



SWEDISH MISSION COUNCIL & INTRAC
REVIEW OF WORKSHOP SERIES 1997-1999

STRENGTHENING ORGANISATIONS NORTH AND SOUTH

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Swedish Mission Council

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PREFACE

Capacity building is rapidly becoming a central part of the strategic focus of many organisations operating in the international development community. This is also true for the **Swedish Mission Council** (SMC).

SMC is an ecumenical organisation whose membership is made up of Swedish Churches and Christian Development Organisations. SMC's mandate is to promote co-operation, sharing of experiences and renewed reflection on the meaning of Christian Mission in our present time.

SMC has also a framework agreement with the Swedish International Development Co-operation Agency (Sida) which implies that affiliated organisations can apply for government funding for international development projects/programmes through SMC.

Today, the international community is experiencing rapid change all over the globe and questions of development are becoming more complex and controversial than ever before.

It is also true that during the last decade we have seen unparalleled development in many areas with regard to communication and new technologies which offers new possibilities to deal with the burning issues of our time. Yet many of the problems of poverty and inequality remain seemingly intractable. It is obvious that both financial stringency and a pervasive scepticism about development impact is putting organisations under increasing pressure to demonstrate results and effective performance to a variety of stakeholders

Capacity building is now of fundamental importance, if our organisations and institutions are to address effectively the pressing issues of our time both locally and globally.

In 1997 SMC initiated a workshop for its members with the aim of introducing the concept of organisation development and capacity building. This initiative proved to be so popular that two further workshops were held in 1998 and one in 1999. It is encouraging to note that almost all the member organisations of SMC participated in one or more of the workshops.

The interest for these workshops arose out of a need expressed by SMC members to strengthen their own organisations as well as their partners in the South. There was also a recognition by SMC that healthy, vibrant organisations are central to any sustainable development and consequently the workshops were planned:

- To deepen the understanding of organisations and how they work and develop.
- To examine different approaches to strengthening church -related organisations (North and South) involved in development and the implications this has for one's own organisation and work.

The **four workshops** were facilitated by OD-consultants from INTRAC

As part of an ongoing learning process, the SMC has also asked the consultants to write a summary report of the content and methodology of the workshops including their own observations and suggestions for continued Organisation Development interventions for SMC and its members.

On behalf of SMC and all the participants, we want to thank both INTRAC and the facilitators, Miss Liz Goold, Max Peberdy and Bruce Britton, for their dedicated and professional work during the workshops. Special thanks to Liz and Bruce who have put a great deal of effort into producing this report. We also want to thank Sida for support and encouragement in connection to these workshops.

There is a growing interest among our members for issues related to organisation development. These series of workshops, although just a small beginning, have stimulated SMC and its members to continue to deepen the understanding of our own organisations and how we relate to others. This report is an important contribution to our ongoing OD work. We hope that this document will be useful to both past participants and other readers.

Stockholm December 2000

Karl-Erik Lundgren
/Swedish Mission Council/

INTRODUCTION

In 1997, Swedish Mission Council (SMC) initiated a workshop for its members, entitled “Strengthening Organisations: North and South”. They sought the assistance of the International NGO Training and Research Centre (INTRAC) in UK to facilitate this workshop. The workshops proved to be very popular with members and consequently SMC decided to hold a further three workshops in collaboration with INTRAC up until 1999. Both SMC and INTRAC have now taken the opportunity to reflect on these experiences so far, to document what has been learnt and the long and short-term effects of such training. This may be of use to SMC in its future planning, as well as to those who participated and other interested organisations.

SMC therefore requested INTRAC to follow up participants via a questionnaire, as well as to write a summary of the content and methodology of the workshops. SMC also requested observations about the workshop series from the facilitators and suggestions for continued Organisation Development type interventions.

This report offers the following:

- The rationale and purpose of the workshops.
- A summary of the make-up of participants.
- A general outline of the purpose, content and methodology of the workshops.
- Analysis of the follow-up questionnaire to past participants and the long and short-term effects of their participation.
- Facilitators observations and reflections.
- Possible ways for SMC to take these or other OD initiatives forward.

This report has been written primarily for SMC and for those who participated in the workshops. We also hope it can be shared with others who are interested in organisational change – both North and South.

RATIONALE AND PURPOSE

These workshops arose out of a need expressed by SMC members to strengthen their partners, as well as themselves. There was also a recognition by SMC that the external environment was changing; the donor world was calling for more evidence of impact. Therefore, members needed to demonstrate their added value and distinctiveness as church-related development organisations if they are to survive in the future. Furthermore, there was also a recognition by SMC, that the impact of many members may be limited due to the ‘project-mentality’ that exists, and a more holistic organisational approach is needed. In turn, many members are going through their own internal changes and need support in handling them. The emphasis on strengthening organisations, *North and South*, was based on the assumption that organisations involved in development, both North and South, need to be strengthened if they are to have healthy partnerships that ensure impact at the grassroots level.

Organisational strengthening or ‘capacity-building’ are terms that are often used in relation to partners as well as to Northern agencies themselves but are poorly defined. Whilst recognising that there is no single universal definition or approach, a working definition was used within the workshops where organisational strengthening was seen as a mixture of processes and interventions (internal and external) that support and strengthen an organisation to carry out its purpose in a sustainable and effective manner that is appropriate to its context. Activities may relate to any part of the organisation but should be carried out with the ‘whole unique picture’ of the organisation, its stage of development and its context in mind. Organisational strengthening is not just a one-off discrete activity, but demands a whole reorientation of approach. To Northern partners this may have implications for how they plan, fund, relate and so on. In this report, the terms “organisational strengthening” and “capacity-building” are used interchangeably although organisational strengthening is used more as this is the theme of the workshops and implies a strengthening what is already there. A distinction is made in relation to Organisation Development where this is seen as one particular approach to strengthening organisations and supporting organisational change and is explored further on page 22.

A preparation questionnaire was sent out to participants, prior to the workshops, to identify their issues and concerns more specifically, (see Appendix I). From these, the design of the workshops was adapted according to the needs and experiences of participants within the context of two broad aims, namely:

- To deepen the understanding of organisations and how they work and develop.
- To examine different approaches to strengthening church-related organisations involved in development (North and South) and the implications these have for the participants work and organisations.

In addition, the facilitators also shared their assumptions at the beginning of each workshop.

- Participants came from church-related organisations that were involved in development work.
- Participants had an interest in strengthening partner organisations, not just their projects.
- Participants were being sent by their organisation and would endeavor to apply what they had learnt back in the workplace.
- Participants would take responsibility for their own learning.

PARTICIPANTS

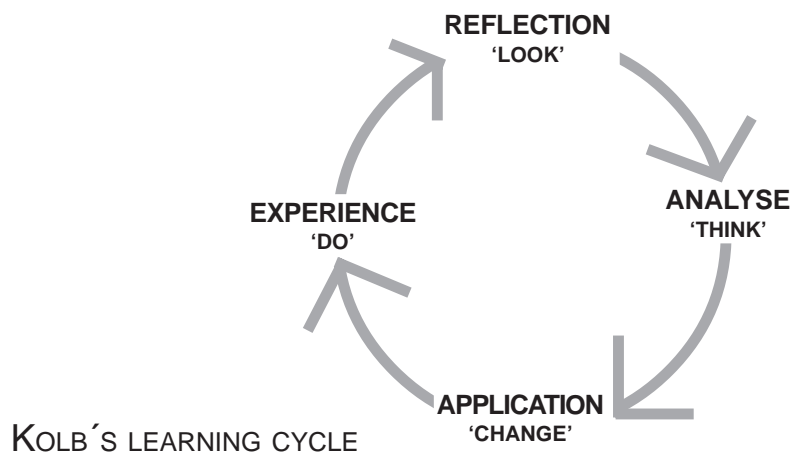
In total 89 participants took part in 4 workshops representing over 20 organisations. These organisations represented a mix of large and small, young and old, development and mission agencies and church denominations (see Appendix II). With a few exceptions, most received the majority of their funding for development work through Sida. Many organisations sent more than one participant per workshop; over the duration of the workshop series several staff from each organisation attended. The gender mix was generally representative of the gender mix in member organisations, with a fairly equal balance of men and women but with more men in senior decision-making positions. Over the course of the workshop series three participants representing Southern partner organisations took part. The majority of those participating worked at programme level although Directors and Board Members did take part from smaller agencies. It was noticeable that the seniority of those attending increased in the later workshops as information spread about the importance of these workshops from those less senior staff who attended the earlier workshops. It was also evident that many of the older participants had worked overseas for many years whilst many of the younger members did not have overseas experience. This appears to be indicative of staffing trends and the decline in the missionary culture.

Appendix IILIST OF
PARTICIPANTS

page 46

APPROACH AND METHODOLOGY

The approach used during the workshops was based on adult learning principles, using Kolb's learning cycle. This included starting with issues that were relevant to participant's work situation, providing opportunities for participants to reflect on their experience along with appropriate input, as well as support in the application of new learning back in the workplace.



A variety of learning methods were used, including small group work, case studies, input, role-play, simulations and drawing. This ensured that different learning styles were catered for.

Each workshop had two facilitators, male and female. Liz Goold from INTRAC facilitated all four workshops along with Max Peberdy in 1997 and 1998 and with Bruce Britton in 1999. The language used was English in the large group, although Swedish was encouraged in smaller group discussions, to ensure full participation, as well as in the plenary group with translation where necessary.

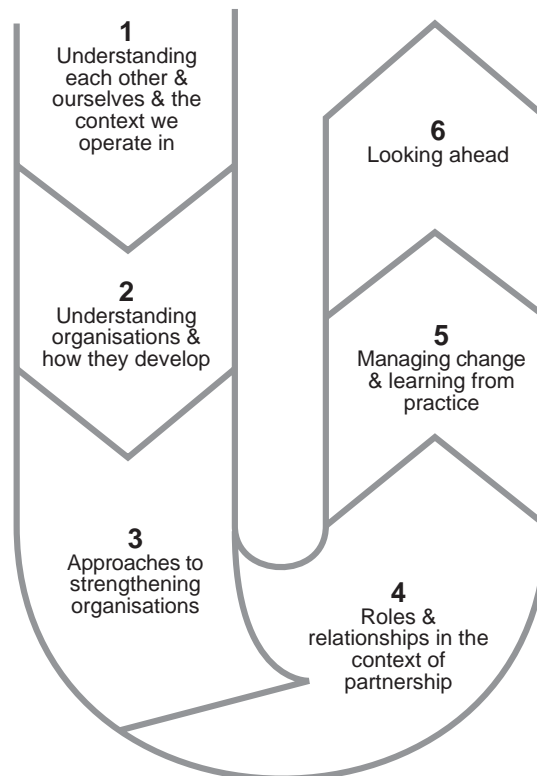
On-going monitoring by participants was encouraged each day. This was done in small group work at the end of each day where participants reviewed the day using the following questions:

- What went well?
- What did not go so well?
- What could be done differently?
- Any group/practical issues to be aware of?

Each small group then sent a representative to meet with the facilitators to feed back. A summary of the feedback was then presented to the plenary group with any necessary response or change at the beginning the following day. This ensured that the facilitators and the course remained in tune with and responsive to participants learning needs.

OVERALL FLOW OF 3-DAY WORKSHOP

Each workshop took place over a period of 3 days and was residential. The series of workshops evolved over time in accordance with the needs of and feedback from participants, as well as the introduction of new ideas and material. However, the basic rationale and approach remained the same, namely, how to strengthen organisations, both those of the North and South. The content of the workshops sought a balance between participants looking at their partners and also looking at themselves. Interestingly, there appeared to be a greater shift to looking at themselves in the latter workshops. This could be a reflection of the impact of significant changes taking place in the church-related development sector in Sweden today, as well as participants from a more senior level taking part.



OVERALL “FLOW” OF 3 DAY WORKSHOP

The main flow of the three-day workshops is illustrated in the diagram above. The rationale for this flow is that in order to effectively support our own or other organisations in their development, we need to have an understanding of organisations and how they work and change, as well as the context within which they work. Therefore, the first part of the workshop (1 and 2) was devoted to this. From here, this understanding was carried forward into organisational strengthening work/capacity-building with partners (3), and the nature of the relationships between Northern and Southern partners (4). The final part of the workshop (5/6) was devoted to exploring ways that participants’ own organisations can manage and learn from the changes they are facing so they remain effective, relevant and healthy. With this in mind, a core part of the workshop was devoted to exploring issues of identity and to the distinctiveness of church related organisations in development work.

THREE DAY WORKSHOP: SESSION OUTLINE

The following is a more detailed breakdown of the basic process used in the workshops, drawing together the core areas that featured in all three, as well as indicating any additions that came later.

	Day I	Day II	Day III
8.00 - 9.00	<i>Breakfast</i>	<i>Breakfast</i>	<i>Breakfast</i>
9.00 - 12.00	Arrivals Coffee/tea Getting started, getting to know each other Understanding the relationships within and between us	Identity: the “soul” of an organisation (coffee/tea) Characteristics of a healthy organisation	Role of the Northern partner in capacity building and partnership relationships (coffee/tea) The Learning organisation
12.00 - 14.00	<i>Lunch</i>	<i>Lunch</i>	<i>Lunch</i>
14.00 - 17.00	Understanding the context we work in (coffee/tea) Understanding organisations and how they develop	Approaches to working with and strengthening organisations (coffee/tea) Role and nature of OD and change	Managing change (coffee/tea) Action planning and evaluation
17.30 - 18.30	<i>Dinner</i>	<i>Dinner</i>	<i>Dinner</i>
19.00 - 20.00	Understanding organisational culture using metaphors	Exploring roles and relationships	

DAY I:

Session I: Getting started, getting to know each other

Aim: To begin the workshop dynamically through introductions to our organisations and each other, sharing expectations and concerns, and agreeing the course outline and norms together.

Method: After individual introductory exercises, a ‘polarities’ exercise was often used to introduce the group and its similarities and differences in relation to a number of factors, for example:

- Gender of participants.
- Age and size of organisations.
- Seniority in terms of decision-making in the organisation.
- Overseas experience
- Type of denomination
- Proportion of organisational funding coming from Sida.
- Number of partners.

Rationale: This gave a snap-shot of the group as a whole, revealing important information which would be useful during the workshop, as well as acting as an ice-breaker. Some of the insights from this exercise are illustrated in page 6.

A variety of exercises were also used to share expectations and concerns and agree working guidelines.

Session II: Understanding the relationships within and between us

Aim: To map out internal and external relationships in order to build up a picture of each organisation.

Method: The exercise involved mapping the different types of relationships that exist between and within organisations. This was illustrated through the use of different techniques, for example, developing ‘rich pictures’ and ‘stakeholder mapping’. Both these methods are used to illustrate different types of relationships that exist between and within organisations. In stakeholder mapping, the organisation in question is drawn as a circle and other stakeholders (‘interested parties’) are given a weighting in terms of importance through the size of a circle. The degree of influence that other organisations have on the organisation in question is represented by how far or near the others are drawn. In rich pictures, as much information as possible is elicited in a pictorial form, illustrating the different stakeholders, the nature of the relationship (using symbols to illustrate good or bad), the general climate, influencing factors and so on. This method was used in the 1999 workshop as an alternative to stakeholder mapping.

Each participants drawing was shared in triads, drawing out the differences and similarities and the most important factors. These were hung up for all to see through a ‘gallery walk’.

Rationale: Open systems thinking, which developed in the 1960s, provides a way to look at organisations as complex systems, open to and influencing their surrounding environment. Systems theory allows us to look at and work with organisations as complex human dynamic entities. In doing so it offers up the possibility of understanding organisations in all their richness and energy. Hence the use of exercises like “rich pictures” to build up a picture of the whole organisation. The use of these exercises also provided an opportunity for participants to have a better understanding of other organisations represented in the group, as well as their own organisation.

- Learning:**
- Organisations are influenced by but can also influence their environment, therefore when trying to understand organisations it is important to look at them in their context.
 - Organisations are complex systems and, because of this, it is very difficult to trace clear lines of cause and effect. Organisations can not be treated in a piecemeal fashion but need to be looked at as a whole.
 - As organisations are complex, human, dynamic entities, a certain amount of creative conflict and disorder may well be an important ingredient in an organisation that innovates, learns and keeps on top of its work.

Session III: Understanding the context we work in

Aim: To look at the wider context and the impact this can have on the way organisations work.

Method: This included identification of some of the external changes that have impacted on the life of each participant's organisation or that may well do in the future. Further information was also added through INTRAC's research on donor trends (Appendix III). One method that was used to do this came from the 'Future Search' methodology that encourages a brainstorming of all the possibilities to build up the whole picture.

Having set the context, this session then looked at the type of organisational challenges the context and relationships raises for participants' own organisation and for their partner organisations.

Some of the responses included:

- Do we become isolationist or link up?
- Congregations ask for more information, (greater accountability demanded).
- Need to be clearer about identity/making links and to co-operate with others.
- Creates frustration. Not enough time to work on what needs to be done.
- Challenged by donors to develop stronger links with Southern partners.
- Keeping up with those trends that are binding requirements.
- Fighting to retain organisational identity and not change for its own sake in response to others' demands.

Rationale: The principle behind the use of this approach and indeed, behind all these initial sessions, is the importance of understanding the 'whole picture' when working with organisations, particularly the changing context within which an organisation works and the relationships that are important to or which influence them.

Learning:

- We cannot look at organisations in isolation from their wider social and economic context. That context influences directly how an organisation works.
- Given the large amounts of funding coming from Sida, Swedish church-related development organisations/denominations need to be aware of the changing donor and development trends, as well as the changes in the domestic economy and their member church congregations.

Appendix IIIa
THE CHANGING
FACE OF NGOS

Appendix IIIb
THE BIG PICTURE

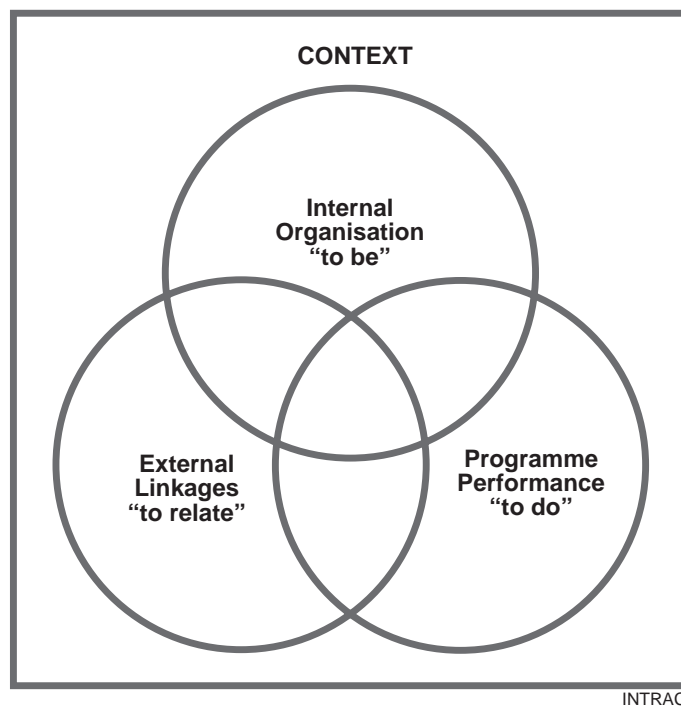
Appendix IIIc
THE BIG PICTURE
OF FUNDING

page 47-51

Session IV: Understanding organisations and how they develop

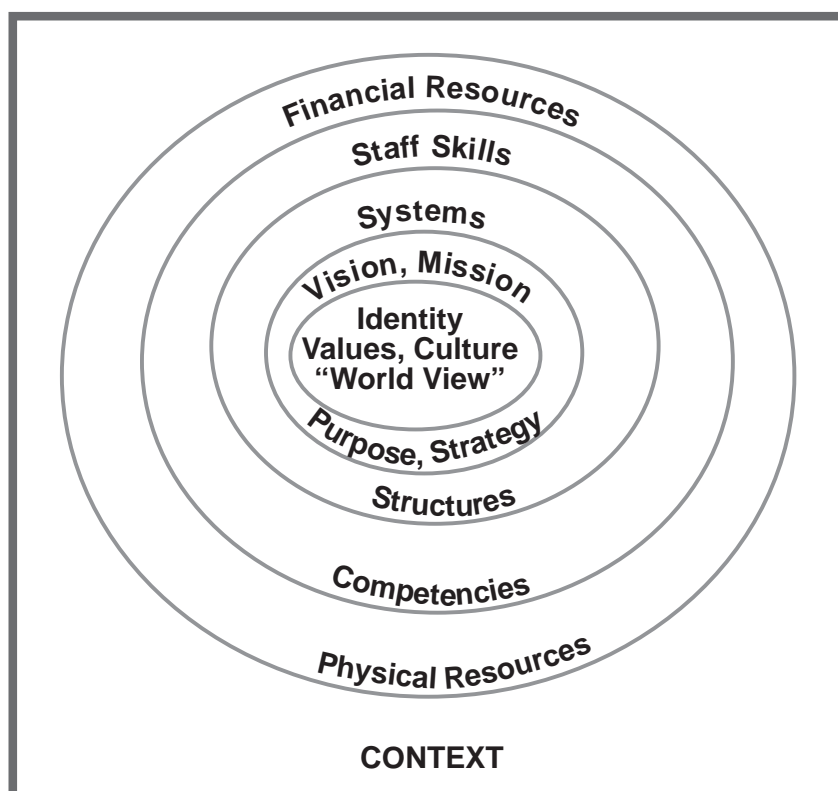
Aim: To link the organisational challenges identified in the previous session to two models that illustrate ways of looking at the key elements of an organisation.

Method and Input: The two models offered were the 'Three Circles Model' and the 'Onion Skin' model.



"3 CIRCLES MODEL"

The 'to be' circle relates to the internal life of an organisation, its identity, culture, leadership, structure, systems, resources and so on. The 'to do' circle relates to the programme performance of an organisation, its impact and effectiveness, its basis for existence. The 'to relate' circle concerns the nature of the organisation's external linkages: with member churches, donors, government and other NGOs. The circles are interlocked to illustrate that a change or issue in one circle will be affected or influenced by the other, therefore emphasising the importance of looking at an organisation as a whole, rather than as separate parts. The model also illustrates the importance of understanding the surrounding socio-political-cultural context, which any organisation is influenced by and can have impact on. Using the image of the 'onion skin' it is possible to consider more deeply the 'to be' part of the organisation.



INTRAC/CDRA 1995

"ONION SKIN MODEL"

Organisations can be likened to an onion with different layers. The outside layer of the 'onion-skin' represents the physical and financial resources that an organisation needs: money, buildings, vehicles, equipment. Inside that layer are the human skills and competencies required to implement activities. Next come the structures and systems needs to make an organisation work. Inside that the vision, purpose and strategy of the organisation – what it wants to achieve and how. At the very heart, (or soul), of an organisation lies its core; its identity, values, culture, 'world-view' or 'conceptual framework': how it sees and understands the world and its place in it. Leadership also plays a key role here. While the outer rings are generally more tangible and easily assessed, the core elements are largely intangible and observable only through the effects they have, both internally and in the programmes and external relationships. By their very nature, the core elements are often deep-rooted, complex and more difficult to understand but without 'health' in these areas, an organisation can become 'de-capacitated' i.e. it will not have the capacity and ability to be effective and healthy in the long-term. The image of the onion also illustrates the importance of handling organisations with care – when you cut an onion you can cry!

STAGES IN AN ORGANISATION'S LIFE

After looking at the make-up of an organisation, this session then examined the way organisations change over time. Organisations are never static, they are dynamic

Appendix IV
THE LIFE
CYCLE

page 52

and, like their context, always changing. A number of models were used including 'Greiner's Five Phases' (1972) and the 'organisational life cycle', (see Appendix IV).

The limitations of these models were also explored, given that they do come from a linear way of thinking and do not take into account the impact of external changes. Other models that reflect different cultural values were also explored. For example; a more organic model of the organisational life cycle developed by the 'Concerned for Working Children' in Bangalore, India was introduced. This uses the organisational metaphor of a tree growing from a seed to maturity, providing shade for other saplings whilst sometimes competing with them for scarce resources.

Another approach to looking at stages in the development of an organisation that was introduced in the 1999 workshop comes from CDRA (Community Development Resource Association) in South Africa. This identified three critical stages, each of which are important in their own right for healthy development:

DEPENDENCE: a period of great learning and development of skills where others play a major role in providing the resources and environment required for growth. This can also be termed as the "pioneer" or childhood stage.

INDEPENDENCE: a shift in the relationship and a period of testing to determine the uniqueness of the organisation, using capacities and competencies to impact the wider environment. This could be likened to an adolescent stage in the organisational life cycle and movement to early adulthood

INTERDEPENDENCE: the organisation now realises its full potential through its effective collaboration with others (adulthood).

Within one organisation these stages can co-exist simultaneously. Similarly, they may not occur in a linear fashion, with an organisation moving between different stages. These stages can also be reflected in relationships between Northern and Southern organisations.

In several of the workshops, case studies were used to apply some of the models and understanding gained from the previous session.

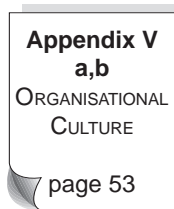
Rationale: Looking at these different models of development in organisations emphasises the importance of understanding that organisations are never static, that they are constantly changing and that their needs may be very different at one stage than another.

Learning: Participants were often able to relate to these models, particularly the 'organisational life cycle', in terms of the stage of development of their own organisation. Many of the older and larger agencies saw themselves at the aristocracy stage, (or sometimes living death!), whilst recognising many of their partners were at the infant or adolescent stage although some of the participants did come from smaller and younger "pioneer" agencies, as well as there being examples of some more established, older church partners. This in turn creates a challenge for capacity building, as the needs and demands of the Northern partner may be different from those of the Southern partner. It underlines the importance of being able to 'read' where a partner is in terms of its own stage of development and to be aware that your own organisation may be at a different stage and this may bias your own judgement. Every organisation is unique and therefore a "blueprint" approach cannot be used. The principle of "do no harm" was often stressed.

Session V: Understanding organisational culture using metaphors

Aim: To recognize that organisational culture can be a potent part of organisational life and cannot be ignored when seeking to understand and work with organisations.

Method: One way of seeking to understand organisational culture is through the use of metaphors and drawing. This session introduced the concept of metaphor, based on some of Morgan's work. People were encouraged to think creatively about their organisations and describe them in terms of a metaphor, (e.g. plant, means of transport, animal etc.), and then to draw them. These drawings were exhibited and participants shared their picture in a 'gallery walk' eliciting from them some of the underlying assumptions that can provide a key to understanding organisational culture. Examples included, airplanes about to crash, overloaded buses, ships with different class compartments, three headed animals or a new computer with all the up-to-date software but it is not connected (see pictures overleaf)!



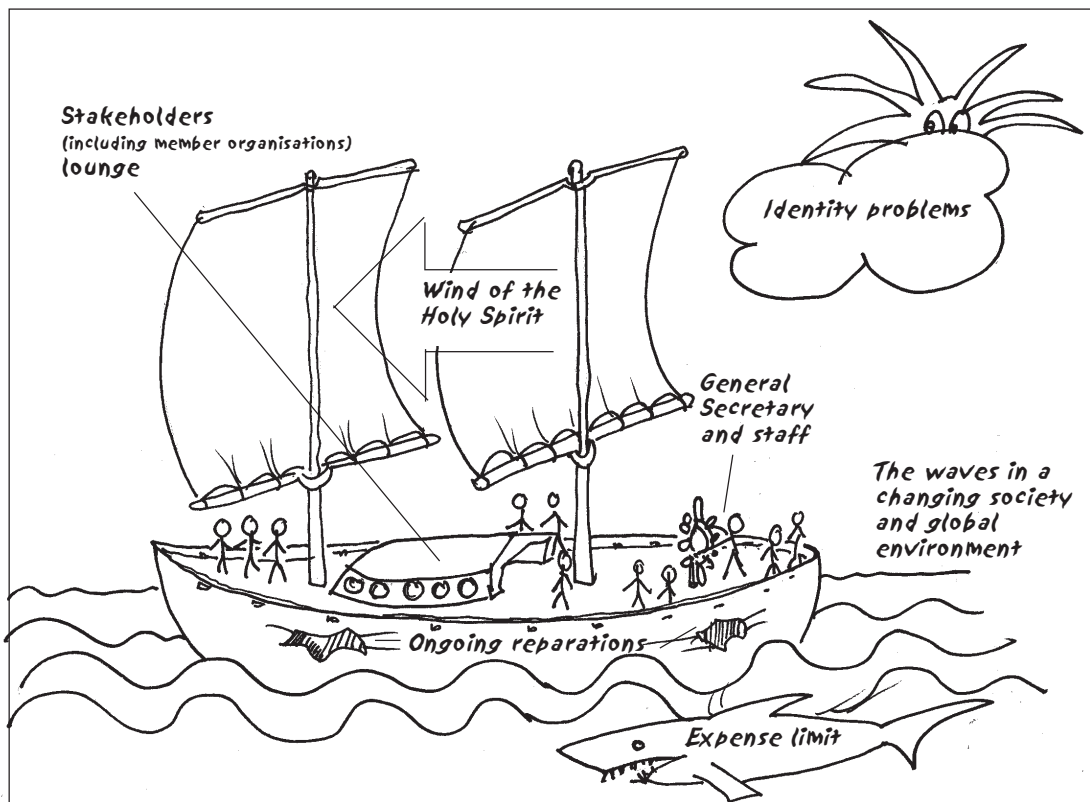
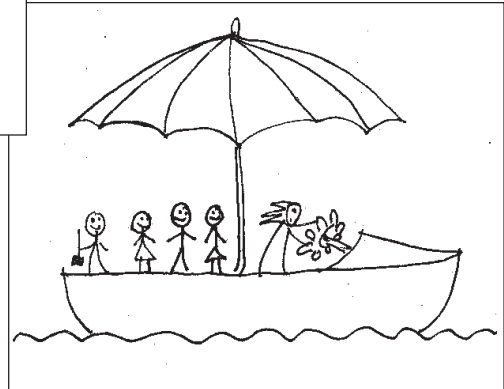
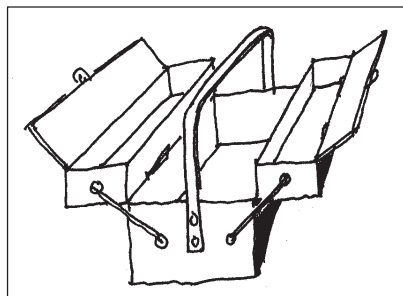
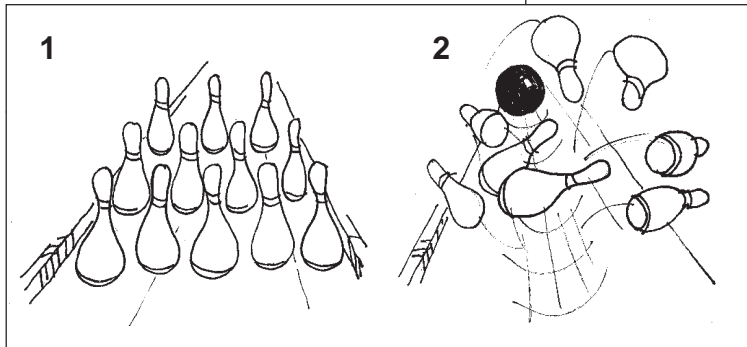
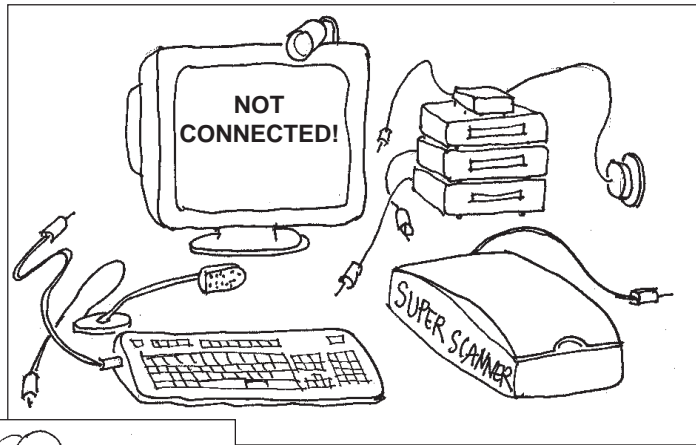
Other pictures and models for understanding organisational culture were also used, for example, the 'hippo in the water', where you only see a small part of the hippo as the bulk of the body is under the water. Different models of understanding organisational culture, e.g. Schein (1992), (see Appendix V), were also shared the next day.

Rationale: In relation to organisations the unseen part of the hippo can be likened to the underlying assumptions of organisational culture that influence organisational behaviours. According to Schein (1992), one way of understanding organisational culture, is to look for those areas where there is a discrepancy between what the organisation states and what it does. This can usually point to basic underlying assumptions that informs and drives organisational behavior. These need to be understood and made more conscious if you are going to work with organisational culture. If ignored, changes which occur may be superficial.

Learning:

- That intangible assumptions are difficult to see, hard to understand but can be very powerful, and, like a hippo, need to be treated with care!
- That using methods that exercise the right side of the brain, the creative side, can access insights and underlying assumptions that can reveal far more than words.

Examples of pictures drawn during the workshops to illustrate participants metaphors of their own organisation



Day II

Session I: *Identity; the “soul” of an organisation.*

Aim: To focus on the concept of ‘identity’, particularly as it relates to Christian organisations involved in development.

Rationale: Identity can be seen as the ‘soul’ or the ‘life-force’ of the organisation. It encompasses many things, as does the identity of an individual (Appendix VI). It is useful to distinguish these elements and explore them more deeply as they are key to understanding the essence of an organisation. Without a clear identity, then an organisation can become ‘de-capacitated’. In turn there needs to be a ‘fit’ between an organisation’s identity and values and what it does.

Appendix VI
THE SOUL OF AN
ORGANISATION

page 54

Method: Participants were asked to think about identity in relation to humans and then to consider how each element of human identity applies to organisations. From this the concept of identity was explored. This was done in a variety of ways, for example looking at publicity, as this can say a lot about an organisation’s identity in terms of what it gives value to, its model of development and the church’s role. In one workshop, participants were invited to share their publicity and logos and discuss what these said about what they valued, their theology and how they approached development. In another workshop we looked at different models of development, the stated theology and the nature of the activities including how the organisation structured and organised its work. Throughout there was an emphasis on ‘is there a fit?’

Elements of organisational identity identified included:

- History.
- Age.
- Culture.
- Purpose.
- Reputation.
- Focus of activity.
- Theology and Christian values.
- Conceptual framework/‘worldview’ - a robust framework as to how the organisation sees the world, its model of development and analysis of why people are poor. For Christian organisations, this is often informed by its theology.

Appendix VIIa
MODELS OF
DEVELOPMENT

page 56

Appendix VIIb
THE FOUR
PARADIGMS

page 57

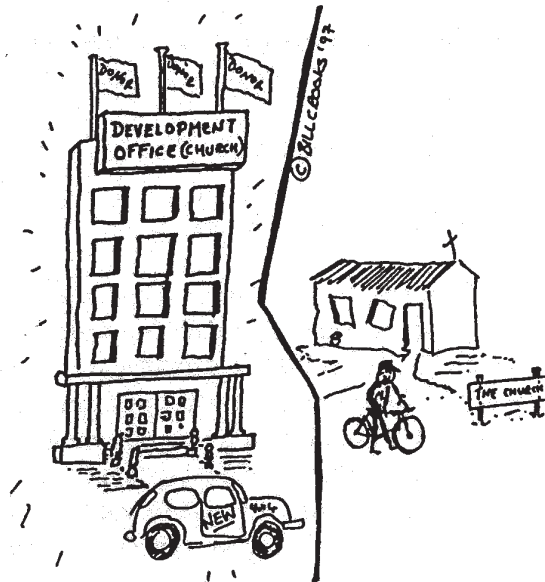
The conceptual and theological framework within which church related development organisations operate was explored by examining different models of development and their theological and theoretical underpinning (see Appendix VII). Participants were invited to identify the different models of development they were operating from in terms of their actual activities and then to compare this with their own theoretical understanding of development as well as their Christian standpoint. Discrepancies were explored to illustrate where tensions may occur in denominations and agencies.

Another way of exploring conceptual frameworks and world views is to see where tensions and different priorities emerge in organisations involved in development.

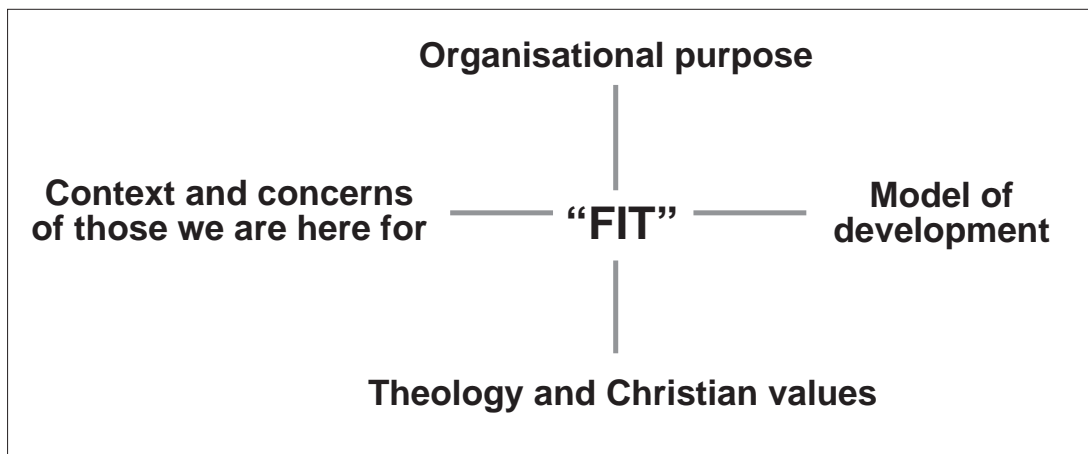
An example could be between the programme department and fund-raising departments where often contradictory approaches and tensions arise due to different world-views.

Participants were encouraged to look at where critical incidents/tensions have taken place in their organisation and what this tells them about the different world-views that may exist.

Input and learning: Where there is a “fit” then there will be a congruence in what the organisation says and does - where there is a lack of “fit” then a lot of energy can be trapped or used up in trying to bridge the gap. To those outside the identity can be weakened as the organisation does not appear to be “practicing what it preaches”. In the long run, this situation is not sustainable as tensions and “splitting” are likely to take place which will inevitably affect performance.



This is illustrated in the picture opposite where the development department of a church can receive a lot of resources from outside and can sometimes be seen as a separate agency in its own right. Meanwhile the local church that arguably gives the development department its local legitimacy is ‘split off’ and is not able to access such resources. This can encourage a dualism as well as a tension which contradicts a holistic approach often promoted by the church.



The figure above was used in one workshop and summarizes the importance of ‘fit’ between purpose, context, need, theology and model of development.

Session II: Characteristics of a healthy organisation.

Aim: To have a clearer sense of what constitutes a “healthy” organisation in order to be able to effectively support your own organisation or others.

Rationale: When working with organisations, people’s perceptions of what may need to change are based on their own assumptions of what an organisation should look like and their own experience of organisations (be it good or bad). These assumptions often remain implicit and hidden. It is useful to make these assumptions explicit as they may not be shared. If they are shared, they can act as a catalyst for action, both in terms of what to work towards, as well as affirming the strengths that are already there.

In later workshops, greater emphasis was given to looking at more dynamic, integral qualities of organisational life, for example, the ability to think strategically or to learn from practice, rather than quantitative indicators for static items like a written vision statement (is it shared/owned?) or the existence of an information system (is it used, feeding back learnings and so on?). The latter is more often found in the use of organisation assessment checklists.

Method: One way of doing this was to ask participants to think of an organisation that they admired and to state the three key characteristics of that organisation. These were then grouped as a composite list and were used to explore ways in which such characteristics could be developed in partners and the participants’ own organisations.

Appendix VIIIa
STRENGTHS TO
LOOK FOR IN SOME
NGOs

Appendix VIIIb
GUIDELINES FOR
HEALTHY
CHURCHES
INVOLVED IN
DEVELOPMENT
page 58-61

Appendix IX a,b,c
ORGANISATION
ASSESSMENT
TOOLS
page 62-67

An input was also offered from the facilitators experience of some key strengths to look out for when working with organisations, (see Appendix VIII).

Participants were introduced to other ways of diagnosing organisational health through the use of organisation assessment tools and checklists (see Appendix IX for samples). A number of these tools were shared in earlier workshops as they are often used by donors to assess and monitor their partners. Each is based on implicit model of how an organisation works.

Learning: Although recognising the importance of monitoring change and development in organisations, many of the organisation assessment tools used by Northern agencies with partners do not acknowledge the differing stages of a partner’s development and its context. Given the donor relationship, it was recognized that these tools might not provide accurate or open information if applied by a Northern partner. Tools can be used in a constructive or destructive way and given the sensitivities of organisational life, it was agreed that they should be used with care and for an explicit purpose, along with other processes not just on their own.

Session III: Approaches to working with and strengthening organisations

Aim: To focus on two schools of thought, or world views, in working with and strengthening organisations.

Method: Input and discussion around two schools of thought in working with organisations; the 'scientific management' approach and the 'adaptive management' approach.

Appendix X
MANAGEMENT
TOOLS
page 67

- The 'scientific management' approach with its emphasis on structures, tools, strategic planning, technical training and rules and procedures.
- The 'adaptive management' school which focuses on power and relations, learning 'formation', strategic thinking, approaches and appropriate methods (see Appendix X).

Rationale: Understanding the assumptions behind different schools of thought has direct relevance to organisational strengthening, (or 'capacity-building' as it is sometimes called), as it will affect the approach taken and what is focused on. For example, a scientific management approach may put greater emphasis on 'fixing' 'problems', for example, re-structuring. This approach may also recommend long-term strategic plans; whilst an adaptive management approach may focus more on addressing underlying issues on an ongoing basis, for example, unhealthy power relationships that may exist internally, or the need for more of a strategic thinking/learning approach to work.

'DO NO HARM' REFLECTION

"I remembered one morning when I discovered a cocoon in the bark of a tree, just as the butterfly was making a hole in its case and preparing to come out. I waited a while, but it was too long appearing and I was impatient. I bent over it and breathed on it to warm it. I warmed it as quickly as I could and the miracle began to happen before my eyes, faster than life. The case opened, the butterfly started slowly crawling out and I shall never forget my horror when I saw how its wings were folded back and crumpled; the wretched butterfly tried with its whole trembling body to unfold them. Bending over it, I tried to help it with my breath. In vain. It needed to be hatched out patiently and the unfolding of the wings should be a gradual process in the sun. Now it was too late. My breath had forced the butterfly to appear all crumpled, before its time. It struggled desperately and, a few seconds later, died in the palm of my hand."

NIKOS, KAZANTZAKIS
ZORBA THE GREEK

from CDRA Annual Report 1997/8

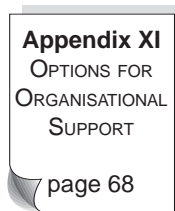
One metaphor is useful here and was often shared in the workshops. It likens organisational capacity building to the making of a curry (Postma 1998). An organisation that reflects good capacity is somewhat like a festive curry meal. Making the meal requires skill, dedication, fresh ingredients and good timing. There are staple ingredients that are essential but also specific ingredients that can only be selected by the people of that place. It is only they who will be able to put all the ingredients together in a recipe, and in a way they and their communities enjoy most. An appreciation of how sensitive organisational life is and the importance of 'do no harm' when working with them, was also stressed.

Learning: It was acknowledged that your "world view" in relation to organisations will affect the way you work with your own or other organisations. It was recognised that a balance is needed between both approaches but at present the dominant paradigm in the North appears to be the 'scientific management' approach, for example; as illustrated by log-frame analysis (LFA). It was recognised that this did not always sit easily with a more flexible approach needed in capacity-building; indeed, it could even undermine or contradict such approaches.

Session IV: Role and nature of OD and change

Aim: To identify a range of approaches to organisational strengthening, with particular emphasis on Organisational Development, (OD).

Method: This session often began with a brainstorming of current approaches used in organisational strengthening work- for themselves or partners. This was related to a range of approaches, (see Appendix XI), depending on the needs of the organisation. Organisation Development as *one* approach to strengthening organisations was then focused on through the use of a case study of an OD exercise with a Diocese in West Africa. This involved analysing and “reading” the organisational issues facing the Diocese, critiquing the OD intervention and drawing out principles of good practice; for the Northern partner, the partner itself and the consultants.



Rationale: OD was focused on as it illustrates many important principles that are relevant to organisational strengthening/capacity-building work.

Input: Organisation Development is a particular type of capacity-building intervention that comes from a long tradition of practice in different sectors.

OD work aims to develop a deep understanding of an organisation, (assessment or diagnosis), in its own particular context. It looks at the organisation as a whole, its inter-relationships and, invariably, the ‘core of the onion’. OD will often need an objective, skilled external facilitator/consultant who uses a process consultancy rather than an ‘expert’ based approach, that ensures active involvement of the client in the diagnosis and planning of changes.

OD is not just concerned with promoting one-off change; rather it is concerned with helping the organisation to develop a continuing capacity for handling change and learning from practice. Given this, OD is long term, not a one-off activity.

Learning: Key learnings from the assessment of the OD exercise included:

- Importance of understanding and relating to the wider picture
- Finding the appropriate mix relevant to the context and organisation, not a blue-print approach
- Understanding the distinctive characteristics and culture of the church
- Building on the potential strengths of the church
- The importance of identity
- Avoid encouraging dualism, i.e. a splitting between development and the rest of the church’s work
- Importance of the commitment and involvement of key stakeholder to the process and outcomes
- Ensure a “fit” between theology, development and present day realities
- The importance of the will and capacity to manage the process from within
- The need for a clear mandate from senior leadership
- Integrate gender and diversity issues
- Change has a cultural, political, personal ,spiritual and technical dimension.
- Change takes time!

**Appendix
XIIa**
STRENGTHENING
DIOCESAN
DEVELOPMENT

**Appendix
XIIb**
A BRIEF
INTRODUCTION
TO OD

**Appendix
XIIc**
PRACTISING OD
— SOME KEY
ISSUES THAT
ARISE
page 69-75

These points are expanded in Appendix XII.

This particular case study generated considerable discussion on the role and implications of the Northern partner in OD work. These, plus questions generated by other Northern agencies are outlined below:

- How can we play a funding role and a capacity-building role at the same time?
- How do we support the outcomes of an OD process if they come up with different priorities to our own?
- How do we “signpost” effectively when there are no ‘good’ local OD providers?
- How do we deal with a situation where other donors supporting the same partner have different policies and perspectives on OD and capacity-building?

This last question raised considerable debate about the dualism perpetuated by many Northern, church-related partners due to the perception that back-donor funds should not be used for activities that were not seen as traditionally development-oriented. There appear to be differing views on Sida’s conditionality around this matter. The OD approach does challenge traditional approaches to development including church-related development work. It suggests that rather than just funding and supporting sector-development programmes and projects, there needs to be an emphasis on supporting the whole church to reflect and act developmentally within a community context at local level.

Session V: Exploring roles and relationships

Aim: To explore the nature of the relationships between Southern organisations and their Northern partners.

Rationale: This session was introduced in the 1999 workshop in recognition that organisational strengthening can not be looked at in isolation from the roles and relationships between Northern and Southern organisations.

Method: A simulation exercise was used. The exercise was possible because of the presence and active cooperation of two participants; one a representative of a Swedish organisation and the other a representative of one of their Southern partners.

The exercise involved the two participants being interviewed in the context of a simulated television programme about international development. The 'interviewer', (played by one of the facilitators), asked a series of questions that explored the nature of the relationship between the Southern and Northern organisations. The evolving, (and true), story of this relationship was followed up to the point where a decision had been made to negotiate a formal partnership agreement between the two organisations. The television interview was then 'frozen' at that point and the remaining participants, who had been observing the interview, were divided into two groups: one group representing the Southern organisation and the other representing the Northern organisation.

The two groups were placed in separate rooms with only simulated 'fax' communication and asked to negotiate and agree the terms of a partnership agreement based on mutual rights and obligations. After a period of discussion during which time the simulated 'faxes' were sent via the facilitators from one 'organisation' to another, representatives from each organisation were brought together in a 'fish-bowl' discussion to try to reach a consensus on the broad terms of a partnership.

Learning: The process of negotiation identified many of the issues that make the development of South-North partnerships difficult:

- a significant difference of views about what constitutes reasonable rights and obligations.
- suspicion about the motives of each partner.
- a recognition that the funding relationship can distort the idea of partnership and 'weight' the balance of power in favour of the Northern organisation.
- concern that the legitimacy and access provided by the Southern organisation is often under-valued.

Appendix XIIIa
NEGOTIATING
RELATIONSHIPS
page 76

Appendix XIIIb
RELATIONS
BETWEEN
SOUTHERN AND
NORTHERN
NGOs
page 77-80

After a lengthy discussion during which the Southern organisation took an assertive approach and the Northern one a placatory approach the two parties were still unable to achieve a consensus and agreed that they would need to do more work on the areas of difference before they could achieve agreement.

The exercise then returned to the simulated television interview with the two original participants who first of all explained what had actually happened and then discussed what they had witnessed in the exercise. The exercise concluded with the identification of some principles of good practice when negotiating relationships. These can be found in Appendix XIIIa.

DAY III

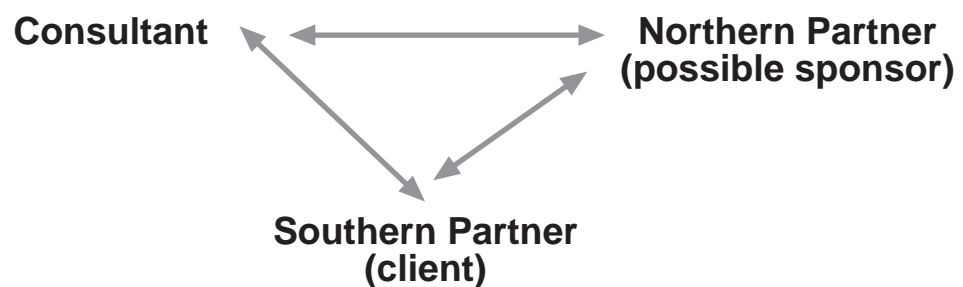
Session I: Role of the Northern partner in capacity-building and partnership relationships

Aim: To explore the opportunities and limitations of the Northern partner role in capacity-building and partnership relationships and identify principles for good practice

Method: The previous discussion on OD and relationships generated a lot of issues concerning the role of the Northern partner in organisational strengthening work and relationships with partners. As a way of analysing these issues the following scenario was presented to the group for discussion.

An OD consultancy has taken place with a partner and a local consultant, where organisational issues and ways forward were identified and agreed on. The Northern partner has provided the finance for this consultancy to take place. Who should receive the report?

Rationale and input: This simple scenario invariably generated a lot of discussion and debate as it challenged the (often unquestioned) assumption that the Northern partner should automatically receive the report. It was used to illustrate and challenge issues around ownership, confidentiality and accountability; all of which are critical in partnerships and capacity-building work. The concept of “client” (ie who the consultancy is for) and “sponsor” (ie who pays and initiates) was used here to sharpen the focus. The two may not necessarily be the same. This was illustrated by drawing the triangular relationship, emphasizing the basic principle that in an OD process, the relationship between consultant and Northern partner should be minimized, whilst communication from the Southern partner to the Northern partner should be encouraged. In turn, the primary relationship in OD work is between the consultant and client (Southern partner). The consultant feeds back and submits its report to the Southern partner and it is then up to them to share it with others including its Northern partner. The consultant is paid by the Southern partner or they request their Northern partner to do so. In one workshop, the whole issue of the ethics of confidentiality triggered a big debate- which this simple scenario intended to do.



Learning: From the discussion that followed, the following principles were offered as “10 Commandments” in organisational strengthening work with Southern partners, although they could be equally applied to the Swedish context:

- I Be clear as to “Who is the client?”
- II Be super aware of your role and manage the boundaries
- III Catalyse with care
- IV Read the situation well and signpost appropriately
- V Strengthen local capacity-building providers
- VI Let the process take its course and see the process through
- VII Place the development work within the context of the whole church
- VIII Co-ordinate with other agencies and within your own
- IX Make the relationship part of the process
- X “Remove your own plank” - apply OD to yourself

Appendix XIV
TEN OD
COMMANDMENTS
FOR NORTHERN
PARTNERS
page 81-88

A fuller description of these “commandments” can be found in Appendix XIV.

Power in relationships

The danger of mixing the funding role of Northern partners with capacity building work was stressed, where capacity-building can just become a funding hoop to jump through and the need identified belongs to the Northern partner rather than being owned by the Southern partner. At the same time, the power of developmental funding decisions based on an accurate reading of the partner was also emphasised. The power imbalance in North-South relationships was recognised- indeed, one indicator of good capacity-building work would be a shift in the nature of this relationship where the Southern partner may take a more pro-active stance and/or challenge its Northern partner.

Capacities needed in organisational strengthening work

To conclude this session, participants were encouraged to identify and explore the personal and professional qualities needed if engaging in organisational strengthening work and the sort of support Northern agencies may need themselves to develop such qualities. Organisational strengthening is not just a discrete activity but demands a whole re-orientation of approach. For Northern partners, this will have implications for how they plan with partners, report, monitor, relate and fund – for example, how will this funding decision/planning process/reporting procedure/evaluation disable or enable the development of this partner and its relationships. Asking and working with such questions is part of the capacity challenge for Northern partners (see Appendix XV).

Appendix XV
PERSONAL AND
ORGANISATIONAL
CAPACITY
CHALLENGES
page 89

Session II: The Learning organisation

Aim: To identify the characteristics of a 'learning organisation' and provide an opportunity for participants to relate these to their own organisation.

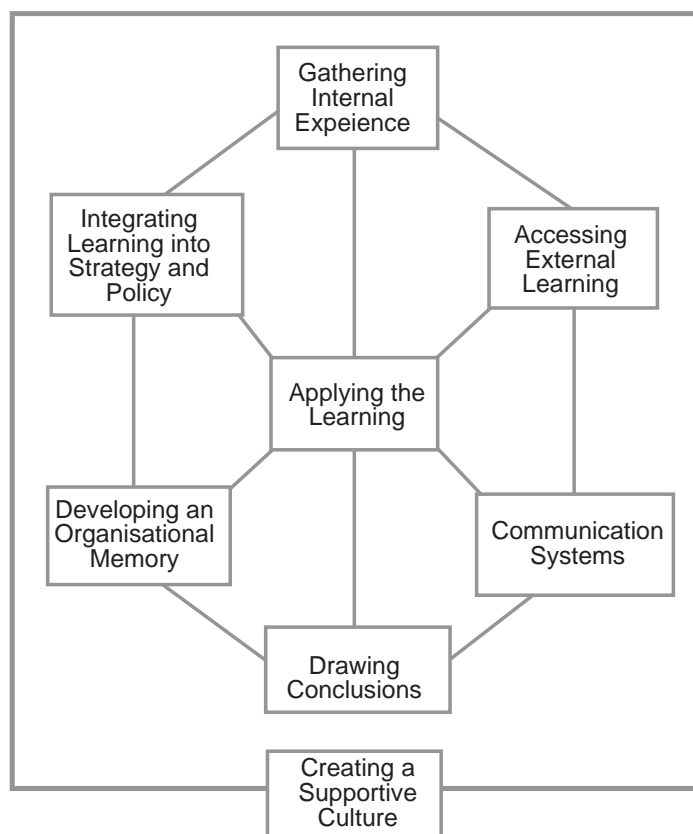
Input and Rationale: One of the most important characteristics of a healthy and "capacitated" organisation is its ability to learn from and adapt to challenges arising both within the organisation itself and in its external environment. This is summarised in the form of the equation concerning organisational survival, developed by Reg Revans (1993): $L \geq C$ (where L, the rate of learning, must be greater or equal to C, the rate of change). The concept of the learning organisation was introduced as:

"An organisation which actively incorporates the experience and knowledge of its members and partners through the development of practices, policies, procedures and systems in ways which continuously improve its ability to set and achieve goals, satisfy stakeholders, develop its practice, value and develop its people and achieve its mission with its constituency" Aiken and Britton (1997) - see Britton, B. (1998).

The process of development is seen by many writers, including David Korten (1984), as itself a learning process moving through four stages:

- Learning to be effective.
- Learning to be efficient.
- Learning to expand.
- Learning to be sustainable.

In order to be able to go through these learning stages, an organisation needs to develop the eight key characteristics summarised in the diagram.



Method: Explanation of the characteristics of the learning organisation, (see above), after which workshop participants were encouraged to assess their own organisations against these characteristics using a questionnaire instrument devised by one of the workshop facilitators, Bruce Britton (1998). Time constraints prevented an in-depth analysis of each organisation's 'learning profile' but comparisons were drawn between the strengths and weaknesses of a number of the organisations represented. Participants were encouraged to consider ways in which they could strengthen the characteristics that were currently under-developed in their organisation.

Approaches to organisational learning: Two main approaches to strengthening organisational learning were discussed: the '*individual competence approach*', which is best illustrated by Peter Senge's (1994) five 'disciplines' for learning in organisations:

- Personal Mastery - learning to expand our personal capacity to create the results we most desire, and creating an organisational environment which encourages all its members to develop themselves toward the goals and purposes they choose.
- Mental Models - reflecting upon, continually clarifying, and improving our internal pictures of the world, and seeing how they shape our actions and decisions.
- Shared Vision - building a sense of commitment in a group, by developing shared images of the future we seek to create, and the principles and guiding practises by which we hope to get there.
- Team Learning - transforming conversational and collective thinking skills, so that groups of people can reliably develop intelligence and ability greater than the sum of the individual members' talents.
- Systems Thinking - a way of thinking about, and a language for describing and understanding, the forces and interrelationships that shape the behaviour of systems. The discipline helps us to see how to change systems more effectively, and to act more in tune with the larger processes of the natural and economic world.

The second approach to developing organisational learning presented was the '*OD approach*', which focuses more on the development of the necessary systems, strategies and organisational culture supportive of learning at individual, team and organisational levels.

Learning: The concept of the learning organisation was new to some participants. The use of the questionnaire invariably raised broader organisational questions that would need to be also addressed, for example an organisational culture where staff are scared to make mistakes will not be conducive for organisational learning. It was recognised that working with such a tool can provide a less threatening way of raising such issues but it may need careful facilitation if used internally with management and staff.

Session III: Managing change

Aim: To explore approaches to managing change and identify guidelines for good practice.

Rationale: The process of strengthening organisations whether Northern or Southern, will almost inevitably require changes to be made to existing ways of working. At a wider level, the increased pace of socio-economic change and the instability in social, economic and institutional life has led to a turbulent, messy and difficult environment for organisations involved in development to work in. Therefore, managing change is a daily reality and needs to be handled consciously if Northern and Southern organisations are going to be able to face the tough challenges ahead.

Method and Input: The session on managing change focused on three main areas:

- The human side of change
- Models for managing change
- Guidelines for managing change

Since change in organisations involves people, it is important that managers understand the human side of change; and, particularly, what can cause resistance.

Key points raised by participants included:

- Loss of control.
- Excessive uncertainty.
- Unexpected surprises.
- Lack of any continuity.
- Loss of face.
- Concerns about future competence.
- Unintended consequences.
- Increased workload.
- Surfacing of past resentments.
- Threat of job losses.

A number of models and tools for understanding and managing change were introduced and assessed, for example, Kurt Lewin's often quoted 'unfreezing- change-re-freezing' model, as well as his force field analysis where the forces for and the forces hindering change are identified.

Guidelines for managing change based on the work of John Kotter (1995) were discussed in small groups and related to their own experience of organisational change, either within their own organisation or with partners. Kotter's guidelines included:

- Recognise the need for change and establish a sense of urgency and avoid the 'boiled frog' syndrome ¹.
- Form a guiding coalition of individuals who are committed to the change effort and have the authority and credibility to carry the rest of the organisation with them.

¹ This analogy was used to illustrate the importance of being open to the changes around you. If you put a frog in boiling water, it will immediately jump out but if you place a frog in a pan of cold water and turn the heat up, it will not notice the gradual change in temperature and will eventually be boiled!

- Ensure there is shared vision as to what the organisation could look like as a result of going through the changes.
- Communicate the vision, the need for change and the consequences of not embracing the change.
- Empower others in order to identify the obstacles and overcome understandable resistance.
- Plan for and celebrate short term “wins” to create a momentum for the change whilst keeping the long-term in view.
- Institutionalise the change by building it into the organisation’s culture. Demonstrate that the change is consistent with the organisation’s values and world view and that the change has helped the organisation to become more effective.

Learning: Kurt Lewin’s ‘unfreezing – change – re-freezing’ model was seen to be too simplistic as it implied that change takes place in time-bound episodes rather than the more realistic concept of continuous change with little or no opportunity to ‘re-freeze’. Force field analysis (see session IV) was seen to be a useful way of identifying the barriers to change. It was also acknowledged that a more effective strategy may be to identify and build on existing forces in favour of change in order to create a ‘critical mass’ of support for the change effort.

Kotter’s guidelines for change were seen as useful, although there were some concerns raised that this came across as somewhat top-down. The following guidelines could also be added to ensure that the change is based on “the whole picture”, where real participation takes place from those affected by changes and the human dimension of change is taken into account. Resistance may be just as easily due to poorly handled change as to natural human behaviour.

The following guidelines could therefore be added to include:

- Ensure the change is based on an internal and external analysis
- Assess/Build readiness for change
- Ensure the vision is modeled in leadership behaviour
- Ensure the Board is involved
- Ensure stakeholder participation
- Recognize and attend to the human dimensions of change- change can be an opportunity but also a loss. Opportunities to let go of the past, to “mourn it” need to be acknowledged.
- Develop a strategy and process for change that specifies who will lead, how people will participate, the key stages involved and how decisions will be made.

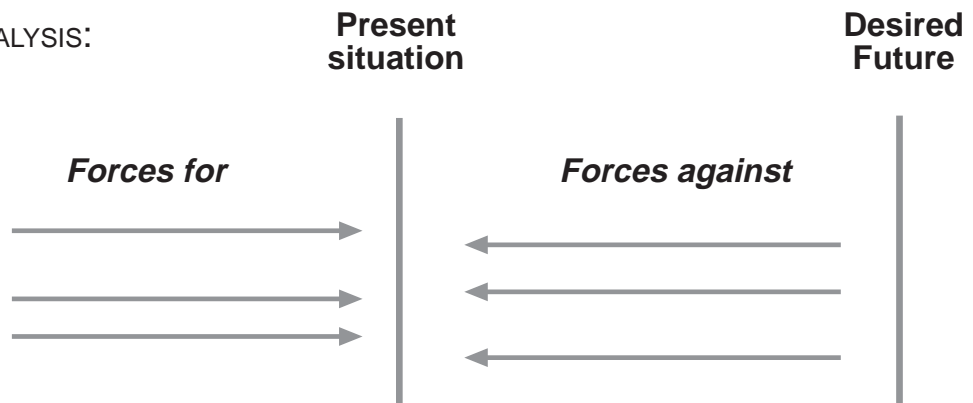
Session IV: Action planning and evaluation

Aim: To identify areas that need to be worked on further or change, as a result of the learning from the workshop.

Rationale: A number of issues, dilemmas and learning points were identified during the course of the three days. To help participants consolidate and starting looking ahead to application back on their own organisation, it was seen as important to provide some space to reflect individually and in organisational groups.

Method: Force-field analysis was often used as a tool to help clarify the sort of changes that may be needed, as well as to identify the forces for and against change. The use of force-field was often demonstrated taking an example from one of the participants. Discussions then took place in smaller, often organisational groups. From this a more specific personal action plan was developed which also indicated some of the support that participants may need in order to take these changes forward.

FORCE-FIELD ANALYSIS:



Learning: As indicated above, by analysing the forces for and against change and giving a different weight to each force in terms of priority, participants found it easier to develop a strategy for change, which may involve minimising the forces against, as well as building on forces for. In some cases, participants saw that some of the hindering forces could become levers for change.

Evaluation and Follow-up: Evaluation of the 3-day workshop built on the monitoring sessions that happened at the end of each day. It was generally carried out in a plenary session, referring participants back to the original aims and expectations agreed at the beginning. A questionnaire form was used and subsequently summarised for SMC's use.

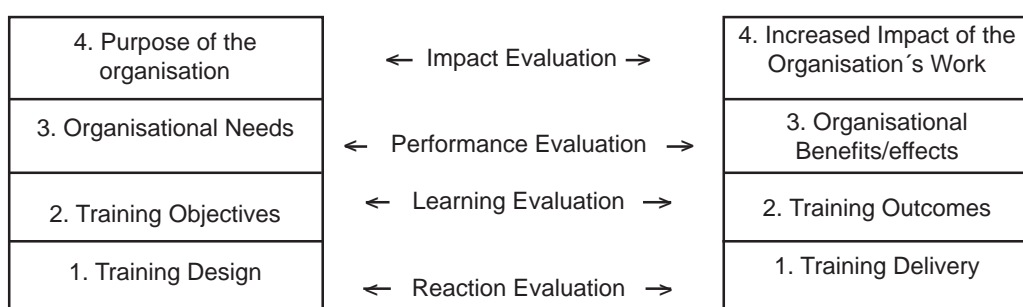
A concrete offer for support was also made at the end of each workshop from Karl-Erik Lundgren of Swedish Mission Council through the opportunity of a follow-up meeting about 3 months after the workshop. From the follow-up questionnaires, it is clear that these have proved very useful for those who have attended.

EFFECTS OF THE WORKSHOPS: ANALYSIS OF FOLLOW-UP QUESTIONNAIRE

**Appendix
XVI**
FOLLOW-UP
QUESTIONNAIRE
page 90

In order to assess the effects of this workshop series, a questionnaire was compiled by the facilitators in collaboration with SMC. This was sent in April 2000 to all those who attended, with a follow-up request in June 2000. The responses were summarised (see Appendix XVI) and the following is the subsequent analysis.

The survey focused on the effects of the workshops on the individual, their organisation, their relationships and capacity-building work with partners. Spin-offs and unintended effects were also looked at; for example, the effect on relationships with SMC, other SMC members and Sida). The questionnaire was based on the four level model of evaluation (in the figure below).



Sixteen participants completed a questionnaire devised specifically for this report. Whilst not statistically representative, the respondents did cover all the workshops with more responses from the workshops held in 1997 and 1998 than 1999. Respondents also included two participants from Southern partner organisations out of the three who participated in total.

Methodological constraints

Within this study there were also some methodological constraints. A rigorous assessment of impact (level 4) was beyond the scope of the study as this would have meant assessing the performance of Swedish member organisations and their partners and in turn, those with whom they work. The workshop content had developed over time, so the responses from one year maybe different to another making comparative work difficult. Short term and long term effects were also variable as some respondents took part last year, whilst others were from three years ago. Given that organisational change is by its nature long term it is more realistic to focus on the short term effects. The longer term effects may need to be followed up by SMC at a later stage. Some interesting examples are already becoming apparent. It was also not possible to follow-up the questionnaire with phone interviews, as originally intended due to time and availability constraints. Again, this may be an area for follow-up by SMC.

Feedback from participants

I) THE WORKSHOP ITSELF (Workshop Delivery)

Respondents expressed a high level of satisfaction with the workshops. They commented favourably about the participatory nature of the workshops and how they provided useful insights on the nature of organisations, as well as managing change. The motivation for attendance came from two sources: a general interest in understanding their own organisation and the need to deal with specific organisational changes that were already underway.

From the end of workshop evaluations, the main learnings focused on understanding organisations “with new eyes”, particularly the importance of vision and conceptual framework, the role of OD in organisational change and the role of the Northern partner and steps in managing change. In 1999, the greater emphasis on North/South partnerships and the learning organisation in the workshop design was also apparent.

Much of the above learning was confirmed in the follow-up questionnaire. Many respondents focused on the process of change in their own organisation and the need for participation, particularly by the Board, the need for a clear vision, values and conceptual framework. This is interesting as it indicates that the areas that “stuck” and were more relevant in the longer term, tended to be those that related to the organisational changes that many of the Swedish organisations are going through, rather than their work with partners in the South.

II) APPLICATION (Workshop Outcomes)

Respondents were divided when asked about what follow-up took place following their attendance at the workshop. For some organisations, follow-up included:

- models and learning used and replicated in follow-up workshops and seminars
- asking the facilitators back to their own organisations for in-house work
- incorporating ideas into existing change processes.

For others, there was little direct follow-up. In this case the reasons cited were:

- lack of time
- the workshop participant was not senior enough to initiate action
- organisational culture, power struggles and conservative thinking (although how to deal with this was also attributed to the workshop)
- Board members not equally committed to the proposed changes.

A significant number of respondents recognized the critical role that senior management and Boards play in change processes and therefore the importance of involving Board members as well as senior staff in future OD initiatives by SMC.

Participants were also asked about contact they subsequently had with other workshop participants. Respondents reported varying degrees of contact, with most having limited or no contact following the workshop, and others describing regular meetings arranged by SMC and visiting each others organisations. Where respondents reported attending SMC-arranged follow-up sessions, their experience was very positive. Lessons were shared and ways forward discussed. Respondents expressed greater confidence from these gatherings and saw them as essential in keeping alive the good spirit generated from the workshop and supporting them in their own

organisational change processes. As one respondent put it, “*we notice a better understanding because ..we have a better knowledge of each others organisation. Now we know we have the same problems and the same fight*”. One respondent did however, express a concern that it was not so easy to share when the organisations are so different.

When asked to identify what follow-up would have helped them, respondents emphasised the potential for in-house workshops dedicated to applying the concepts to their own organisation’s issues and involving both Board and staff members. This would help to bridge “*the gap from the individual training to the collective training in a particular working place or office*” as one respondent put it.

III) INDIVIDUAL AND ORGANISATIONAL EFFECTS/BENEFITS

Almost unanimously, respondents reported positive benefits for themselves as individuals as a result of attending the workshop even if it was, in the words of one respondent, becoming a “*thorn in (the Board’s) flesh*”! When asked to justify the time and money to their manager or Board, again many of the respondents focused on the value of having new insights and ways of thinking into managing change and organisational life. One respondent indicated greater understanding of funding trends and requirements. Many of the responses were attitudinal, “a mental change”, “an eye opener” as some put it. Interestingly for one respondent, it actually meant making the decision to leave their organisation.

Nearly every respondent reported that their organisation had benefited through a greater focus on identity, vision, mission and strategy and a better understanding of organisational change. Some referred to their role in influencing change and attitudes towards organisation development. One respondent indicated better inter-departmental team-work and communication and one referred to the critical importance of having one of the facilitators continue to work with them. Respondents found it more difficult to identify the effects that their attendance at the workshop had on their relationships with partners or the partner organisations themselves, although a small number explained that OD programmes with partners had been initiated. It appeared hard for respondents to relate this workshop to any effects on their own constituency in Sweden. One or two indicated that their constituency was better informed and there was a broader interest in these issues.

In a small number of cases, respondents reported a consolidation of their relationship with SMC and improved relationships with Sida. There was a greater sense that SMC is serious about their own development and that they have a greater understanding of the language that is used about OD and this also helps them in their applications.

IV) WAYS FORWARD

Looking to the future, respondents identified the current challenges facing their organisations, which were wide-ranging and included:

- the need for strategic planning and thinking
- clarity about future role and identity
- clearer and more realistic focus;
- leadership and clearer delegation system

- better use of own capacities in developing methodologies
- building more active co-operation between staff, the Board and churches
- continued organisation development
- increasing the participation of partners and shifting responsibility/power from North to South.

Respondents look to SMC for a lead in supporting further work on OD and capacity-building, and suggested that further follow-up workshops, seminars and publications would all be helpful in this process. Respondents also described an important role for SMC in promoting and creating opportunities for OD and capacity-building work with partner organisations and also promoting North-South exchanges. One or two also saw the need to consider the Eastern Europe and the Former Soviet Union context. A small number of organisations had used external consultants, (including SMC), for their own OD work. There was a more limited experience of promoting OD work with partners in the South but a slightly greater use of external consultants (Swedish and Southern organisations like CORAT Africa based in Kenya).

COMMENTS AND OBSERVATIONS FROM FACILITATORS

I) OVERALL

SMC should be congratulated for its practical commitment to supporting its members by providing a series of opportunities for members to explore and deepen their understanding about OD/change and organisational strengthening. Even though these workshops were introductory by nature, they have clearly put OD, organisational strengthening and capacity-building on the Swedish map. From the high demand to attend the workshops and from the follow-up survey, it is clear the workshops met a need and were relevant to issues that many members are struggling with. In terms of the aims (see p. 5), it could be argued that they have been met with an additional emphasis on managing change and relationships.

II) THE WORKSHOPS

- The workshop participants demonstrated a commendable willingness to discuss in a frank way their own organisation's shortcomings as well as strengths. The methodology and approach used was appreciated and a similar experiential approach should be encouraged in any future initiatives.
- The issue of organisational identity, particularly for church-based/related organisations involved in development, raised a lively debate. Some participants reported the perceived need to repress the importance of faith and theology as factors affecting their organisation's sense of its own identity in discussions with secular development agencies. This may reflect a perceived intolerance among secular development organisations or perhaps a lack of clarity and confidence about the role of faith and theology in church-based development practice. Others saw it as important to express this dimension but struggled to put it across in terms that others outside the church would understand. A few felt it as important to keep the two separate with the concern that it would be seen as using development to evangelize others. Whatever the reasons, much could be gained by creating further opportunities for discussion about organisational identity, the role of theology in relation to development and how this is communicated to others. The question of "fit" between what you do and what you say, was very alive in the workshops and it would be worth returning to this.
- The "holistic approach" was referred to by participants and facilitators alike. However, there did appear to be different interpretations of the term "holistic". In the workshops, this referred to looking at organisations as a whole, not just their projects or their international work, as invariably the wider organisation or context will impact on such work. However, it was also used in discussing issues around identity where holistic was used in relation to the spiritual and the material and at times, to integrating international and national work around mission, development and advocacy.
- Indeed, the holistic approach has implications for the different denominations that took part. On the whole, participants represented the international work of participating denominations. However, many of the issues raised had implications for the whole organisation/church/denomination. This could be due to a mixture of factors including:

- I) how the aim and focus of the workshops were perceived
- II) how SMC may be perceived in relation to international work
- III) a reflection of the dualism that may exist in many of the denominations in terms of national and international work.

Inevitably, this may well affect any follow-up being carried out at a wider organisational level. This will need to be considered further by SMC in terms of who they target for future workshops and follow-up if they wish to promote an OD approach.

- Despite the stress on a holistic approach to organisations, it is clear that many members are still working at project level. Supporting members to make the strategic shift to working at programme and organisational level has many implications in terms of members and SMC's role, competence and capacity and needs to be taken on board.
- In a large number of organisations, there was a wide gap between aspirations and resources (including human resources). In these circumstances, organisations should be encouraged to narrow their focus and concentrate their resources for example geographically, sectorally or both. More programmatic and thematic approaches could help in this respect.
- There was a tangible shift within the workshop series to looking more closely at issues around management of change, as well as the learning organisation. This was in response to participants feedback in previous workshops and could be an indication of the many changes that members feel they are in. The ability to consciously and continually manage or influence change and learn from practice is a key competence that may need greater support in the future. Whilst many participants expressed enthusiasm for the idea of becoming a learning organisation, there was little evidence of organisations making the best use of their experience for learning purposes. A systematic assessment of members' capacity for organisational learning would be a useful first stage in enabling them to translate their enthusiasm into practice.
- The greater emphasis on relationships between partners in the North and South in latter workshops underlined the critical role that relationships play in organisational strengthening work with partners. In a number of organisations the understanding of the concept of partnership with Southern organisations was very limited. These organisations need encouragement and support to clarify the nature of their existing relationships and aspirations and to develop agreed principles with their Southern 'partners' that will ensure clearer and more balanced relationships in the future. Any future work around capacity-building should bear this in mind. Likewise, relationships cannot be considered in isolation from the relationship with Sida as this is invariably linked to relationships with SMC, members and partners given Sida's contribution to development aid. This could be explored far more in terms of the influencing and advocacy role that members and SMC could play. The presence of some Southern partners in two of the four workshops greatly enriched the process and allowed for a deeper exploration of partnership issues. This should be encouraged more, whilst ensuring there is adequate preparation/briefing and the dynamic between the Southern partner and Northern partner is handled well.

- There was limited evidence of concern about impact and quality of work carried out by members and partners. What is the monitoring and evaluation (M+E) capacity of members and how is this being supported? OD is not an end in itself but is one way of supporting organisations to perform more effectively in relation to who they are there for. It was not clear if impact was assumed and is happening or that this area is lacking. The capacity of members to monitor and evaluate their work and to support partners to do likewise could be an area for follow-up, in particular the monitoring and evaluation of organisational strengthening work.
- The changing context within which members are operating was emphasised and information was shared from INTRAC's research on donor trends. However, the awareness of some of the strategic issues in the development sector appeared limited. The ability to "read" the changing context in Sweden, particularly the funding scene and the context of their partners cannot be over-emphasised. Supporting members to think, analyse and act strategically may need greater support in the future by SMC, as well as sharing up-to-date information about trends in the donor world. This may also have implications for SMC's own capacity - How this information is used to inform strategic choices is also linked to the capacity for organisational learning, as indicated above.
- Given the introductory nature of the workshops and the limited time available, issues of gender and diversity did not feature prominently within the workshops, except in discussions about culture and within plenary discussions. Given that gender and diversity issues are integral to most organisations and their effectiveness, this would be an area worthy of follow-up at an organisational and programme level.
- The sensitive, and sometimes confusing, nature of Board - staff relationships was raised. The respective roles and responsibilities of staff and Board in relation to the whole organisation may benefit from re-examination in a number of organisations. Experiences of those who have tried to work on this could be shared more widely. In any further OD initiatives by SMC, it will be important to ensure that Board members and senior management are actively targeted and encouraged to participate.

III) THE FOLLOW-UP SURVEY

This study illustrates many of the challenges of measuring the effects and impact of capacity-building interventions. For example, having little base-line data to measure against, identifying criteria to use to make a judgment, the issue of attribution to one intervention when there are other factors and forces at play (particularly the further you go away from the point of training) and the difficulties of assessing impact when the final impact is far away from those who have actually taken part in the training.

Ironically, although the topic being considered was organisational change, these workshops illustrated the potential and limitations of one-off training events. For many it was a trigger for change, personally and organisationally. For others, it remained at an individual level, due to the weight and complexity of their organisation. This underlines the importance of follow-up and the need for more

in-house work where more staff, senior management and Board members can participate as well as those representing the whole denomination/church – not just the international work. Indeed, there have been some follow-up workshops and consultancy with some of those members that took part as a direct result of these workshops, for example Church of Sweden and Baptist Union of Sweden. It would be interesting for SMC to track the changes that have taken place in a sample of these organisations, as part of its monitoring of long-term effects. More difficult, but as important, it would also be interesting to track the impact of such work in relation to working with partners.

In addition to the successful follow-up meetings, ongoing action learning sets or mentoring for members could be another way of consolidating and building on learning.

SMC may need to consider the need to target further initiatives on leadership and managing change specifically for Director and Board level to ensure organisational changes are sustained.

There did not appear to be many OD practitioners used by members in Sweden or by their partners in the South. Identifying existing practitioners and the development of further sources of such support in the South would be worth considering, given the limited role of Northern partners in such sensitive work. Likewise, it could also be worth considering the development of OD practitioners who could offer appropriate OD support within the church-related development context in Sweden given the very clear need that has emerged from these workshops.

POSSIBLE WAYS FORWARD

Given the organisational needs expressed by respondents in the follow-up study and the high demand for follow-up to this initiative, the following are some possible ways forward that could be taken up by SMC. These need to be part of an overall strategy which is linked to members needs, the availability of such support, the changing context and SMC's own role, capacity and competence.

- Offer the opportunity for single organisations to identify and work on organisational issues by supporting in-house workshops involving Board members and staff together. In denominations, this will need to ensure that a cross-section from the whole organisation is involved, not just the international side, if organisation-wide change is to take place.
- Develop action-learning sets as a way of supporting follow-up for participants on an intermittent basis around their own work issues. This would require the development of a small cadre of skilled action-learning facilitators.
- Consider follow-up workshops to deepen understanding of an OD approach (this has already been carried out through a workshop with CDRA in November, 2000).
- Draw up guidelines for good practice in organisational strengthening and partnership development for church-related organisations. Draw on the experience of workshop participants for illustrative examples. Workshops involving Southern partners should be built on and followed up by other Northern partners and SMC.
- Take a whole systems approach and explore those processes and mechanisms that help and hinder partnership and organisational strengthening work in relation to Sida and apply lessons from influencing change to the relationship with Sida and also the Ministry of Foreign Affairs.
- Support capacity-building efforts aimed at strengthening organisational learning.
- Explore other methods for strategic thinking which can be used with large groups, for example. Future search conferences which focus on getting the whole system in the room, finding common ground and planning for the future. The emphasis on harnessing energy and focusing on the potential for action can be an encouraging process as compared to the more problem-solving approach. It is also participatory and ensures the involvement of all parts of the system which may address some of the senior management, international/national concerns.
- Consider the possibility of an OD formation programme for a small pool of OD consultants in Sweden that would be available to member organisations to work with them on their OD issues, contracted by themselves. These consultants and facilitators would need to bring a solid understanding of church culture as well as development into their OD practice. The question of relating to the

whole church would need to be explored in terms of funding parameters, its effect on the development work and the scope of the work. They could also be available to work with partners on relationship issues, as well as promoting the formation of OD consultants in the South. This could be combined with the action-learning set facilitation. SMC could support such initiatives but not be directly involved in sensitive OD work, given the funding relationship they have with their members through their frame agreement with Sida. The same triangular relationship referred to earlier may also apply here!

- Offer specific workshops on managing/influencing organisational change, leadership, strategic thinking, specifically for Board/Director level at in-house level and maybe for a cluster of similar members. Ensure all parts of the whole organisation/denomination are represented (international and national). These workshops should be held over a period of time with mentoring and accompaniment built in between stages to ensure learning is built on and into practice.
- Offer workshops on monitoring and evaluation of capacity-building. SMC could draw together their own practice and that of others first, possibly involving Sida who also have an interest in this area. A Southern perspective here would also be critical. Sharing case studies from staff practice and continuing this in action learning sets would be worth exploring.
- Gender and diversity issues at an organisational and programmatic level should be followed up by SMC and with its members.
- The whole question of a theological perspective on development and OD and the role and identity of the church needs far deeper exploration. Different theological perspectives should be encouraged, including voices from the South. The ability of the Churches to
 - I) encourage this theological reflection for themselves based on their practice
 - II) collaborate ecumenically on this theological reflection
 - III) find ways of communicating this reflection to others in an accessible way should also be encouraged.
- Find out about and encourage the sharing of good practice from other members and frame agreement organisations. This could also be shared in a workshop/ action learning set setting and/or on SMC's web-site.

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