

The Brooke International Resources Workshop

The organisation

The Brooke is an overseas equine welfare charity whose aim is to improve the lives of horses, donkeys and mules working in the poorest parts of the world. These animals often form the backbone of the economy for poor communities in developing countries.

The need

The Brooke's annual Resources workshop brought together representatives from all Brooke branches, affiliates and significant partners to discuss key issues relating to planning and budgeting, key financial topics, and to share experiences. Beth Matheson, Financial Controller, wanted an external facilitator to help her develop a 3-day agenda for the finance representatives and to facilitate the sessions, taking into account a wide range of participants from different countries including Egypt, India, Guatemala, Kenya, Jordan, Ethiopia and the UK.

What we did

Jacqueline worked with Beth to establish the strategic context for the workshop; giving key stakeholders confidence that the Brooke were making the best use of funds. Jacqueline also suggested a session for participants to share and acknowledge progress based on recent changes to reporting and risk management. The next steps were then clear; to embed those changes and gain support and ownership from the rest of the organisation. With an understanding of the context in which the country representatives were working and a picture of what needed to be different as a result of the workshop, Jacqueline worked with Beth to identify specific objectives for the workshop to make the most of this rare face-to-face opportunity:

- To share experiences and skills within the finance and resources functions, and with the Programme team
- Further develop relationships across affiliates, branches and partners, and with the UK
- Facilitate two-way feedback on and embed changes to reporting, budget and risk management
- Identify the support participants need and to develop their own support plans
- Identify the ownership and support needed from others in the organisation
- Kick-off the planning process for the following year.

Jacqueline suggested sending the draft workshop agenda to the country representatives for their input and to engage them in pre-workshop preparation activities. She also discussed various options for running the sessions with Beth, introduced practical tools to facilitate planning and communication, and suggested ways of ensuring input and participation from the country representatives. She then developed a detailed agenda with facilitator's notes to enable smooth co-facilitation.

During the workshop Jacqueline and Beth worked closely together to accommodate changes to the agenda in response to participants' needs and involvement by The Brooke's Chief Executive. Jacqueline ensured actions and decisions were captured and agreed. At the close, the participants evaluated, which included a review in four months' time to measure the medium term impact.

Benefits

- Participants were able to link the workshop to the bigger strategic context
- Representatives from different countries were able to exchange experiences and views, promoting learning and greater understanding
- Participants evaluated the workshop objectives as fully met
- The evaluation gave participants the opportunity to identify and evaluate their own objectives for the workshop; the majority of these being fully met or exceeded
- The external facilitator brought experience of designing and facilitating similar international events
- The external facilitator introduced practical tools to facilitate planning and communication
- Using an external facilitator enabled Beth to focus on supporting and building relationships with the country representatives, whilst retaining ownership of the overall process.

Comments from Brook International

Participants reported:

- “Enough time for all important issues”
- “Ensured best participation and learning”
- “Very fruitful and helpful”
- “Set up very useful open discussions”
- “Captured actions and learning and recapped on what we’d done”
- “I loved the tools, the evaluation and the form for actions and support needed - excellent job!”

“This was definitely the most productive international finance workshop we have held so far and I really benefitted from Jacqueline’s help in giving the workshop a sense of strategic purpose, which all participants appreciated.”

Beth Matheson, Finance Manager at Brooke International

Four months later, Beth commented that reporting had improved and the budget process was smoother with increased UK programme support.