

Tool # 2 A five skill set checklist

This checklist is based on the points suggested for tracking progress in the development of each skill set (found in the Boxes). The tool is still under development and items on the checklist can be adapted or substituted for by other items that you find more useful. The checklist can be filled in by one or more informants who know the group well. It can also be filled in by the group and the group's facilitator as a tool for self-evaluation. Ideally, both these approaches will be used. The checklist should be completed by more than one informant. Disagreement among informants or between informants and the group about responses should be treated as an opportunity for learning.

This tool can be applied with a group on several occasions over time, depending on how fast the group is evolving and acquiring new skills. However, each group is different and it is important to recognize that several of the skills can take months or even years to develop, while others may develop much more quickly.

Section A of this tool is designed to identify the group so that you can go back to the same group later on and repeat the same tool if desired. The questions also track how the group's definition of its primary activity may be changing over time because this will indicate which skill set may be of emergent or forthcoming importance to the group.

If you want to use a more sophisticated tool that will track the level of any given item on the checklist then use Version B. This enables you to distinguish levels of accomplishment on any given item. The scaled assessment depends on a subjective judgment as to whether an item on the checklist is done effectively or "well." For this reason the checklist should be completed by an informant who is very familiar with this group and other similar groups.

To conduct this assessment **CIRCLE ONE NUMBER** for each item to indicate you consider the skill level is:

- 1=Early:** the group does not fully understand how to use this skill and is not able to do it well, even with facilitation
- 2=Intermediate:** the group fully understands how to use the skill but is not yet able to do this well even with facilitation
- 3=Advanced:** the group can do this well but depends on outside facilitation
- 4=Fully-developed:** the group can do this well AND independently, without outside facilitation

A five skill set checklist
Version A.

A. Identification of the group

1. Name of the group: _____

2. Name of the most important organization supporting this group:

3. What types of organization does this group work with to achieve its goals? Check any that apply:

- NGOs
- Local government program
- Religious organization
- Local farmer cooperative or similar organization
- National farmer cooperative
- Bank
- Public agricultural research and extension service
- Watershed organization
- Other: _____

4. Number of members: Total _____ **Women** _____ **Men** _____

5. Main purpose of the group today? Check one:

- Internal savings, or savings and lending
- Collective marketing
- Technology testing
- Collective natural resource management
- Other _____

6. When did the group form? Year: _____

7. Main purpose for which the group originally formed?

- Original purpose is the same as its purpose today [**Go to Part B**]
- Original purpose is different from its purpose today; **check one:**
 - Internal savings, or savings and lending
 - Collective marketing
 - Technology testing
 - Collective natural resource management
 - Other _____

B. Assessment of the five skillsets: CHECK IF YES

1. Group management skills: Does the group ...

- ✧ Have a vision of its goals shared by all its members
- ✧ Demonstrate capacity to resolve internal conflicts
- ✧ Support continuous learning for its members
- ✧ Make decisions democratically with the participation of all its members
- ✧ Follow its own internal rules
- ✧ Include a diversity of people who can contribute to the group
- ✧ Initiate problem solving without waiting for external support to do so
- ✧ Monitor and evaluate its progress towards its goals

2. Internal saving and lending skills: Does the group...

- ✧ Save regularly
- ✧ Manage group savings so that they are protected
- ✧ Grow group funds by lending savings to group members
- ✧ Charge an interest rate decided upon by the group
- ✧ Lend equitably so that all members have an equal chance of getting a loan
- ✧ Manage group funds transparently so everyone knows the procedures
- ✧ Keep good records

3. Basic market skills: Does the group ...

- ✧ Identify market opportunities
- ✧ Analyze the profitability of market opportunities
- ✧ Collectively market their products
- ✧ Improve their products to meet customer demand
- ✧ Build relationships with buyers
- ✧ Build relationships with suppliers
- ✧ Keep records about their business
- ✧ Adapt production practices so they can respond to market demand
- ✧ Adapt post-harvest practices so they can respond to market demand

4. Sustainable production and natural resource management skills: Does the group....

- ✧ Locate or visualize their own farms in relation to a wider landscape
- ✧ Understand how practices on one farm may harm or help neighbors and others located elsewhere
- ✧ Monitor the status of at least one vital resource over time
- ✧ Negotiate with others about use of natural resources
- ✧ Design and implement conservation or rehabilitation plans for natural resources
- ✧ Have agreed rules for managing their natural resources
- ✧ Enforce these rules

5. Experimentation and innovation skills: Does the group...

- ✦ Know how to conduct simple, experimental comparisons between current practice and new technologies
- ✦ Start small when trying out an innovation that is risky
- ✦ Test the same innovation in different conditions
- ✦ Keep a record of important data from their experiments
- ✦ Involve knowledgeable people like farmers, consumers or traders in experimenting with new ideas
- ✦ Create market opportunities rather than simply reacting to them
- ✦ Share the results of experimentation widely
- ✦ Proactively seek new ideas
- ✦ Monitor and evaluate use of its innovations by members or others

*A five skill set checklist
Version B (Scaled)*

A. Identification of the group

1. Name of the group: _____

2. Name of the most important organization supporting this group:

3. What types of organization does this group work with to achieve its goals? Check any that apply:

- ✦ NGOs
- ✦ Local government program
- ✦ Religious organization
- ✦ Local farmer cooperative or similar organization
- ✦ National farmer cooperative
- ✦ Bank
- ✦ Public agricultural research and extension service
- ✦ Watershed organization
- ✦ Other: _____

4. Number of members: Total _____ **Women** _____ **Men** _____

5. Main purpose of the group today? Check one:

- ✦ Internal savings, or savings and lending
- ✦ Collective marketing
- ✦ Technology testing
- ✦ Collective natural resource management
- ✦ Other _____

6. When did the group form? Year: _____

7. Main purpose for which the group originally formed?

- ⌘ Original purpose is the same as its purpose today [**Go to Part B**]
- ⌘ Original purpose is different from its purpose today; **check one:**
- ⌘ Internal savings, or savings and lending
- ⌘ Collective marketing
- ⌘ Technology testing
- ⌘ Collective natural resource management
- ⌘ Other _____

B. Scaled assessment of the five skill sets

This assessment depends on a subjective judgment as to whether an item on the checklist is done effectively or “well.” For this reason the checklist should be completed by an informant who is very familiar with this group and other similar groups .

CIRCLE ONE NUMBER for each item to indicate you consider the skill level is:

- 1=Early:** the group has no knowledge of or does not fully understand how to use this skill and is not able to do it well even with facilitation
- 2=Intermediate:** the group fully understands how to use the skill but is not yet able to do this well even with facilitation
- 3=Advanced:** the group can do this well but depends on outside facilitation
- 4=Fully developed:** the group can do this well AND independently, without outside facilitation

CIRCLE ONLY ONE NUMBER FOR EACH QUESTION:

1=EARLY	2=INTERMEDIATE	3 = ADVANCED	4=FULLYDEVELOPED
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1. Group management skills: Does the group ...

- Have a vision of its goals shared by all its members **1 2 3 4**
- Demonstrate capacity to resolve internal conflicts **1 2 3 4**
- Support continuous learning for its members **1 2 3 4**
- Make decisions democratically with the participation of all members **1 2 3 4**
- Follow its own internal rules **1 2 3 4**
- Include a diversity of people who can contribute to the group **1 2 3 4**
- Initiate problem solving without waiting for external support **1 2 3 4**
- Monitor and evaluate its progress towards its goals **1 2 3 4**

CIRCLE ONLY ONE NUMBER FOR EACH QUESTION:

1=EARLY	2=INTERMEDIATE	3 = ADVANCED	4=FULLY DEVELOPED
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2. Internal saving and lending skills: Does the group...

- Save regularly 1 2 3 4
- Manage group savings so that they are protected 1 2 3 4
- Grow group funds by lending savings to group members 1 2 3 4
- Charge an interest rate decided upon by the group 1 2 3 4
- Lend equitably so that all members have an equal chance of a loan 1 2 3 4
- Manage group funds transparently so everyone knows the procedures 1 2 3 4
- Keep good records 1 2 3 4

3. Basic market skills: Does the group ...

- Identify market opportunities 1 2 3 4
- Analyze the profitability of market opportunities 1 2 3 4
- Collectively market their products 1 2 3 4
- Improve their products to meet customer demand 1 2 3 4
- Build relationships with buyers 1 2 3 4
- Build relationships with suppliers 1 2 3 4
- Keep records about their business 1 2 3 4
- Adapt production practices so they can respond to market demand 1 2 3 4
- Adapt post-harvest practices so they can respond to market demand 1 2 3 4

4. Sustainable production and natural resource management skills: Does the group...

- Locate or visualize their own farms in relation to a wider landscape 1 2 3 4
- Understand how practices on one farm may harm or help neighbors and others located elsewhere 1 2 3 4
- Monitor the status of at least one vital natural resource over time 1 2 3 4
- Negotiate with others about use of natural resources 1 2 3 4
- Design and implement conservation or rehabilitation plans for natural resources 1 2 3 4
- Have agreed rules for managing their natural resources 1 2 3 4
- Enforce these rules 1 2 3 4

5. Experimentation and innovation skills: Does the group...

Know how to conduct simple, experimental comparisons between current practice and new technologies	1	2	3	4
Start small when trying out an innovation that is risky	1	2	3	4
Test the same innovation in different conditions	1	2	3	4
Keep a record of important data from their experiments	1	2	3	4
Involve knowledgeable people like farmers, consumers or traders in experimenting with new ideas	1	2	3	4
Create market opportunities rather than simply reacting to them	1	2	3	4
Share the results of experimentation widely	1	2	3	4
Proactively seek new ideas	1	2	3	4
Monitor and evaluate use of its innovations by members or others	1	2	3	4