the other party 14 days written notice, which must include copying the SPONSOR ([CONTACT EMAIL ADDRESS]).

9. FINAL PROVISIONS

This Contract is governed by and shall be interpreted in accordance with the laws of [COUNTRY]

SIGNED by Facilitator(s)
Address
e-mail
Date

SIGNED by Participant
Address
e-mail
Date



ANNEX 5: PARTICIPANT COMPANY PROFILE

ACCELERATION PROGRAM PARTICIPANT COMPANY PROFILE

To be completed by each AP Participant, for sharing within her AP group as well as with prospective mentors.

NAME:			
COMPANY's NAME			
Position in the company:			
PHOTO		COMPANY LOGO	
CONTACT DETAILS			
Registered address			
Contact numbers	Work		
	Cell		
	Skype		
Email address			
Website			
Social media sites	FB		
	Twitter		
	LinkedIn		
	Other		
COMPANY OVERVIEW			
Year when operations started			
MY COMPANY <i>(Description of product(s) / service(s); sales track record; notable successes; etc.)</i>			
MY TARGET MARKET <i>(i.e. who buys my product(s) / service(s) and why)</i>			

ANNEX 5-1: PARTICIPANT GROWTH GOALS

GROWTH GOALS	
MY MOST IMPORTANT GROWTH PRIORITY BUSINESS GOAL FOR THE DURATION OF AP	
MY MOST IMPORTANT GROWTH PRIORITY PERSONAL DEVELOPMENT GOAL FOR THE DURATION OF AP	
I WOULD LIKE A MENTOR TO GUIDE ME IN ACHIEVING MY PRIORITIZED GROWTH GOAL (BUSINESS OR PERSONAL DEVELOPMENT GOAL) DESCRIBED HERE =>	

ANNEX 6: BUSINESS ROADMAP FRAMEWORK¹

The questions in this Framework are designed to probe your understanding of the different aspects of your company, and to help you focus on those areas that require strengthening. (Your answers will change as your company evolves.)

- **You will need to be able to answer all these questions satisfactorily, should you wish to attract investment.**
- Those questions that you cannot answer at the start of the Acceleration Program, you should focus on answering over the period of the AP using the resources at your disposal (Facilitator; peers; topic experts).

Category	Business Indicators (CURRENT)	Business Indicators (FUTURE)
1. Market	<p>1.1 Customer segments....for whom we are creating value...</p> <p>For EACH CUSTOMER SEGMENT:</p> <p>1.1.1 What "job" does the customer need done</p> <p>1.1.2 What "pain" is the customer experiencing in getting this job done</p> <p>1.1.3 How does our product / service solve this "pain" i.e. what is our solution (i.e. product / service benefits)</p> <p>1.1.4 What alternatives does our customer have for solving this pain (what are the competitive products / services)</p> <p>1.1.5 Which attributes of our solution are a substantial improvement in performance/cost/price of the competitive products/services</p> <p>1.1.6 Do we have an unfair advantage and if yes, what is it</p> <p>1.1.7 Who (by name/profile) are our current most important customers.</p>	<p>1.1.8 How many customers in this segment could we attract over the next 5 years - including from the competition, and who are they</p> <p>1.1.9 Who (by name/profile) will we be targeting to become new customers over the next 12 months</p> <p>1.1.9.1 how will we generate leads</p> <p>1.1.9.2 how will we convert these to customers</p> <p>1.1.9.3 how many will we convert to customers, and by when</p>

¹ Sources for the compilation of this Roadmap include: Business Model Canvas(<https://strategyzer.com/canvas/business-model-canvas>); Leanstack (<https://leanstack.com/projects/345442/canvases/409273>); XL Academy (<https://www.xl-africa.com/xl-africa-academy>); <http://link-caribbean.com/resources/> (accessed in June 2017)

	<p>Our Value Proposition</p> <p>Our product is.....which helps (<i>customer</i>).....to do (<i>job</i>).....by (<i>how it does the job</i>).....which differs from (<i>competitors' products</i>).....because (<i>what / how it does this better</i>).....</p>	
	<p>1.2 Customer relationships - FOR EACH TARGET SEGMENT:</p> <p>1.2.1 What type of relationship does each customer expect us to establish and maintain with them: 1.2.1.1 as the Principal (AP Participant) 1.2.1.2 as the company</p> <p>1.2.2 What is the lead time for closing a deal</p> <p>1.2.3 What resources (including time) are required to maintain this relationship</p>	
	<p>1.3 Customer channels - FOR EACH TARGET SEGMENT:</p> <p>1.3.1 Which channels do our customers want us to use to reach them</p> <p>1.3.2 Which ones ARE we using and which ones work best</p>	1.3.3 Which channels will we be adding, and by when
2. Team and Key Partners/ Suppliers	<p>2.1 Team members - FOR EACH MEMBER:</p> <p>2.1.1. For what is s/he accountable</p> <p>2.1.2. What skills and experience does s/he have that are appropriate for the position</p>	2.1.3 What skills gaps will we be addressing, and by when
	<p>2.2 Key Partners / Suppliers</p> <p>2.2.1 Who are our Key Partners and what do we acquire from them</p> <p>2.2.2 Who are our Key Suppliers and what do we acquire</p>	2.2.3 What Partners / Suppliers will we be adding to address the existing gaps (if any); and by when

	from them	
3. Financial	3.1 Revenue streams - FOR EACH TARGET SEGMENT: 3.1.1 For what benefits (value) do our customers currently pay 3.1.2 How much do they pay 3.1.3 How do they currently pay	3.1.4 How would they prefer to pay 3.1.5 For what (services/products) would they be willing to pay 3.1.6 What new customers can we attract with our existing products/services 3.1.7 What new customers could we attract with our new products/services 3.1.8 What is our projected revenue for the next 12 months 3.1.9 What is our projected revenue for the next 5 years.
	3.2 Cost structure FOR EACH PRODUCT / SERVICE: 3.2.1 What are our most important costs (inputs) 3.2.2 Which key activities are the most expensive (can involve multiple inputs) 3.2.3 What is our gross margin per average sale 3.2.4 What is our breakeven point (costs=revenue) 3.2.5 Which are our most profitable products/services	3.2.6 What are our projected costs for the next 12 months 3.2.7 What are our projected costs for the next 5 years
		3.3 Growth financing 3.3.1 What is our target annual revenue at 5 years from now 3.3.2 How much \$ funding do we need, and for what, to reach this target 3.3.3 How will we raise this funding: \$ from sales \$ from grants \$ from loans \$ from investors 3.3.4 How will we repay the loan (<i>if relevant</i>) 3.3.5 How will we exit from the equity investment (<i>if relevant</i>) (<i>investor expectation = 10 x \$ investment after 5 years</i>) 3.3.6 How else will we "de-risk" the business for an external investor

4. Formality of Business	My Company has the following:	Select Y / N / NA* <i>*(Not Applicable)</i>
	4.1. Financial Statements for past 2 years:	
	Income Statement	
	Balance Sheet	
	Cash flow Statement	
	4.2 Product(s) / Service(s)	
	Working prototype(s)	
	Final product (s) / Service(s) that have been validated by market (i.e. there are paying customers)	
	4.3 Human Resources	
	Job Descriptions	
	Organizational Chart	
	HR Management Manual incl. policies and processes	
	Payroll System	
	4.4 Operations	
	Minutes from Management / Board meetings	
	Policies and Operating Procedures	
	Operational Manual(s)	
	Product / Service Lists	
	Company Strategy	
	Tactical Plan incl. Marketing Plan and Sales Forecast	
	Goal Tracking Tools	

SECTION 2: ACCELERATION PROGRAM CURRICULUM

ANNEX 7: 5 PROVEN WAYS TO MAKE NETWORKS WORK

1. Create opportunities

Create opportunities to introduce yourself to people who could make a significant difference to your business. Send a letter of introduction, card or make a phone call expressing your interest in them and their work/contribution to business and what an impact it has made on you or your organization.

You could mention that you would like to:

- a) write an article for them;
- b) interview them for your company newsletter as a role model; or
- c) simply learn from them.

Most people are genuinely delighted (and often surprised) to have some positive feedback and if they have time, will respond favorably.

2. Plan

When planning to go to a business function, take along several blank business cards with you in case someone does not have any cards with them. This way you can always walk away with their details.

While networking may begin with an exchange of details, this is only the first step in building business. You have to make contact soon after rather than just file their card, and build the relationship before asking for business or referrals.

3. Remember relevant points

When leaving a function, write on the back of the card three things about them - one personal, one descriptive and one business interest. That way you will always have something relevant to draw on when you meet or talk to them again.

4. Ask for referrals

If you have established a good relationship with a contact and they are happy to work with or hear from you, ask how your information, product or service can help another colleague or associate. Don't be afraid to ask your new ally if they know of other groups who may benefit from meeting you or how your products or services may be of value. Offer them a free article or newsletter both for their interest and to help them promote what you are doing. If they do introduce you to new networks, you could invite them to join you and their contact for a discussion.

5. Build your profile

The above advice is all well and good, but clearly you need to be making the effort to network and build relationships in the first place. Business is built on relationships and trust. The more good relationships you have built, the larger your network - the larger your network the larger your net worth. If building your net worth is of interest to you...you must build your profile.

ANNEX 8: WHY AREN'T YOU NETWORKING?

- **I haven't got any free time**

Truth is, effective networking can actually *save* you time by giving you a support network and an instant database of people to call for information, help and/or products or services.

Use your diary and schedule sufficient time to both attend one or two networking events regularly and follow up on new contacts. You can collect all the business cards in the world but if they gather dust on your desk, they are worthless.

- **I'm not good at meeting new people**

Do you enjoy making friends? That's all networking really is – be excited about the amazing and inspirational people you are yet to meet. In reality, these scary new people are just as nervous as you.

- **People won't find me interesting**

What is wrong with us? We constantly doubt ourselves when we are actually pretty amazing! Be proud of whom you are – you are absolutely worth talking to, and everyone else is just as nervous as you.

- **I don't know what to say**

My advice is to ask questions, but open-ended ones. Allow a person to let you in to their space. Don't ask questions like "How are you?" "How was your trip here this morning?" or "Isn't this weather lovely?" Instead ask something like, "What brings you to this event this morning?" and let the conversation flow from there.

Remember to listen...and keep listening. Engage yourself in that conversation fully and give that person the respect they deserve. Don't look around for other people to speak to.

- **I have problems introducing myself to strangers**

After you say hello, they are no longer strangers, are they?

- **I don't know how to leave a conversation**

Exit gracefully. "I don't want to take up any more of your time, but it has been a pleasure speaking with you." Or "I must go to the bathroom now, but it has been an absolute pleasure meeting you." Now please don't think that every time someone wants to go to the bathroom they can't wait to get away from you! Also, don't promise to follow up if you have no intention of doing so.

Networking is not only a sanity-saver for soloists, it is an extremely powerful business marketing tool. It is a well-known fact that people do business with people they like and how are they going to like you if you hide behind an inbox?

Source: Flying Solo – Robert Gerish - Online Magazine, Article Published 3 March 2006 by Ricky Nowak
www.flyingsolo.com.au

ANNEX 9: THE 5 SIMPLE STEPS TO SUCCESS

1. Know What You Want

This sounds easy but the main reason that most people don't get what they want in life is because they don't really know what they want. Few have a clear picture of where they are going or where they would like to be. Most people simply drift through life aimlessly with no clear plan, taking things as they come. They react to what happens rather than taking control.

Goal Setting

- The most important thing about a goal "is having ONE"
- "What the mind can conceive and believe you can achieve"

2. Know When You Want It

People often confuse goal setting with dreaming. A goal is a dream with a date attached to it. So decide what you want and when you plan to get it.

**"Destiny is not a matter of Chance -
it is a matter of Choice"**

Make Your Goal Attainable

Your goals need to be realistic and achievable – break the major goals down to a series of smaller goals. It was once said

**"The best way to eat an
Elephant
is
one bite at a time"**

3. Develop a Plan

Once you have established what you want and set yourself a time frame for achieving it you need a plan for action. Your plan is simply your map of how you are going to arrive at your destination.

"Failing to Plan is Planning to Fail"

4. Don't be afraid to go for it!

Many people have low self-esteem and simply feel they are unworthy of a better position in life. These people will never realize their full potential.

In the World Today

- 3% of people make things happen
- 10% of people expect things to happen
- 60% of people just watch things happen
- 27% of people don't know what happened

Which category do you belong to?

5. Believe in Yourself

Visualize yourself doing what you want to do. Develop a 'can do' attitude.

Mix with positive people and high achievers. If you constantly mix with negative people or underachievers you will find some of it rubs off and you will adopt some of their negative attitude.

Mix with positive people as they will reassure you along the way.

Don't let people pull you down

- FACT:** If you put one crab in a bucket it will always climb out
FACT: But if you put two crabs in a bucket neither of them will climb out
The reason being that one keeps pulling the other one back down.

The Entrepreneur

An Entrepreneur is a successful business owner who understands little difference between obstacle and opportunity and is able to turn both to their advantage.

The Recipe for Success should include:

Vision

You need to project ahead and envisage where the business is going and anticipate changes in the market place. You need to step out of the present and see beyond, so the future takes care of itself.

Hard Work

All successful business people have to pay their dues in terms of long hours and hard work. You have to make compromises in your personal and social life in order to reach your goals. All of which will often be referred to as how Lucky you are.

“Luck”!!!

Luck is the point where **Opportunity** meets **Preparation**.

“I am constantly amazed to see the harder I work the luckier I become”

Good Leadership

You need excellent interpersonal skills plus are able to inspire and motivate others.
Lead by example – **Do as I do**

Being Able To Take Risks

Without being a gambler, you need to take calculated risks. Without this ability to take a leap into the unknown there would be no progress.

Being Resourceful

We are all in the business of problem solving.
Don't stand around waiting for the problems all to go away because often when all the problems stop so has the business.

“Think outside the box”

Ability To Bounce Back

You will need staying power, determination and persistence to make a comeback – after a devastating disappointment or financial loss.

Keeping Your Finger On The Pulse

Monitor your financial position.
Keep your records up to date.
Keep an eye on the bottom line.

“Knowledge is Power”

Happiness And Health

You will need high energy levels, good health and stamina to run your own business. Separate your business from your family time.

“Find a peaceful place of your own to relax and recharge”

Self-Motivation

You must want to be a winner to succeed. All the books, seminars and motivational lectures in the world cannot get you to the finishing line without the need for achievement that comes from within.

Belief In Yourself

You have to have faith in yourself and your abilities. You need to develop a sense of self-confidence and trust your intuition.

Time Management

Never allow a document to pass your hand more than twice – once to receive it, the next to process it.

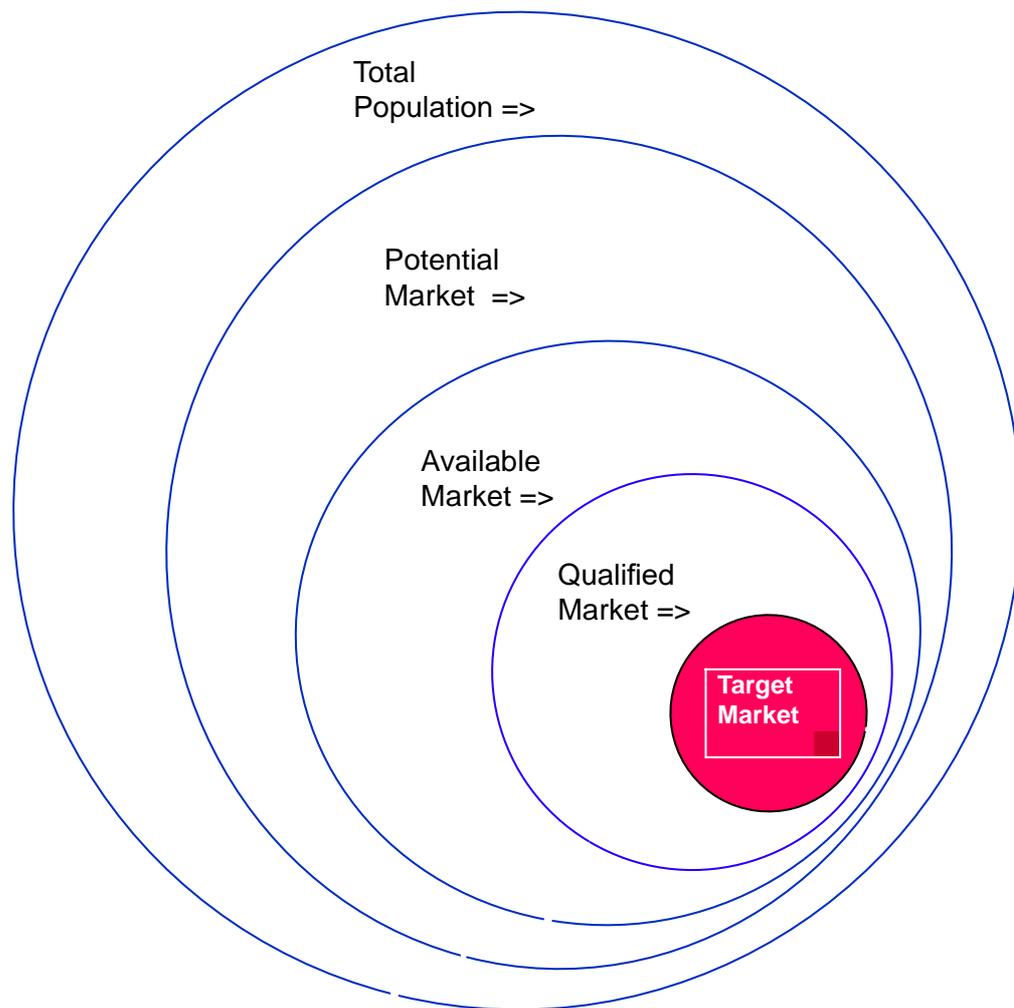
Use the 4 Ds to streamline paper work:

1. Do it
2. Dump it
3. Diaries it
4. Delegate it

“Success depends on Attitude”

ANNEX 10: TARGET MARKET DIAGRAM

Determining your target market



ANNEX 11: MARKET VALIDATION

Far more important than business planning

Makes business planning easy

What?

- Used to validate the initial idea
- Helps determine if there is a real need
- Provides input on how to market the product.
- Helps to reduce risks at the earliest stage
- Helps to identify specific features of importance
- Provides confidence to allow you to move to planning the build-up of your business

Why?

- Helps companies make better business decisions about development, launch and marketing of new products
- Understand customer's "pain" or need
 - Which are important?
 - Are the needs being met by current products?
- Get a pulse on what's happening and trends in the market the competitors
- Helps adapt the product/service to real customer needs
- Provides a vehicle to engage potential stakeholders

Types of Research

- Primary research - Primary data is original information gathered for a specific purpose
 - Critical for market validation
 - Bottom Up
 - Far more valuable to startup companies than secondary research.
- Secondary research –Already exists and has been collected
 - Faster and less expensive
 - Helps identify or better define the problem
 - Helps to interpret primary data more insightfully
 - Sets up the primary interview questions
 - Top Down

Collecting Data

- Telephone surveys, mail surveys, personal interviews (best) or group surveys
- Ask questions or observe
 - Close-end questions and
 - Open-ended questions. Respondents can answer in their own words
- Questionnaire design important

ANNEX 12: MARKETING TOOLS

Getting to know your market

Customers

- *Identifying your Customers*
- *Knowing their Expectations*

Competitors

- *Identifying your Competitors*
- *Knowing their Operations*

Marketing Tools

Traditional P's

- Product / Customer
- Price / Cost
- Place / Convenience
- Promotion / Communication

Service P's

- People / Caring
- Physical Surroundings / Confirmation
- Process / Coordinated

SWOT Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats

Promoting your business using the four promotional tools:

- Advertising
- Personal Selling
- Sales Promotion
- Publicity

ANNEX 13: MARKETING PLAN KEY POINTS

Executive Summary
Situation Analysis
Customer Analysis
Marketing Strategy
Control
Finances
Appendix

ANNEX 14: SOLUTION TO SMALL CHANGES CAN MAKE A GREAT DIFFERENCE

Solution to Small Changes can make a Great Difference			
	Given		Result
Sales	1 000 000	+ 5%	1 050 000
Cost of Sales	700 000	- 5%	698 250
Gross Profit	300 000		351 750
Overhead	200 000	- 5%	190 000
Net Profit	100 000		161 750
% Increase		$(161\,750 - 100\,000) \times 0,001$	61,75

ANNEX 15: PLANNING AND THE BUSINESS PLANNING PROCESS

If we have a plan, we have a much clearer idea of where we are headed and how we are going to get there.

“We don’t plan to fail we just fail to plan”

Types of planning include:

1. Strategic
<ul style="list-style-type: none">• This is the broad direction part of the plan• Any setting of long-term goals may be considered strategic planning• In military terms this is the “winning the war” part of planning• In a business plan this appears to be the easy bit but is often done superficially
2. Tactical
<ul style="list-style-type: none">• This is the “how to” part of the plan.• Once our general direction is set in the strategic part of the plan then we set about putting in place the detail of what we have to do to make it happen.• In military terms this the “winning battle” part of planning• In a business plan this comprises most of the volume and work• This part of any plan is almost useless if the first part is not properly done
3. Contingency
<ul style="list-style-type: none">• Sometimes called “scenario planning”• Looking at circumstances that might happen and creating responses• The value of this approach is in thinking through responses when the pressure is not there and panic is not impinging on your thought processes

Planning is:

- for future thinking
- controlling the future
- integrated decision making: a formalized procedure to produce an articulated result, in the form of an integrated system of decisions

In the end business planning is ongoing, not a static document but a way of continuing to work on your business and adapt it to customer needs as well as refine your business model (your way of making money).

The Business Planning Process

1. Start by looking to the life plans and goals of the owners of this business.
 - Until this is clear then the business plan can never make sense because we haven’t been able to define the context that the business must exist in.

- If there is any lack of congruity between the real personal goals of the owner and the specifics of the business plan there will be tension and stress and ultimately the potential of business failure.
2. Based on the above clearly stated goals we can create a broad direction for the business. This is the strategic direction or *Vision* that drives the business.
 3. When we have clarity about the direction of the business then we can start creating specific short term, achievable milestones for the business.
 - These milestones are called Objectives.
 - Objectives should be SMART (Specific, Measurable, Achievable, Relevant, Time-bound)
 4. What remains is to put in place some way of translating this business plan into daily priority, and setting a consistent mechanism for updating the plan.

Source: *Business Planning for Growth Companies*, Brian Waling & Victoria University of Technology, 1999

ANNEX 16: NEEDS AND WANTS

Explanatory Notes

Something is missing in most of our lives. For many of us, part of what's missing is often a sense of purpose, values, or worthwhile standards against which our lives can be measured.

What's also missing for many of us is a sense of belonging, or relationship. People suffer in isolation from each other.

In a world without purpose, without meaningful values, what have we to share but our emptiness; the needy fragments of our superficial lives?

As a result, most of us scramble about hungrily, seeking distraction, in television, poker machines, or in alcohol or other drugs.

And most of all, we seek THINGS. Things to wear and things to do. Things to fill the emptiness. Things to shore up the eroding sense of self. Things to which we can attach meaning, significance, life.

(Abridged and modified from 'The E Myth, by Michael Gerber)

So many die with their music still in them. I have spent my days stringing and unstringing my instrument, while the song I came to sing remains unsung.----Rabindranath Tagore

So: What is the main driving force in my life at the moment??

Is it:

- Survival/Security
- Recognition/Acknowledgement
- Achievement
- Freedom
- Love
- Fun/Pleasure
- A sense of purpose
- Other

The philosopher Nietzsche believed that if we know *what* it is we want, we can probably manage the *'how'*.

Freudian psychology is based upon the view that the main human drive is for 'pleasure.' Adler talked of the term... "striving for superiority"; Maslow's view is that there is a hierarchy of needs; Glasser lists 5 human needs (not a hierarchy); while Viktor Frankl is of the view that the primary human motivation is the search for *meaning* or *purpose* in life. Frankl suggests that perhaps the important question is not: "What do I want, or expect from life?" but "What does life expect from me"?

*Until we make peace with who we **ARE**, we will never be happy with what we **HAVE**.*

In our model, all control comes from the inside. We do not have a predestined path to follow and there are always choices. There is also a big difference between **Need** and **Want**.

In our model everyone has the same five basic Needs and everything we want is to meet a Need. The needs, which are non-hierarchical are:

- **FUN**
- **POWER / RECOGNITION**
- **FREEDOM / CHOICE**
- **LOVE / BELONGING**
- **SURVIVAL** (*The most basic*)

As humans, we have many wants, and these wants are all associated with the five basic needs. All we can do is behave, and our behavior is always an attempt to meet those needs at any given time.

A person with a physical disability may have a want that will meet a specific need. For example, a person who uses an electric wheelchair may want the chair to be charged nightly. The reason may be that this will meet the need for **Freedom** and perhaps **Survival**.

If one or more of the five basic needs are not being met, then it is very difficult to operate effectively, and this may influence people to choose inappropriate behavior.

Next time you hear someone say, "I want....." ponder on whether the person is talking about a '**Need**' or a '**Want**'.

Taking the first step helps bridge the gulf between our dreams and accomplishments
Unknown

The fingers that meet your Needs

The THUMB is for FUN. It means things are good when pushed up.

The INDEX finger is for POWER. When you point it at yourself you know you are in control.

The MIDDLE finger is for FREEDOM. (You have the choice to be rude or not!)

The RING finger is for LOVE & BELONGING. You wear a ring when you have met the one for you.



The LITTLE Finger is for SURVIVAL. It is like a tree that will grow in a healthy environment.



Exercises

Exercise N1: What's missing in my life?

Write down 3 things missing in your life

- 1.
- 2.
- 3.

Exercise N2: My Needs and Wants

List some of the things that you **Want** and identify which **Needs** will be met.

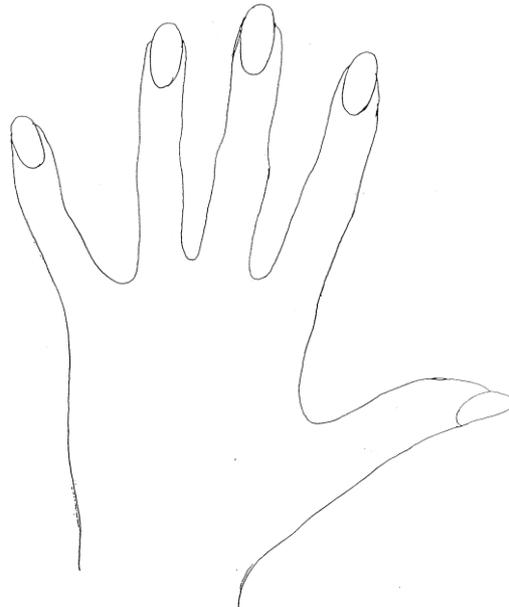
Example

The Want	The Need(s)
Money =>	Fun, Power, Freedom, Survival
Friends =>	Fun, Love & Belonging
Chocolate =>	Fun, Survival

The following two exercises are geared to reinforce the concepts of Needs and Wants (as defined in this model).

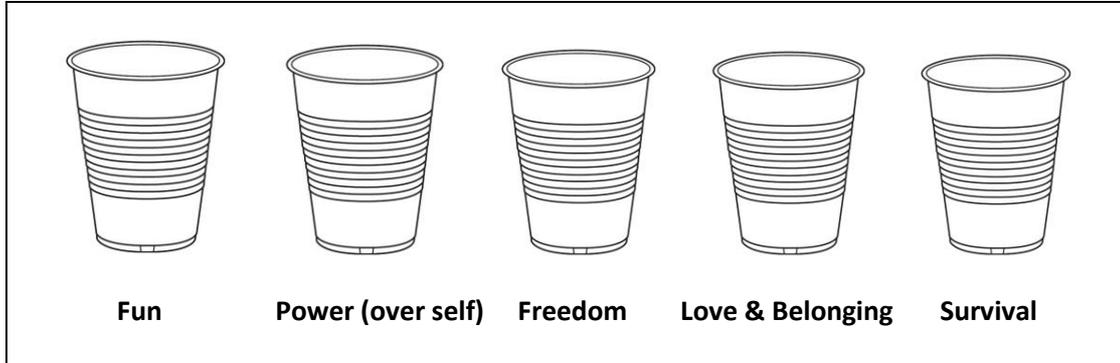
Exercise N3: Needy fingers

Name the fingers, which correspond to each of the five Needs.



Exercise N4: Fill up your cup

Fill each cup to the level which is an appropriate indication of the extent to which your needs are being met at the moment.



The exercise helps people identify what is complete or is missing in their lives and they may or may not want to share the results.

ANNEX 17: VALUES AND BELIEFS

Explanatory Notes for Beliefs

Have you ever stopped to wonder what drives you? Why you hold certain beliefs about yourself and the world around you? What makes you believe in something—often when there is no logical reason? Why do our beliefs have such a profound impact on our self-confidence, self-concept, our abilities and our achievements?

Our beliefs are part of who we are; they help form our character and show what we stand for—yet often we can't explain why we believe what we do. Many beliefs are rooted in upbringing. During childhood, parents, family, teachers and peers have great influence over us. We accept beliefs taught to us by others.

A strongly held faith or belief about something will bring it into our reality. Our thoughts and beliefs control our actions, and those in turn bring people and events into our lives that can direct our dreams and desires.

Do your beliefs support you or limit you? Rigid or limited thinking leads to stagnation and creates poor communication and understanding. It hinders progress in achieving goals or enjoying satisfying relationships.

We are told to believe in ourselves, but until we know what we believe in, how can we believe in ourselves? Defining and understanding your belief system is basic to establishing your intentional identity and potential.

Since your potential also depends on the pictures you form in your mind about your abilities, (what you see, you believe; and what you believe, you see) understanding beliefs helps you paint clearer pictures (blueprints) for a more rewarding life.

Ask yourself honestly if ALL your beliefs still serve you. Are they valid in your life today? Are they in keeping with your goals? Could you change your attitudes if necessary?

A firmly rooted belief system helps you build your dreams, make tough decisions and get you through challenging times. You will begin to understand what you stand for, what you need to change, and what you need to discard to move forward with confidence and clarity.

Believing in who you are, and your abilities frees you to pursue goals and dreams without reservation and drives you forward with confidence, independence, autonomy, and direction. Your thoughts and beliefs become your reality, so choose wisely. Living in harmony with your beliefs is the secret to accomplishing great things.

Explore 'Beliefs' (*Exercise B1: Your Beliefs* and *Exercise B3: Do my beliefs help me*) i.e. not just identifying our major beliefs, but also exploring the topic: what things would you like to believe about yourself; what stops you from doing this; or what stops you from **acting** as if these beliefs were true?

Exercises for Beliefs

Exercise B1: Your Beliefs

Write down one thing you believe about each of the following:

LOVE

MONEY

WORK

LIFE

AGEING

HAPPINESS

GUILT

MY PLACE IN THE WORLD

Where do you think most of those beliefs came from? Parents, family, friends, peers, church, school, media, the medical profession, etc.?

Write down one thing you believe about yourself.

Write down one thing you would like to believe about yourself.

What do you think stops you?

How would it be if this did NOT stop you?

Exercise B2: Ten popular irrational beliefs

This can be used as a hand out or if there is time, as an exercise following the one above.

These beliefs are very common but do not help people develop personally.

1. I must be loved, liked, or approved, by every significant person I meet.
2. I must be completely competent, make no mistakes, and achieve in every possible way, if I am to be worthwhile.
3. Some people are bad, wicked, or evil, and they should be blamed or punished for this.
4. It is dreadful when things aren't the way I would like them to be.
5. Human unhappiness, including mine, is caused by factors outside my control, so there is little I can do about it.

6. If something might be dangerous, unpleasant, or frightening, I should worry about it a great deal.
7. It's easier to put off something that is difficult, rather than face up to it.
8. I need someone stronger than myself to depend on.
9. My problem(s) were caused by event(s) in my past and that's why I have these problems now.
10. I should be very upset by other people's problems and difficulties.

Re-write these sentences in a way that reflects your own beliefs and values - give example to clarify.

Exercise B3: Do my beliefs help me?

Write down 3 of your BELIEFS that you have found useful. In what way(s) are they useful to you?

- 1.
- 2.
- 3.

Now write down 3 of your BELIEFS that are not helpful to you.

- 1.
- 2.
- 3.

Why do you retain these beliefs?

Would you be prepared to change any of these beliefs?

Which ones and why?

Why did these beliefs become part of your belief system?

WALK THE TALK

**I would rather see a sermon, than hear one any day,
I'd rather that you walk with me, than merely show the way;
And the lectures you deliver, might be very wise and true,
But I think I'll get my lesson by observing what you do;
Because I might misunderstand you and all this high advice you give,
But there's no misunderstanding how you act and how you live.**

Unknown

Explanatory Notes for Values

“Clarifying your values is the first essential step towards a richer, fuller, more productive life”.

Carl Rogers

Values have been described as going one step beyond beliefs. Values sort beliefs into needs, wants and guidelines, which define the importance of these beliefs. Beliefs generally represent *what you think is true*, while values represent things *the way you want them to be*.

Why Do We Need Values?

Values contribute to the image we present to others. They also help us to determine an image of others. If staff throughout an organization have widely differing values, this is likely to have negative repercussions on teamwork and ultimately, on the performance of the organization as a whole. If an organization does not have a clearly stated set of values, it is unlikely to find staff that can work together harmoniously.

Every decision we make in life is a reflection of what is important to us. Values reflect who we are and why we do what we do. Our values change as we change. When we have a conflict of values this may bring personal and/or career dissatisfaction.

Through our senses (seeing, hearing, smelling, touching and tasting) we take in information. Upon entering the brain, it is diagnosed, labeled and then given a place within our storage system, like a disk in a computer. In other words, our values act as a filter for new information. According to our value systems, we usually label this information ‘good’, ‘bad’, or describe it in other ways.

If we do not know what our values are, or what is important to us, it becomes very difficult to discover what we really want in life.

Exercises for Values

Exercise V1: Your 5 most important values

List some common values; e.g. financial security, love of a partner, love of family, honesty, truth, compassion, justice, liberty, peace of mind. Make a list of your five most important values:

- 1.
- 2.
- 3.
- 4.
- 5.

If you were only allowed three values, which two would you leave out?

- 1.
- 2.
- 3.

If you were only allowed one value, what would it be?

- 1.

Exercise V2: Two tough questions

Use these questions to the group to illustrate how our beliefs and values influence judgments about people.

Question 1: If you knew a woman who was pregnant who had 8 kids already, three who were deaf, two who were blind, one mentally retarded, and she was pregnant and had syphilis; would you recommend that she have an abortion?

Question 2: It is time to elect a new world leader, and your vote counts. Here are the facts about the three leading candidates:

Candidate A: Associates with crooked politicians and consults with astrologists. He has two mistresses. He also chain smokes and drinks 8 to 10 martinis a day.

Candidate B: He was kicked out of office twice, sleeps until noon, used opium in college and drinks a quart of whisky every evening.

Candidate C: He is a decorated war hero. He's a vegetarian, doesn't smoke, drinks an occasional beer and hasn't had any extramarital affairs.

Which of these candidates would be your choice?

Answers to Questions:

Candidate A is Franklin D. Roosevelt

Candidate B is Winston Churchill

Candidate C is Adolf Hitler.

And by the way: Answer to the abortion question - if you said yes, you just killed Beethoven

Exercise V3: Values Auction

The Facilitator auctions off the values that are listed on the board - that were developed earlier.

This exercise helps people prioritize their values and appreciate which values are important to other people.

You have \$10 (Facilitator decides how much) to spend at a Values Auction.

You have to decide which values are most important to you and how much you are prepared to spend on them. Remember - if someone bids more than you, you lose your money.

Value bid for	Cost
• -----	\$.....
• -----	\$.....
• -----	\$.....
Total:	\$.....

Exercise V4: Crystal and Marlowe

Crystal and **Marlowe** loved each other very much but lived in separate countries, isolated from each other by 2000 kilometers of radioactive wasteland. After they had not seen each other for a long time, Crystal decided that she had to see Marlowe because she missed him so much. She went around asking everyone if they had a spaceship that could take her to where Marlowe lived.

First she met **Freda**, who said she was too busy and couldn't help. The next person she met was **Duran**, a pilot, who said he could take her if agreed to sleep with him first. She didn't really want to do that, so she asked her **mother** for advice. Her mother told her it was really Crystal's decision and she would have to make up her own mind. Since Crystal didn't have anyone else to ask, she went back to Duran and agreed to sleep with him.

The next day Duran kept his part of the bargain and flew her to where Marlowe was living. When Crystal arrived, she threw herself into Marlowe's arms and told him what she had done in order to see him. Marlowe was angry with her and slapped her and walked away. **Zander** happened to be working nearby and saw what happened. He came over and hit Marlowe, who overbalanced and fell off the space station and into a pit of radioactive sewage. Crystal watched him sinking, with a half-smile on her face.

List the characters, in order of their 'badness', from the 'worst' to the 'least bad'.

- | | | | |
|---|-------|---|-------|
| 1 | ----- | 2 | ----- |
| 3 | ----- | 4 | ----- |
| 5 | ----- | 6 | ----- |

If you were Zander, how would you have responded to the argument between Crystal and Marlowe? Should Mother have offered Crystal more support? Why/why not? Do you see Crystal as a 'victim of circumstance' or a manipulator? Why? Was Marlowe justified in hitting Crystal? Does your answer mean that violence is never justified? Sometimes justified? Did you give Duran credit for keeping his part of the bargain?

Exercise V5: Shelters

Some leading astronomers believe that the Earth is on a collision course with a huge asteroid. According to their calculations, more than two thirds of the Earth's land mass will be destroyed when the asteroid hits.

Underground shelters have been built in a remote area of Southern Peru (one of the few places believed to be safe) to house and protect people for six months - the time estimated for the resulting fires and fallout to have settled down enough to enable them to re-establish a human civilization.

A group of prominent elder citizens has determined which people should be given access to particular shelters. For one of those shelters 10 people have been selected. Due to a decade of unusual weather patterns, the Earth is now faced with the possibility of severe food shortages. At the time of the estimated collision, there may not be enough food to sustain the 10 people for 6 months in this shelter.

In small groups, your task is to rank the 10 people in respect of priority for admission to the shelter, should there be a food shortage at the time of the impact (1 = high priority and 10 = low priority, that is number 10 would be the first person to be struck off the list if the food shortage did eventuate). Start by making your own individual rankings and then negotiate with other members in your group to try to reach consensus. Discuss the values and beliefs behind your decisions.

DESCRIPTION	YOUR RANK
Male computer programmer, 32 years, Communist	()
His wife, three months pregnant, 30 years	()
A four-year-old orphaned girl	()
Male laborer, 40 years	()
Female model, 19 years	()
Male homosexual art student, 25 years	()
Female doctor, 40 years, unable to have children	()
School teacher, male, 42, divorced, on grounds of cruelty	()
Female prostitute aged 25	()
Eighty-year-old man in a wheelchair	()

Exercise V6: What sort of person am I?

This exercise helps people clarify their values and beliefs and what is important to them. Also, the questions can be used by the Facilitator at any time to engage participants in discussion.

- What do I really care about?
- What brings a tear to my eye?
- What quickens my pulse?
- What helps me to smile?
- What helps me to feel good about myself?
- (How can I help others to do so?)
- What injustice might influence me to want to help others?
- What gets me thinking "If only...."
- What do I remember fondly?
- What do I remember with sadness?
- How would I help a sad kid smile?
- What would I like to do (if anything) for people who are underprivileged?

- What are my plans, if any, for making this country, or the world, into a better place to live?
- What is one of my expectations from life?
- What is one of my fears?
- What things or things could I not live without?
- Finish this sentence: "In my wildest dreams....."

Who is he?

A man of course

Yes, but what does he do?

He lives and is a man.

Oh quiet! But he must work. He must have a job of some sort.

Why?

Because obviously he isn't one of the leisured classes.

I don't know. He has lots of leisure. And he makes beautiful chairs.

There you are then. He's a cabinet maker.

No, no!

But you said so.

What did I say?

That he made chairs and was a joiner and a carpenter.

I said he made chairs, but I did not say he was a carpenter.

All right then he's just an amateur.

Perhaps! Would you say a thrush was a professional flautist, or just an amateur?

I'd say it was just a bird.

And I say he is just a man.

All right! You always did quibble

(DH Lawrence)

ANNEX 18: SELF-ESTEEM AND SELF-CONFIDENCE

Explanatory Notes

We suggest that Self-Esteem (however it is defined) contains some, or all of the following qualities:

- A sense of security, or 'connectedness'
- A sense of identity, or a self-concept
- A sense of belonging
- A sense of purpose
- A sense of personal competence, or resilience
- Dignity
- Pride
- An ability to accept responsibility for one's behavior

Developing the characteristics of self-esteem early in life is important because a person's self-esteem determines, to a great degree, how she will act and learn.

People who possess high self-esteem are usually eager to learn, they get along well with others, they enjoy new challenges and they are highly motivated. People with high self-esteem are more likely to become high achievers who enjoy success.

People who lack self-esteem generally do not learn as well. They are more likely to feel inadequate and to compensate for such feelings by criticizing the achievements of others. They are likely to become concerned about what others may think and lose motivation. When problems arise, they tend to blame others, and to find excuses for themselves.

People who lack confidence in themselves believe they are going to fail anyway, so they rarely put forward the effort required to succeed. After repeated failures, they truly believe they cannot succeed. As a result, their levels of self-esteem and motivation drop even lower.

It is important to remember that our levels of self-esteem are not static and that they can change dramatically throughout our lives, depending on circumstances.

We encourage Participants to **see themselves in terms of the person they are**, rather than judge themselves by external factors such as perceived achievement, appearance, material wealth, or status.

If we do not **like**, or **respect** ourselves, it is unlikely that we will be able to like, or to respect other people, their values, or their property.

One of the obstacles to attaining high self-esteem is the tendency to judge ourselves and other people. It is one thing to dislike certain colors, foods, sensations, or other people. But when we reject parts of ourselves, we greatly damage the psychological structures that keep us alive.

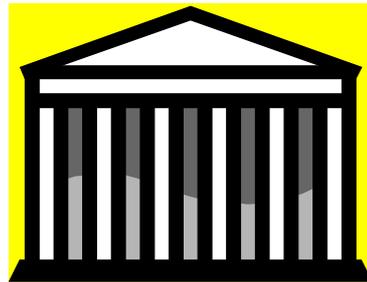
Self-responsibility is indispensable to high self-esteem. Avoiding self-responsibility leaves us helpless. We give power to everyone except ourselves. When we are frustrated, we tend to

look for someone to blame.....the Government, our boss, our colleagues, our parents, our star signs, etc.

The fundamental point about self-esteem is that it is self-generated and does not come from other people. To quote Nathaniel Branden, the essence of high self-esteem is not related to our achievements, but *“to those internally generated practices which make those achievements possible.”*

Six pillars of self-esteem

(Hand out)



In his book *'Six Pillars of Self-Esteem'*, Nathaniel Branden identifies six principles for developing self-esteem:

- Living Consciously (Being aware)
- Self-Acceptance
- Self-Responsibility
- Self-Assertiveness
- Living Purposefully
- Personal Integrity

According to Branden, these six principles underpin the basis of the person we are.

The Practice of Living Consciously (Being Aware)

Living consciously is a state of being mentally active, rather than passive. It is the ability to look at the world through fresh eyes. Living consciously is seeking to be aware of everything that bears on our interests, actions, values, purposes and goals. It is the willingness to confront facts, pleasant or unpleasant. It is the desire to discover our mistakes and to correct them. It is the quest to keep expanding our awareness and understanding, both to the 'external' and to our 'internal' world. It is respect for reality. It is recognizing that being unable to accept reality is the root of much human misery

The Practice of Living Purposefully

Identifying our short-term and long-term goals and purposes and the actions needed to attain them (formulating an action plan); organizing behavior in the service of these goals; monitoring our actions to be sure we stay on track; paying attention to outcomes so as to recognize if and when we need to “go back to the drawing board.”

The Practice of Self-Responsibility

Realizing that we are the author of our choices and actions; that each one of us is responsible for our life and well-being and for the attainment of our goals; that if we need the co-operation of other people to achieve our goals, we must offer values in exchange, and that the question is not “Who’s to blame?” but “What needs to be done?” (*“What do I need to do?”*)

The Practice of Self-Assertiveness

Being authentic (honest) in our dealings with others; treating our values and persons with respect in social contexts; refusing to fake the reality of who we are, or what we want, in order to avoid disapproval; willingness to stand up for ourselves and our ideas in appropriate ways in appropriate contexts. Honoring our wants, needs and values, and seeking appropriate ways to express this in reality.

The Practice of Personal Integrity

Living with congruence between what we know, what we profess, and what we do; telling the truth, honoring our commitments, exemplifying in action the values we profess to admire (“walking the talk”).

The Practice of Self-Acceptance

The willingness to own, experience, and take responsibility for our thoughts, feelings and actions, without evasion, denial, or disowning. Giving oneself permission to think one’s own thoughts, experience one’s emotions and look at one’s actions, without necessarily liking, endorsing, or condoning them.

Summarized from ‘The Art of Living Consciously’, by Nathaniel Branden

Name your 'demon'

(Hand out)



1. **Parent 'tapes'**. (The messages that keep playing inside you and most undermine your ability to enjoy life.)
2. **Guilt complex**. Do you think you are self-punishing? Do you hate yourself for your mistakes? Do you re-hash your regrets?
3. **Perfectionism**. Do you attach your whole value to what you 'do' in life? Do you believe you ought to be perfect? Is it important for you to please and impress other people? Do you get discouraged by 'failure'?
4. **Inferiority complex**. Do you feel inferior to others to whom you compare yourself? How do you measure your own worth? Do you believe that you are good enough to do the things you want to do?
5. **All-or-nothing thinking**. (e.g. If you tell the truth 100 times and lie once, would you call yourself a liar?)
6. **Irrational assumptions**. Do you believe that we all have the ability to be happy? What do you think stops some people from being happy?

The Critic

(Hand out)



The Critic is a negative inner voice that attacks and judges us. Everyone has a critical inner voice, but people with low self-esteem tend to have a more vicious and vocal critic.

If we allow him to, the Critic will:

- Blame us for things that go wrong.
- Compare us to others (their achievements and abilities) and find us wanting.
- Set impossible standards of perfection and then beat us up for the smallest mistake.
- Keep an album of our mistakes.
- Describe how we **ought** to live, and tell us that we are bad if we don't comply.
- Insist we must be the best, and if we aren't the best, we are nothing.
- Call us names, such as STUPID, INCOMPETENT, UGLY, SELFISH, WEAK, and try to convince us they are true.
- Reads our friends' minds, and try to convince us that they are bored, turned off, disappointed, or disgusted by us.
- Exaggerate our weaknesses by insisting that we **always** say stupid things, or never finish anything on time.
- Undermine our self-worth every day of our life.
- Weave himself into the fabric of our thoughts
- Always seem reasonable and justified.
- Use our 'shoulds' and 'oughts' against us.
- Try to maintain his power over us.

The Critic's Many Forms

There are many selves in each of us. Examples include the Pleaser, the Rule-maker, the Pusher, the Perfectionist, the Rational Mind, the Responsible Parent, the Critic, the Playful Child, the Vulnerable Child, the Higher Self, the Being self. There are power selves, child selves, spiritual selves, parental selves, and instinctual selves.

The more you explore yourself, the more voices you will find. What you will discover is that each part of you has a purpose. Some parts of you may not have been allowed to express themselves much in your life, or at all, so they may be angry with you and may be sabotaging you in some way.

Other parts, that you may think are really good and useful, may be locking you into unfulfilling ways of being. For example, if the part of you who is always pleasing others and being super helpful is primary in you, you may not be getting any of your own needs met.

And if you're always giving to others, you never let others have a chance to give to you, so you automatically push them into taking from you and even being selfish. Each part of you, when given too much sway, can be negative and destructive.

Source: Dr Hal and Sidra Stone ('Your Inner Critic' tape)

Time Somebody Told Me

Time somebody told me
That I am lovely, good and real
That my beauty could make hearts stand still.

It's time somebody told me
That my love is so complete
That my mind is quick and full of wit
That my loving is just too good to quit.
Time somebody told me.

Time somebody told me
How much they want, love and need me
How much my spirit helps set them free
How my eyes shine full of the white light
How good it feels just to hold me tight.

Time somebody told me

So I had a talk with myself
Just me—nobody else

Cause it was

Time somebody told me.
Tillery Banks, from 'Hello To Me With Love'

(Hand out)

Affirmations - Important Points

Everyday in every way I'm getting better and better.
I have everything I need to enjoy my here and now.
Everything I need is already within me.
I love and appreciate myself just as I am.
I accept all feelings as part of me.
The more I love myself, the more I have to give others.
I am now attracting loving, satisfying relationships into my life.
I am relaxed and centered. I have plenty of time for everything.
I feel happy just being alive.
I give thanks for my life of health, happiness and self-expression.



1. Always affirm in the present tense, not the future. Rather than saying, "I will get a wonderful job", try saying "I now have a wonderful job." This is not lying to yourself but it is

acknowledging that everything is created first in the mind, before it can manifest in the physical.

2. Always phrase affirmations in the most positive way you can. Affirm what you **do** want, not what you **don't** want. Instead of saying, "I no longer oversleep", try saying, "I now wake on time and full of energy."
3. In general, the shorter the affirmation, the more effective.
4. Always choose affirmations that feel right for you. Bear in mind that you may feel emotional resistance to any affirmation when you first use it; especially one which is powerful for you. This may be because of fear of change and growth.
5. Try as much as possible to create a feeling of belief that your affirmations can be true. Temporarily (at least for a few moments) suspend your doubts and hesitations. Rather than saying an affirmation by rote, try to get the feeling that you really do have the power to create that reality (which in fact you do.)

Write one affirmation of your own in this space:

(Hand out)

Am I growing, or stagnating in a self-created rut?

Every six months or so, check on your personal growth by asking yourself questions like these:

- ❖ Have I come up with any new conclusions about myself, or developed new understanding, or more clearly defined values?
- ❖ Am I devoting more time to thinking about the reason other people behave as they do? Have I stopped trying to change them? Am I working more on changing my approach, so that they respond differently to me?
- ❖ Am I better at controlling (choosing?) my emotions, temper or moodiness? Am I better disciplined, stronger?
- ❖ Have I become more assertive - better able to express my feelings and needs, without being aggressive? Can I handle other people's difficult behavior better?
- ❖ Am I better organized - managing my time better, so that I can achieve more, with less stress?

- ❖ Have I made progress towards overcoming a fear? Have I developed any new skills, or at least gained more confidence?
- ❖ Am I taking more responsibility for my behavior? Have I stopped playing victim, blaming others for my problems?
- ❖ Am I making more independent decisions? Am I better able to solve problems without help, or at least thinking through more, before asking for advice?
- ❖ Am I balancing my life better to have more fun? Am I taking myself less seriously, better able to laugh things off? Am I developing a more positive attitude?
- ❖ Am I being myself more, or am I still hiding behind an act?

(Hand out)

20 ways to enhance your self-esteem

- ✓ Take full responsibility for your actions.
- ✓ Stop blaming others. Try not to see yourself as a victim.
- ✓ Consciously generate positive thoughts and feelings.
- ✓ Associate with people who help you to feel good about yourself.
- ✓ Do as many as you can of the activities you love.
- ✓ Learn to accept yourself.
- ✓ Treat yourself as you would treat a close friend.
- ✓ Try not to change other people. Change your own attitudes.
- ✓ Stop feeling guilty. Guilty is a negative emotion.
- ✓ Learn from your mistakes. Don't regret them.
- ✓ Keep a diary of all your achievements, big and small.
- ✓ Invest time in your personal growth. Keep learning.
- ✓ Schedule time for yourself.
- ✓ Try not to compare yourself with other people.
- ✓ Always have something to look forward to.
- ✓ Express your feelings. Respect the feelings of others.
- ✓ Live with a sense of integrity. Be true to yourself.
- ✓ Be willing to laugh at yourself. Laughter is still the best medicine.
- ✓ Do something kind or thoughtful for another person.
- ✓ Live in the present. Try not to waste time regretting the past. Move on.

(Hand out)

Self Esteem Affects Perception of Others

PERSONS WITH HIGH SELF ESTEEM	PERSONS WITH LOW SELF ESTEEM
Are likely to think well of others.	Are likely to disapprove of others.
Expect to be accepted by others.	Expect to be rejected by others.
Evaluate their own performance more favorably than people with low self-esteem.	Evaluate their own performance less favorably than people with high self-esteem.
Perform well when being watched: not afraid of others' reactions.	Perform poorly when being watched: sensitive to possible negative reaction.
Work harder for people who demand high standards of performance.	Work harder for undemanding, less critical people.
Inclined to feel comfortable with others they view as superior in some way.	Feel threatened by people they view as superior in some way.
Are able to defend themselves against negative comments of others.	Have difficulty defending themselves against others' negative comments: more easily influenced.

The following exercises are designed to remind us that we are all in charge of our own 'pleasure cruiser' and that we are, ultimately, responsible for our own happiness.

Exercises

Exercise S1: In search of self

This can be addressed as a group discussion introduced by the Facilitator, or an individual exercise with a handout for participants to complete and then discuss as a group.

There is often conflict in a person's mind between our belief system (what we think is true) and our value system (the way we want things to be.) This can be important in terms of identity. For example:

THE PERSON WE THINK WE ARE



THE PERSON WE WANT TO BE



THE PERSON WE WANT OTHER PEOPLE TO THINK WE ARE

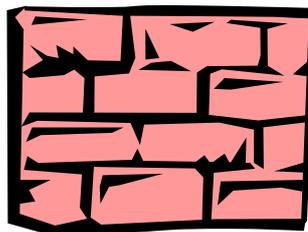
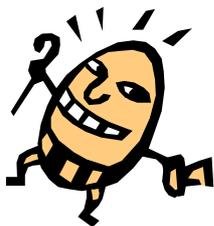


THE PERSON WE THINK OTHER PEOPLE THINK WE ARE



Which of the above do you believe has been the greatest focus in your life so far? Why do you think this has been so?

The dilemma between the person we think we are and the person we would like to be (our 'Ideal' Image) can result in a *Self Esteem Wall*.



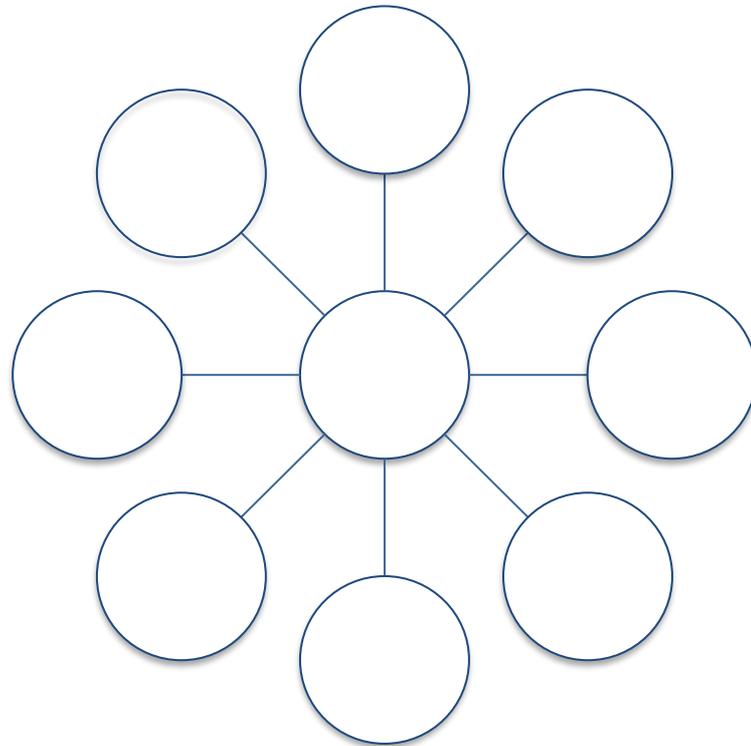
There are sometimes conflicting needs, for example we may want other people to perceive us in a particular way (gentle, kind, strong, wise etc.) and choose behaviors to match this image.

When a person hits this 'wall' she may either 'OPT OUT' (act in non-assertive way) or ACT OUT (choose inappropriate compensatory behavior such as aggression).

Exercise S3: The Ferris Wheel.

Put your name in the circle in the center of the wheel. Think of 8 different roles/functions you have in life and list them, one in each circle; e.g. father, mother, sister, brother, son,

daughter, uncle, friend, neighbor, worker, etc. Now give yourselves a rating out of 10 for your behavior in each of these roles. You are to do this, using any criteria you wish; e.g. your own value systems, ethics, etc.



When you have completed this part of the exercise, assess yourself as **a human being** (out of a possible 10 marks, again using your own criteria). Write this number in the middle circle next to your name. Now ask yourself 3 questions:

- * Is it possible to be a '10' in any, or all of those roles?
- * Do I want to be a 10?
- * If I do (and have not awarded myself a 10) what would I need to do differently to achieve it?

NB When you answered these 3 questions, did you assess yourself as a human being, or did you just assess your behavior? Is there a difference? There may or may not be a difference, noting we often want to be someone we are not and want others to view us in a particular way and judge ourselves accordingly.

Exercise S4: I am good at...

Make a list, starting with the words "I am....." or "I am good at...."

Exercise S5: How I put myself over to others.

Write down any words that describe the image you think you put over to other people. (Write quickly, without judging). In groups of three, take 10 minutes to share your list. Give each other feedback about whether the qualities listed fit in with their impression of you.

Exercise S6: I'm like or unlike you

In pairs, take it in turns to say one or two sentences beginning: "I'm like you, in that...."Then do the same, beginning each sentence: "I'm unlike you, in that....."

Exercise S7: Hidden personality

Introducing a Hidden Personality. Give yourself a few minutes to think about a positive aspect of your personality that people don't know about. Describe this hidden personality to the rest of the group.

Exercise S8: BAG

Make an inventory of good reasons for your self-esteem today. Write down what your BAG is.

- Blessings-----who you are and what you are thankful for
- Accomplishments-----what you have done so far of which you are proud
- Goals-----what your dreams and ambitions are

Exercise S9: Five years from now

- A. Describe a typical day in your life at the moment.
- B. Describe your ideal typical day five years from now.
- C. How is the 'Today You' similar to and different from the 'You Five Years from Now'?

Exercise S10: Self-Esteem Check-Up

Rate how much you believe each statement, from 0-10. **0** means you completely disbelieve it. **10** means you think it is completely true. Then total your scores.

	Rating
1. I am a worthwhile person.
2. I am as valuable a person as anyone else.
3. I have all the qualities I need to live well.
4. When I look into my eyes in the mirror I have a pleasant feeling.
5. I feel a 'success' overall.
6. I can laugh at myself.

**Mean score for adults is 43.*

Exercise S11: 'Stretching' our personal boundaries.

Allow yourself to experience the liberation of acting against your fears and painful inhibitions. Take the following activities in any order you wish, until you have completed the list.

- * An emotion I have never shared. I will share that emotion today.
- * A risk I have never taken. I will take that risk today.
- * An achievement I have never tried. Today I will try for that achievement.
- * A rejection I have never chanced. Today I will take that chance.
- * A need I have never admitted to anyone. Today I will admit that need.
- * An apology I have never been able to make (either to myself or to another person.) Today I will make that apology.
- * An affirmation I have never offered. Today I am going to offer that affirmation.
- * A secret I have never shared. Today I will share it with someone.
- * A hurt I have never revealed. Today I will reveal that hurt.
- * A love I have never expressed. Today I will tell someone "I love you."

Exercise S12: What do I believe about myself?

Which of these sentences describes you at the moment? Put a circle around the ones you believe to be true.

- | | | | |
|-----------------------------------|-----------------------|----------------------------------|----------------------|
| <i>I am happy</i> | <i>I am beautiful</i> | <i>I am a winner</i> | <i>I am a gossip</i> |
| <i>I am sick</i> | <i>I am dumb</i> | <i>I am fine</i> | <i>I am sad</i> |
| <i>I am good</i> | <i>I am lovable</i> | <i>I am a failure</i> | <i>I am a bore</i> |
| <i>I am a slow learner</i> | <i>I'm OK.</i> | <i>I am a loser</i> | <i>I am clumsy</i> |
| <i>I am an interesting person</i> | | <i>I am in charge of my life</i> | |

What are some things you would like to believe about yourself?

What stops you from believing they are true?

The following are examples of what some people believe. Put a circle around those that you believe to be true.

- | | |
|--|--|
| <i>It's fun to be alive</i> | <i>It's good to hear people say nice things about us</i> |
| <i>Most people are friendly</i> | <i>It's more fun to work together than alone</i> |
| <i>Having lots of money is important</i> | <i>We can do anything if we try</i> |

Exercise S13: The Big Boost

Participants work in pairs and recall a time when their self-esteem received a big boost e.g. when they passed an important exam, when their team won a grand final, or when they received a great compliment.

Each Participant completes the **'Certificate of Self-Esteem'** for the other person, and then publicly presents this to her. *(It is recommended that Facilitator(s) seek permission from all Participants to allow these to be read in public, as some people may prefer to exercise their right to privacy.)*

Describe a time at work, school or home when your self-esteem got a big boost.

When was it?

Where were you?

What happened?

How did you feel?

SELF-ESTEEM CERTIFICATE



This certificate of self-esteem is awarded to

It has been awarded on the occasion when

This led to a feeling of high self-esteem.

Congratulations!

Signed



Exercise S14: Inner Critic or Demon

What does your inner critic or demon look like?
How many of them do you have?
How do you deal with him/her/it/them?



Exercise: Identify at least 1 of your 'Inner Critics or demons'. Give him/her a name and draw a picture of what you think he/she looks like.

Discuss: "What are you going to do about it? How will you slay the critic or demon? How will this make life different?"

ANNEX 19: DECISION MAKING

Explanatory Notes

Some decisions we make every day:

To get up, to shower, to have breakfast, to go to work, to say good morning to our partner/flat mate, etc. Not all of these are conscious decisions. Some are examples of 'organized behavior', that is practiced behavior (something that has worked for us in the past). Driving a car is 'organized' behavior, as is getting something from one of our cupboards. When we go to bed at night, much of our behavior is 'automatic' or 'organized' because we have consistently chosen to carry out this behavior in a particular sequence.

Have you ever been put down/criticized for a decision you made? Think of a time when you had to make an important decision....how did you feel? What are some of the ways in which this showed? (For example did you get sweaty palms? Did your heart race? Did you get a headache? Did you pace up and down? etc.). Can you remember what were you thinking at the time?

How did you picture in your mind the results of the decision? Was your decision made on the basis of past experience, or future expectation?

Discussion points:

1. **Make a list of some of the decisions you have made recently**, both minor and major. List the needs that were met as a result of the decision you made. **Not to decide is to decide.**

2. **Informed decision-making.** What are some ways we can make an informed decision? What strategies can we use to reduce ineffective decision making? SAMRIC Simple, Achievable, Measurable, Realistic, ImmEDIATE, Consistent (with your values).
3. **Making decisions based on intuition.** Does this work for you? Some people use a combination of intuition and objective information.
4. **Decide to Decide.** What do you do when you have an idea? People respond in a number of ways. Life today is nothing more than a collection of the results of the choices/decisions we have made. Today's decisions are tomorrow's realities.
5. Focus on the end of the Program and what you would like to do as follow-up; e.g. what sort of work or work experience do you want? What sort of decisions might you need to make?
6. What factors might influence you in the decision-making process? Values? Feelings? Risk level? Family? Habits? Peers? Past experiences?



(Hand out)

One way to make a decision - the "rational" way

What's the problem/question?

Information Needed:

Option A	Option B	Option C
Positive Consequences	Positive Consequences	Positive Consequences
Negative Consequences	Negative Consequences	Negative Consequences

My Choice:

(Hand out)

An alternative way to make a decision

While the previously described method of making decisions works well for some people, it suggests that there is such a thing as a 'positive' and a 'negative' outcome. One of our biggest fears that keep us from moving ahead with our lives is our difficulty in making decisions. Sometimes this is based on fear. Some of us are like the proverbial donkey between two bales of hay - unable to decide which one we want, and, in the meantime, starving to death.

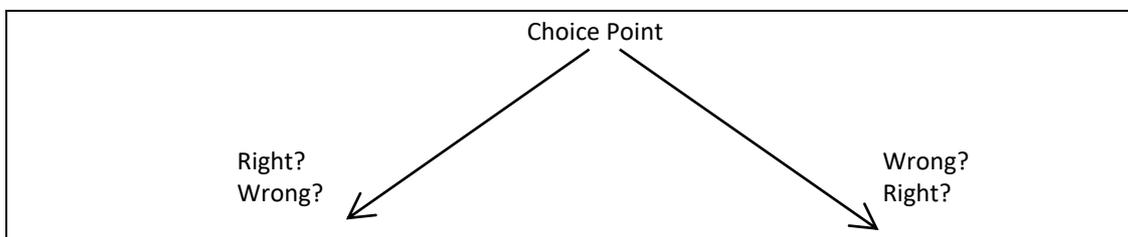
The problem may be that we have been taught, "Be careful. You might make the '**wrong**' decision!" Just the sound of that can strike terror into our hearts. We may be afraid that the '**wrong**' decision will deprive us of something - money, friends, lovers, status, or whatever the '**right**' decision is supposed to bring us.

Often it is our fear of 'failing' that immobilizes us. The inventor, Thomas Edison, was said to have tried some 300 times to invent the light bulb. When confronted with this fact, his reply was that he had not '**failed**'; he had merely found 300 ways to make a light bulb that didn't work.

We suggest that there is really nothing to lose, only something to gain, whatever choices you make in life. All we have to do to change our world is to change the way we think about it.

Most of have been taught to use the 'No-Win' decision-making model. This model looks something like this:

NO-WIN MODEL



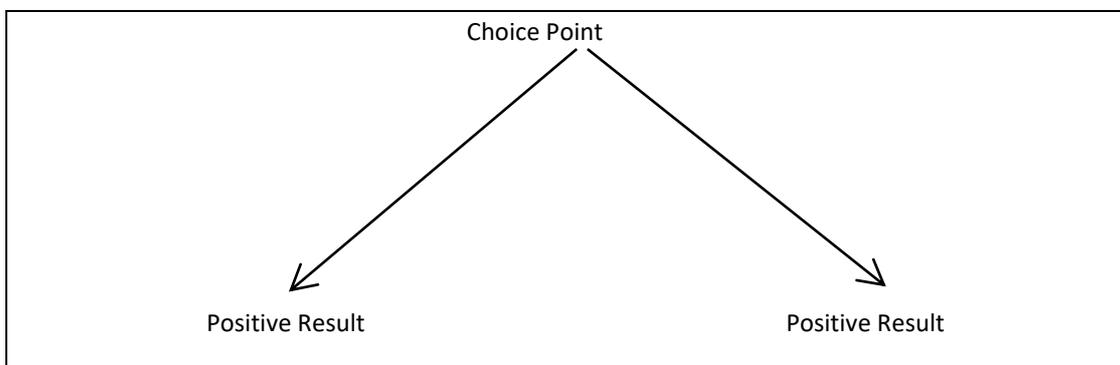
Your heart feels heavy about the choice you are about to make. You may feel paralyzed as you think about the consequences. You stand at the threshold of the decision, lamenting, "Should I do this or should I do that? What if it doesn't work out the way I plan? What if.....?" At this point you are probably beginning to feel stressed.

After the decision is made, the No-Win model tends to influence you to constantly re-assess the situation, hoping you didn't make a mistake. You waste valuable time and energy and may well make yourself miserable.

You gain relief if the outcome is as you hoped it would be - but only temporarily. As you breathe a sigh of relief, you may already be worrying that the situation might reverse itself and that it might *ultimately* prove to be the '**wrong**' decision. Furthermore, you may already be fearful about the next decision you are facing, because you will have to go through the whole agonizing process again. But there is another way.

In her book *'Feel the Fear And Do It Anyway'*, Susan Jeffers explores what she calls the **No-Lose** model. It looks like this:

NO-LOSE MODEL



Notice that what lies ahead are simply two paths - A and B, both of which are 'right', or positive. Each path has nothing but positives along the way. What are these positives? Opportunities to experience life in a new way, to find out who you are and who you really want to be, and what you really want to do in your life. Each path is strewn with opportunities...**despite the outcome!!!**

If you are standing at the No-Win Choice Point, your "What if..." self may well try to take over. But if you are standing at the No-Lose Choice Point, your "fearless" self has an opportunity to take control.

For example: "Isn't it fantastic! I've been offered a new job. If I take it, I'll have an opportunity to learn new ways of doing things, and to broaden my experience. If it doesn't work out, I know I'll handle it. If, for some reason it doesn't work out here, there will be other opportunities. It's an adventure, no matter which way I turn."

If you can accept that there are no 'right' or 'wrong' decisions when you use the No-Lose model, there are steps you can take to heighten your awareness about the alternatives that lie before you. Here are some suggestions.

(Hand out)

Before Making A Decision

1. **Focus immediately on the No-Lose model.** Affirm to yourself, "I can't lose- regardless of the outcome of the decision I made."
2. **Do your homework.** Talk to as many people as you can. Not only does talking to people glean valuable information, it clarifies your intention to have it happen! Intention is a powerful tool in creating something you want in your life.
3. **Establish your priorities.** (Identify or confirm what it is you **really** want). This can be quite difficult because many of us have been conditioned at an early age to do what other people want us to do. We may be out of touch with those things that really bring us satisfaction.

4. **Listen to your impulses.** For many people, intuition works more effectively than logic. Very often our subconscious minds send us messages as to which choice may be 'better' for us at a particular time. If you find intuition works for you, stick with it. If it doesn't work, do something different.

5. **Lighten up.** It may be that by choosing 'Option A' you get to taste the strawberries, while if you choose Option B you get to taste the raspberries. If you hate strawberries and raspberries, you can choose another path. Whatever happens as a result of your decision, you'll handle it.

After Making A Decision

1. **Throw away your picture.** We all create expectations of what we would like to happen after a decision is made. The picture in our mind's eye might have served a valuable function in helping to make the decision. But once the decision is made, let the picture go. Since we can't control the future, the picture may create unhappiness if it's not fulfilled.

2. **Accept total responsibility for your decisions.** This is a tough one! We all have a tendency to look around for someone to blame if things are not working out to our liking. When we take responsibility for our actions we usually become a lot less angry at the world. And at ourselves!

3. **Don't protect, correct.** It is important to commit ourselves to any decision we make and to give it all we have. But, if it isn't working, **change the behavior!** Many of us have so much invested in making the 'right' decision, that even if we find that we don't like the path we have chosen, we hang in there for dear life. It makes more sense to change what we are doing, rather than to invest more, when it's no longer paying off.

PONDER THIS: A decision is not a decision until it has been acted upon e.g. a telephone call made, or a commitment of some other kind undertaken. Until then, it is only an intention.

The 'Ripple' Effect

Many decisions have repercussions, in that our actions may have an effect on other people, just as a pebble that is thrown into a pond will have an effect on the surface of the water. We call this the 'Ripple Effect'.

Example of the 'Ripple' Effect:

Ten-year-old relative (Mick) was staying with his relatives in their family home. One day he decided to get up late. The family was inconvenienced because all the children had a bus to catch. Mick then hassled the other children in the car, on the way to meet the bus.

The atmosphere in the car became strained, which affected the other four passengers. When Mick got on the bus he snarled at the bus driver, who then reacted by becoming irritated at the other passengers' behavior.



When Mick arrived at school he and two other classmates (passengers on the bus) carried their behavior over into the classroom situation and upset the teacher, who then retaliated by over-reacting to other members of the class. Later in the day Mick came to realize how his behavior had affected not only people with whom he had interacted, but also, through a ripple effect, others who were indirectly involved.

Exercises

Exercise D1: Using the "no lose" method

- Ask participants to think about a major decision they have made in their lives/or think about a decision they are currently facing. Use the 'Rational' method to arrive at a decision. Then use the 'No Lose' method.
 - Using the No-Lose model, write down all the positive things that can happen by choosing another pathway - even if the outcome might not be what you picture.
 - Discuss some of the advantages of the 'No Lose' method e.g. it obviates the need to 'worry' about making the 'right' decision and also for self-blame if the 'wrong' decision is made.
- Look at some clues in your life that suggest you may be 'off-course' and begin making your game plan to correct the situation.
- Put signs up in your home and office that say: **SO WHAT! I'LL HANDLE IT!**

Exercise D2: Scenarios

Scenario 1: Budgeting => buying something you need or something you want or would like.

You are on a low income, which leaves very little for luxury items. Your friend/partner has a birthday shortly. They have hinted that they would like a particular book costing \$30. You can only spare \$15, without leaving yourself short on necessities. What are some of your options?

Scenario 2: Choosing behavior in a group situation.

You are in a supermarket and you see someone who appears to be shoplifting. What are your some of your behavioral choices? Which needs will you be meeting?

Scenario 3: Making a decision whether to challenge another person's inappropriate behavior.

You are in a supermarket queue for people buying eight items or fewer. You notice that the person who is being served has some 18 or 20 items in their trolley. The assistant is very young and appears to lack the assertiveness to confront the customer. The queue is quite long and you are in a hurry. What are some of your behavioral choices? Which needs will you be meeting?

Scenario 4: Making a decision whether to be assertive where your personal rights are concerned.

You are a new sales assistant in a supermarket. Your manager has been making what you consider to be unreasonable demands on you. You are not a member of union and don't know any other staff member well enough to confide in. What are your some of your behavioral choices? Which needs will you be meeting?

ANNEX 20: IDENTIFY PERSONAL LIFE GOALS

The Man Who Wanted A Job

A man who was ragged and who appeared to be down on his luck, came across a road boss and said, "Can you help me? I need work." The road boss said, "Fine. Take that large boulder over there and roll it up and down the hill. If you need work, that will meet your needs."

The man said, "You don't understand. What I really need is money." The boss replied, "Oh, if it's only money you need, here is fifty dollars. But you cannot spend it."

Again the man was perplexed. "You don't understand. What I really need is food, clothing and fuel, not just money." The boss replied, "If you are sure that is what you need, then spend the money for food, clothing and fuel. But do not eat the food, wear the clothing, or burn the fuel."

The man finally realized that what he really needed was a sense of security, peace and inner satisfaction. All totally invisible. All within the mind.

This story makes a number of points, the major one being that we often use the words **need** and **want** interchangeably. Glasser's 'Choice Theory' model suggests that there are only five human needs: **Fun, Power (over self) Freedom, Love & Belonging and Survival**. The model suggests that everything we want is to meet one or more of those needs.

In the above story, the man thought he knew how to ask for what he wanted. Many people do not know what they want, do not know how to ask for it, whom to ask, or do not value themselves enough to believe they deserve it.

Some of the **reasons why people do not ask for what they want**:

- * **FEAR (OF APPEARING FOOLISH, FEAR OF FAILURE, FEAR OF REJECTION)**
- * **PRIDE**
- * **IGNORANCE**
- * **LIMITING OR INACCURATE BELIEFS**
- * **LOW SELF-ESTEEM**

If you don't ask, you don't get
Gandhi

What lies behind us and what lies in front of us are tiny matters compared to what lies within us.

Ralph Waldo Emerson

(Hand out)

Barriers to asking for what we want

Many of us don't know what to ask for. Either we don't know what is available to us, because we have never been exposed to it, or we are so out of touch with ourselves that we are no longer able to perceive or to express our needs and wants. Some of us have never learned to value ourselves enough to ask. In *'The Aladdin Factor'* by Jack Canfield and Mark Victor Hansen, the authors identify many of these barriers:

1. **IGNORANCE.**
We don't know what is available and what is possible.
We don't know how to ask.
2. **LIMITING AND INACCURATE BELIEFS.**
We are programmed by our parents.
We are programmed at school.
We are programmed by the media.
We are programmed by our religious training.
We are programmed by our doctors.

Some examples of limiting beliefs:

"My success will deprive someone else."
"If I get what I want, it will make me unhappy."
"If you really loved me, I wouldn't have to ask."

3. **FEAR (False Expectations Appearing Real)**
Fear of rejection.
Fear of looking stupid.
Fear of being powerless.
Fear of punishment.
Fear of abandonment.
Fear of endless obligation.
4. **LOW SELF-ESTEEM**
"I was happy to be wanted by everybody."
"My needs are not important."
"I am not worth it."
5. **PRIDE**
"I don't want to appear weak and needy."
The fear that people will judge us for not already having it.
We are supposed to be able to figure it out by ourselves.

Exercises

Exercise G1: The 'Magnificent Seven'

What do I really want? (Relate to Needs, Wants & Expectations)

Why do I want it? (Relate to Beliefs & Values)

What am I doing to get it? (Action)

Is what I am doing helping me? (Evaluation)

If it's not helping, am I prepared to change my behavior? (Life change)

In what way(s)? (Options)

What help do I need? (Do I know whom to ask, what to ask for, how to ask? Am I prepared to keep asking until I get it? Am I prepared to 'pay the price'?)

Exercise G2: "What do I really want?" exercises

The following exercises are designed to assist people to discover what they really want in life.

1. **Voyage from your easy chair.** (For people who find it *easy* to fantasize)
 - * Who in the world would you most like to spend a day with? Why?
 - * What time and place in history would you most like to visit? Why?
 - * What animal (if any) would you most like to be for a day? Why?
2. **Voyage from your easy chair.** (For people who find it *difficult* to fantasize)
 - * What did you like to do at the age of 5? At 10? At 15? At 20?
 - * What do you like to do now?
 - * What do you really dislike doing?
3. **Write down all the things you would do if you knew you could not fail.**
4. **Write the story of your imaginary twin** (the person who didn't have your chances in life **OR** who didn't have to face the difficulties you have faced.) Where would he/she be today? What would they be doing?
5. **Write your own epitaph.**
6. Describe your **Job From Heaven.** (It must have tasks, hours and salary)
7. Describe your **Job From Hell.** (It must have tasks, hours and salary).
8. **If you had \$10,000 given to you as a present, how would you spend it?**

9. *What is your greatest achievement in life?*

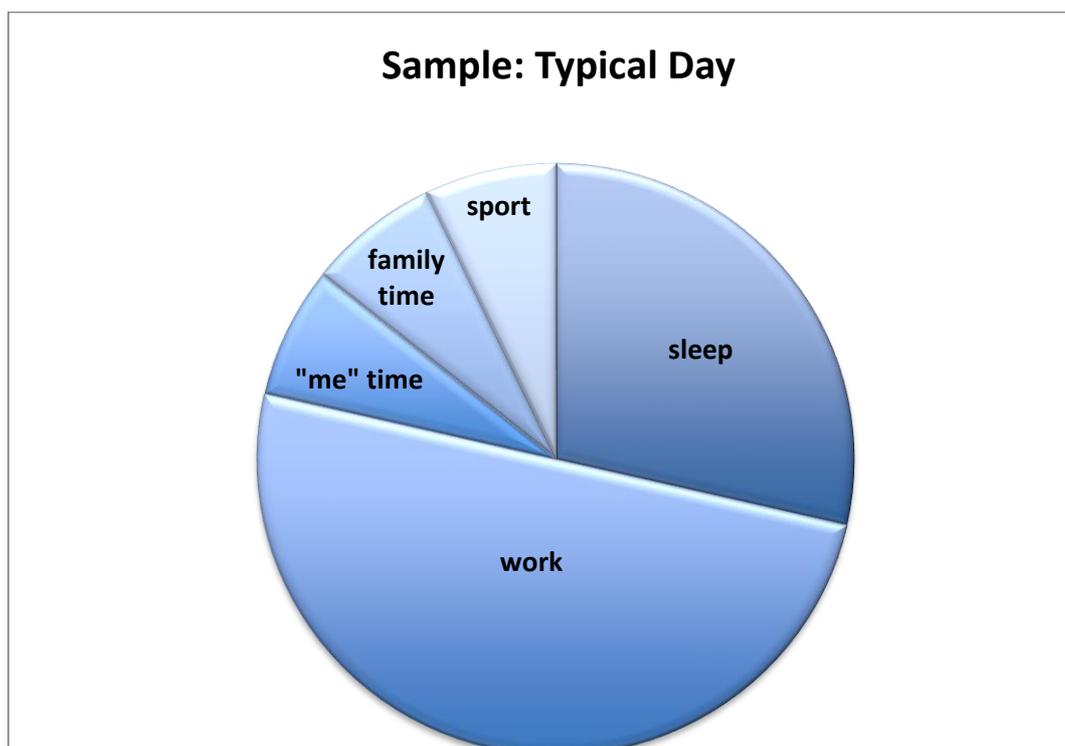
10. ***If you could change one thing about yourself, what would it be?***

11. *Imagine you are now 80 years of age. You are lying on your deathbed. You have lived a life full of financial success and social prestige. What are you feeling at the moment? What would you be saying to yourself?*

12. ***Pretend for a moment that you have everything you have always wanted. Describe the ways in which life would be different for you.***

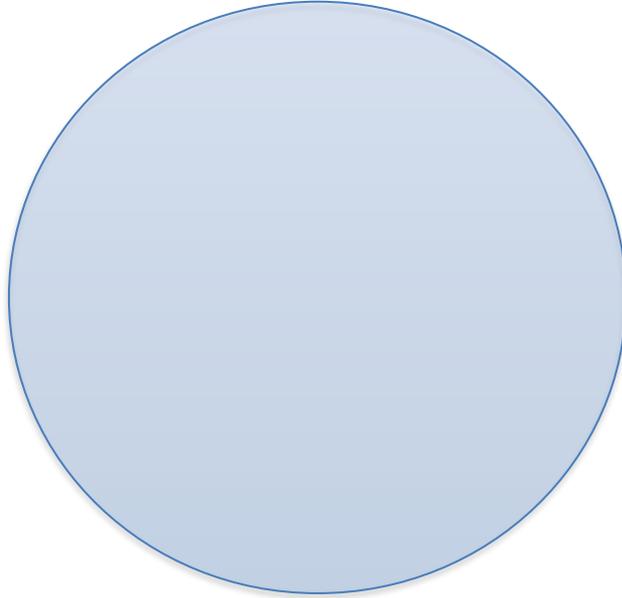
Exercise G3: 'Ideal Time' Pie

Imagine that this circle represents your life. Divide it up into as many sections as you wish to show how you currently divide your time (e.g. sleeping, working, playing sport, working, me/family time etc.).



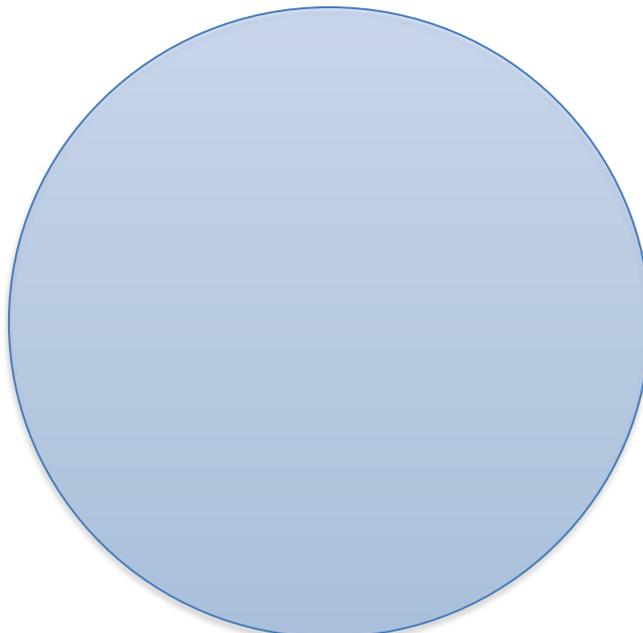
Create your current "typical day" pie chart below.

My Typical Day



Think about how happy you are about the way you are dividing your time. Would you like more time for YOU, or with another person? Less sleeping time or more? Create your own ideal time pie below.

My Ideal Day



Exercise G4: Planning to Take More Effective Control

Answer the following questions:

- **What do I *really* want?**
- **Why do I want it?**
- **What have I been doing so far to get it?**
- **Has this been helping?**
- **How do I know this?**
- **What things, if any, am I prepared to do differently?**
- **What help do I need?**

IS MY PLAN:

- ✓ **SIMPLE?**
- ✓ **ACHIEVABLE?** (Do I really believe this thing can be achieved?)
- ✓ **MEASURABLE?** (How will I know if I'm succeeding?)
- ✓ **REALISTIC?** (Can I achieve this thing successfully, given my current beliefs, motivation and the reality of my present situation?)
- ✓ **IMMEDIATE?** (Can I start doing something *today*?)
- ✓ **CONSISTENT?** (Is what I am planning to do in line with my values, beliefs / ethics / morals / religion etc.?)

The steps I am going to take to achieve my goals are:

I will know that I am succeeding when:

I may choose to(behavior) if 'success' takes longer than I think.

HOW DETERMINED AM I TO SEE THIS THROUGH?

- I'll think about it.
- I might give it a try.
- I will definitely give it a try.
- I will make a big effort.
- I'll do whatever it takes.

SIGNED:

DATE:

ANNEX 21: EFFECTIVE BEHAVIOUR

Explanatory Notes

Great Lies we Live by....

- "I didn't have time".
- "I forgot all about it".
- "I must always do my best".
- "Outside forces are to blame for the state of my life". (It's always someone else's fault).
- "More is better"
- "Other people can 'make us' angry, sad, happy, depressed etc".
- "I am **always**"(late, sick, last, right, wrong, etc.).
- "That's just me; I can't change the way I am."

Choosing Behavior-The Story of Victor Frankl

Victor Frankl was a psychiatrist who was imprisoned in a German concentration camp for the last four years of World War II. He wrote of his horrific experiences and why he survived this ordeal when thousands of others died. Although he had everything taken away from him, such as his possessions, his home, his clothes, his work, his writing and his freedom of choice, there was something they could not take. They could not take away his thoughts.

He could choose what to think about and how to think about it. Even when his food, his health and his dignity were taken away and they forced him to work building roads in the snow, ice and mud, while chained to other prisoners, he could still choose his thoughts. He could choose to hate the guards, or he could choose to feel sorry for them.

He could choose to loathe his fellow prisoners (who looked like the walking dead) or he could choose to respect and comfort them. He could choose to think about his home and his past life, or choose to think about how to survive where he was. He could choose to think about his future, such as when he would be released, or choose to give up on his life and die, like so many others.

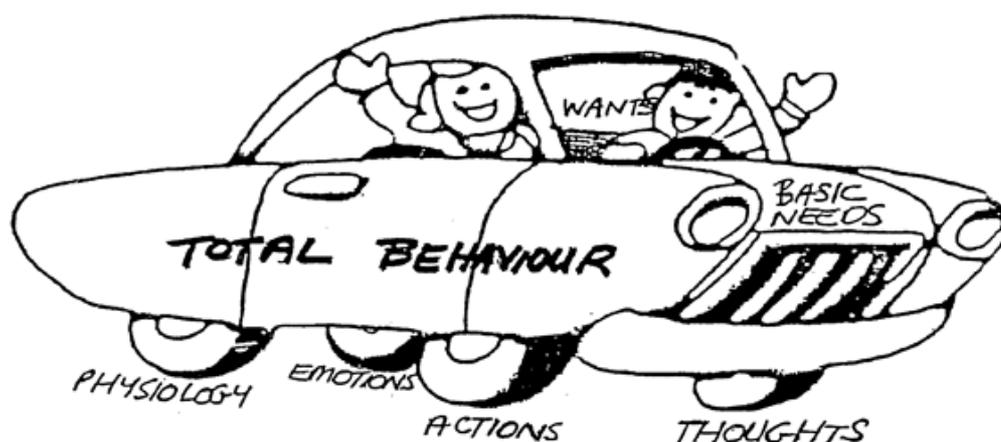
Every waking minute of every day he could choose his thoughts for that moment. He couldn't choose his thoughts for the next day, or for the coming months. He could not even choose them for the coming evening. He could only choose his thoughts for that one moment.

Just as Victor Frankl observed, "When your world collapses around you, you can still choose your thoughts". To blame another person for your bad moods is to relinquish responsibility for your thoughts and actions. It is like giving over the steering wheel of your life to another. If you want to keep control of your own moods, keep your own hands firmly on your own wheel.



The Behavioral Car

THE MODEL CAR, AS USED TO DEMONSTRATE THE PRINCIPLES OF 'CHOICE THEORY'



We behave as a 'whole'. Our behaviour is an attempt to satisfy our basic needs. When we behave, we use all our 'wheels'.

Re-introduce the Behavioral Car. Discuss the various parts; e.g. the four wheels which demonstrate the four aspects of 'Total Behavior'. To recap, behavior is made up of four components: Thinking, Feeling, Physiology and Acting (Doing). Our control over the rear two wheels (Physiology and Feeling) is limited but we have more control over the front wheels (Thinking and Acting).

Language that reflects chosen behavior

People who have been devalued by society (e.g. people with disabilities, people who are seeking paid work) often find it difficult to make decisions to change their behavior because their self-esteem is low and they lack self-confidence. However, nearly everyone experiences low self-esteem at some time.

In this context, people may feel that their life choices are limited (which is often true). However, we have more choices than we realize. By accepting more responsibility for our own behavior, we develop more control over our lives.

The way we use language may indicate to what degree we are in control of our lives. It is

common to hear people placing responsibility for their behavior onto others. For example: "If you hadn't been hassling me to get there quickly, I wouldn't have had the accident", OR "It's your fault that I'm late for work", OR "You make me angry when you waste time".

(Hand out)

Guilt and Worry (The 'Useless' Emotions)

In his book, *'Your Erroneous Zones,'* Wayne Dyer talks about what he calls "the" of guilt and worry. Dyer lists some of the 'psychological payoffs' for these emotions. For example, if we choose to '**WORRY**', we may be perceived as a 'caring person', we may attract sympathy, it gives us an excuse not to actually **do** anything and it provides an excuse for indulgent behavior: e.g. "I had to have that extra drink / extra food because I was so worried."

Choosing **GUILT** enables us to live in the past, rather than the present, it can be an avoidance technique, which gives us an excuse not to work on our own behavior. For some people, feeling guilty is a way to 'punish' themselves for being 'bad'. If they feel guilty for long enough, they believe this will exonerate them.

ANGER also, is a choice. We suggest that although we may not have total control over our feelings, we do have control over how we act. Many people use anger as a behavior to get what they want. It is also often used as a precursor to blaming other people.

Choosing anger also draws attention to ourselves, thus enabling us to feel important and powerful; we can use it to manipulate others; we can use it as an excuse ("I couldn't help myself"); we can use it to try to make other people feel guilty, or we can use it as a means to break down an interaction with a person in which we feel threatened.

If we really have the 'key to our own behavioral car,' we will realize that we do have control over our actions. In other words, if we feel angry, we need to take responsibility for the feeling and 'own' the anger. Secondly, even if we feel anger, we do not have to 'act' angry.

BLAME is another example of a wasted emotion. It is a neat little device that merely enables us to shift the responsibility for our actions onto someone else.

We do not have to be emotional slaves to every frustrating circumstance. If we see frustrations as an opportunity to change our own behavioral reactions, we can often overcome the anger or guilt or worry, and by doing so, begin to choose more appropriate and effective behavior for ourselves.

(Hand out)

The Man In The Mirror

If you get what you want in your struggle for self
And the world makes you king for a day
Then go to the mirror and look at yourself
And see what that Man has to say

For it isn't a man's father, mother, or wife
Whose judgment upon him must pass
The fellow whose verdict counts most in life
Is the Man staring back from the glass.

He's the fellow to please, never mind all the rest
For he's with you right up to the end
And you've passed your most dangerous, difficult test
If the Man in the glass is your friend.

You can fool the whole world down the pathway of years
And get pats on the back as you pass
But your final reward will be heartache and tears
If you've cheated the Man in the glass.



When you read this again, think about these main points:

- * **If you don't like yourself, there is less chance that other people will find you likeable.**
- * **Who cares what other people will think about you? It's the opinion you have of yourself that really counts.**
- * **You can fool some of the people some of the time, but in the end you can't fool yourself.**

Exercises

Exercise EB1: Behavioural Car Experiment

Ask for four volunteers. Each volunteer is allocated one wheel of the car. Begin with the 'Physiology' wheel. Ask the volunteer to provide (or estimate) their current heart rate. (This would normally be in the 60-80 beats per minute range). Ask if the person is able to reduce this to (say) 25 beats per minute within two minutes. (It is extremely unlikely that they will be able to accomplish this).

Ask the second volunteer (who has been allocated the 'Feeling' wheel) to feel angry and to maintain this emotion for the next two minutes. Again, it is unlikely that they will be able to achieve this.

Ask the third person to "Think Green" for the next two minutes. Again, this is difficult to accomplish.

Ask the fourth volunteer (who has the 'Action' wheel) to raise their right arm and hold it up for 2 minutes.

IMPORTANT: Although this experiment may be simplistic, it does bring out the point that if we want to change our behavior, it is easier to begin with the 'Action' component, rather than with the 'Thinking' or 'Feeling'.

The above scenario is based on the assumption that a decision to act, or to change behavior has already been made. The process of decision-making is seen as a precursor to the above process and is referred to in more detail in a separate annex.

At the end of this exercise it is often productive to ask participants to consider how the Behavioral Car could be further modified; e.g. by using a rear-vision mirror to represent past experiences, or by seeing the brake as the 'self-imposed limitations' which we sometimes place on ourselves.

At this stage, some Facilitator(s) may wish to select a Participant to sit at the steering wheel of the 'Behavioral Car' and point out that the car has an (invisible) engine. Offer the participant the key for the ignition. When she reaches out for the key, place the key back in your pocket and say: "Sorry. This is the key to my car. Who has the key to your car?"

This exercise (in addition to adding a dramatic touch) offers a strong reinforcement of the principle of taking more effective control over one's life.

Exercise EB2: The 'I can't' exercise (RIP)

Make a list on a sheet of paper of all the things you believe you can't do (i.e. things that you believe that you *are not capable of* doing). Collect all papers and burn or bury or them, with an appropriate eulogy. For example, join hands and bow heads:

"We are gathered together to honor thee memory of '**I Can't**'. While he was here on Earth he touched the lives of every one of us. His name, unfortunately, has been spoken in every public building, school and home.

We have provided '**I Can't**' with a final resting place and a headstone that contains his epitaph. He is survived by his brothers and sisters, '**I Can', I Will**' and '**I'm Going To Right Away**'. They are not as well known as their famous relative and are certainly not as strong and powerful yet. But perhaps, with our help, they will become so.

May '**I Can't**' rest in peace and may everyone present pick up their lives and move forward in his absence. Amen".

(Pin up 'tombstone' on wall, '**I Can't: RIP July 2018**).

Exercise EB2: The Worry Sheet

Do you worry about any of these...?

1. *My children.* ("Everyone worries about their children, I wouldn't be a very good parent if I didn't, now would I?")

2. *My health.* ("If you don't worry about your health you could die at any time!")
3. *Dying.* ("No one wants to die. Everyone worries about death.")
4. *My job.* ("If you don't worry about it you might lose it.")
5. *The economy.* ("Someone ought to worry about it, the President doesn't seem to care.")
6. *Having a heart attack.* ("Everyone does, don't they." "Your heart could go at any minute.")
7. *Security.* ("If you don't worry about security, you'll find yourself in the poorhouse, or on welfare.")
8. *My partner's happiness.* ("God knows I spend a lot of time worrying about him/her being happy, and they still don't appreciate it.")
9. *Prices.* (Somebody ought to worry about them before they skyrocket out of sight.")
10. *Accidents.* ("I always worry that one of my family will have an accident. It's only natural, isn't it?")

And perhaps the most neurotic of all . . .

11. *Having nothing to worry about.* ("I just can't sit still when everything seems all right, I worry about what might happen next.")

Do any of the above worries relate to you? Next time you find yourself choosing 'worrying behavior', ask yourself: Is my behavior helping me? Is my behavior helping anyone else?" If the answer is "no", choose an alternative behavior. You may also want to use the strategies discussed in the 'Worry' exercise below.

Exercise EB3: The 'Worry Letter' Exercise

Write down one worry on a sheet of paper. Put it in a safe place and do not look at it until the weekend (specify a time). Take it out and do one of three things:

- ⇒ **Ask yourself "Is it still a worry?"**
- ⇒ **If the answer is 'yes', do something about it.**
- ⇒ **If you can't do anything about it, put it away and worry about it next week.**

Another effective way to deal with worry is to set aside a specific time each day (or week) as 'worry time'; e.g. between 7.00 and 8.00pm. Always ask yourself the question: "Is my (worrying) behavior getting me what I want?"

Exercise EB4: Language Exercise

Reconstruct the following sentences so that they indicate 'ownership' of the behavior. Leave out words like 'must', 'have to', 'make', 'ought to', 'and should'. Use 'choose' when you can.

You make me angry when you come to work late.

(Sample answer: I feel angry when you come to work late.)

I shouldn't be as fat as I am.

.....
I really ought to lose weight.
.....

I must try to get to work on time.
.....

The bad weather made me late for work.
.....

You left me no alternative other than to leave you behind.
.....

You made me love you - I didn't want to do it!
.....

I just didn't have time to phone you last week.
.....

I can't help feeling you don't like me.
.....

It's the Government's fault that I don't have a job.
.....

Discuss what participants got out of the exercise and how hard they found it.

Sample answers:

I choose to eat too much and be overweight

I'm going on a diet

I'm leaving home early so I get to work on time

I'm sorry I'm late for work, even though the weather was bad

I left you behind

I love you

I'm sorry I did not phone you last week

I want you to like me

I wish the government would give me a job)

ANNEX 22: MENTORING - BACKGROUND INFORMATION

What Makes a Good Mentor:²

- **They are "present" and in the moment**
They take a personal interest in their mentees³ and value their time. They switch off their cell phones and are 100% focussed on the conversation with the mentee.
- **They listen actively**
They try to understand, and are non-judgemental. They show that they are listening by making eye contact, by their body language, and by encouraging the mentee to open up.
- **They ask lots of good questions**
They don't merely offer their own opinions and advice, but they ask questions in order to learn more so that they can help the mentee clarify and solve her own problems.
- **They are role models**
They lead by example and share how their own routines and habits have helped them achieve their personal and professional goals.
- **They keep their promises and hold their mentee accountable**
The Mentor session concludes with an action list, including who is responsible for what. At the next session the Mentor reports back on what s/he has done, and expects the mentee to do the same. In this way the Mentor drives accountable behavior.
- **They learn from their mentees**
Mentors are open to learning from their mentees and this fosters a two-way relationship.
- **They are humble**
Mentors are not perfect and understand that mentees can learn from their mistakes and shortcomings as well as from their successes and strengths. They share their mistakes which in turn helps to establish trust and hence gives the mentee permission to be vulnerable.
- **They share great stories**
In addition to listening and asking insightful questions, Mentors teach by telling compelling stories about their own lessons learned.
- **They provide feedback**
The Mentor's interest is to help the mentee learn about herself and grow. Because of being sensitive to the mentee's needs, feedback will be specific, sincere and timely.
- **They are patient**
Mentors understand the importance for reflection, and hence permit their mentees to move at their own pace as they develop new insights. They allow the mentee to make mistakes and learn from these.
- **They respect and honor confidentiality**
They understand and subscribe to the need for treating shared information as sensitive and confidential.
- **They set boundaries.**
Mentors understand the need for a trusted professional relationship.

What will the Mentor Do?

The Mentor will provide tailored support for the mentee. Sometimes a different Mentor or a Coach may be required for addressing a specific challenge. In this case this requirement must be brought to the attention of the Facilitator who will assist the Mentor in finding the appropriate person.

The Mentor will:

- Create a safe learning environment for taking risks
- Be open and honest
- Listen actively

²https://www.thebalance.com/characteristics-of-amazing-mentors-2275990?_ga=2.89947611.1756965252.1494939373-2122442601.1400000782 (accessed on 16 May 2017)

³ "Mentee" in this section refers to the Acceleration Program "Participant"

- Discuss goal setting
- Inspire and offer encouragement
- Share relevant knowledge and life experiences
- Provide guidance and advice
- Challenge the mentee to move beyond her comfort zone
- Leverage his/her network for the benefit of the mentee
- Hold the mentee accountable

The first Mentor-Participant meeting

This meeting will allow for:

- more detailed introduction to each other;
- discussion on the importance of confidentiality and that the Mentor is bound by the contract between the Facilitator and the Mentor. If necessary a non-disclosure agreement can be entered into;
- setting the boundaries – when and where meetings will take place; whether the Mentor can be contacted in between mentorship sessions etc.;
- the Participant will describe what she does and discuss the specific goals and challenges of her business and what she aims to achieve over the period of the Acceleration Program;
- the Mentor provides the Participant with some insight as to his/her own background;
- the Mentor confirms that s/he is confident of helping the Participant meet expectations;
- jointly the Mentor and Participant discuss what the Participant requires, agree on milestones in order to reach the Participant’s goals; and commit this to writing;
- the Participant and Mentor agree on a process for planning or scheduling meetings; the next meeting to be scheduled;
- complete the Mentoring Update form; (Mentor to forward to the Facilitator after the meeting).

The Mentor and the Participant need to agree on confidentiality. The Mentor should have the Participant’s approval before taking any written notes from this or any other meeting.

For a deep and rewarding experience, there must be a good level of trust. Trust will develop with time provided that both parties are committed to the process of adding value to each other. The Mentor will have signed a contract with the Facilitator prior to joining the Mentoring program wherein confidentiality is addressed, and at their first meeting the Mentor and the Participant sign a *Mentor-Participant Agreement - Annex 35* that will govern their relationship. (The mentor forwards a copy of this agreement to the Facilitator.)

The second (and further) meetings

The approach will be to follow up on the outcomes of the previous meeting, to course correct if necessary, and set new activities for completion by the next meeting.

Contractual and Reporting Relationships

Whilst the Mentor and the Participant report directly to the Facilitator, their relationship with one another is governed by mutual confidence and respect. Two separate agreements oversee these relationships respectively viz:

- Facilitator-Mentor Agreement (*see Annex 30*)
- Mentor-Participant Agreement (*see Annex 35*)

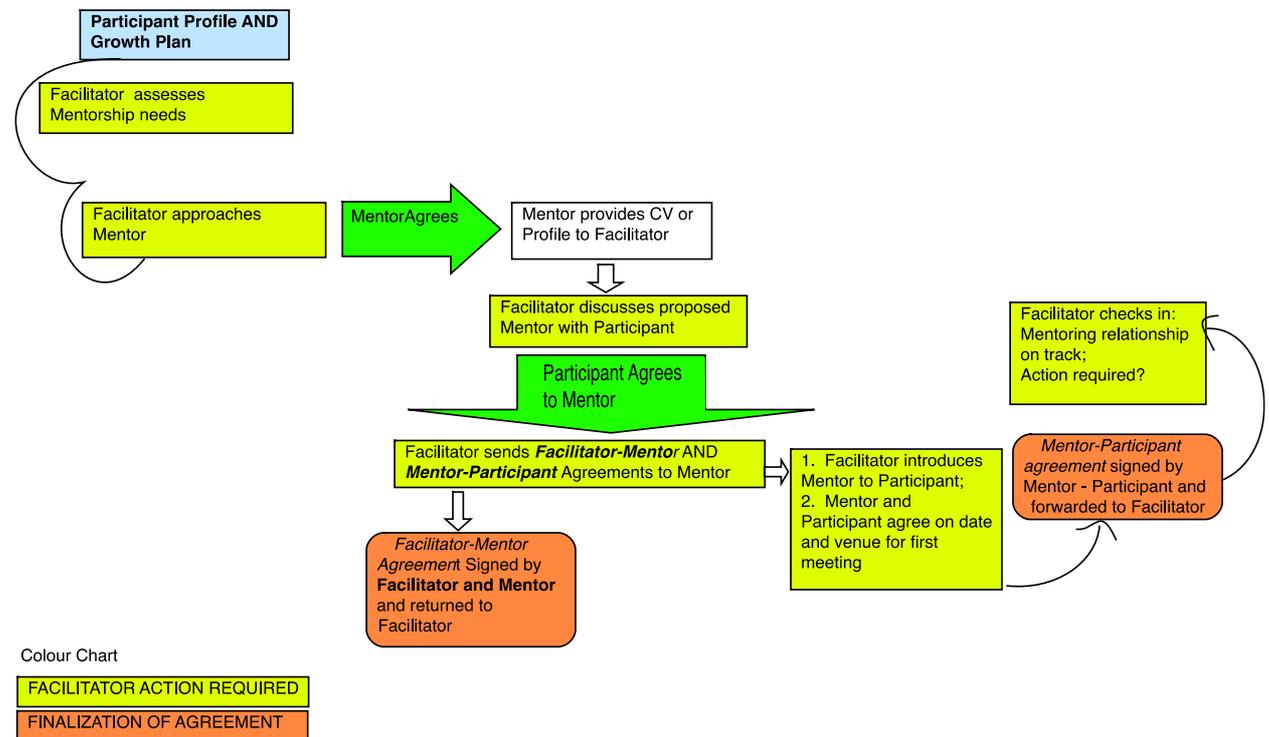
The **Facilitator-Mentor Agreement** defines the roles and responsibilities of the Mentor; the payment of the mentor; the process for substituting mentors if necessary; confidentiality / liability issues; and the process for settling disputes (between the Facilitator and the Mentor; the Mentor and the Participant and the Facilitator). The *Mentor-Participant Progress Form*, which enables the Facilitator

to monitor at a high level the relationship, and the progress towards achievement of milestones, forms part of this agreement.

The **Mentor-Participant Agreement** is a back-to back of the Facilitator-Mentor Agreement, with the same conditions applying to the Participant where relevant. The Mentor-Participant Agreement defines the roles and responsibilities of the Participant and the Mentor respectively; the process to be followed should it be necessary to substitute a mentor; confidentiality / liability issues; and the process for settling disputes.

Figure 1 below illustrates the process in matching a Mentor with a participant, and at which point each respective agreement should be signed.

Figure 1: Mentorship Matching and Contracting Process



ANNEX 23: MENTOR-PARTICIPANT PROGRESS FORM

The Mentor and Participant may decide on a more detailed template to be used for their own internal purposes - the template below can be used as a baseline.

Participant (Name)	
Mentor (Name)	
Date of mentoring session	
Questions for mentor and Participant	
What area does the Participant wish to focus on to grow her business?	
What is working well in her business?	
What key problem(s) is the Participant grappling with in relation to her business?	
What business matters is the Mentor helping with?	
What personal matters (e.g. attitudinal, motivational) is the Mentor helping with?	
What milestones or actions have been agreed between Mentor and Participant?	
Is Facilitator engagement required? If yes, then what?	
When is the next session?	

ANNEX 24: MENTORING UPDATE FORM

The Facilitator is responsible for monitoring the mentoring relationship, and will use the following form to gather inputs from the Mentor and Participant jointly. The form will be available online, and is to be completed by both the Mentor and Participant at the end of each mentorship session. In addition to the form below, the Facilitator will check in periodically with both the Mentor and the Participant respectively to determine whether the relationship is working well.

Participant (Name)	
Mentor (Name)	
Date of mentoring session	
What is the area the Participant will focus on for growth over the course of the AP?	
Have milestones been clearly articulated in order to track progress towards achieving the desired growth? (sliding scale)	
Is progress on track to achieving these milestones? (sliding scale)	
What is working well in the mentoring process/what can be improved? (sliding scale)	
Participant Action	
Mentor Action	
Facilitator engagement required – if yes then what?	
When is the next session?	

ANNEXURE 25: MENTORSHIP EXPECTATIONS

Mentors are experienced individuals who understand what it takes to run a business, and who are willing to share their knowledge, skills, and experience, as well as leverage their networks, for the benefit of their mentees. Their interest is on developing the mentee and her business. They are willing to apply "tough love" and hold the mentee accountable.

The following are key for successful mentorship:

- A willingness and openness from both parties to learn and grow from their engagement, and an understanding that company growth is not guaranteed. Where the relationship is not working, there should be an agreement to end it amicably.
- Ownership by the **mentee** of the mentoring agenda and direction of the process. Although the mentor can guide and advise, it is the mentee who selects the discussion topics.
- *Goal-oriented* engagement geared towards the achievement of specific goals as determined by the mentee (these may be personal or business). Although the mentor may influence the goal setting, sh/e must respect the mentee's decisions.
- Mentor and mentee agreeing to show up regularly and on time, as well as fulfill any personal obligations to which they agreed - trust and reliability are key.

Key expectations from mentees are:

- Commitment to the mentoring relationship evidenced by:
 - scheduling meetings up front, and keeping to these
 - developing growth goals; activities to achieve these goals; plus associated timelines; and sharing these with the mentor
 - setting the meeting agenda in advance with the mentor
 - providing the mentor with requested information in a timely fashion
- Limiting requests to the mentor (not appearing "needy") - and saying "thank you" when appropriate
- Understanding what as mentee, she brings to the relationship that may be of value to the mentor
- Reaching agreement on confidentiality that will govern their relationship
- Reviewing the relationship from time to time

Mentees must understand that mentors are investing their valuable time in the mentee and hence the relationship should be nurtured, valued and respected.

ANNEX 26: FACILITATOR - MENTOR AGREEMENT

**AGREEMENT
BETWEEN
NAME OF FACILITATOR (hereinafter referred to as "Facilitator")
AND
NAME OF MENTOR (hereinafter referred to as "Mentor")**

**(jointly referred to as "the Parties")
OF THE
[NAME OF PROGRAM]
ACCELERATION PROGRAM**

**TO BE HELD INFROMto
.....20..**

The Parties hereby agree as follows:

1. DURATION OF THE AGREEMENT

This Agreement shall be for a period of up to eight (8) months to coincide with the starting and completion dates of the [NAME OF PROGRAM] Acceleration Program (AP), viz. from ---- 2017 to - ---- 2016 in [NAME OF COUNTRY].

2. ROLE AND RESPONSIBILITIES OF THE MENTOR

The Mentor agrees to provide mentorship services to the Participant(s) of the aforementioned AP[INSERT PARTICIPANT(S) NAMES], hereinafter referred to as "Participant(s)"[DELETE "S" IF ONLY ONE PARTICIPANT], in agreement with the Mentorship Guidelines provided in Annexure 25 to this Agreement.

Specifically, **the Mentor agrees to:**

1. Meet with his/her Participant once per month for five sequential months, keeping the Facilitator apprised of the time(s) and location(s) mutually agreed with the Participant. It is recommended that the venue preferably be in a public space, but devoid from distractions. (Mentoring sessions can also be done virtually.)
2. Approach the Participant as a "protégé" rather than as a "pupil", and define his/her role as supporting the Participant in a variety of ways including:
 - Leverage his/her network for the benefit of the Participant
 - Share relevant knowledge and life experiences
 - Provide guidance and advice
 - Inspire and offer encouragement.
3. Challenge the Participant to move beyond her comfort zone.
4. Discuss goal setting and what the Participant requires for the purpose of achieving her stated goals for the duration of the Acceleration Program, agree on milestones in order to reach these growth goals, commit this to writing, and monitor progress towards achievement of these goals.

5. Actively listen to the Participant.
6. Be open and honest, consistent and dependable.
7. If necessary, initiate contact to schedule/confirm meetings.
8. Keep confidential personal and business information about the Participant and her business and personal life.
9. Address and resolve problems pertaining to the Mentor-Participant relationship, or those preventing the Mentor from fulfilling his/her mentoring duties, should they arise, and where necessary let the Facilitator know.
10. Provide the necessary information to the Facilitator for her monitoring efforts of the mentoring relationship, as per Annexures 1 and 2. Such information provided to the Facilitator will be kept confidential by her, with access to the same granted only to nominated staff from the project staff.

Romantic relationships between the Mentor-Participant should be avoided or declared immediately to the Facilitator (in which case the relationship as a Mentor will be terminated with immediate effect).

Should the Mentor wish to invest in the Participant's business or join the management or be paid to undertake consulting or other work for the Participant, both the Mentor and Participant will inform the Facilitator immediately. (Such activity may occur, but once the Mentor moves beyond his/her mentoring role to become involved in the Participant's business in another way, the relationship as a Mentor will be terminated with immediate effect).

- 3. PAYMENT** [THIS CLAUSE SHOULD BE ADAPTED AS RELEVANT FOR THE AP. WHERE MENTORSHIP HAS BEEN SECURED THROUGH SPONSORSHIPS OR FOR GRATIS, THIS SHOULD BE REFLECTED AS SUCH IN THIS PARAGRAPH]

The Facilitator will pay [OR WILL PROVIDE SPONSORSHIP PROMOTIONS OFFOR– **DELETE THIS CLAUSE IF NOT APPLICABLE**] the Mentor which will be inclusive of all relevant taxes and transfer sending costs. Payment will be made within 7 days of receipt of invoice, at the end of the 3rd and 5th mentoring sessions respectively for the sessions conducted during each respective period.

4. SUBSTITUTION OF MENTORS

During the course of the AP, the Mentor, in discussion with the Participant, may deem it necessary to enlist skills or competences other than those that had initially been requested by the Participant.

In such an event the Mentor will immediately notify the Facilitator and agree on an appropriate way forward. Should it be agreed that a new Mentor/Coach with a different skills/competences set is required, then the agreement with the current Mentor will be ended and a new agreement with a new Mentor/Coach entered into.

5. CONFIDENTIALITY AND LIABILITY

The Parties agree as follows:

1. they undertake to protect and keep secret and confidential any information that was not in the public domain at the time of disclosure about the other Party, or about the Participant and her business operations;
2. that the Facilitator will not be held liable in any way for any actions of the Participant(s).
3. that the Mentor will not be held liable for any advice given to his/her Participant(s) within the mentorship principles.

6. SETTLEMENT OF DISPUTES

Where there are disputes that cannot be resolved between the Facilitator and the Mentor, and/or between the Mentor and the Participant and the Facilitator, the Sponsor's project team may be approached to assist in finding a resolution (CONTACT EMAILS).

7. NOTICES AND COMMUNICATIONS

All notices given in accordance with this Agreement shall be communicated by email.

8. TERMINATION OF AGREEMENT

Either party may terminate this Agreement by giving the other party 10 working days written notice, which must include copying the Sponsors project team (CONTACT EMAILS).

9. FINAL PROVISIONS

This Agreement is governed by and shall be interpreted in accordance with the laws of [COUNTRY]

SIGNED by Mentor

Address

e-mail

Date

SIGNED by Facilitator

Address

e-mail

Date

*(Attachments: Annex 23: Mentor-Participant Progress Form Annex 24: Mentoring Update Form;
Annex 25: Mentorship Expectations)*

ANNEX 27: MENTOR-PARTICIPANT AGREEMENT

AGREEMENT

BETWEEN

NAME OF MENTOR (hereinafter referred to as “Mentor”)

AND

NAME OF PARTICIPANT (hereinafter referred to as “Participant”)
(jointly referred to as “the Parties”)

[NAME OF PROGRAM]
ACCELERATION PROGRAM

TO BE HELD INFROMto
.....20..

The Parties hereby agree as follows:

2. DURATION OF THE AGREEMENT

This Agreement shall be for a period of up to eight (8) months to coincide with the starting and completion dates of the Acceleration Program (AP), viz. from ----- 2016 to ----- 2016 in [NAME OF COUNTRY].

3. ROLE AND RESPONSIBILITIES OF THE PARTICIPANT:

In keeping with the Mentorship Guidelines provided in Annex 25: Mentorship Guidelines to this Agreement, **the Participant is responsible for:**

1. Ensuring that she is present, on time (being sensitive to her Mentor’s time constraints), and mentally engaged for the full duration of each of the six mentorship sessions;
2. Having a strong desire and taking the initiative and responsibility to develop herself by investing time and effort to increase her knowledge and competence;
3. Articulating and communicating clear and specific developmental goals to her Mentor;
4. Asking for advice (i.e. the “how best to...”) from her Mentor, rather than help (i.e. the actions to...). Acknowledging that her Mentor’s role is to provide guidance, she might suggest ways her mentor can help but she must accept what her Mentor is able and willing to offer;
5. Accepting feedback from her Mentor graciously, and expending effort to implement changes that will move towards achievement of goals;
6. Avoiding being overly dependent on her Mentor, and also seeking guidance from other sources;
7. Being willing to embrace new ideas, take risks, and try new approaches, and being willing to make mistakes and learn from them;
8. Balancing enthusiasm and self-confidence with humility;

9. Demonstrating a willingness to expand her own network;
10. Communicating problems or issues clearly and on a timely basis with her Mentor; being honest and candid in all dealings with her Mentor, discussing her failures as well as successes.

The Participant acknowledges that her Mentor is not necessarily a certified Coach.

4. ROLE AND RESPONSIBILITIES OF THE MENTOR

The Mentor agrees to provide mentorship services to [INSERT PARTICIPANT(S) NAMES.....] hereinafter referred to as the Participant(s) of the aforementioned AP, hereinafter referred to as "Participant(s)"[DELETE "S" IF ONLY ONE PARTICIPANT], in agreement with the Mentorship Guidelines provided in Annexure 3 to this Agreement.

Specifically, **the Mentor agrees to:**

11. Meet with his/her Participant once per month for five sequential months, keeping the Facilitator apprised of the time(s) and location(s) mutually agreed with the Participant. It is recommended that the venue preferably be in a public space, but devoid from distractions. (Mentoring sessions can also be done virtually.)
12. Approach the Participant as a "protégé" rather than as a "pupil", and define his/her role as supporting the Participant in a variety of ways including:
 - Leverage his/her network for the benefit of the Participant
 - Share relevant knowledge and life experiences
 - Provide guidance and advice
 - Inspire and offer encouragement.
13. Challenge the Participant to move beyond her comfort zone.
14. Discuss goal setting and what the Participant requires for the purpose of achieving her stated goals for the duration of the Acceleration Program, agree on milestones in order to reach these growth goals, commit this to writing, and monitor progress towards achievement of these goals.
15. Actively listen to the Participant.
16. Be open and honest, consistent and dependable.
17. If necessary, initiate contact to schedule/confirm meetings.
18. Keep confidential personal and business information about the Participant and his/her business and personal life.
19. Address and resolve problems pertaining to the Mentor-Participant relationship, or those preventing the Mentor from fulfilling his/her mentoring duties, should they arise, and where necessary let the Facilitator know.
20. Provide the necessary information to the Facilitator for her monitoring efforts of the mentoring relationship, as per Annexures 1 and 2. Such information provided to the Facilitator will be kept confidential by her, with access to the same granted only to nominated staff from the project.

Romantic relationships between the Mentor-Participant should be avoided or declared immediately to the Facilitator (in which case the relationship as a Mentor will be terminated with immediate effect).

Should the Mentor wish to invest in the Participant's business or join the management or be paid to undertake consulting or other work for the Participant, both the Mentor and Participant will inform the Facilitator immediately. (Such activity may occur, but once the Mentor moves beyond his/her mentoring role to become involved in the Participant's business in another way, the relationship as a Mentor will be terminated with immediate effect.)

5. SUBSTITUTION OF MENTORS

During the course of the AP, the Mentor in discussion with the Participant may deem it necessary to enlist skills or competences other than those that had initially been requested by the Participant.

In such an event the Mentor will immediately notify the Facilitator and agree on an appropriate way forward. Should it be agreed that a new Mentor/Coach with a different skills/competences set is required, then the agreement with the current Mentor will be ended and a new agreement with a new Mentor/Coach entered into.

6. CONFIDENTIALITY AND LIABILITY

The Parties agree as follows:

4. they undertake to protect and keep secret and confidential any information that was not in the public domain at the time of disclosure about the other Party, or about the Participant and her business operations;
5. that the Facilitator will not be held liable in any way for any actions of the Participant(s).
6. that the Mentor will not be held liable for any advice given to his/her Participant(s) within the mentorship principles.

7. SETTLEMENT OF DISPUTES

Where there are disputes that cannot be resolved between the Participant and the Mentor, these should be referred to the Facilitator. If the dispute cannot be resolved by the Facilitator, the Sponsor's project team may be approached to assist in finding a resolution (CONTACT DETAILS).

8. NOTICES AND COMMUNICATIONS

All notices given in accordance with this Agreement shall be communicated by email.

9. TERMINATION OF AGREEMENT

Either party may terminate this Agreement by giving the other party written notice, which must include copying the Facilitator as well as the Sponsor's project team (CONTACT DETAILS).

10. FINAL PROVISIONS

This Agreement is governed by and shall be interpreted in accordance with the laws of [COUNTRY]

SIGNED by Mentor

Address

e-mail

Date

SIGNED by Participant

Address

e-mail

Date

(Attachments: Annex 23: Mentor-Participant Progress Form; Annex 24: Mentoring Update Form; Annex 25: Mentorship Expectations)

ANNEX 28: THE FACILITATOR'S CHECK LIST FOR MENTORSHIP

	ACTION	DONE?
1.	Discussion between Facilitator and prospective Mentor to outline mentorship component of the program (to include key points of the Facilitator-Mentor Agreement, Mentor-Participant Agreements, reporting/monitoring etc.)	
2.	Mentor agrees to participate and signs <i>Facilitator-Mentor Agreement</i> with Facilitator	
3.	Participant agrees on selection of Mentor	
3.	Introduction by Facilitator (virtual) between Mentor and Participant	
4.	First meeting between Mentor and Participant in Month 2 – agree on “growth goal(s)” and discuss confidentiality (sign <i>Mentor-Participant Agreement</i> and return a copy to Facilitator)	
5.	Self-arranged meeting in Month 3; 1-1 feedback Facilitator: Participant	
6.	Self-arranged meeting in Month 4; 1-1 feedback Facilitator: Participant	
7.	Self-arranged meeting in Month 5; 1-1 feedback Facilitator: Participant	
8.	Self-arranged meeting in Month 6; 1-1 feedback Facilitator: Participant and to discuss her progress and what is needed going forward.	

ANNEX 29: PARTICIPANT SESSION FEEDBACK FORM

Date of report: [insert date]

Appendix 1: Business Development Peer Learning Sessions

AP Session Details – Peer Discussion

Answer Options	Response
Registration, Introduction & Networking (1st session)	
Small Businesses - Mickey Mouse or Mini Empire?	
Marketing - What sort of business are you in?	
Marketing - Getting the word out, Marketing yourself & your products	
Benchmarking Financial Performance	
IT/ICT - Making it work for you	
Growing your Business - Making decisions & Planning Action	
Graduation, Presentation & Networking Function (final session)	
Other (please specify)*:	

*If "Other", please specify:

Your AP Facilitator

Answer Options	Response
Not successful	
Slightly successful	
Moderately successful	
Largely successful	
Totally successful	

If you selected "Not successful" or "Slightly successful", please give the reason(s) for your response.

-

Answer Options	Very poor	Poor	Satisfactory	Good	Excellent
Facilitation of discussion among participants					
Managing group dynamics for all participants to contribute and learn					
Knowledge of subject area					
Appropriateness of practical examples & experience					
Sharing other information (e.g. resources, expertise) to support participants					
Pace of sessions and adherence to time					

Ability to keep you engaged & motivated					
Approachability					

Answer Options	Response
Less than 25% in total	
Between 25-50% of the session	
More than 50% of the session	

If you have any other feedback for your AP Facilitator(s), please share here:
-

Outcomes of your AP Session

Answer Options	No, not at all	Not as much as I would have liked	Yes, absolutely!	Not sure
Share (and validate) your experiences, knowledge and skills with your fellow participants				
Learn knowledge and/or skills relevant to your business from your fellow participants				

Answer Options	Strongly disagree	Disagree	Agree	Strongly agree	Not sure
Was extremely useful and relevant to you/your business					
Introduced you to new ideas/methods/tools					
Gave you access to appropriate expertise to help you/your business					
Supported you to look at (or deal with) with norms & beliefs currently constraining your personal or business growth					
Was a very good investment of your time					
Was very enjoyable					

Answer Options	Response Count
Yes, for sure! I plan to introduce a change in the coming weeks.	
Yes, but not right away. I intend to introduce a change in a few months from now.	
Not sure - I'd like to learn more about this topic before I make any changes.	
No - I'm satisfied with my current situation as regards to the topic covered in this session.	
No - I did not learn anything new through this session.	

If you selected "Yes" above, please tell us what you will do differently:

-

Logistics of your AP Session

Answer Options	No	Not entirely	Yes	Not applicable (N/A)
Length of session				
Start & end times				
Choice of venue (e.g. location, accessibility)				
Physical space (e.g. seating arrangements, temperature, lighting etc.)				
Refreshment(s)				

Please share any thoughts on how this session could have been improved:

-

If you have any other last comments on this session, please share here:

-

Appendix 2: Personal Development Peer Learning Sessions

AP Session Details – Personal Development

Answer Options	Response
Self-esteem, Self-confidence	
Personal boundaries	
Self-awareness (i.e. looking at yourself with honesty)	
Self-love / self-compassion	
Values and Beliefs	
Needs and Wants	
Self-discipline (self-accountability)	
Taking effective, timely decisions	
Taking appropriate risk(s)	
Effective behaviour - dealing with guilt, worry, fear, inner critic etc.	
Meeting the challenges of change (in your life/business)	
Resilience (i.e. how well you “bounce back”)	
How you sell yourself (your personal brand)	
Time management	
Work-life balance	
Issues concerning your health / lifestyle	
Family responsibilities / arrangements	
Dealing with stress	
Conflict resolution	
Taking control of & responsibility for your personal development (incl. identifying your Life Goals)	
Other (please specify)*:	

Your AP Facilitator

Answer Options	Response
Not successful	
Slightly successful	
Moderately successful	
Largely successful	
Totally successful	

If you selected "Not successful" or "Slightly successful", please give the reason(s) for your response.

-

On the basis of your experience in this session, please rate your AP Facilitator for each of the following: (response count)

Answer Options	Very poor	Poor	Satisfactory	Good	Excellent
Facilitation of discussion among participants					
Managing group dynamics for all participants to contribute and learn					
Knowledge of subject area					
Appropriateness of practical examples & experience					
Sharing other information (e.g. resources, expertise) to support participants					
Pace of sessions and adherence to time					
Ability to keep you engaged & motivated					
Approachability					

Answer Options	Response
Less than 25% in total	
Between 25-50% of the session	
More than 50% of the session	

If you have any other feedback for your AP Facilitator(s), please share here:

-

Outcomes of your AP Session

Answer Options	No, not at all	Not as much as I would have liked	Yes, absolutely!	Not sure
Share (and validate) your experiences, knowledge and skills with your fellow participants				
Learn knowledge and/or skills relevant to your business from your fellow participants				

Answer Options	Strongly disagree	Disagree	Agree	Strongly agree	Not sure
Was extremely useful and relevant to you/your business					
Introduced you to new ideas/methods/tools					
Gave you access to appropriate expertise to help you/your business					
Supported you to look at (or deal with) with norms & beliefs currently constraining your personal or business growth					
Was a very good investment of your time					

Was very enjoyable					
--------------------	--	--	--	--	--

Answer Options	Response
Yes, for sure! I plan to introduce a change in the coming weeks.	
Yes, but not right away. I intend to introduce a change in a few months from now.	
Not sure - I'd like to learn more about this topic before I make any changes.	
No - I'm satisfied with my current situation as regards to the topic covered in this session.	
No - I did not learn anything new through this session.	

If you selected "Yes" above, please tell us what you will do differently:
-

Logistics of your AP Session

Answer Options	No	Not entirely	Yes	Not applicable (N/A)
Length of session				
Start & end times				
Choice of venue (e.g. location, accessibility)				
Physical space (e.g. seating arrangements, temperature, lighting etc.)				
Refreshment(s)				

Please share any thoughts on how this session could have been improved:
-

If you have any other last comments on this session, please share here:
-

Appendix 3: Technical Workshops

AP Session Details - Technical Workshop

Answer Options	Response
Business planning	
Project management	
Leadership skills	
Marketing and promotion	
Sales	
Tendering and costing	
Financial management	
Investment readiness	
Export readiness/development	
Customer service / dealing with customers	
Staff management	
Better use of IT for business	
Risk assessment	
Negotiation	
Networking	
Developing strategic alliances for growth	
Communication skills (incl. public speaking, inter-cultural etc.)	
Market research	
Customs	
Dealing with suppliers	
Time management	
Dealing with stress	
Conflict resolution	
Other (please specify)*:	

Name of Technical Expert who conducted this workshop:

Answer Options	Very poor	Poor	Satisfactory	Good	Excellent
Knowledge of subject area					
Appropriateness of practical examples & experience					
Sharing other information (e.g. resources, expertise) to support participants					
Managing group dynamics for all participants to contribute and learn					
Pace of sessions and adherence to time					
Ability to keep you engaged & motivated					
Approachability					

Outcomes of your AP Technical Workshop

Answer Options	Strongly disagree	Disagree	Agree	Strongly agree	Not sure
Was extremely useful and relevant to you/your business					
Introduced you to new ideas/methods/tools					
Gave you access to appropriate expertise to help you/your business					
Supported you to look at (or deal with) with norms & beliefs currently constraining your personal or business growth					
Was a very good investment of your time					
Was very enjoyable					

Answer Options	Response Count
Yes, for sure! I plan to introduce a change in the coming weeks.	
Yes, but not right away. I intend to introduce a change in a few months from now.	
Not sure - I'd like to learn more about this topic before I make any changes.	
No - I'm satisfied with my current situation as regards to the topic covered in this session.	
No - I did not learn anything new through this session.	

If you selected "Yes" above, please tell us what you will do differently:

-

Logistics of your AP Technical Workshop

Answer Options	No	Not entirely	Yes	Not applicable (N/A)
Length of session				
Start & end times				
Choice of venue (e.g. location, accessibility)				
Physical space (e.g. seating arrangements, temperature, lighting etc.)				
Refreshment(s)				

Answer Options	Response Count
In person (i.e. you were together as a group, in the same place as the Technical Expert)	
You connected virtually with the Technical Expert, from your own location	
You connected virtually with the Technical Expert, along with some members of your group in a shared location	

Please share any thoughts on how this workshop could have been improved:

-

If you have any other last workshop on this session, please share here:

-

ANNEX 30: FACILITATOR'S ACCELERATION PROGRAM MONTHLY REPORT

ACCELERATION PROGRAM – [INSERT COUNTRY]

Monthly Report for [insert month]

Date of report: [insert date when finalised/submitted]

Sessions & Workshops conducted this month

Overview of Session(s)

	Date	Start & end times	Duration of session ¹	Main topic(s) discussed ²	No. Participants in attendance ³	Names of Experts / Speakers
Peer Discussion						--
Personal Development						--
Technical Workshop						
Motivational session						
Any other session(s) organised for/with your AP group ⁴						

Please use this table in your Monthly Reports, completing as appropriate to your AP. This will make it easy to see what exactly has taken place during the month for your AP.

Explanatory notes for this Overview table

- ¹To the nearest ¼ hour (e.g. 2½ hours, 1¼ hours...)
- ²Please write what you planned as the main topic(s) for the session (e.g. "Intros, Ground rules, Networking; Values, Beliefs, Needs & Wants; Taxation for Business; IP as a Business Asset etc.)
- ³For participants not in attendance: please list by name, indicate why they did not attend (where you know this - e.g. out of country, conflict with a previous engagement, ill etc.), and what they (and/or you) have done/are planning to do to bring them up to speed (e.g. Skype meeting to run through major points of session). If they have missed sessions previously, please also indicate this so that we are aware of recurrent no-shows.
- ⁴You may decide with your group to run a couple of additional sessions to address a need that has been voiced by your group but which is not covered by the AP (e.g. *Dress for Success, Networking practice, Public speaking, Pitching for Business...*). This will alert the Implementing Organization to what is missing from the current rollout of APs.

Summary of Session(s)

For each of the sessions conducted during the month covered by this report:

- **Description of the activities**, with the time allocated to each - e.g. introductions, recap of last session, homework from last session, discussion on a particular topic (this may/may not be linked to the session's main theme), content related to the session's main theme, exercises & learning activities for participants, group reflection etc.
 ⇒ *As an alternative, you can include your session plan as an annex to this document / as a separate attachment; and simply refer to this in this section.*
- **Any matters which arose up during the session for discussion / resolution by the group, and decisions agreed** e.g. dates for upcoming sessions, extending the duration of a session, additional activity planned by/for the group outside of the AP's sessions (e.g. attending an upcoming networking event as a group).

Participants Feedback re. Session(s)

Your Reflections re Session(s)

With reference to your participants' feedback, please share your perspectives and significant lessons learned for each of the sessions conducted during the month. This may include, e.g.

- Any comments you may have in response to your participants' feedback - e.g. you may decide to allocate more time to peer sharing in your next session // you may recognise that a few participants need extra encouragement to contribute more fully // you may decide to prepare a list of useful resources around the next session's topic // you may decide a 2nd technical workshop to delve more deeply into the topic ...
- Your thoughts on whether the session delivered what you wanted...and what was expected by participants (and if not, why not).
- What worked well...what did not; what change(s), if any, you would make in the future to improve the session.
- Any particular behaviour or dynamic that might have occurred with/between participants that has caused you (or the group) some pause for thought/concern - e.g. one of your participants flared up during a Personal Development session which made it difficult for you/the others to move through a topic...
- Any recommendations you may have for how your participants could be further supported in relation to the main topic(s) of the session – e.g. you may have shared resources (articles, websites, books, upcoming event etc.) with them etc.

Mentoring Activities update

Mentoring Activities conducted this month

Name of Participant	No. and date(s) of Mentoring Session(s) over this period [i.e. from the date of your last report to this	Mentoring relationship on track? ¹ [Yes / Satisfactory / No, Facilitator concerned]	Action required from Facilitator? ² [Yes / No]	Action completed by Facilitator? ³ [Yes / NA / No, ongoing]

	report's date]			
...	e.g. #1_21 st June, #2_15 th July, #3_14 th August			
...				
...				
...				
...				

Explanatory notes for this summary Mentoring Activities table

- ¹ This is the Facilitator's opinion based on the information provided in the Mentoring Update form as well as any other updates she receives directly from either the Mentor or Participant (e.g. "checking in" emails, phone call, during an AP session etc.). *If you respond "No, Facilitator concerned", please detail in bullet point form below the table.*
- ² This will come from in the Mentoring Update form, and/or may arise in conversation with the Mentor and/or Participant. *If you respond "Yes", please detail in bullet point form below the table.*
- ³ This will be correct as of the date of your report. *If you respond "No, ongoing", please provide time estimate by when you anticipate completing the required action (e.g. end of August, mid-September etc.).*

Your reflections re mentoring activities

In addition to completing the summary table above, please provide a short narrative with your additional reflections – what is working / is not working so well (including improvements you could suggest), any particular challenges you may be experiencing (and your proposed solutions), any particular support you would like from JS/KVS etc. *For example, mentors may be giving you feedback that the length or number of mentoring sessions is insufficient; or one of your mentors will be unavailable for a couple of sessions; or you, as Facilitator, observe that the face-to-face sessions tend to be more motivating for your participants etc.*

For participants who have not yet started their mentoring sessions, please explain the situation and indicate your estimated date by which their mentoring will commence.

Media/Comms/PR Activities for this month

In this section, please indicate the Media/Comms/PR actions you have undertaken in the month to raise awareness and keep the program visible in the public domain. Your activities may be specific to your own AP, to the entire AP across the region, or to women’s entrepreneurship more generally (in which you mention the AP)...etc. Remember to include your **online and offline activities** (see notes accompanying the Summary Table below).

In addition to completing the table below which summarizing your Media/Comms/PR activities, please provide a short narrative with your reflections – e.g. what worked / did not work so well (including what improvements you’d suggest), any particular challenges you may be experiencing, any particular support you would like from the Implementation Organization etc.

Summary Table of Media/Comms/PR activities

Title of article/show	Date of publication/event	Hyperlink	Notes
e.g. “Women entrepreneurs succeed in new markets” - The Sunday Gleaner	e.g. 22 nd April 16		
e.g. "Phenomenal Women" Radio Program - SOS 95.9FM, Marigot in St. Maarten/ St. Martin	e.g. 18 th May16, 12:30-1:30PM		e.g. panel discussion of women in business

Explanatory notes for this Media/Comms/PR table

- Please list **all AP-related Media/Comms/PR activities for the month**, be this something initiated/conducted by you (as Facilitator), by any of your AP participants, or by an external party. This should therefore include:
 - o Online articles, blogs, social media activities
 - o Press, TV, radio & any other media coverage
 - o Events (e.g. presentation you gave at your local Chamber of Commerce...)

As applicable, please also attach **“documentary proof” of your media activities** e.g. scanned copies of printed newspaper articles, locally released press releases.

Feedback for Implementation Team

In keeping with the program’s ethos of reflecting learning, please include any feedback you have in relation to the support provided to you this month.

This section may include e.g.

What worked well...what did not; what change(s), if any, you’d like to see made in the future to improve this support - e.g. more/fewer Meetings, longer/shorter calls, more/less discussion, calls with smaller groups for in-depth discussion, certain topics for which you’d like some particular assistance....

For recommendations you have made regarding further support you’d like to provide to your participants for the session (under 1.4 Your Reflections), please indicate if there is any way in which we may help. Where we can, we will certainly do so.

SECTION 3: MANAGING AN ACCELERATION PROGRAM

ANNEX 31: SELECTING, TRAINING, CERTIFYING AND RESOURCING FACILITATORS

The Facilitator

The Facilitator is key to the success of the Acceleration Program. The Facilitator is the one who must skillfully lead the learning process by navigating and identifying opportunities, resources and routes to be taken. She is guided in this process by the expressed needs of her participants. Using her experience, knowledge and contacts, the Facilitator supports the participants in identifying and negotiating key development challenges, as well as drawing upon the huge resource that the participants themselves represent.

The Facilitator needs, in equal measure, strong facilitation and business development skills. There must be clear evidence that she has the below-mentioned soft skills, facilitation experience, and business development skills.

Soft Skills and Facilitation Experience

- Be a "people-person", that is, someone who enjoys mixing with people, and helping them achieve their goals/dreams
- Empathetic towards business clients and the proposal/problems they bring to the table.
- Self-confidence, ability to make decisions and to work without supervision.
- Not necessarily a specialist, but with a general affinity with personal development material (e.g. Neuro Linguistic Programming), gained through reading and application, participation in other programs, or by academic study.
- Be a resourceful "go-getter" and self-starter, with strong organization skills and able to find information, facilities and resources etc. as the needs arise.
- Have strong networks in the business community – this is particularly important as the Facilitator must have existing connections with *growth-oriented* women entrepreneurs in order to identify possible interested participants, as well as service providers (technical experts, mentors/coaches, motivational speakers).
- Previous facilitation experience including excellent communication skills, active listening, open-ended questioning and other techniques for stimulating discussion.
- Experience in participant-centered methodology.
- Good public relations skills to influence important stakeholders and so gain supporters both within the community and the media.

Business Development Skills

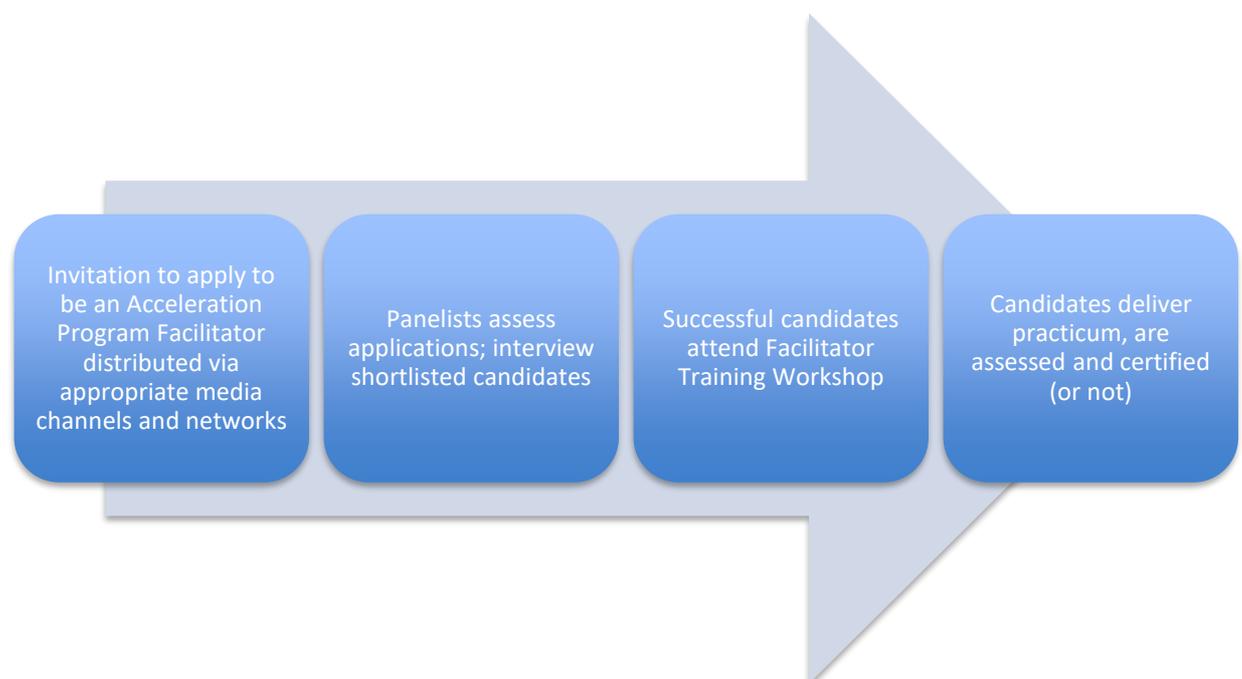
- Have a comprehensive understanding of business management and development, especially in marketing, market research and cash flow management. The Facilitator need not necessarily be a specialist in any one area.
- Practical experience working with or in small & medium enterprises (SMEs), ideally in an advising/counseling role.
- Thorough understanding of the process of change as a business moves from an idea, through start-up and accelerated growth. This will include a pragmatic understanding of business planning, its limitations and how it is best used at each stage.
- Have a quick and practical business mind, with a "nose" for good, viable, sustainable enterprises as well able to assess the strength, character and motivation of the person(s) involved.
- Ability to diagnose existing and foresee potential problems in a business, although not necessarily having the answer to address/solve the problems.
- Have good knowledge of the existing local business support programs and support networks, particularly those suitable/available to the participants.

The Facilitator Application Process

(See Annexes 30: Facilitator Application Form, and 30-1: Explanatory Notes to Facilitator Application Form)

Where the Acceleration Program will be implemented as a single, stand-alone program by an organization already engaged in business development activities, there is the possibility of training (a) staff member(s) in the methodology. However, where the Acceleration Program will be implemented in different cities/regions requiring the engagement of *several* Facilitators simultaneously, it will be necessary to canvas, recruit and train multiple candidates in the Acceleration Program methodology. What follows is the process that will result in a number of competently equipped Facilitators to deliver multiple Acceleration Programs.

Figure 2: Process for Selection and Certification of Facilitators



An invitation to become a certified Facilitator for the Acceleration Program (see Annex 31: *Invitation to become certified Acceleration Program Facilitator*) is distributed widely in the targeted region via the sponsors' own networks and its communication channels (e.g. web page; social media sites; newsletters); the traditional media (press releases sent to major newspapers and television channels); local business support organizations' networks and cross-postings on their websites.

Scoring and Shortlisting of Facilitators

A Selection Panel to review the applications and shortlist the candidates should comprise between two and four assessors who understand deeply the requirements of an Acceleration Program Facilitator. Panellists first convene to discuss and check their understanding of the scoring process. Once the application deadline has passed, the information from the application forms, where this is captured on a platform such as Survey Monkey, must be downloaded and forwarded to the Panellists. Panellists independently score and enter their scores on the scoring template (see Annex 32: *Explanatory Notes to Scoring Criteria for Selection of Facilitator(s)*). Where the Panellist believes that she cannot objectively score an applicant (e.g. where the applicant is a personal friend) this must be communicated to the other Panellists and she must refrain from scoring the particular application.

One-on-one interviews are conducted with the shortlisted candidates. These interviews can be either virtual, or in person, providing that the same method is used for all candidates to ensure a fair process.

The interview follows an agenda (see text box) the sequence of which is discussed with the candidate at the start of her interview.

Should the Panellists have remaining questions for any of the candidates that have been interviewed, a second interview with the concerned candidate may be conducted. Thereafter the Panellists consensually agree on the final list of applicants who will be invited to attend the *Training of Facilitators Workshop*.

Each applicant is notified as to whether she has been successful or not. The successful applicants receive a confirmation letter explaining the next steps, including their preparation for and attendance at the Training Workshop for Facilitators.

SAMPLE AGENDA FOR INTERVIEWING FACILITATOR APPLICANTS
• Welcome and introduction
• Explanation of interview process and the time it should take
• The time commitment required (to attend the Facilitator Training Workshop, as well for delivery of an Acceleration Program)
• Specific issues requiring clarification from the candidate's application (where relevant)
• 4 scenario questions testing the applicant's response as to how she would effectively manage and facilitate a discussion group; how she would deal with a breach of confidentiality in the group; how she would deal with an outburst of emotions that may be expressed during a session; how she would ensure her Acceleration Program was sustainable.
• Questions from the Candidate
• Wrap up, including next steps.

Training of Facilitators

The purpose of the training is to: create common understanding of the content of the Acceleration Program; equip Facilitators to run the process; clarify the responsibilities and accountabilities of the Facilitators and the sponsor; and assess the suitability of the applicants as Facilitators.

The training of Facilitators focuses on two learning areas:

- facilitation methodology
- business, and personal development via peer learning

The Training Workshop is designed to accommodate up to 20 participants. It runs over 5 days; days 1 - 3 cover the two learning areas as well as the roles and responsibilities of the Facilitators and their reporting requirements; days 4 and 5 make provision for the Facilitators to deliver a section of the program and receive feedback from the Workshop Trainers. The decision as to whether they will be certified or not is made after a joint discussion by the Workshop Trainers and other relevant parties e.g. representatives from the sponsor.

During the training the objectives of the program are presented and the target beneficiaries of the program, viz: growth-oriented women entrepreneurs, discussed to ensure common understanding of the expectations (the "what"). The "why" is also discussed to ensure relevant *buy-in* from the Facilitators.

The responsibilities of Facilitators are explained (Table 2).

Table 2: Summary of Facilitator's Responsibilities

Marketing, sourcing and selection of GO women for your AP	<ul style="list-style-type: none"> • Outreach including advertising and encouraging GO women to complete the application • Shortlisting and interviewing applicants • Selecting and securing commitment from candidates.
Business and Personal Development Peer Learning Sessions	<ul style="list-style-type: none"> • Arrange venue and refreshments • Check venue set-up (seating, water, refreshments, flip chart etc.) • Notify participants of date and time • Prepare for and facilitate the session • Ensure Participants complete the session feedback forms, after EACH session; • Submit a monthly report on highs, lows, proposed changes etc.
Technical sessions	<p>In addition to actions listed in <i>Business and Personal Development Peer Learning Sessions</i>:</p> <ul style="list-style-type: none"> • Identify and invite the technical expert • Introduce the speaker and the workshop topic, and conclude session
Motivational Sessions	<p>In addition to actions listed in <i>Business and Personal Development Peer Learning Sessions</i>:</p> <ul style="list-style-type: none"> • Identify and invite the Role Model Woman Entrepreneur • Introduce the speaker, and conclude the session • At the beginning of the next group session, solicit feedback from the participants on the Motivational Session/Speaker and capture in Facilitator's monthly report
Matching Mentors with Mentees	<ul style="list-style-type: none"> • Determine mentoring needs of each participant • Identify appropriate mentors • Approach and contract with mentors • Clarify expectations with mentors/mentees and introduce • Monitor and evaluate feedback from mentors and mentees and take action where necessary
Reporting	<ul style="list-style-type: none"> • Complete and submit monthly reports providing feedback on sessions and activities held during the preceding month • Complete and submit a Final Report at the end of the program, reflecting on major program lessons, achievements, and suggested improvements.

Certification

During the training workshop Facilitators are required, inter alia, to do a practicum that will confirm whether they will be certified as Facilitators or not. The practicum takes place over the last two days of the training workshop.

The criteria against which Facilitators are assessed are shared with them on Day 1, viz:

- **Facilitation Style** (including effectively managing the group dynamics; creating a safe space; encouraging effective sharing between participants by citing own examples; creating a sense of energy and enthusiasm; effectively closing the session)
- **Content Knowledge** (including use of local examples and cutting-edge thinking; addressing issues raised by the group)
- **Self-Development** (“comfort level” with this topic; sharing of new insights; reflecting on how

to apply new insights)

- **Engagement and teamwork with fellow Facilitators** (supportive attitude; constructive feedback)

The assessment is done by two Acceleration Program Trainers as well and can include representatives from the implementation team (e.g. staff of the Sponsor).

Where the program is implemented in very small countries, additional criteria to consider may include:

- Economy (scalability in country; number of citizens; money circulation in country)
- Export (export capacity of the country across all sectors mainly manufacturing, and services to lesser extent)
- Supportive Environment (existence of active business support organizations; ongoing support)

The assessment team consensually agrees on whether the requirements for certification have been met. Once a final decision has been made the Sponsor informs the Facilitator(s) and enters into a contract with the Facilitator(s) (*see Annex 34: Contract Sponsor-Facilitator*).

Where candidates are deemed not to have met the requirements for certification then they are **not** permitted to deliver the Acceleration Program.

Resources of the Acceleration Program

The Facilitator has many resources at her disposal. This includes her own expertise, that residing in her Participants, as well as that which can be shared by external experts and role models who can be sourced from her network.

Facilitators bring their professional expertise to the Acceleration Program. Facilitators are selected, inter alia, for their knowledge and experience in starting and running a business, and ability to share this with others. As Facilitators they form their own source of expertise and shouldn't be reserved in drawing upon it. Facilitators should keep in regular contact with each other - this is an important part of the process and will enrich the program

The **Participants** are all experienced business operators and their experience represents a significant resource for the program. Each business operator is already running a successful business - she has a wealth of knowledge and experience to draw upon. One of the primary aims of this program is to enable the Participants to learn from one another, share experiences and build a shared picture of best business practice for small businesses. Participants are also encouraged to share their professional expertise within their group. **The value of the program depends on the sharing of experience and skills.**

Where specialist needs arise, Facilitators are expected to identify and organize technical sessions that are delivered by **topic experts** to address the skills gap. Groups may decide they would like to have technical sessions on specific topics where no one in the group has the requisite knowledge. Facilitators will then organize accordingly, subject to any budget constraints. These will be integrated into the Acceleration Program so that participants can share their learning, reflections and experience on the topic in peer learning sessions after participating in technical sessions. For example, before financial management session, workshops could be organized to address weaknesses in accounting.

Outside speakers may include:

- Specialists known to the Facilitators or participants in the program.
- Facilitators or participants from other Acceleration Program groups. (The Facilitators should be in regular contact to support one another and identify ways in which their resources or those of their groups can be utilized.)

- Successful women entrepreneurs from the region willing to share their entrepreneurial journey and lessons learned (**motivational sessions**).

Typically, there is no budget for outside speakers (apart from selected expert sessions). Hence the costs of an outside speaker, where a fee is required, will need to be recovered from the Participants. "Gift baskets" as a token of appreciation, containing products that are manufactured by the participants may effectively substitute a fee.

The key issue is to ensure that the time is effectively used, hence do not use outside speakers for technical sessions to gain general information. If a speaker is invited, time must be spent determining the specific information participants need. Those issues should be outlined for the speaker so that he/she can provide a targeted address.

Support Material is provided for each session. This is a starting point for discussion, but the specific content should be carefully negotiated with the Participants.

Acceleration Program materials comprise:

- *Acceleration Program for Growth-Oriented Women Entrepreneurs Instruction Manual*
- *Acceleration Program for Growth-Oriented women Entrepreneurs Instruction Manual TOOLKIT that comprises:*
 - *Explanatory Notes*
 - *Templates*
 - *Exercises*
- *Re-linking Development Theory and Practice: Caribbean Lessons in Accelerating Female Entrepreneurship* (Lashley, Smith, and Sawers 2017)

Facilitators are expected to familiarize themselves with the use of these training materials and also to keep themselves current with new trends and thinking in entrepreneurship development. They are encouraged to read widely on the topic such that they can share current insights with their training audiences. Facilitators are expected to add to the given materials by including local examples, case studies, etc. that would benefit the participants.

Where multiple Facilitators have been appointed to run Acceleration Programs in parallel, there is enormous value in facilitating "peer-learning" between them and encouraging the development of a **Facilitator Learning Community**. This can be done using virtual communication platforms like Skype; Go-to-Meeting; Zoom etc. and should be facilitated by an experienced person from the Implementing Agency / Sponsor.

Whilst operational matters can best be communicated electronically (via email), the discussions between the Facilitators should be focussed on addressing learning points. "Meeting up" PRIOR to each Peer Learning session provides an opportunity for sharing envisaged approaches and ideas, whereas "meeting up" POST the Peer Learning session facilitates the sharing of tools and exercises that worked well / did not work as well; and a reflection on what could have been improved.

The importance of encouraging the development of a strong support network between Facilitators cannot be overemphasised. Not only does this provide a platform for testing ideas and gaining reassurance from their peers which results in a more confident approach, but an effective network encourages the sharing of expertise, and linkages to a wider network of experts / mentors / coaches.

"On-boarding" of Facilitators takes time and effort. Facilitators are likely to require support with the approach and methodology; with sections of the content with which they are unfamiliar; and with reflection of and adaptation to participants' changing needs. Especially when implementing the first Acceleration Program there should be regular contact between the Acceleration Program Trainers and the Facilitator(s).

ANNEX 32: FACILITATOR APPLICATION FORM

Application Form for Facilitator(s) for the Acceleration Program

Contents of Application Form:

- I. Your contact information
- II. Your educational & professional background
- III. Your training/facilitation experience
- IV. Your motivation to become an AP Facilitator
- V. Growing a small business in the Caribbean
- VI. Your networks
- VII. Your business product/service
- VIII. Your track record

I. Your contact information
Applicant name: Ms/ Mrs/Dr/Prof/
Email address: Phone (include country prefixes): Work: Cell: Skype:
Country where you are based:

II. Your educational & professional background
Please describe your educational and professional background.

III. Your training / facilitation experience
Please expand on what discussions you have facilitated with adult audiences; when; the target audience; and for whom the facilitation was provided. Also indicate any positive results /objectives obtained as a result of the facilitation. Also indicate whether you were the lead- or co-facilitator.
Do you have experience in working with entrepreneurs, and specifically women entrepreneurs? If yes, please elaborate.

Are you interested in behavioural and development psychology as it relates to self-development, and have you any coaching experience or acquired skills in this area (possibly acquired through reading or academic study)? Please elaborate.

What evidence can you provide in support of your having the required soft skills

What evidence can you provide to demonstrate that you have the necessary business development skills

IV. Your Motivation to become an AP Facilitator

Why do you want to be certified as an Acceleration Program Facilitator?

What do you believe will be your greatest challenge on this assignment?

V. Growing a small business

How would you respond to the following statements:

1. In start-up phase, it is NOT advisable for a business to have a diversified business portfolio (either motivate for or against).

2. Please complete the following sentence: "Funding is NOT the most important inhibitor for growth-oriented businesses, rather....."

How would you differentiate a "growth-oriented" business from a "lifestyle" business? (Draw especially on your experience of businesses in your country.)

VI. Your Networks

Are you a member of any of the following business organizations (please tick relevant organizations)?

Chamber of Commerce

Industry association (please specify)

Small business association (please specify)

Women entrepreneurs association (local or international – please specify)

Business and professional women association (please specify)

Service clubs such as Rotary or Lions (please specify)

Local economic development organization (please specify)

Business Incubator

Other (please specify)

Which of your networks do you intend to leverage in order to identify GO women entrepreneurs who could benefit from this program?

VII. Your Business Product/Service

Do you own a registered company? If yes, what are its products / services?

Please indicate your company's website and/or social media (if applicable) address:

VIII. Your Track Record

Please provide the names and contact details of two referees prepared to attest to your suitability as a Facilitator.

Please provide two testimonials from previous participants, including their contact details, which attended facilitated discussions led by you and can attest to your competence.

ANNEX 32-1: EXPLANATORY NOTES TO FACILITATOR APPLICATION FORM

Sections 1, 2 and 4 are self-evident.

Section 3: *Training / Facilitator experience* probes whether the applicant has worked with women entrepreneurs, and also her interest in the topic of "self-development" being an important component for holistic learning. It requests evidence of business and soft skills development.

Section 5: *Growing a small business in your country* comprises 3 independent scenario questions e.g. *Funding is NOT the most important inhibitor for growth-oriented businesses, rather..."* and the applicant is required to justify her answer. There are no absolute answers, and hence the questions are designed to explore the understanding and insight of the applicant.

Section 6: *Networks* requests information on the applicant's network as a possible resource for her program. She will be required to source her applicants from her network, as well as the various service providers including topic experts, mentors, and role models, and hence a strong network is vital - she must be able to demonstrate "connectedness".

Section 7: *Business Product/Service* captures the business interest of the applicant as well as whether she is running her own business or whether she is working for an organization/company. This information is used inter alia, to form an opinion on whether the applicant has an understanding of the challenges of starting and running a business, and whether she has first-hand experience of facing and resolving such challenges.

Section 8: *Track record* captures testimonials and contact details of referees should the selection panel desire to do a reference check on the candidate.

APPLICATION FORM

1. *Contact information*
2. *Educational & professional background*
3. *Training/facilitation experience*
4. *Motivation to become an Acceleration Program Facilitator*
5. *Growing a small business in your country - scenario questions*
6. *Networks*
7. *Business product/service*
8. *Track record*

ANNEX 33: APPLICANT SCORING CRITERIA AND EXPLANATORY NOTES FOR SELECTION OF FACILITATOR(S)

Table 1: Scoring criteria and weighting

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)
Criteria	Evidence of facilitation, soft skills, and personal development experience	Evidence of business development skills	Demonstrated understanding of growing women-led enterprises in the country	Ability to leverage own networks for benefit of the AP and specifically for sourcing suitable GO women	Motivation	Final Recommendation Yes=1 / No = 0	Total Score (out of 10)	First Ranking (from best = 1, to worst)	Final Ranking (from best = 1, to worst)	General Comments
Weighting	45%	35%	10%	10%	Yes = 1; No = 0					
Guide for scor	Score Adult facilitation experience out of 10 (1 = low; 10 = high)	1 = low; 10 = high	1 = low; 10 = high	1 = low; 10 = high						

Table 1: *Scoring criteria and weighting*, extracted from the Annex 3, *Template for Scoring of Facilitator(s)*, guides the Panelist in assessing the application. There are two "killer" criteria, viz. "Motivation" and "Final Recommendation". In the case of "Motivation" where the Panelist is of the opinion that this is not well aligned with the objectives of the Acceleration Program (e.g. "I want to enhance my academic achievements") by selecting "No" the candidate is disqualified from moving ahead in the process. Similarly, if a Panelist believes for some reason that a piece of information presented has not been accounted for in the criteria (e.g. the applicant will be out of her country for the period that the program will be implemented) then by selecting "No" under "Final Recommendation", the candidate will be disqualified from progressing further in the process.

It is understood that the absolute scores will differ between Panelists, and that it is the score *relative to each of the other applicants* that influences the relative position and hence the selection or not of the candidate.

Based on the "Total Score" out of 10, the Panelist manually ranks the applications from best (1) to worst (1+n) - see column (h) - First Ranking.

Once the respective Panelists have completed their individual scoring of the applications, the information is consolidated into a single spreadsheet such that the "First Ranking" of the respective Panelists can be viewed alongside each other. The Panelists as a group discuss and reach consensus on the "Final Ranking" - column (i) of candidates, from which the top 20 - 25 candidates form the shortlist and are invited to an interview with the Panelists.

ANNEX 34: CONTRACT SPONSOR-FACILITATOR

Sample

CONTRACTING AGREEMENT

BETWEEN

[NAME OF SPONSOR]

AND

[NAME OF FACILITATOR]

for

[NAME OF Acceleration Program]

THIS AGREEMENT (hereby referred to as the "Contract") is made between [SPONSOR] OF registered address(herein referred to as the "Sponsor" acting herein and duly represented by[name],.....in his/her capacity as[position in company] and _____ [NAME OF FACILITATOR, FACILITATOR'S COMPANY and ADDRESS] (herein referred to as the "Facilitator") .

WHEREAS:

- A. The objective of the Acceleration Program (hereinafter referred to as AP) is to establish a support system to growth-oriented (GO) women entrepreneurs to provide them with a suite of service offerings to assist them to grow substantially. Sponsor is responsible for the provision of logistical and organization support for the implementation of up to [number] of discrete Acceleration Programs in [country].
- B. Sponsor is responsible to provide all logistical and other support to the Facilitator(s) in rolling out up to [number] APs. Pursuant thereto, Sponsor has contracted the above-named Facilitator to provide the services detailed hereinafter, and the Facilitator has agreed thereto subject to the terms and conditions of this Contract.

NOW THEREFORE, IT IS HEREBY AGREED BY AND BETWEEN THE PARTIES:

1. SERVICES TO BE PROVIDED

- (a) The Facilitator shall be responsible for the delivery of the AP in _____ [NAME OF CITY].
- (b) **Annex A - Terms of Reference for Contracted Services** outlines the role and responsibilities of the Facilitator.
- (c) The Facilitator shall be independently responsible for delivering the contracted services.
- (d) For the implementation of this AP, the Facilitator shall be responsible for contractual agreements with other service providers as identified in **Annex A**.
- (e) The Facilitator agrees to provide the highest level of expertise and due diligence to the participants under the contract.

2. DURATION OF THIS CONTRACT

- (a) The duration of this Contract shall be for a period of one (1) year starting from the date of the last signature or until the completion of the AP, whichever is the later.
- (b) The Contract comes into effect on the date of the last signature.

- (c) The implementation of the Action, comes into effect, on the day following the date of the last signature.
- (d) **Annex B - Estimated Breakdown of Facilitator's Days for AP** shows the activities foreseen for the delivery of the AP.

3. TOTAL CONTRACT AMOUNT

- (a) Sponsor agrees to pay the Facilitator a total of **USD [AMOUNT]**, which is inclusive of the Facilitator Fees and Logistic Costs as per **Annex C - Proposed Expenditure Budget for AP**.
- (b) **Annex D - Travel and Accommodation** details the arrangements for this AP.

4. ADDITIONAL FUNDING

The Facilitator will source additional funding as per **Annex C**.

5. PAYMENT TERMS

- (a) The **Total Contract Amount** indicated above will be paid by Sponsor to the Facilitator in three instalments, as follows:
 - an advance of **USD[AMOUNT]** (which represents 60% of the total amount);
 - a second payment on receipt of the Facilitator's Monthly Report for Peer Learning Session #2 (*Small Businesses - Mickey Mouse or Mini Empire?*), of **USD [AMOUNT]** (which represents 35 % of the total amount);
 - a final payment on receipt of the Facilitator's Final Report, of **USD [AMOUNT]** (which represents 5 % of the total amount).
- (b) The advance will be made on signature of this contract by both parties.
- (c) This AP must have confirmed a critical mass of suitable participants for implementation. Should this number not be achieved, this contract will be cancelled. In such an instance, the Facilitator will refund to Sponsor the balance of funds remaining from her advance after deducting costs incurred to date (i.e. her Facilitator Fees and the Logistical Costs associated with activities up to, and including, the Outreach as specified in **Annex C**) as well as bank costs associated with making this refund to Sponsor.

- (d) The Facilitator will submit to Sponsor, within one week of notifying the successful AP applicants, an Outreach Report including her Final List of AP participants.
- (e) The second and final payments will be made by Sponsor subject to the Facilitator being fully compliant with the conditions of this contract; her monthly reporting being up-to-date and presenting an accurate reflection of her AP sessions; and her participation in the required Facilitator group (peer discussion) calls as defined by Sponsor.
- (f) The Facilitator will provide Sponsor with the details of a bank account to receive these payments using the form in **Annex E - Contact and Banking Details of the Facilitator**. Further guidance pertaining to invoicing are given in **Annex F - Important Information on Invoicing**. It is the Facilitator's responsibility to ensure that her banking information is correct; and she must inform Sponsor in writing of any changes in a timely manner. Sponsor will not be responsible for banking charges incurred by either Party resulting from incorrect information having been provided by the Facilitator.
- (g) All transfers to Facilitator will be made by Sponsor in USD currency.
- (h) Sponsor will instruct its bank to conduct the following transfers to the Facilitator and will confirm by email once these transfers have been made:
 - the advance within 1 working day of this Contract being signed by both parties;
 - the second payment within 1 working day of receiving the Facilitator's Monthly Reports for the period up to, and including, Peer Learning Session #2 (*Small Businesses - Mickey Mouse or Mini Empire?*);
 - the final payment within 1 working day of receiving the Facilitator's Final Report (with attachments) for the AP2.
- (i) For these payments to the Facilitator, Sponsor will cover all transfer costs (i.e. outbound - for Sponsor to transfer the funds; and inbound – for the Facilitator to receive the funds).
- (j) For the payments to be made by the Facilitator to service providers for this AP (as identified in **Annex A**), Sponsor will cover the bank charges up to a maximum ceiling limit of USD [AMOUNT].

6. TAXES AND DUES

The Facilitator shall pay all taxes, duties, fees, and other impositions that may be levied in conjunction with the fulfilment of the contract, the amount of which is deemed to have been included in the Total Contract Amount.

7. REPORTING DELIVERABLES

- (a) All reports shall be submitted in electronic format to the Sponsor as per **Annex G - AP2 Reporting: Guidelines, Forms & Reports**. This provides details of reports as well as the schedule for submissions.
- (b) Upon completion of the AP, the Facilitator shall submit to Sponsor a brief non-audited financial report on the costs incurred for the preparation and delivery of her AP – including expenditure (for all the sessions held, contracted service providers etc.) as well as income (from participants, sponsors etc.). The template for this (Excel) will be provided to the Facilitator by Sponsor.
- (c) Appended to her final submission, the Facilitator will also include the completed Participant Checklist, which details her AP Participants' attendance and participation over the course of the AP.

8. OUTREACH & COMMUNICATION ACTIVITIES

The Facilitator shall conduct initial outreach and communication activities as described in **Annex A**. These will be documented in her Outreach Report, as indicated in **Annex G**.

9. APPLICABLE LAW AND DISPUTE RESOLUTION

- (a) The contract is made in [COUNTRY] and shall be governed by the laws of [COUNTRY].
- (b) If a dispute arises out of, or in connection with, this contract, and the Parties do not resolve some or all of the dispute through discussions between the signatories of the parties, then either Party may provide to the other written notice containing a request to negotiate. This notice shall be given promptly to prevent further damages resulting from delay and shall specify the issues in dispute. If agreed by both Parties, the assistance of a 3rd party in resolving the afore-mentioned dispute may be requested.
- (c) If the Parties do not resolve some, or all, of the issues in dispute within 30 days from the notice to commence negotiations, the Parties agree to attempt to resolve those issues through mediation.
- (d) The mediation shall be carried out in accordance with the provisions of the Mediation Act of [DETAILS OF ACT RELEVANT TO THE COUNTRY OF IMPLEMENTATION].
- (e) Fees and expenses of the mediator and all administrative costs of the mediation, such as the cost of a meeting room, if any, shall be borne equally by the Parties, unless the court awards specifically provide otherwise.

- (f) The Parties agree that the representatives selected to participate in the dispute resolution process will have the authority required to resolve the dispute or will have a rapid means of obtaining the requisite authorization.
- (g) All information exchanged during the negotiation and/or mediation shall be regarded as “without prejudice” communications for the purposes of settlement and shall be treated as confidential by the Parties and their representatives unless otherwise required by law. However, evidence that is independently admissible or discoverable shall not be rendered inadmissible or non-discoverable by virtue of its use during negotiation and/or mediation.
- (h) If within 30 days of the appointment of the mediator, the Parties do not resolve some, or all, of the issues in dispute, the Parties shall submit those issues in dispute to binding Arbitration after written notice by either Party to the other Party.
- (i) A sole Arbitrator is to be appointed by the Parties by mutual consent. The arbitration shall be carried out in accordance with the provisions of the Arbitration Act, [DETAILS OF ACT RELEVANT TO THE COUNTRY OF IMPLEMENTATION]. The resulting award shall be final and binding on the Parties and shall be in lieu of any other remedy.
- (j) The Parties agree that they will each be responsible for their own costs including their attorney fees and personal travel, unless the court award, specifically provides otherwise.

10. INTELLECTUAL PROPERTY, USE OF MATERIALS & PROGRAMME VISIBILITY

- (a) All the reports, documents and software submitted by the Facilitator to the Sponsor, and all relevant data and supporting materials compiled in performing the Services, shall be the property of Sponsor. The Facilitator shall be permitted to retain a copy of such documents and software.
- (b) The Facilitator must use the materials and methodology provided by Sponsor for running this AP in accordance with the most recent version of the AP Implementation Manual.
- (c) All promotional material associated with the AP must include Sponsor's logo; and must be pre-approved by Sponsor prior to being released in the public domain. Branding of the AP must adhere to the most recent “AP Guidelines to 3rd Party Branding”, provided separately to the Facilitator by Sponsor.

11. LIMITATIONS ON LIABILITY

In no event will Sponsor be liable for any direct, indirect, incidental, special, EXEMPLARY, or consequential damages, even if Sponsor has been advised of the possibility of such damages for any use related to the Implementation Manual and associated Annexes, regardless of cause. Specifically, Sponsor is not responsible for, and hereby expressly disclaims any and all liability for, any and all damages or loss resulting to any party in connection with any transaction entered into in connection with any ideas, concepts or procedures related to the Implementation Manual and associated Annexes.

12. FORCE MAJEURE

- (a) The failure of either Party to fulfill their obligation shall not be considered to be a breach of the contract in so far as such inability is due to an event beyond the reasonable control of the Party and such event makes it impossible for the Party to perform its obligations.
- (b) As soon as reasonably practicable following the date of commencement of a Force Majeure Event, and within a reasonable time following the date of termination of a Force Majeure Event, the Party invoking it shall submit to the other Party reasonable proof of the nature of the Force Majeure Event and of its effect upon the performance of the Party's obligations under this Contract.
- (c) Either Party shall at all times take all reasonable steps within their respective powers and consistent with good operating practices (but without incurring unreasonable additional costs) to:
 - prevent Force Majeure Events affecting their obligations under this Contract;
 - mitigate the effect of any Force Majeure Event; and
 - comply with their obligations under this Contract.
- (d) The Parties shall consult together in relation to the above matters following the occurrence of a Force Majeure Event.
- (e) Should paragraph (a) apply as a result of a single Force Majeure Event for a continuous period of more than [180] days then the parties shall endeavor to agree to any modifications to this Contract (including without limitation, determination of new costs (if appropriate) in accordance with the provisions of Clauses 3, 4 and 5) which may be equitable having regard to the nature of the Force Majeure Event.

13. INDEMNITY

- (a) The Facilitator agrees to indemnify Sponsor against any loss, damage or claims arising against the Sponsor as a result of the actions of the Facilitator, her employees or agents engaged by the Facilitator under this Contract.
- (b) The Sponsor agrees to indemnify the Facilitator of any loss, damage or claims against the Facilitator as a result of the actions of the Sponsor, its employees or agents engaged by Sponsor under this Contract.

14. INDEPENDENCE OF SPONSOR AND FACILITATOR/ CONFLICT OF INTEREST

- (a) The Facilitator represents that she is an independent contractor and is not the servant of or in any way connected to Sponsor. Sponsor represents that it is not the servant of or in any way connected to the Facilitator.
- (b) The Facilitator shall not accept any remuneration, commission, discount or similar payment from any person other than Sponsor in connection with the contracted services other than the exception of provisions provided for in Clause 4.

15. NOTICE AND COMMUNICATIONS

- (a) All notices given in accordance with the contract shall be in writing or can be via email bearing an electronic signature.
- (b) All notices and communications shall be served on the respective Parties through their authorized representatives as detailed hereunder.

Facilitator's Name:

Business Title, Company Name:

Address:

Email:

Sponsor's Name:

Business Title, Company Name:

Address:

Email:

16. MODIFICATIONS

Should circumstances arise which call for modifications of this Contract, these may be made by mutual consent of both Parties in writing. Proposals in this respect from one Party shall be given due consideration by the other Party.

17. TERMINATION OF CONTRACT

- (a) Either Party may terminate the contract by serving 30 days' formal written notice to the other Party.
- (b) The Facilitator may terminate the contract where Sponsor:
 - (i) Fails to perform the support services or part thereof as stipulated.
 - (ii) Fails to perform any of its obligations, provided that the Facilitator has informed Sponsor of the relevant breach and Sponsor has failed to remedy the breach within 7 days from the date of notification thereof.

If the contract is thus terminated, the Facilitator shall reimburse Sponsor for deliverables not yet fulfilled as of the date of termination of the contract.

- (c) The Sponsor may terminate the contract where the Facilitator:
 - (i) Fails to perform the contracted services or part thereof as stipulated.
 - (ii) Fails to perform any of her obligations under the contract, provided that Sponsor has informed the Facilitator in writing of the relevant breach and the Facilitator has failed to remedy the same within 7 days from the date of notification thereof.

If the contract is thus terminated, the Facilitator shall reimburse Sponsor for deliverables not yet fulfilled as of the date of termination of the contract.

- (d) Upon receipt of notice of termination by the Sponsor, the Facilitator shall take immediate steps to bring the contracted services to a close in a prompt and orderly manner. The Facilitator shall reduce expenses to a minimum and shall not undertake any further commitments under the contract from the date of receipt of such a notice.
- (e) The initiation of arbitration proceedings in accordance with the contract shall not be deemed a termination of the contract.
- (f) In case of a breach of the contract by the Facilitator, included but not limited to failure or refusal to deliver the contracted services within the time limit specified, Sponsor may procure the contracted services from other sources subject to prior approval by *Sponsor*.

18. ANNEXES

The following Annexes (A-G) form part of, and are incorporated into, the contract:

- a) ANNEX A - Terms of Reference for Contracted Services
- b) ANNEX B - Estimated Breakdown of Facilitator’s Days for AP
- c) ANNEX C - Proposed Expenditure Budget for AP
- d) ANNEX D - Travel and Accommodation
- e) ANNEX E - Contact and Banking Details of the Facilitator
- f) ANNEX F - Important Information on Invoicing
- g) ANNEX G - Reporting: Guidelines, Forms & Reports.

19. COMPLETENESS OF THE CONTRACT

- a) This Contract is entered into voluntarily and is at-will. That is, either Party is free to terminate with or without cause.
- b) Each Party acknowledges that this Contracting Agreement contains the entire contract between the Parties for the services herein agreed upon.

IN WITNESS WHEREOF the Parties affixed their respective signatures each on the day and year mentioned in the relevant attestation clause.

SIGNED by [NAME OF SPONSOR'S EMPLOYEE]
[POSITION]

Date)
Location)

SIGNED by (Name of Facilitator))
Business Title, Name of Company

Date)
Location)

ANNEX A

TERMS OF REFERENCE FOR CONTRACTED SERVICES

Role and Responsibilities of the Facilitator

A. Role of the Facilitator

The Facilitator acts as a navigator, identifying opportunities, resources and routes through the process, but it is the participants who determine the overall direction. Using her experience, knowledge and contacts, the Facilitator supports the participants in identifying and negotiating key development challenges, remembering to draw upon the huge resource that the participants themselves represent.

Key aspects of the Facilitator's role include:

- Building an environment in which participants can share knowledge, take risks, and provide each other with support and feedback.
- Providing structured input as a session starter for the peer learning sessions
- Supporting participants to identify and resource individual and group learning needs.
- Encouraging reflective learning by using personal experience as an ongoing case study.
- Providing knowledge of local, regional or national resources to support the development process.
- Managing group dynamics.
- Evaluating continuously, as part of each session.
- Managing the time.
- Encouraging the development of networks, which will live on beyond the life of the AP.

B. Responsibilities of the Facilitator

1. Deliver the Acceleration Program (AP) to participating women entrepreneurs - viz:

- Organizing and facilitating **1 Registration session** and **7 peer learning sessions** for participants (each 2-hour duration), as well as conducting their final **Graduation event**.
- Organizing and facilitating **3 personal development sessions** (each 2-hour duration).
- Organizing **4 technical workshops** (each 2-hour duration) to be delivered by subject experts on a demand-driven basis; these may be delivered face to face or virtually by subject experts. *[Depending on the needs of the participants, up to 2 of these technical workshops may be replaced by up to 2 additional personal development sessions.]*
- Organizing **5 one-on-one mentoring sessions** (1,5 hour duration) for each of the participants.
- Organizing **2 motivational sessions** with female entrepreneur role models.

2. The Facilitator is also responsible for:

- Marketing of the AP, including outreach to GO women entrepreneurs. Implementing Organization will provide limited assistance.
 - Leveraging her own networks to identify and encourage GO women to apply to the AP.
 - Selecting 10 - 12 participants to the AP.
 - Selecting and contracting with service providers involved in their AP, viz: Technical (subject matter) Experts, Mentors, venues, caterers etc.
 - Organizing venues and refreshments for all the AP's events.
 - Identifying suitable Mentors for participating women entrepreneurs by matching against their determined AP growth goals. Once contracted, the Facilitator will monitor the Mentor-Participant relationships to facilitate optimal benefit for the entrepreneurs. This will include monthly "check-ins" with the Participants as well as their Mentors, and taking any corrective action required.
 - Monitoring and evaluating the AP Participants' progress, and capturing this using the templates provided by Sponsor.
 - Submitting an initial Outreach Report (with Final Participant List) and subsequent Monthly Reports to Sponsor on her AP, including consolidated feedback from the AP Participants for each activity conducted during the month (except for the Motivational sessions) as well as providing her own reflections.
 - Submitting a report on her AP Graduation event, to include press mentions and collateral materials.
 - Submitting a Final Report, which will include her reflections of the entire AP, recommendations for improvements, and indicate how AP services may be provided to GO women entrepreneurs in this AP's country beyond the end of the program. Her final submission will also include her AP Participant Checklist as well as her AP's financial report.
-

ANNEX B

ESTIMATED BREAKDOWN OF FACILITATOR'S DAYS FOR AP

Facilitator fee (per day)	USD
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No of GO participants per AP	15
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Activities foreseen per AP	Total Days	Cost
Outreach (including reaching out to organizations pre- and during launch)	7.0	USD
Interviewing* and selecting	9.0	USD
Contracting – with AP Participants, Technical Experts, and Mentors	2.0	USD
Oversight of organization of logistics: venue and refreshments for 18 sessions (9 Peer sessions; 3 Personal Devt. sessions; 4 Technical sessions; 2 Motivational sessions) <i>N.B. Admin Assistant, who will execute the logistics, is included in Expenditure Budget.</i>	1.0	USD
Preparation for and delivery of Registration (x1) & Peer Learning (x8) sessions	13.5	USD
Preparation for and delivery of Personal Development sessions (x3)	4.5	USD
Arrangement of and attendance at Technical sessions (x4)	2.0	USD
Arrangement of and attendance at Motivational sessions (x2)	1.0	USD
Determination of AP Participant's growth goals (15 x 2 hrs = 30hrs) Tailored one-one support to AP Participants on monthly basis (15 x 8m x 1hr = 120hrs) Exit interview with AP Participants (15 x 2hrs = 30hrs)	16.0	USD
Determining mentorship needs of AP Participants (15hrs); identifying Mentors and matching with AP Participants (15hrs); monthly check-in with Mentors and AP Participants (15 x 6m x 0.5hrs = 45hrs)	8.0	USD
AP Monthly Reports to Sponsor - 1x Outreach (with Final List of AP Participants); 9x Monthly; Final AP Report	7.0	USD
Contact with <i>Implementing Organization</i> , telephone and email support	12.0	USD
Organizing AP2 Graduation	1.0	USD
Total for Facilitator's fees	84.0	USD

* Interview Assumptions	
No of interviews	15
No of APs	1
No of Facilitator(s)	1
Assessing applications incl. team discussion to arrive at candidates' shortlist (hours)	16
Setting up and confirming interviews (hours)	2
Time per interview (hours) at 1 hour per interview (hours)	15.0
Finalizing Participant List (incl. team calls) and Notification of AP Participants (hours)	8.0
Total hours	41
Total days on OWN AP	5.13
Total days as Evaluator	3.87
Total days	9.00

ANNEX C

PROPOSED EXPENDITURE BUDGET for AP

Sponsor's Contribution for AP		USD ****		No. of AP Participants (for budgeting): 12		
*** [NAME OF COUNTRY]						
PROJECTED COSTS	Quantity		No. Persons	Unit Price	Total	Notes
Facilitator Fees						
Estimated level of effort:	***	days		USD ***	USD ***	
Sub-Total for Facilitator Fees					USD ***	
Logistical Costs						
Outreach expenses / PR for dissemination of information				USD ***	USD ***	
Venue for 9 peer sessions - x1 Registration; x8 combined Peer Learning / Personal Development / Technical sessions	9	sessions		USD ***	USD ***	
Refreshments - Registration session	1	sessions	13	USD ***	USD ***	
Refreshments - x8 combined Peer Learning / Personal Development / Technical / Motivational sessions	8	sessions	13	USD ***	USD ***	
Additional costs for Final Networking / Graduation event, including printing of certificates				USD ***	USD ***	
Technical Experts' fees (4 Technical sessions x 2 hours/technical session x U\$/hour).	4	2		USD ***	USD ***	
Mentors' fees (5 one-on-one mentoring sessions x 1 hr duration/session x no. of AP Participants x U\$/hr)	5	1	12	USD ***	USD ***	
Administrative Assistance					USD ***	
Printing costs: (i) <i>Self-actualization Handouts</i> plus (ii) <i>AP Participant Workbook</i>					USD ***	
Sub-Total for Logistical Costs					USD ***	
TOTAL COST for AP					USD ***	

PROJECTED REVENUE	No. Persons	Unit Price	Total	
Sponsor's Contribution for AP			USD *****	
Participant Fees for AP	12	USD ***	USD ***	
Sponsors		USD ***	USD ***	
In-Kind Contribution		USD ***	USD ***	
TOTAL INCOME for AP			USD ***	
TOTAL INCOME = TOTAL COST			***	

ANNEX D

TRAVEL AND ACCOMMODATION

- (1) The cost of domestic travel, local ground transport and/or accommodation for the Facilitator or the AP Participants will not be covered by the Expenditure Budget unless as a result of additional funding/sponsorship efforts by the Facilitator.
- (2) No *per diems* will be paid for the Facilitator or the AP Participants under the Expenditure Budget.

ANNEX E

CONTACT AND BANKING DETAILS OF THE FACILITATOR

Dated: _____

First Name/Surname:	
Phone Number:	
Postal Address:	
BANK DETAILS	
Exact Name of the holder of the Account:	
Account Number:	
Name and Address of the Bank:	
Bank Branch:	
Bank Branch Number:	
IBAN and/or SWIFT code(s):	
INTERMEDIARY BANK (if applicable)	
Name and Address of the Intermediary Bank:	
Intermediary Bank IBAN and/or SWIFT codes	

ANNEX F

IMPORTANT INFORMATION ON INVOICING

The invoice should provide Sponsor with the following information:

- Project Title: [NAME OF AP]
- Reference: COUNTRY OF IMPLEMENTATION
- Name of facilitator, address, telephone and/or fax, email
- Facilitator invoice N°
- Date of invoice
- Request for Disbursement (Description) - linked to requisite deliverables. i.e. Signed Contract & Finalized Participants List.
- Amount Invoiced
- Amount to be paid in US (\$) or otherwise

ANNEX G

AP REPORTING: GUIDELINES, FORMS & REPORTS

General Guidelines

The Facilitator will receive the necessary Survey Monkey data (e.g. completed application forms, participant feedback forms, mentors' forms etc.) from Sponsor; and will be responsible herself for preparing the reports for her AP.

For all the APs:

- All the forms and report templates listed below will be developed by Sponsor in Survey Monkey, and will be available for the Facilitator(s) (and participants, as necessary) to access (24x7) on an ongoing basis or for a designated period as specified below. During this time, Sponsor will be responsible for resolving any technical issues backend; and for downloading the data and sharing with the Facilitator within a week of receiving her (their) request for this data.
- Unless otherwise specified below, the data will be downloaded from Survey Monkey; and will include the individual responses as well as some summary statistics (e.g. number of responses) and accompanying charts (bar, pie etc.).
- The Facilitator(s) will use this Survey Monkey data, along with their own observations, to generate their AP reports.
- The Facilitator(s) will send their AP reports to Sponsor.

AP Forms & Reports

The list of forms and reports that will be used or generated for the AP is given below.

Summary of the AP Forms & Reports

	Responsible party	Schedule	Data source(s)
<i>At the start of the AP</i>			
1. AP Application form	To be completed by applicants online; completed forms to be provided to Facilitator(s) by Sponsor	At the end of the AP's application period	
2. Outreach Report and Final List of Participants	To be completed by Facilitator	Within one week of notifying successful AP applicants of their acceptance into the AP.	
<i>During the AP</i>			
2. Participant Checklist	To be completed by Facilitator	For each session (<i>to be appended to AP Final Report</i>)	
3. Participant Session Feedback form	To be completed by AP Participants, and provided to Facilitator by Sponsor	After each Peer Learning session (x8), Personal Devt. sessions (x3), and Technical workshops (x4)	
4. Participant Growth Plans	To be completed by AP Participants, and provided to Facilitator by Sponsor	During the early part of the AP so that the Facilitator can use as input for finding/matching appropriate Mentors for their AP Participants	
4. Mentor-Participant Progress form	To be completed by Mentors and AP Participants (<i>confidential</i>)	During each mentoring session	
5. Mentoring Update form	To be completed by Mentors and AP Participants, and provided to Facilitator by Sponsor	After each mentoring session	
6. AP Monthly Progress Reports; Graduation Event Report	To be prepared by Facilitator	Monthly (to include activities conducted that month). Separate Graduation Report within 2 weeks of the event.	Participant Session Feedback forms; Mentoring Update forms; feedback directly from Participants and/or Mentors
<i>At the end of the AP</i>			
7. Participant Exit Questionnaire	To be completed by participants <u>online</u> , and provided to Facilitator by the Sponsor	At the end of the AP	
8. AP Final Report	To be prepared by Facilitator <u>online</u> and provided to the Facilitator by Sponsor. The financial report will be prepared separately, in Excel.	At the end of the AP	

