

Strengthening Advisory Boards' Capacity: Insights for the CBPF Learning Program

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1. Introduction.....	2
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1.2 Key Findings.....	3
1.2.1 Learning Needs.....	3
1.2.2 Mentorship Expectations.....	4
1.2.3 Program Design Preferences.....	5
1.2.4 Challenges Identified.....	5
1.3 Recommended Actions by local leaders.....	6
1.3.1 Prioritize Technical Topics.....	6
1.3.2 Enhance Onboarding.....	6
1.3.3 Design a Comprehensive Program.....	7
1.3.4 Address Barriers.....	7
2. Thematic Analysis of Key Findings.....	7
2.1 Learning Needs and Capacity Gaps.....	7
2.2 Heat Map (Frequency by Theme).....	9

1. Introduction

This report presents findings from the needs assessment phase of the CBPF Learning & Mentorship Program. Conducted between December 11, 2024, and January 8, 2025, this phase aimed to identify Advisory Board members' key challenges, learning needs, and expectations, ensuring that program design aligns with their lived experiences and professional realities. Using a participatory and human-centered design (HCD) approach, this process emphasized empathy, co-creation, and iterative problem-solving to generate actionable insights.

Design research, a problem-solving methodology prioritizing end-user needs and behaviors, guided the approach. Unlike conventional methods relying on quantitative metrics, this approach actively engaged participants in shaping solutions, employing iterative phases of empathy, definition, ideation, and refinement. This structure allowed for rapid prototyping and testing, making it well-suited to address the complex, context-driven challenges faced by CBPF Advisory Board members.

The assessment achieved a 77% completion rate, with 23 out of 30 booked interviews conducted. Participants included Advisory Board members from local and national NGOs across the Middle East, Africa, Southeast Asia, and the Caribbean. The diversity of the group—spanning conflict-affected regions like Sudan, Syria, Gaza, Myanmar, and Haiti—provided rich insights into both context-specific and thematic challenges. Leaders from youth-led and women-led/rights organizations further enriched the analysis.

Notably, less than half of the advisory board members responded to different emails offering one-on-one conversations. While not preempting on how this reflects on their interest and potential participation in the learning program, it is an indication to consider keeping an individual approach in communication even though it is less time efficient. Our purpose remains to keep this programme inclusive and welcoming and it would require an individualized approach. Notable themes emerging from these discussions include:

- Regional challenges such as conflict-sensitive programming and the interplay between national funds and cluster systems.
- Advocacy for gender inclusion and localization, particularly in areas dominated by international actors.
- Cross-cutting issues like disability inclusion, resource mobilization, and navigating governance and power dynamics.

These conversations also revealed a range of mentoring needs. Participants expressed interest in tailored guidance on strategic advocacy, governance, and technical skills, which could inform the mentoring component of the program. The insights fostered trust and ensured participants' voices remained central to the program's foundation.

This report sets the stage for designing a responsive and inclusive Learning Program, tailored to the realities of Advisory Board members while addressing their most pressing challenges.

1.2 Key Findings

1.2.1 Learning Needs

Participants highlighted recurring themes such as CBPF fund allocation processes, due diligence requirements, communication and negotiation skills, localization advocacy, and strategic presentation skills. Enhanced coordination mechanisms with clusters and donors, and efficient document review were also identified as priority areas.

Key themes included:

- **Humanitarian Architecture and Cluster-Fund Interconnection:** Participants emphasized understanding the roles and interactions between national humanitarian funds and cluster systems, noting a gap in clarity.
- **Disability Inclusion:** Integrating disability perspectives into program design and humanitarian operations was frequently mentioned.
- **Resource Mobilization:** Challenges in securing sustainable funding prompted calls for training in proposal writing and donor engagement.
- **Conflict-Specific Knowledge:** Navigating restricted zones, managing prolonged emergencies, and balancing immediate and developmental needs emerged as critical areas for capacity building.

Focus was placed on transitioning from emergency to development funding models and addressing localization through practical advocacy.

A key observation is that those one-on-one conversations were unevenly focused on the learning program and its parameters and often went beyond addressing different needs of local and national NGOs around capacities, financing, and coordination within their contexts and the UN humanitarian architecture in their context/country.

1.2.2 Mentorship Expectations

Participants sought mentorship tailored to:

- **Strategic Leadership:** Enhancing confidence in governance roles and high-level engagement.
- **Advocacy Skills:** Representing local voices effectively and navigating power dynamics.
- **Technical Expertise:** Deepening understanding of governance mechanisms, fund allocation, and technical processes.

Preferred mentorship formats included:

- Peer mentoring and thematic exchanges to foster collaborative learning.
- One-on-one guidance for addressing context-specific challenges.
- Practical mentorship focuses on fund governance, gender-responsive programming, and resource mobilization.

We observed that some of those expectations and needs would be also covered by a peer to peer methodology in the Learning programme - we will need to articulate specifically with the mentoring programme.

1.2.3 Program Design Preferences

Participants broadly supported:

- **Monthly Online Sessions:** Covering cross-cutting themes such as localization and advocacy.
- **Monthly Workshops:** Diving into specialized topics like governance and inclusion.
- **Interactive Formats:** Emphasizing pre-session reading materials, group discussions, and visual content for clarity.

Inclusion features were crucial, with participants advocating for translation support, flexible scheduling, and asynchronous options to address connectivity and accessibility challenges in remote or conflict-affected areas.

1.2.4 Challenges Identified

Participants reported the following barriers:

- **Onboarding Gaps:** The lack of structured orientation or clear Terms of Reference (ToR) for advisory board members led to role ambiguity.
- **Power Imbalances:** Donor-dominated governance processes can lead marginalized local NGO perspectives.
- **Connectivity Issues:** Poor internet access in conflict zones limited virtual participation, compounded by the lack of physical meeting options.
- **Language Barriers:** Inadequate interpretation services restricted participation for non-English-speaking members.
- **Due Diligence Processes:** Stringent requirements excluded smaller and less-resourced organizations from funding opportunities.

Additional concerns included:

- **Humanitarian Architecture:** Limited clarity on cluster functions and their integration with fund governance.
- **Youth and Women-Led Organizations:** These groups faced significant cultural and structural challenges, including exclusion from decision-making and stringent funding criteria.
- **Coordination with local and regional CSOs:** coordinating with other local actors is not straightforward regarding their constituency perspective in the fund or coordination with local actors active in clusters where decisions are made.
- **Building a collective voice for advocacy:** many leaders have mentioned and spoken about advocacy, building collective voices regarding fund allocation, due diligence or localization - it is about creating a guided space for collective and peer to peer work on specific advocacy needs.

1.3 Recommended Actions by local leaders

1.3.1 Prioritize Technical Topics

Focus on critical themes such as fund governance, localization within the fund, and advocacy strategies to address foundational gaps among Advisory Board members. Key topics include:

- **Fund Governance:** Strengthen understanding of governance mechanisms, fund allocation processes, and advisory board roles.
- **Localization:** Understand how localization is embedded in the funds' strategy and work and develop practical strategies for advancing localization, including integrating local perspectives into fund decision-making.
- **Negotiation and Strategic Advocacy:** Build skills in representing local NGO voices effectively in donor-heavy environments.

- **Disability Inclusion:** Provide actionable strategies for incorporating disability perspectives into humanitarian program design and response.
- **Gender Mainstreaming:** Explore approaches like gender-responsive budgeting and ensuring equitable participation in governance.
- **Conflict-Specific Knowledge:** Offer context-specific modules on navigating restricted zones, managing prolonged crises, and balancing short- and long-term humanitarian needs.
- **Resource Mobilization:** Provide training on strategic fundraising, proposal writing, donor engagement, and partnerships to bolster local NGO capacities.

1.3.2 Enhance Onboarding

Develop a structured onboarding package tailored to the needs of new members, ensuring clarity and readiness for their roles. Key elements include:

- **CBPF Governance Mechanisms:** Cover fund allocation processes, national vs. global fund requirements, and governance frameworks.
- **Role Expectations:** Clearly outline the responsibilities and contributions expected from Advisory Board members.
- **Practical Tools:** Provide guidance on navigating governance dynamics, advocating for equitable fund distribution, and contributing effectively to decision-making processes.
- **Interactive Orientation:** Conduct live orientation sessions complemented by a digital onboarding toolkit for self-paced learning.

1.3.3 Design a Comprehensive Program

Implement an interactive, modular learning framework that includes:

- **Monthly Group Sessions:** Focused on cross-cutting themes like localization, governance, and advocacy.
- **Bi-Monthly Thematic Workshops:** Cover specialized topics such as gender mainstreaming, resource mobilization, and conflict response.
- **Peer Learning Sessions:** Match participants with experienced advisors for sharing lived experiences and building targeted skills.
- **In-Person Engagements:** Facilitate quarterly or annual networking and problem-solving sessions, when feasible, for deeper collaboration.

1.3.4 Address Barriers

Address key barriers to participation through tailored solutions:

- **Translation and Interpretation:** Ensure real-time translation during sessions and provide pre-session materials in multiple languages (e.g., Arabic, French, Spanish).

- **Asynchronous Learning Options:** Offer downloadable materials, pre-recorded videos, and written summaries to support participants with connectivity challenges.

Introduce tools and strategies for:

- **Effective Communication:** Build capacity for articulating ideas clearly and advocating in high-pressure, donor-dominated settings.
- **Meeting Readiness:** Equip members with practical approaches to reviewing documents and preparing for meetings efficiently.
- **Decision-Making:** Provide techniques for navigating governance processes and dynamics and find the channels and ways to assert local NGO voices in discussions.

Strengthen governance processes to promote equitable participation by:

- Introducing **rotating leadership roles** in advisory boards to distribute influence fairly.
- Allocating **dedicated time slots** for local NGO representatives during meetings.
- Engagement with local actors ahead of the meetings to influence the agenda-setting
- Ensuring **transparent and inclusive decision-making frameworks** to address power imbalances effectively.

2. Thematic Analysis of Key Findings








2.1 Learning Needs and Capacity Gaps

Theme	Frequency	Examples	Recommendations
CBPF Technical Knowledge	21/23	Participants highlighted gaps in understanding governance, fund allocation, and due diligence processes. Examples: Hanafi Elkhalfa emphasized onboarding gaps; Stephanie Antoun requested CBPF mechanism clarity.	Develop tailored onboarding resources, interactive workshops on governance, and clear pre-reading summaries to improve understanding of CBPF policies.
Strategic Advocacy Skills	17/23	High-priority need for negotiation, lobbying, and presenting evidence-based arguments. Example: Jeanne Frangieh stressed the importance of advocacy for localization and decision-making exposure.	Conduct advocacy-focused workshops incorporating storytelling, negotiation tactics, and public speaking, with role-play and real-world scenarios for practice.
Localization Strategies	18/23	Key need for practical approaches to localization,	Peer-to-peer learning sessions showcasing successful case

		especially in conflict-sensitive areas. Example: Sanda Kyaw Win discussed challenges in translating localization policies into implementation.	studies and mentorship on managing localization efforts in complex contexts.
Inclusion, Gender, and Youth Inclusion	16/23	Strong emphasis on gender mainstreaming, disability inclusion, women-led organizational capacity-building, and youth inclusion. Example: Amal Syam and Nafisa advocated for gender-sensitive protocols, while Joshua Jatau highlighted barriers for youth-led organizations.	Thematic sessions on gender-responsive budgeting, disability inclusion strategies, and leadership enhancement for women- and youth-led organizations.
Resource Mobilization	13/23	Difficulty accessing sustainable funding and gaps in proposal writing and donor engagement were recurring themes. Example: Marie-élise Wong identified a need for resource mobilization skills.	Develop training modules on partnership-building, grant proposal writing, and engaging with donors to strengthen local NGO funding capabilities.
Conflict-Specific Knowledge	10/23	Challenges in adapting emergency protocols, navigating politically restricted zones, and balancing immediate and long-term needs. Example: Mustafa Alokoud raised issues related to cross-border funding.	Context-specific modules on emergency response in conflict zones, coordination across clusters, and strategies for addressing prolonged crises.
Coordination with Clusters	15/23	Significant need for clarity on cluster coordination and integration with fund governance. Example: Georges Kouwonou discussed gaps in understanding cluster mechanisms and humanitarian architecture.	Host workshops on cluster dynamics, with examples from local leaders and how they are navigating fund governance and clusters' work effectively.

2.2 Heat Map (Frequency by Theme)

Below is a heat map that visually represents the importance and frequency of each learning theme

Learning Theme	Frequency (Mentions)
CBPF Technical Knowledge	
Strategic Advocacy Skills	
Localization Strategies	
Inclusion (Gender, Youth, Disability)	
Coordination with Clusters	
Leadership Development	
Readiness for meetings and Document Review	

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