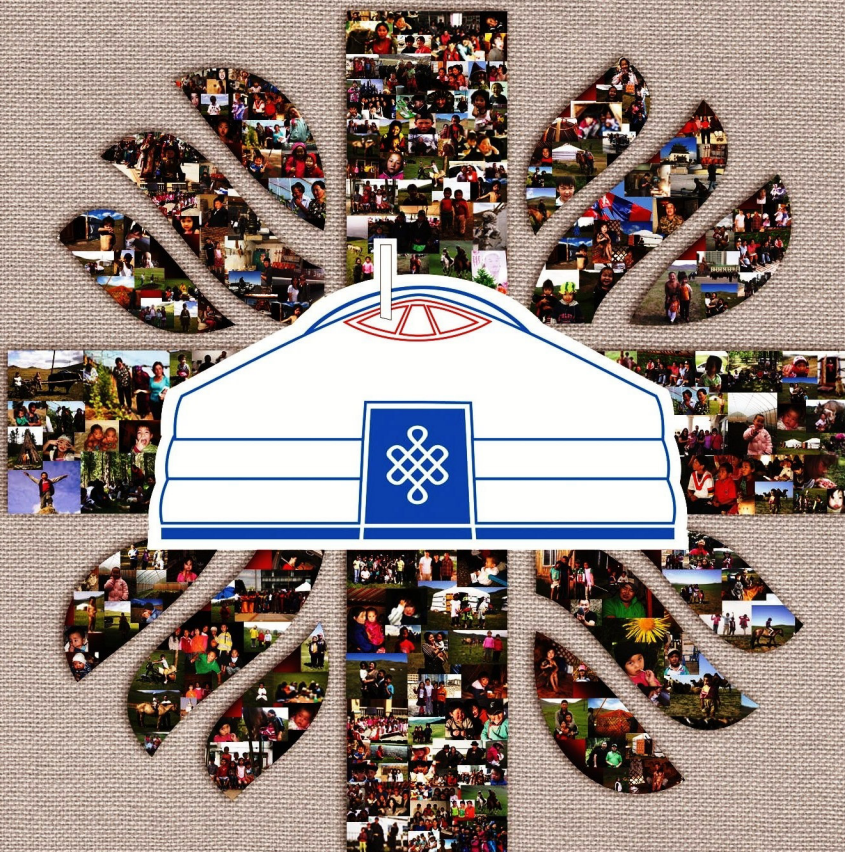


# STRATEGIC PLAN

## 2014-2016



Caritas **Mongolia**

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## Acknowledgements

Caritas Mongolia would like to show its full appreciation to all those who participated and contributed to the strategic planning process. Inputs from all stakeholders were extremely useful in taking into account the perspectives of representatives of the Government of Mongolia and program beneficiaries during the consultations, Caritas partners during the Partners Week and Caritas Mongolia staff involved in the strategic planning workshop. Participants include:

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- Ms Yoko Yokoyama, International Desk Programme Officer, Caritas Japan
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- Mr Zar Gomez, Regional Coordinator, Caritas Asia

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### *Mongolia Board Members:*

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- Ms Oidov Oyungerel, Legal Advisor of the Apostolic Prefecture
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- Mr Amartushin Otgon Bayar, Governor, Guulin Village, Gobi Altai
- Mr Davaanyam, Governor, 1st Khoroo, Songino-Khairkhan District, Ulaanbaatar

### *Supporters and Beneficiaries:*

- Ms Shepherd, President, International Women's Association, Ulaanbaatar
- Health Food group, A lot of Harvest Beneficiaries, Soil Land Benefit group, Harvest group, Eco Healthy Food group, Beneficiary groups working at the demonstration plot in Gobi Altai
- Ms Myagmar (beneficiary) and MsChimid, Bayankhoshuu area, Ulaanbaatar
- Ms Byambadolgor, beneficiary, 25 Khoroo, Ulaanbaatar
- Harvest group, passive solar greenhouse beneficiaries, Ulaanbaatar
- Sunlight group, passive solar greenhouse beneficiaries, Ulaanbaatar
- Instructors at the Skills Training Centre, Ulaanbaatar
- Trainees at the Skills Training Centre, Ulaanbaatar
- Ms Gansukh, Skills Training Centre graduate, beneficiary, Ulaanbaatar
- Ms Dashjargal, Skills Training Centre graduate, beneficiary, Ulaanbaatar
- Ms Darisuren, Skills Training Centre graduate, beneficiary, Ulaanbaatar

This whole process of reviewing the past to plan the future program would have been harder without the careful and clarifying accompaniment of Frank de Caires, of On-Change, our consultant. Together, we have spent fruitful days before, during and after this "journey". Thanks to his expertise, Frank has provided an atmosphere in which everyone was stimulated and encouraged and as a result: the new Caritas Mongolia Strategic Plan 2014 – 2016 was produced.

We own much to those who, in one way or another, were with us though physically absent; with special Thanks to H.E. Bishop Isao Kikuchi, Caritas Asia – President, Julia Gietmann, Caritas Germany and Markel Kathleen, Catholic Relief Services.

To each and all of you: no words can express our gratitude for your sustained support.

Fr Pierrot Kasemuana  
Executive Director

Ulaanbaatar, Mongolia  
03 July 2013



# 1. Executive Summary:

In June 2013 Caritas Mongolia set out its second Strategic Plan for 2014 – 16 and this builds on the knowledge and practical experience gained over the last four years implementing a range of development projects. These include: Innovative Farming Approaches in Mongolia (IFAM), Skills Training Centre, Social Reintegration, Environment and Emergency preparedness. The process in developing the strategic plan involved all staff and a series of consultations with project stakeholders (beneficiaries, government counterparts and associates) and a workshop with Caritas partners: Belgium, Czech, France, Japan and Taiwan.

## *1.1. Key Program strategies for Caritas Mongolia:*

- Food Security: Innovative Farming Approaches in Mongolia (IFAM): (2<sup>nd</sup> phase)
  - Promote and facilitate co-operative development
  - Create Audio-Visual Communication Resources
  - Transfer Ownership of the Demonstration Plot to Beneficiaries in Gobi Altai
  - Develop and Promote the Caritas Mongolia IFAM Brand
  - Facilitate Access to Processing Technology and Marketing
- Skill Training Centre (STC)
  - Develop a Survey and analysis on Poverty and Vulnerability in the target ger communities in Songino Khaikhan district, Ulaanbaatar
  - Consider and Design Options for Enhancing the Quality of the Skill Training Centre with focus on Production Skills and Marketing
  - Create and maintain a Network of Trainees

### Phase II:

- Scale up the Skill Training Program with Government Collaboration and Resources.
- Social Reintegration
  - Consolidate the Country Sheet Information Package for Returnees

- Promote the Reintegration Services Offered by Caritas Mongolia to European Governments
- Network and Collaborate with the Government of Mongolia on the 'Beehive' Program (encouraging Mongolians to Return home)
- Establish Health and Safety Protocols
- Create Linkages between the Reintegration Team and Other Caritas Mongolia Project Teams/Staff
- Emergency Preparedness
  - Create a Step by Step Guide for Caritas Mongolia: Being Prepared to Deal with Emergencies
- Environment (with Caritas Czech)
  - Develop an Advocacy Strategy on Environmental Issues related to Mining.
  - Collaborate with Caritas Czech on Joint Training Initiatives.

## *1.2. Key Institutional Strategies*

- Board of Directors
  - Broaden the Membership of the Board of Directors
  - Recruit an Independent Auditor
  - Strengthen the Capacity of the Board of Directors
- Caritas Mongolia Staff
  - Strengthen the Capacity of Caritas Mongolia staff
  - Continue and Strengthen an Open Approach Internally and Externally
  - Recruit a Qualified Professional in Charge of Finance

## 2. Overview:

Caritas Mongolia was set up in response to the *zud* (a severe winter) in 1999 - 2000. Since then, Caritas Mongolia produced its first Strategic Plan in 2009 for the four-year period: 2010-13. The following activities were implemented: Institutional capacity building; Strengthening the sustainability of program activities; Registering as a Mongolian NGO (2010), and becoming a full member of the Caritas Network (2011); Advocacy on climate/environment, gender issues and migration; Collaboration with other INGOs/NGOs; and Developing a policy document on preparing for emergencies. See Annexure II for the Caritas Mongolia Program Schedule from 2010 to 2016.

In December 2013, Caritas Mongolia will conclude its first strategic plan and during June 2013 it embarked on reviewing progress and developing its second three-year strategic plan for 2014 to 2016. Consultations were conducted by an independent consultant to gain inputs from key stakeholders (see the report in annexure III) and a strategic planning workshop with all staff was organized on 11 and 12 June 2013. The inputs from these processes were shared with Caritas Partners (Belgium, Czech, France, Japan and Taiwan) during the 'Partners Week' facilitated by Caritas Asia on 13 and 14 June 2013.

This report outlines the development context in Mongolia and the strengths, Weaknesses, Opportunities and Threats of Caritas Mongolia, based on the implementation of its first strategic plan. The vision, mission and values – developed with the contributions of all staff are outlined followed by the program strategies and objectives for 2014 – 16. The report is completed with Caritas Mongolia's institutional strategies and objectives and the external and independent perspectives of the consultant.

## 3. Development Context in Mongolia:

Mongolia is a large country with 1.565 million square kilometers of land and a population of 2.8 million in 2011. Many people live in isolated communities in the countryside and there is increasing disparity between rich and poor despite the wealth being generated by the mining in natural minerals. There are poor health services in the countryside and a continual migration to the cities that cannot provide enough jobs and adequate living conditions, especially in the severe cold winters.



Some 22 years after holding its first multi-party elections, contemporary Mongolia has achieved much in the political arena, with a democratic culture established, seeking peaceful means in the resolutions of disputes and conflicts. In recent years, this has gone hand in hand with greater market openness. Traditionally, agriculture, particularly herding, was the mainstay of the economy. However, the scale of exploration and mining activities have become the primary focus of Mongolia's government. As a result, it is the mining and extracting sector that has emerged as the key driver of foreign investment as well as Mongolia's exports.

Even as it turns into a mining powerhouse, Mongolia is doing what it can to preserve its pastoral landscapes, home not only to a distinctive national culture but also to economic potential through tourism, as well as agriculture. The country is seeking to market both its cashmere and its meat products as premium products grown in a sustainable, traditional manner (source: "The Report. Mongolia 2013", Oxford Business Group).

Even though the economy of Mongolia is growing rapidly, the gap between the rich and poor is increasing, therefore the reformation of the social welfare's basic services for the low-income citizens and the prudent allocation of wealth needs to be tackled urgently. Rate of unemployment is high, therefore, particularly the issue supporting the employment of young adults also needs to be solved immediately. There through, issues such as deficient infrastructure and environmental problems based on over-centralization population are still arising.

Even if there is medium-term economic growth observation along with the mining development in Mongolia, the economy of the country is facing issues such as mining product export emancipation and adopting various sources for the economic growth. The management of macro-economy as well needs to be well balanced in order to ensure the sustainable economic growth. On the other hand, there are major problems regarding to the over-centralization population and community development disparities (source: Website of Japanese Embassy in Mongolia).

## 4. Strengths, Weaknesses, Opportunities and Threats:

The following analysis is based on inputs from Caritas Mongolia staff, based on the recent implementation of its strategic plan 2010 to 2013.

### 4.1. Strengths:

- Human resources are committed, skilled and experienced in setting up the programs over the last three years (agronomists, trainers (IFAM and Skill Training Centre), social workers and field workers). Staff have kept updated on ideas and new technologies in their fields and this is applied in the programs. The organization is run in a democratic way and methods are transparent and open.
- The organization is stable and the direction is well known to support social issues in society.
- Caritas supports its employees to be empowered. They can attend foreign meetings and workshops and share their real country experience and knowledge and learn from others.
- Caritas works diligently within the laws and regulations of Mongolia. It also collaborates actively with government authorities at national, provincial and district levels.
- Caritas Mongolia benefits from the long and rich history of Caritas Internationalis and the experience of the Catholic Church.
- Caritas has networked with other donors and NGOs, in addition to the Caritas family, including the European Union (and potentially USAID). Caritas is well respected in Mongolia.

### 4.2. Weaknesses:

- There is not enough investment of resources into the organization to build the human resource capacity. For example staff are stretched by carrying out two to three different roles. There is a need for a full time social worker for the Skill Training Centre and a trained and qualified finance manager. There is also a need to build capacity in English skills, especially as the organization deals with international English speaking partners and donors.
- Caritas needs to raise its profile further so that more people know about the organization.
- The IFAM project has set up a new design but it does not have a patent for this. Not enough people know of the Caritas Mongolian brand of

solar passive greenhouses.

- While Caritas has guidelines on administrative rules and procedures in English (and these should be translated into Mongolian), there is a need for everyone to follow and to take responsibility themselves (without having to be controlled in a military and regimented style). Actions should be taken more promptly to deal with administrative issues.

#### *4.3. Opportunities:*

- There are sufficient number of agronomists and masons trained in the IFAM project. They have gained enough experience and knowledge and have established a good team. There is a chance of connecting to the market for beneficiaries.
- The research and demonstration plots are working well and known to people, especially in Gobi Altai.
- Beneficiaries have been empowered through training workshops.
- There is potential for Caritas Mongolia to work in partnership with some Caritas Member Organizations within the Caritas Internationalis network who are willing to accompany Caritas Mongolia over the coming years.
- Put more power in working with local government authorities.
- Improve the training centres and set up mobile centres so that staff can go wherever there are needs.
- Make more linkages between beneficiaries across all projects, and create a guide to support the setting up of co-operatives. Some of the groups that have been established are working well.
- Many stakeholders have been involved in the programs (with more than 350 beneficiaries in the IFAM project) and they could be trained in emergency preparedness so that they are ready to respond promptly. Stakeholders could be powerful allies in supporting Caritas Mongolia in being able to respond to emergencies.

#### *4.4. Threats:*

- Lack of stability of skilled staff and the need to increase job satisfaction and leadership skills.
- Sustainability of project with the need to continually develop new projects and new donors as each project has its own life cycle.
- Lack of encouragement from government policy makers. For example the government has not provided a policy for reducing tax for NGOs. However, the support and relationships are good at provincial and dis-

strict levels, and the government is starting to appraise the work of Caritas Mongolia.

- Being a Church/faith based organization, there are always suspicions and fears that Caritas Mongolia might use its social works to spread a foreign religion.
- Mongolia became a 'middle income country' in 2011 and this has meant a reduction in technical development assistance. On paper Mongolia has big natural resources with the largest copper and gold mine in the world. However, the reality is that the majority of people live in poverty.
- Lack of funding for projects.
- Locally, although Caritas Mongolia is registered as a local NGO, it is still being seen as "foreign and wealthy", thus, still almost impossible to secure local income.

## **5. Vision, Values and Mission:**

- **VISION:**

People will live free of poverty in a healthy, secure and just society

- **VALUES:**

Justice and equality

Harmony and unity

Respect and dignity for everyone

- **MISSION:**

Caritas Mongolia will facilitate and create integral livelihood opportunities for vulnerable communities enabling a healthy and just society

## 6. Program Strategies and Objectives

### *6.1. Food Security: Innovative Farming Approaches in Mongolia (IFAM) (2<sup>nd</sup> phase)*

#### *6.1.1. Promote and facilitate co-operative development:*

- Ensure that beneficiaries form socially cohesive and collaborative co-operatives that are self sustaining and working towards achieving joint objectives of innovative farming approaches. This will involve supporting communications between co-operative group members and resolving any issues in a constructive way.
- Ensure that co-operative members have the right training, tools and equipment to carry out their duties in promoting sustainable farming approaches. This will include training in the construction of greenhouses, maintenance and agro farming soil and water management, access to water and to financial mechanisms so that cooperatives can ultimately purchase their own greenhouse/s and access to processing technology and marketing initiatives.

#### *6.1.2. Create Audio-Visual Communication Resources to Promote IFAM: <sup>(1)</sup>*

- Prepare the core information (i.e. in text and photographs) for the curriculum for IFAM including:
  - o Construction of solar passive greenhouses
  - o Agro running (day to day maintenance of the greenhouses)
  - o Water and soil management
  - o Nutritional value and recipes
  - o Cellar (underground cold storage)
  - o Co-operatives and their development
- Develop a communications operational plan with human resources, schedule and budget, outlining the target audience and media to be used (i.e. video, television, radio, website, publications, calendar and posters etc.). Linkages could be made with the government to air the program to promote innovative farming approaches on television and radio. Short videos could also be used to promote the program to other development agencies, including the government ministry of agriculture.

<sup>(1)</sup> Caritas France has expressed interest in supporting a communications strategy for IFAM.

### ***6.1.3. Transfer Ownership of the Demonstration Plot to Beneficiaries in Gobi Altai:***

- Negotiate with the government officials in Gobi Altai and prepare a plan to hand over ownership of the land and greenhouse to the co-operative groups that are operating there. There will need to be a way of demarcating the land for each greenhouse and preparing guidelines for the use of shared and access to water from the 2 large tanks. There will also need to be co-operative guidelines for the current and long term use of the land and greenhouse (i.e. including when a beneficiary may pass on his/her share in the co-operative to someone else). There will also need to be joint agreements on sharing and pooling resources such as water and sharing security responsibilities.

Notes:

- a) The Gobi Altai demonstration plot has 12 groups with 63 beneficiaries.
- b) As the current project will complete by November 2013 the project will need to manage the transfer promptly. However, if the project gains continued funding from the European Union, there will be more time for the transfer of land. However, this will give the project the opportunity to transfer the land within the timescale of the extended project, perhaps by the end of the first year, and monitor how it is being managed.

### ***6.1.4. Develop and Promote the Caritas Mongolia IFAM Brand:***

- Prepare a Caritas Mongolia logo (and this should be the same as the existing identity) along with a visual / text for the solar passive greenhouse / IFAM. This should be accompanied by standards to specify how the brand identity (logo) should be shown and placed on / in greenhouses or in any publications or other media.
- The Caritas Mongolia IFAM brand should specify the minimum requirements for the construction and maintenance of a passive solar greenhouse. This can be checked and measured by an independent certifier or Caritas Mongolia to ensure that the relevant standards are being maintained and it further strengthens Caritas Mongolia's integrity and reputation.



- The Brand identity may be used for different products. For example a greenhouse may be adapted to different locations in Mongolia and there will need to be standards for each design and specification.
- Negotiate and sign a memorandum of understanding with ADRA who are building 1,000 greenhouses based on the Caritas Mongolia design. This should specify the standards of the greenhouse and how and where the Caritas Mongolia IFAM brand will be displayed.

#### ***6.1.5. Facilitate Access to Processing Technology and Marketing:***

- Work with government agencies, private sector and NGOs to seek the most appropriate and cost effective technologies for food processing relevant to small scale food co-operatives. Create options for cooperatives by explaining the pros and cons of various types of processing technologies and seeking examples of where they have been used in Mongolia for first hand feedback.
- Support co-operatives in marketing initiatives by linking them to people who can advise them with professional and commercial expertise in Mongolia. Support small scale initiatives that may grow into larger enterprises – learning by doing.
- Work with the relevant government ministries in being able to supply co-operatives with discounted and good quality seeds. Ensure that co-operatives have a procurement system set up to source the materials and products they need to produce and market high quality vegetables and processed food.

#### ***6.2. Skill Training Centre (STC)***

##### ***6.2.1. Develop a Survey and Analysis on Poverty and Vulnerability in the target ger communities in Songino Khairkhan district<sup>2</sup>, Ulaanbaatar:***

- Prepare a questionnaire for a survey on people living in the ger district to ascertain levels of poverty and vulnerability and profiles of target beneficiaries (i.e. household incomes and livelihoods, single headed households, social, health and economic issues people face, including domestic violence, trafficking, internal migration, and accommodation/living facilities and infrastructure (access to electricity, water and heating)).
- Prepare an appropriate methodology to conduct the survey and this could draw on:

- o Gathering information from the central and district government, and NGOs working in the same area.
- o Desk review of relevant documentation (publications or institutional reports).
- o Conducting a door-to-door survey in sample areas (and this could utilize Caritas Mongolia staff and researchers from the university and/or local consultants).
- Conduct analysis of the findings and make recommendations on how Caritas Mongolia will respond to the needs of vulnerable target beneficiaries and adapt the Skill Training Centre to meet their current and emerging needs. Prepare a report based on the findings and recommendations.

***6.2.2. Consider and Design Options for Enhancing the Quality of the Skill Training Centre with focus on Production Skills and Marketing:***

- Brainstorm and analyze the stages of the training process and design areas that can be improved to support trainees in gaining more production and practical skills. (This could involve adding an additional week to the 21 day course).
- With an improved course structure and quality training, liaise with the government Labour and Social Welfare Department for the approval of a certificate that is upgraded to a higher standard.
- Consider financial options for trainees to purchase sewing machines at the end of the course (i.e. this could include part subsidy of the machine by Caritas Mongolia and part repayment of a loan by the graduate trainee, or a full repayment loan over a given time period).
- Support graduate trainees with information on the various career options (i.e. including setting up their own small scale business at home, establishing a co-operative, getting a job with a business tailoring unit, or setting up their own retail outlets).

### ***6.3. Social Reintegration***

#### ***6.3.1. Consolidate the ‘Country Sheet’ Information Package for Returnees:***

- Prepare the ‘Country Sheet’ package that outlines the key information that returnees need (and this should be regularly updated). This includes the following:
  - o Employment opportunities and micro-business
  - o Medical facilities and health insurance
  - o Accommodation
  - o Education (primary, secondary, college and university)
  - o Transportation
  - o Mongolia country sheet statistics
  - o Returnee network (an informal network set up and maintained by returnees from particular countries)

#### ***6.3.2. Promote the Reintegration Services Offered by Caritas Mongolia to European Governments:***

- Prepare communications materials on the reintegration services offered, outlining Caritas Mongolia’s experience since 2007. Market the services to European Governments and follow up electronically and in person to negotiate new contracts.
- Send out newsletters to existing and potential government clients to promote the work of Caritas Mongolia. This could include consolidated information on what is being done during the financial year (with numbers of cases and people involved in the reintegration program and a case study outlining recommendations to improve the support to returnees).
- Liaise with Government clients to demonstrate how the reintegration program can be more effective to support returnees drawing on the practical experience of Caritas Mongolia.

#### ***6.3.3. Network and Collaborate with the Government of Mongolia on the ‘Beehive’ Program (encouraging Mongolians to Return home):***

- Network with the government and promote the services of Caritas Mongolia to advise and support the government in their ‘Beehive’ program.

<sup>(2)</sup> There is a population of 261,917 people in the Songino Khaikhan district, and of these there are approx. 40 to 50,000 people who are vulnerable in the target area of the STC project.

- Set up formal linkages with the government of Mongolia to share information and seek support where necessary on the Social Reintegration program. Projects are funded by European governments and there should be an official connection with the government of Mongolia to ensure transparency of what Caritas Mongolia is implementing.

#### ***6.3.4. Establish Health and Safety Protocols:***

- Set out protocols (in documentation), outlining the process of dealing with returnees. This should include whether there should be one or two staff present when meeting with returnees, especially in difficult cases where there might be disputes over the allocation of returnee funds.

#### ***6.3.5. Create Linkages between the Reintegration Team and Other Caritas Mongolia Project Teams/Staff:***

- Strengthen the 'Forum' for staff (a space to share information) with regular quarterly meetings so that there can be in-depth information sharing and understanding of each other's programs. Smaller team meetings could also be organized as and when necessary.
- Organize shared visits to other programs so that the Reintegration Team can learn and also share their experience and advice. This should also apply to other project staff visiting the work of Social Reintegration and vice versa.

#### ***6.4. Emergency Preparedness***

##### ***6.4.1. Create a Step by Step Guide for Caritas Mongolia: Being Prepared to Deal with Emergencies.***

- Finalize the document that Caritas Mongolia has prepared that outlines, step by step, what needs to be done to be able to respond proactively in the event of an emergency. This should cover the steps needed for launching an emergency appeal with the Caritas Internationalis network and how to follow through with logistics and the required support.

##### ***-Ensure that the guide is in line with the following:***

- o Policies and guidelines of the Emergency Department, Government of Mongolia.
- o Emergency guidelines and procedures of Caritas Internationalis.
- o Sphere Handbook, Humanitarian Charter and Minimum Standards in Humanitarian Response, internationally recognized sets of common principles and universal minimum standards in life-saving areas of humanitarian response .
- Brainstorm ways of setting up an emergency seed fund (of approximately US\$20,000) to respond promptly in the event of an emergency. This fund will be recouped and made available for future emergencies, once funds have been raised through an emergency appeal.

Caritas Mongolia will specify in detail what the fund is for and how it will be used and managed. This would need to be approved by the Board of Directors. Caritas Mongolia could organize events (gala dinners) and other innovative marketing appeals to raise funds.

#### ***6.5. Environment (with Caritas Czech)***

##### ***6.5.1. Develop an Advocacy Strategy on Environmental Issues related to Mining:***

- Continue collaboration with Caritas Czech on the environmental program (developing improved building materials).
- Conduct research on environmental issues related to mining and put forward ways of addressing and mitigating risks. This could lead to a specific program working on mining related environmental issues, in

partnership with like-minded I/NGOs.

#### ***6.5.2. Collaborate with Caritas Czech on Joint Training Initiatives:***

- Participate in trainings offered by Caritas Czech and invite Caritas Czech to trainings set up by Caritas Mongolia.<sup>(3)</sup>

## **7. Caritas Mongolia's Institutional Strategies and Objectives**

### ***7.1. Board of Directors Membership***

#### ***7.1.1. Broaden the Membership of the Board of Directors.***

- Invite well respected professionals, (including government officials, academics, private sector and civil society representatives) to join the Board of Directors to widen and broaden the inputs of the board. This could seek to involve individuals with specific professional experience that meets the needs of Caritas Mongolia (for example in marketing the organization, institutional development and financial management).

### ***7.2. Independent Auditor***

#### ***7.2.1. Appoint an Independent Auditor.***

- Dismantle the current Audit Committee that comprises two members of the Board of Directors (as this represents a conflict of interests).
- The Board of Directors to appoint an independent external auditor to conduct an independent financial audit at the end of the financial year on the work of Caritas Mongolia. The auditor will prepare a report to the Board with findings and recommendations for financial integrity and due diligence.

### ***7.3. Capacity of Board of Directors***

#### ***7.3.1. Strengthen the Capacity of the Board of Directors.***

- Clarify and strengthen the roles and responsibilities of the Board of Directors, with an expanded number of members.
- Conduct training for the Board of Directors to ensure strengthened capacity that will develop the strategic direction and support staff in achieving results for Caritas Mongolia.

<sup>(3)</sup> Sphere project: <http://www.sphereproject.org>



- Organize project visits for the Board of Directors so that there is a thorough understanding on what the organization is setting out to achieve, and how effective and efficient it is.

#### *7.4. Caritas Mongolia Staff*

##### *7.4.1. Strengthen the Capacity of Caritas Mongolia staff.*

- Encourage cross learning and analysis across Caritas Mongolia Teams. This should seek to optimize the skills and experience of staff from different technical sectors in contributing and challenging each other with analysis and recommendations to improve the programs.
- Strengthen analytical and planning skills in creating development programs (i.e. from poverty research and analysis, proposal writing, project planning, implementation and management, project progress and performance management and monitoring and evaluation). This could include studying development frameworks and approaches that fits with Caritas Mongolia's vision, values and mission.

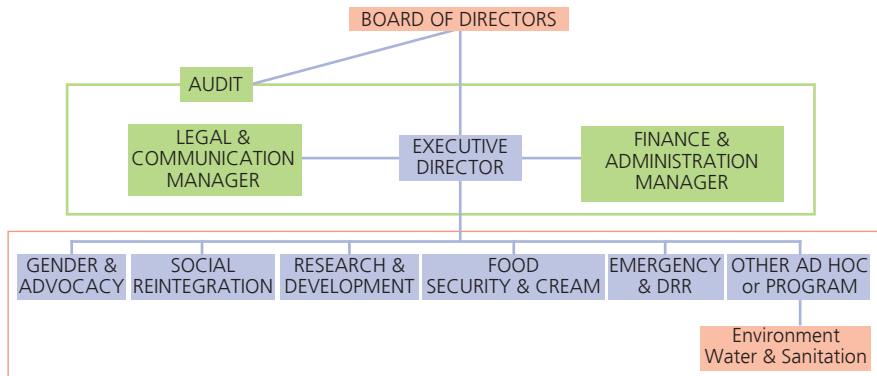
##### *7.4.2. Continue and Strengthen an Open Approach Internally and Externally:*

- Continue and develop an open approach within and across teams in Caritas Mongolia. This will seek to build on staff forums (every three months) and build greater ownership of programs and institutional development with all staff.
- Create and strengthen strong communication links and relationships with partners, donors and associates. Ensure that communication is clear and concise and responds promptly to requests for information.

##### *7.4.3. Recruit a Qualified Professional in Charge of Finance*

- Appoint a qualified professional in charge of the Finance department. This should draw on the skills, experience and qualifications of staff to ensure financial integrity and transparency in all administrative and program systems and procedures.

## Annexure I: Caritas Mongolia Organizational Structure



Office of the Director is made up of: Director, Legal/Communication Manager and Administration/Finance Manager

Management Committee made up of: Office of the Director and different Project Coordinators

## Annexure II: Caritas Mongolia Program Schedule 2010 - 16

No	Project Title	Donors	2010	2011	2012	2013	2014	2015	2016
1	Skill Training Centre	Caritas France							
		Caritas Japan							
		Individual Benefactors/Others							
		STC generated income							
		Caritas Belgium							
2	Voluntary Return and Social Reintegration	Cordaid							
		Caritas Belgium							
		EU-Fedasil							
		Maatwerk bij Terugkeer							
		Caritas Austria							
		EU							
3	Anti-Human Trafficking	Refugee Action							
		Caritas Asia							
4	Sustainable Agriculture and Farmers Rights	Caritas Asia							
		Catholic Relief Services							
5	Food Security and Innovative Farming approaches in Mongolia	European Union							
		Caritas France							
		Others							
6	SWITCH-CCR	EU							
7	Emergency Appeal: Flood in Mongolia	Caritas Internationalis							
8	Capacity building of extension centers & cooperatives in rural areas	EU							
9	Water and Sanitation	Caritas Singapore (Charis)							
10	Innovative Agricultural Project	USAID							
11	Nursery -Extension to STC	Church-In-Need, Miserior, Missio and Holy Childhood							

## *1. Overview*

In 2009, Caritas Mongolia (CM) started a demanding process that produced its first Strategic Plan 2010-13, outlining program, institutional and finance priorities. Over the four years the following activities were implemented: Institutional capacity building; Strengthening the sustainability of program activities; Registering as a Mongolian NGO (2010), and becoming a full member of the Caritas Network (2011); Advocacy on climate/environment, gender issues and migration; Collaboration with other INGOs/NGOs; and Developing a policy document on preparing for emergencies.

## *2. Terms of Reference*

In December 2013, CM will conclude its first strategic plan and during June 2013 it embarked on reviewing its first plan and developing its second three-year strategic plan for 2014 to 2016. This review process with the support of an independent Consultant<sup>4</sup> aimed to develop answers in response to the following questions outlined in the terms of reference<sup>5</sup>:

- I. Be aware of what exactly has been achieved during the period (2010-13). And whether what has been achieved is in line with fixed goals/orientations.
- II. Where/what are the fields wherein CM may have needed more attention but this was not realized; and why?
- III. Where/What are the experiences that will need to be capitalized and optimized for the future?
- IV. Based on this process, what experiences should be considered positively/negatively when elaborating the new SP?

Specific areas for evaluation. It is the aim of CM to have its whole managerial and operational structures be evaluated and this includes the following areas:

- I. Structure of Governance (Board of Directors, Management Committee);
- II. Structure of participation (Assembly);
- III. Programs (Gender; Skill Training; Social Reintegration; Agriculture–Food Security; Environment; Emergency; ad hoc project: sanitation).

## *3. Consultations with Stakeholders*

The consultant undertook joint planning with CM management

team<sup>6</sup> and visited project sites with CM staff to consult with stakeholders in Ulaanbaatar and Gobi Altai and Guulin village from 02 to 09 June 2013. People involved in the consultations included:

- Govt. of Mongolia: Ministry of Agriculture, Governors and social workers.
- Beneficiaries – individuals and groups (1) Skills Training Centre (STC), 2) Innovative Farming Approaches in Mongolia (IFAM) and 3) Social Reintegration projects.
- Trainers / Resource Persons.
- Caritas Mongolia Board members and Staff.

The consultations sought to inform the strategic planning process and ensure that Caritas Mongolia's new and emerging program is focused on meeting the development needs of vulnerable people in the areas where it works. It aims to define the niche of Caritas Mongolia and optimize and leverage scarce resources for greater impact. Guiding questions for the consultations, prepared by the consultant and CM management team were structured across three areas: Project, Institutional and Strategy:

<sup>(4)</sup> Frank de Caires, Director, On-Change Ltd, (frank@on-change.com).

<sup>(5)</sup> The consultant is grateful to the Caritas Mongolia Management Team for their coordination in setting up the consultations in Ulaanbaatar and Gobi Altai and the staff for supporting this mission along with the contributions from the Governing Board and government stakeholders in the review process. In addition, all staff participated actively in the strategic planning workshop and this contributed to the ideas and strategies in the Strategic Plan.

<sup>(6)</sup> CM Management Committee: Fr. Pierrot Kasemuana, Director, Byambajav Oidov (Lucy), Legal and Communication Manager, Jamaa Nasanjargal, Admin. and Finance Manager, Sr Lucilla Munchi, Gender and Advocacy Coordinator, Tegshbayar Sanduijav, Environment, Research and Development Acting, Gandolgor Sainkhuu, Food Security and Agriculture Coordinator, Caritas Mongolia and Frank de Caires, Consultant.

***Guiding Questions for Consultations:***

***I. Project:***

1. How have you / people benefitted from this project?
2. What did you / your organization value the most out of this project (examples)?
3. What problems were encountered and how were these addressed (and can you give examples)?
4. How well has the project met your expectations (rating from 1 to 10)?

***II. Institutional:***

5. What is the most effective aspect of Caritas Mongolia's development program in Mongolia (i.e. it's niche and brand identity)?
6. What should Caritas Mongolia prioritize on to be more effective?
7. How well has Caritas Mongolia communicated with you and your organization?

***III. Strategy:***

8. How well has Caritas Mongolia aligned its program to meet your priorities and needs?
9. Looking ahead, what do you foresee as the emerging strategic development needs or gaps where support is needed?
10. What should Caritas Mongolia do over the next three years?

The summary of the consultations, findings and recommendations were shared with Caritas Mongolia staff participating in the strategic planning workshop on 11 and 12 June, and with the Caritas Partners<sup>7</sup> during the 'Partners Week' facilitated by Caritas Asia on 13 and 14 June 2013.



#### *4. Findings and Recommendations:*

##### *4.1. Innovative Farming Approaches in Mongolia (IFAM)*

The IFAM project, in collaboration with Caritas France is funded by the EU (2010-13) and will complete, with an extension to November, 2013. A key element of the IFAM project is the development of passive solar greenhouses, Bio-climatic Domestic Cellars, and Trench greenhouses. The materials and components for the construction of the greenhouse is provided free by the project and beneficiaries contribute labour for construction and they are responsible for maintaining the greenhouse.



Passive Solar Greenhouse (35 sqm), Demonstration plot, Ulaanbaatar



Ms Myagmar (beneficiary) and daughter Ms Chimid, Bayankhoshuu area, Ulaanbaatar

<sup>(7)</sup> Caritas Belgium, Czech, France, Japan and Taiwan.

### *Benefits of the Passive Solar Greenhouse:* <sup>(8)</sup>

- **Healthy food:** Beneficiaries are able to grow, harvest and consume their own healthy nutritious food without chemicals being used in production. Furthermore, the project has introduced new leafy vegetables in Mongolia. One beneficiary noted that the plants, *“grown with my own hands and soil – guarantees it is fresh, not from China where they use chemicals for fertilizer”*
- **Livelihoods:** In addition to consumption, beneficiaries are able to sell their produce locally and this creates additional income for the beneficiary and household. In two harvests Ms Myagmar earned 460,000 Tugrik(US\$325). Another beneficiary, Ms Byambadolgor earned 1,081,750 Tugrik (US\$765).
- **Enlarged growing period:** The greenhouse enables the growing period to be significantly extended from 3 to 9 months. This means that growers can provide for their households over a longer period of time and sell locally, and this lessens the dependency on imported vegetables from China where chemical fertilizers are used.
- **Self-managed and sustainable:** The greenhouses are self managed by beneficiaries in their own households and this is sustainable as the beneficiary has full ownership and will gain depending on the amount of effort and investment made (i.e. in planting, watering and maintaining the vegetables in the greenhouse).
- **Group membership:** The project elects a member to become a Group Leader and forms a community group of approximately 12 beneficiaries. This creates a support network and enables beneficiaries to exchange information and seek advice from the Group Leader and members who have more knowledge and experience in horticulture. The group membership is particularly beneficial to elderly people as it gives them an opportunity to socialize with their peers rather than sit at home alone.
- **Demonstrating success:** The individual beneficiaries and their greenhouses act as ‘demonstration models’ within their own communities as the greenhouse is visible to others. Beneficiaries have commented that people ask about the greenhouse and would like to have one. They ask: *“where did you get it from – even I want one”*. Another ben-

<sup>8</sup> Note that the consultant and staff visited beneficiaries who were using the passive solar greenhouse and not the bio-climatic domestic cellars and trench greenhouses. Therefore, this section focuses on the greenhouse.

*eficiary commented: "People when they walk by, they keep looking at the greenhouse and they want one".*

The demonstration plots in Ulaanbaatar and Gobi Altai serve as an opportunity to showcase the benefits of the greenhouses to institutions and individuals. It also allows people to compare different models and costs and decide themselves that will be most suitable for their specific context and environment.



Greenhouse (copied from the demonstration plot, and staff trained by the project) at Ch. Lodoidamba Secondary school No. 2, Gobi Altai.



Internal wall insulation using hay, greenhouse, demonstration plot, Gobi Altai

### *Issues of the Passive Solar Greenhouse:*

- **Access to water:** Access to water for own consumption and for the greenhouse is difficult for beneficiaries living in the ger districts in both Ulaanbaatar and Gobi Altai. Water has to be purchased and transported using small trolleys or by carried by hand on uneven roads. The greenhouse requires water on a daily basis and it is a challenge, especially for elderly people to fetch and carry water.

In Gobi Altai the furthest beneficiaries have to walk approx. 6 kilometres from their home to the greenhouse. This means that they have to spend the whole day at the greenhouse and this is challenging especially where they have young children.

- **Material costs and sustainability:** Currently, the project is donating, free of charge, the materials for the cost of construction (approximately \$1,000) and the beneficiaries are constructing the greenhouse themselves. This means that neighbours, and people living in the surrounding area, of those who have received greenhouses also want one. This may cause some resentment within communities and will pose a challenge to Caritas Mongolia to be clear about the criteria for selection and to have an open and transparent allocation process.

The project will be limited in the long term to continually donate, free of cost, the materials for the greenhouses. Therefore, there is a need to research and develop ways to lessen the cost of materials and find ways (including financial loans) to encourage individuals to share and contribute towards costs.

- **Large scale of demonstration plots and sustainability:** The demonstration plot at Gobi Altai is of considerable size with 23 greenhouses and two large water tanks. This will pose challenges to sustain this infrastructure in terms of ensuring that the supply of water, available from the deep well continues and the security and maintenance of the site.
- **Processing technology and marketing:** For the groups (with individual greenhouses) in Ulaanbaatar there is a need for them to set up processing technology to preserve their produce (e.g. pickles sealed in jars) and market this to commercial markets. For leafy vegetables the produce has a short shelf life so it is important that the market is close by to the seller.

- **Motivating beneficiaries:** In some cases, a small percentage of the beneficiaries were not motivated to work in the greenhouse due to different reasons, including: being involved in other work to sustain livelihoods, falling sick, and being discouraged because their seedlings were not successful on the first attempt. There needs to be a systematic way of supporting beneficiaries who require more assistance. This means that Caritas Mongolia staff, especially managers, will need to talk to group leaders to identify and understand the issues that group members are facing, discuss them and come up with joint solutions to resolve the problems with the appropriate follow up support.

### *Recommendations (Passive Solar Greenhouse):*

- I. **Update and consolidate technical information:** Update and consolidate technical information, drawings, specifications and plans on passive solar greenhouses showing what works best in specific locations across Mongolia. This should pull together the learning from the last three years and show the various models with cost options (i.e. utilizing local materials where possible to reduce costs). The information should be displayed in a simplified and clear format, and as large as possible (including posters) to make it accessible to the beneficiaries of IFAM.
- II. **Develop brand identity:** Develop a standard Caritas Mongolia brand identity that is shown on all greenhouses, underground storage cellars and products (including training and communication materials) produced by the project. This should be visible with specifications on where it should be displayed in the greenhouse so that it is clear.

For organizations, such as ADRA, that are using the Caritas Mongolia greenhouse model, the Caritas brand should be displayed in the greenhouses and credit given in any project related information/documents. This should be agreed formally in writing with ADRA or other agencies (including the secondary school in Gobi Altai that has copied the Caritas greenhouse model).

Caritas Mongolia should specify the quality standards for the greenhouse and related products so that it can issue a certificate /letter, stating that the model has been followed accordingly to the relevant standards (for example the thickness of the walls and materials used etc.).

**III. Consolidate training materials:** Consolidate training materials and curriculum that has been developed on key areas including:

- o Construction of greenhouses and cellars
- o Agro running of the greenhouse
- o Water and soil management
- o Nutritional value and recipes
- o Cellar cold storage

The materials should be clear and accessible in a step-by-step methodology for Mongolian beneficiaries and trainers to follow. Where necessary, diagrams and visuals and posters should be used to explain the concepts (without jargon).

**IV. Upscale cooperatives and greenhouses:** Upscale, promote and coordinate with a range of stakeholders (including government, private sector and civil society) a wider community led program – encouraging cooperatives and step back from direct implementation and construction. This will involve Caritas Mongolia playing a stronger facilitating role and encouraging others with the necessary technical support to set up cooperatives and self managed greenhouses. This will also involve facilitating access to water, processing technology and marketing.

**V. Strengthen existing initiatives:** Strengthen and support existing greenhouse initiatives (i.e. where individuals have taken the initiative to make 'homegrown' greenhouses improvising on available materials and with limited design inputs) to ensure that they can gain more from their greenhouse, optimize their resources and improve production.

**VI. Promote solar passive greenhouses:** Promote greenhouses in primary and secondary schools across Mongolia and across government institutions. This will involve training and setting up standards with other institutions in order that they can supply the resources to construct and maintain the greenhouses.



## *4.2. Skill Training Centre*



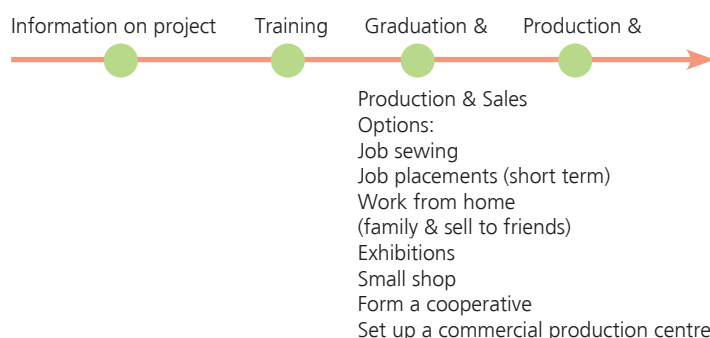
Trainee at the Skills Training Centre, Ulaanbaatar

The Skill Training Centre is based in the Songino Khaikhan district of Ulaanbaatar and offers tailoring and craft skills to vulnerable women. The project is particularly successful in the first three of four stages (as shown in the diagram below):

- 1) Information on the project: There is a good network to spread information about the project. People are informed by word of mouth as the centre has a good reputation for quality. There is also communication via radio and television alerting residents in the ger district about the work of the centre and the training courses.
- 2) Training: The centre provides good quality training as it has qualified and dedicated trainers and well constructed premises with the relevant equipment and technology (including sewing machines, steam iron and dyes for stamping leather etc).
- 3) Graduation and Certificate: On successful completion of the course the trainee receives a certificate that is recognized by the Mongolian Government. This means that when a graduate trainee wants to open a small business she can do this with the necessary government approval.

The fourth stage: production and sales is more challenging as the centre has focused on the training activities and there are a number of options depending on the context, will and commitment of the individual graduate (shown below). Furthermore, no organization can guarantee a livelihood for its trainees in an ever changing and dynamic market place. This

is particularly critical in Ulaanbaatar where there is competition of low priced products imported from China.



### *Benefits of the Skills Training Centre:*

- Creating livelihood opportunities: Creates opportunities for vulnerable women to learn vocational skills that can lead to setting up new livelihoods and sources of income. This is critical in the context of internal migrants from rural areas to the ger districts in Ulaanbaatar where job openings are scarce.
- **Free quality training:** The project offers free high quality training and knowledge transfer to trainees. The trainers give quality supervision and advice over the 21 day course duration and trainees regard the quality of instruction highly. The centre produces quality products in traditional and western clothing, crafts and felt shoes that are sold commercially.
- **Technology support:** The project offers trainees the opportunity to own a sewing machine by granting the trainee a loan of 50% and grant of 50%. This means that the trainee, having successfully completed the course, is able to set up a micro-business at home to cater to a local market in the surrounding area. This also supports the graduate trainee in developing practical tailoring skills and local marketing.
- **Social networking:** Bringing vulnerable women together helps them in getting to meet new people and make friends in a supportive environment. This also gives the opportunity to build working relationships with the potential to form small groups / micro-enterprises in tailoring.

### *Issues of the Skills Training Centre:*

- ***Small scale:*** The project trains 12 students at one time for the course duration of 21 days. The premises cannot cope with more than 12 students and this means that the centre is relatively small scale considering the potential needs of the local community with a population of more than 260,000 in the surrounding district in Ulaanbaatar.
- ***Lack of production facilities:*** The course program of 21 days is not enough for trainees to develop practical production skills (i.e. producing clothes and products for sale commercially) and especially so for trainees who start without any previous tailoring experience. The norm for courses that are offered commercially in Ulaanbaatar is 21 days and this is probably linked to generate profits for the business owner rather than deliver quality training.
- ***Limited marketing opportunities:*** There are limited marketing opportunities for graduate trainees as there are limited jobs opportunities. Furthermore, trainees do not have the practical skills (as they have limited experience in production), technology resources (unless they benefit from a loan of 50% of a sewing machine) and financial capital to set up a small-scale business and create linkages to marketing outlets.
- ***Limited experience in forming groups/cooperatives.*** The project has little experience in supporting graduate trainees to set up small business groups or co-operatives. This means that graduates require one to one support that draws on the scarce resources of the centre and cannot benefit from the economies of scale.
- ***Little cross-learning across projects:*** There is little learning across Caritas Mongolia projects (e.g.: IFAM, Skills Training Centre and Social Reintegration). Trainees have little knowledge of the other activities of Caritas Mongolia and this means that the organization is only being seen or perceived as a small part of what it represents and achieves. Links with the IFAM project could link to potential customers and also develop the knowledge of tailoring trainees in agriculture and nutrition.

### *Recommendations for the Skills Training Centre:*

- I. Consolidate quality training:** Consolidate the training to ensure the highest quality. If necessary this may mean lengthening the 21 day course and add opportunities for students to practice / work on commercial orders or to make clothes for themselves with their own cloth.
- II. Facilitate marketing linkages:** Facilitate marketing linkages for graduates by helping them to determine the best options for themselves and cooperating with others where necessary. This might involve helping a graduate to get a job (i.e. with research, presentation and interview skills, to setting up their own business and marketing products through various marketing channels. This could draw on the Country Sheet information package prepared by the Social Reintegration team and foster links across the 2 programs). The centre should hold back on getting directly involved in wider marketing for trainees as it does not have the resources to do this in the short or long term.
- III. Scale up:** Scale up and facilitate the program to other ger districts for vulnerable women drawing on local government and community resources. The centre should act as a pilot for the government to emulate and replicate in other areas and thus drawing on the expertise and experience of the centre.
- IV. Develop a graduate network:** Develop communication and relationships between graduates and create a dynamic network – for social support, technical tailoring advice and marketing. If the project can maintain an active link between graduates this could serve to promote the work of the centre to a wider community as well as developing a market for graduates. A Caritas Mongolia brand could be created (and this could be linked with the IFAM project) to support the marketing of the work of graduates.

### *4.3. Social Reintegration:*

Caritas Mongolia has been working on Social Reintegration since 2007. It offers support to European governments who are repatriating citizens from other countries back to their country of citizenship. Caritas

Mongolia offers returnees (cases) informational and administrative support to reintegrate to their home country along with funds from European governments in partnership with some European Agencies (@ 2,200 from Belgium and 11,500 from the UK).

In 2012 Caritas Mongolia supported approximately 60 cases and note that each case involves either one person or with their family members. Each case is complex as it requires responding to personal needs and each and every individual has specific circumstances that need to be taken into account. This can be emotionally draining for staff and potentially unsafe for staff when returnees do not agree with the decisions that have been taken by European partners (not by Caritas Mongolia) on how they can access the fund for their support.

The key role for Caritas is administrative as it acts as a liaison point to administer the appropriate support (advice mainly on housing, medical, accommodation, and education) and disburse the funding, depending on the different criteria of each European country. This work supports returnees and contributes to Caritas Mongolia's administrative costs.

### *Issues of Social Reintegration*

- Administrative role: Caritas Mongolia currently works in a mainly administrative role. Partners with longer relationships with Caritas Mongolia have handed over space for decision making whereas new ones retain decision making. However, this could be developed along with the progress of the program with different countries and Caritas staff become more confident in leading on ways to best support Mongolian returnees, and thus convince European governments on how this can be achieved successfully.
- Little cross-learning: The Caritas staff working on the social reintegration program do not have much linkage or cross-learning with staff on other programs (i.e. IFAM, Skill Training Centre and Environment). However, the Social Reintegration staff have a lot to share and could also benefit from learning about the other programs.

### *Recommendations (Social Reintegration):*

1. **Consolidate information:** Gather and consolidate relevant information in a documented 'package' that can be provided to returnees (with an outline of the reintegration process and contacts for further

follow up including: health centres, job advisory agencies and estate agentsetc).

- II. Network and promotion:** Network and promote Caritas Mongolia's Social Reintegration Program with other European governments to optimize the economies of scale and broaden the network. This would require finding out the contact persons in each of the European embassies; preparing and sending a brief outline of Caritas Mongolia and the Social Reintegration program and following up in person to negotiate on terms of engagement and support.
- III. Health and safety:** Create protocols to ensure the health and safety for staff interacting with returnees. For example, this should include a protocol for 2 staff being present in interviewing and meeting with returnees, especially where there may be conflicting situations or disagreements. It would also mean setting out protocols on decision making so that the returnee can see explicitly the steps that the Reintegration team are following and this will safeguard staff in the event of any dispute arising.
- IV. Integration:** Integrate and involve the Social Reintegration team with Caritas Mongolia's other programs. This could involve sharing learning and best practice and visiting other projects to see how the programs are being managed and developed. The reintegration team could also give analytical feedback to staff in other programs on how to best develop the programs.

#### **4.4. Caritas Mongolia:**

Caritas Mongolia has evolved since its beginnings in response to the 'zud' (a severe winter with rain and flooding) in 1999 to 2000. Since then, Caritas has established itself as a creditable NGO, registered in Mongolia and within the Caritas Internationalis family, and developed its first strategic plan for the period: 2010 to 2013. During this time, the organization has been active operationally in setting up a flagship program: Innovative Farming Approaches in Mongolia. It has also set up the Skill Training Centre and embarked on other programs including the collaboration with Caritas Czech on the environment and a policy document on emergencies. It has learned immensely from the last three years and is on the verge of making a step up to another level in the second Strategic Plan 2014 to 17.

### *Recommendations for Caritas Mongolia:*

- I. *Strategically analytical, coordinating and facilitating roles:*** For the Caritas Mongolia team to acknowledge, and build on the strengths and learning it has achieved over the last three years and step back from direct implementation to roles that are strategically analytical, coordinating and facilitating. This will involve managers and staff undertaking joint reviews of programs to ascertain how they are meeting the needs of beneficiaries and how they can be made to be more effective and efficient for strategic sustainable and long-term impact.
- II. *Scale up:*** Scale up the program – building on the success and best practice gained over the last 3 years by networking and facilitating linkages with government, private sector and civil society agencies. This will involve preparing communication materials that clearly highlights the strategic importance of programs and why they should be replicated, along with the operational requirements on how this can be done. Options include accessing resources through developing project proposals or by collaborating with other agencies who have or can gain access to resources and infrastructure. The current programs can act as models of best practice and Caritas Mongolia should present the achievements and issues encountered so that others can learn from their experience.
- III. *Showcase models of best practice:*** Develop and showcase models of best practice across the various programs (farming, construction of passive solar greenhouses, tailoring skills training and community mobilization) based on practical experience and evidence over the last three years. These models should show how the programs can be replicated by others and the associated costs.
- IV. *Proactive human resource management:*** Take more proactive approaches to managing the performance of Caritas Mongolia's human resources by continuing and building on its open approach; reviewing jointly the performance of staff regularly; analyzing situations and creating options for decision making to improve staff performance that will lead to better development outcomes for beneficiaries.
- V. *Involve staff in the Management Committee:*** Involve a member of staff (elected by staff) onto the Management Committee. This will further support Caritas Mongolia's open approach and efforts in en-

couraging staff to participate and contribute to the organization's development. It will also build on the quarterly staff forum meetings where information and learning is shared between all staff.



