

# **GUIDE TO ORGANISATIONAL DEVELOPMENT IN CIVIL SOCIETY ORGANISATIONS**

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**PART 1: ROLES, PROCESS AND METHOD**  
**PART 2: TOOLS AND EXERCISES**

## ABOUT THIS GUIDE

*The Guide to Organisational Development in Civil Society Organisations* is aimed at associations and organisations which want to work on their own development to be even better at fulfilling their objectives, and reaching their strategic goals. It can be used in Denmark and abroad.

The guide was developed by CISU – Civilsamsfund i Udvikling og Danske Handicaporganisationer (Civil Society in Development and Disabled Peoples Organisations Denmark) in partnership with a number of other Danish organisations, and supported by the Ministry of Foreign Affairs of Denmark.

The aim of the guide is to support Danish civil society organisations by:

- Defining the expectations you have of each other and the organisation you are a part of.
- Understanding and qualifying some of the processes used every day, especially when deciding to focus on organisational development.

### Process in four phases

The guide is based on four distinct phases in an organisational development process: clarification, analysis, reflection and decision-making.

The inspiration for the guide came from various sources: INTRAC, SIDA, Bare Foot Guide Community and others. Thanks for the wealth of input we obtained from you and others.

*The opinions expressed in this guide do not necessarily reflect those of CISU, Disabled Peoples Organisations Denmark or the Ministry of Foreign Affairs.*



CISU is a confederation of more than 290 different associations in Denmark engaged in development work - either as their main purpose or as part of their activities. CISU works with capacity-building for such organisations, and administers the Civil Society Fund on behalf of the Ministry of Foreign Affairs.

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Danske Handicaporganisationer

Disabled Peoples Organisations Denmark (DPOD) is an umbrella organisation of 32 Danish disability organisations. DPOD works with advocacy and capacity building in Denmark and in partnership with local organisations in the South to promote the rights on a local and global scale of people with a handicap.

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# 1. AN INTRODUCTION TO THE GUIDE

In 2009, Ethiopia introduced a new law for civil society organisations, which applied severe restrictions to the conditions they work under. One of the elements of the new law was that organisations working with a rights-based approach could receive no more than 10% of their funding from abroad.

That meant that such organisations either had to make fundamental changes to the way they worked (including abandoning rights-based work) or find alternative financing within Ethiopia. Most rights-based civil society organisations felt it necessary to revise their overall goals and strategies, and as part of that process, adapt their organisation to the constraints and conditions of the new law.

The Ethiopian experience may be a little extreme. The forcing of such drastic changes upon civil society is rare. However, it is an example of how external factors can suddenly present an organisation with new problems. A situation that forces the organisation to go through a process of developing and adapting to its new circumstances. These are exactly the types of situations or development processes faced by civil society organisations which this publication focuses on.

The need for development of an organisation can come from external factors, such as the example from Ethiopia shows, or from within the organisation itself. For example: if an organisation goes through rapid growth in the number of tasks it takes on and has to adjust to changes in the way it works.

## THE PURPOSE OF THIS GUIDE

This guide is intended to support and qualify change processes. It is a tool to be used by civil society organisations which need to structure themselves and devise a strategy for development within their organisation.

It aims to provide ideas, inspiration and guidance for volunteers, boards and committees, personnel and the leaders of civil society organisation facing the task of planning, structuring and implementing a process which will develop their organisation. The guide aims to describe processes that can be facilitated by the organisation itself. As such, it will strengthen ownership of the process, which we believe is key to being able to plan and implement a successful organisational development process.

We hope that by producing this guide, we can:

- Inspire more CSOs to start strategic and structured processes which can help develop their organisation
- Provide a handy tool for CSOs to use when working with ad-hoc development processes
- Help Danish organisations and their partners in the South to build a common understanding of what organisational development processes can entail. It will reinforce partnership and working with global problems between organisations in the North and South.

Our aim is thus to help promote a strong, diverse and independent civil society.

## PRINCIPLES

There is a range of principles governing the way we have put together this guide.

### Context:

An organisational development process must be specific to the individual organisation and the context that organisation finds itself in. For the same reason, we cannot present a ready-to-use recipe for organisational development, but have opted to present a series of aspects to consider and introduce a range of tools, which could be useful when for a structured approach to the development of your own organisation.

### Broad applicability:

The guide can be used in different contexts. As such, it is intended for those who want to organise a more extensive process, for organisations who want inspiration for and to learn analytical tools which can be used in the short-term. It could be a tool used to analyse the cohesiveness of an organisation for example, in conjunction with an annual general meeting or the like.

### North and South:

We have tried to produce a guide which appeals to CSOs in the North and South. We believe that there will be certain fundamental elements - despite the main differences - in an organisational development process regardless of where it is being applied. We are also convinced that it will be educational and useful for North-South partnerships if we can use a common frame of reference when discussing organisational development in CSOs.

### From start to finish:

We have opted to produce a guide that tries to take CSOs through the entire process of organisational development, and include the consideration needed for implementation through the points the organisational process recommends.

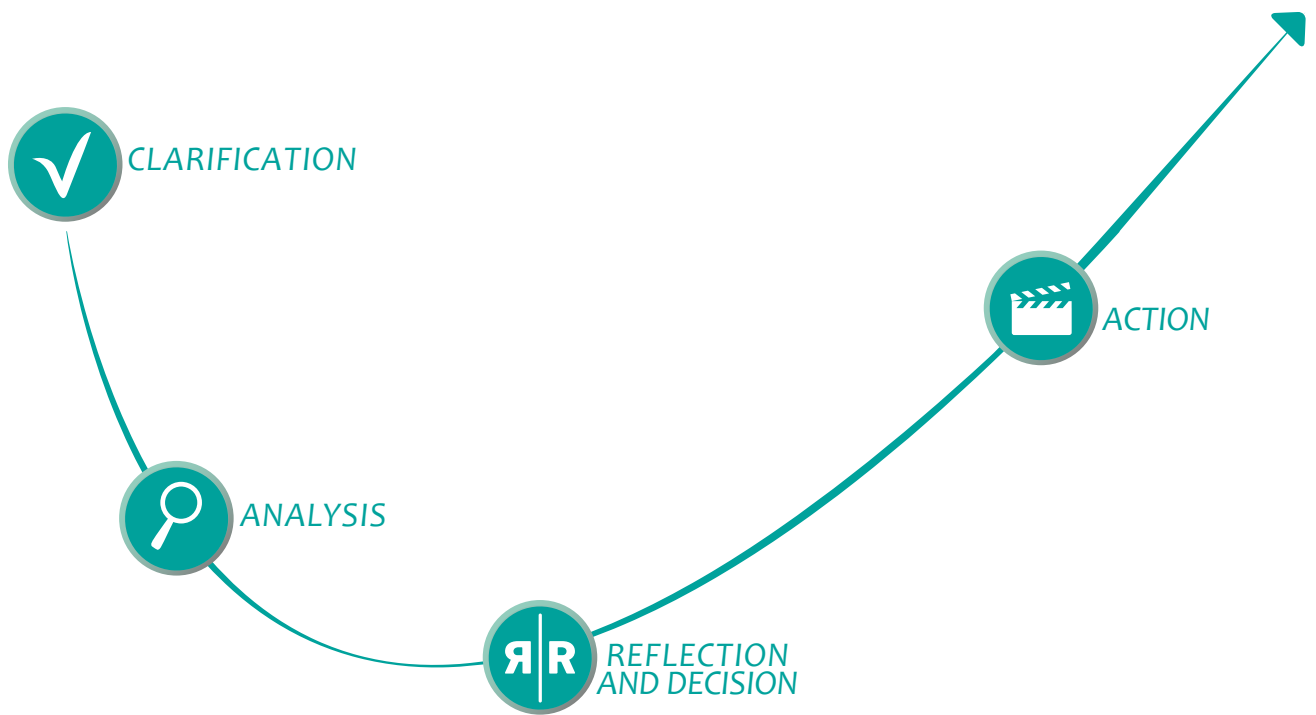
### Ownership:

It is essential that organisational development processes include all levels of an organisation, involving the personnel, volunteers and executives. Similarly, it is important to ensure inclusion regardless of sex, age, ethnicity, religion etc. This will ensure broad ownership of the process and the changes it will lead to.

## DEFINITION: WHAT IS ORGANISATIONAL DEVELOPMENT?

Organisational development in civil society organisations involves processes intended to develop and optimise the organisation by:

- **Analysing** potential and problems in relation to internal conditions and the context the organisation exists in.
- **Work strategically and systematically** within the organisation, using new knowledge and an acknowledgement of such conditions.



#### Figure caption

*Phases in organisational development processes. Organisational development processes involve different phases, which this guide defines as the clarification, analysis, reflection and decision-making and implementation phases. The four phases are illustrated above.*

## PHASES IN ORGANISATIONAL DEVELOPMENT PROCESSES

Different organisations are at different stages of their development. Some have only been in existence for a short period, and face the challenge of organising their work right from scratch. Other organisations have many years of experience, with completely different organisational and development challenges. External factors or contexts can also vary enormously.

This guide envisages an ideal organisational development process, based on four phases. The first phase is clarification of whether and why there is motivation for an organisational development process. If the motivation is there, a more precise objective and possible participants in the process should be considered. The second phase is the actual analysis. This is when a more detailed picture of the organisation is created, along with where the organisational process should take it. The third phase involves reflection and decision-making, including defining the coming process - i.e. precisely what the organisation will work with based on the analysis. The fourth and final phase is implementation. This is when a plan is made for the organisational development process and the changes to be made.

## THE GUIDE'S STRUCTURE

The guide is based on the experience we have of organisational development from our own organisations - CISU and Disabled Peoples Organisations Denmark. We also draw on the experience of facilitating similar processes in other organisations at home and in the South.

### The guide consists of two parts:

**Part 1** Describes roles, process and method for organisational development processes. Chapters 1-3 give an introduction to the guide and its aims. They describe the typical options and challenges faced by CSOs at this time, and present key elements in the understanding of a CSO and its development. Chapters 4-7 go on to describe each of the four steps in the phase model presented above (clarification, analysis, reflection/decision-making and implementation), which we believe should be considered for organisational development.

**Part 2** of the guide is a detailed description of the various tools. These are presented with detailed instructions, and can be deployed based on the information they are presented with. More information may be needed for some of the more complex tools than is presented here. This and other useful information

can be found on the CISU and DPOD websites.

We leave it up to the individual organisation to select and assemble tools, and to plan the process which best suits their needs, options and problems.

The common denominator for the tools presented in this guide is that they can be implemented by the organisation itself. By that, we mean that involving external personnel to support and facilitate the process is not necessary. This requires putting a lot of effort into the preparation process, facilitation and being able to find one or more people within the organisation able to take on facilitation.

As North-South partnerships are an important criterion to this guide, we have included tools which can be used to reinforce such partnerships. Not only can they reinforce the partnership, but also understanding between two or more partners, thus helping to ensure that both organisations develop in the desired direction, with mutual respect for each other and within their individual contexts.

We are aware that not every organisation will go through a structured process with all four phases as described here. Nevertheless, we hope that most will be able to benefit from using some of the tools we introduce.



## 2. THE ROLE OF CIVIL SOCIETY ORGANISATIONS

Ever since Tunisian greengrocer Mohamed Bouazizi lit the petrol he had poured over himself in December 2010 (and which led to his death a few weeks later), Tunisia and the Middle East in general have never been the same. His action was a protest against the confiscation of his goods, and humiliation by the local authorities. His death became the spark which started the social and political protests against the repressive Tunisian regime. Protests which led to a change in government and to reforms for the country.

They also inspired other citizens in the region to topple their political regimes, including in Egypt, Libya and Yemen.

It can seem as if such popular movements are totally divorced from the more formally structured civil society, with its organisations, parties and associations because of their spontaneous nature. But such movements will typically have links to the civil society and various CSOs will play vital roles when changes in society are to be made.

We start the chapter with this example because developments in the Middle East since the start of 2011 demonstrate in many ways the role and importance the civil society can have in societal development.

### STATE, MARKET AND CIVIL SOCIETY

A society can be described as consisting of three main sectors: The state, the market and civil society. The state's role is to govern and regulate. The market is characterised by the buying and selling of goods and services. And civil society represents a common interest between the population in norms, interests and values.

CSOs exist via interaction with the state and the market. Depending on the relationship, CSOs should balance between opposition to the state and market - e.g. by demanding change from politicians, or working and living conditions - and collaboration, e.g. by providing services which the state or market are not able to provide. It can be difficult for a CSO to find and balance strategies, especially in situations in which the civil society is politicised or strongly influenced by the

interests of the state.

### CSOS – A HUGE RANGE OF DIFFERENT SIZES

CSOs range from sports clubs, stakeholder organisations to religious organisations.

Their work and aims can be very specific and tightly focused, or they can have broader and more general objectives and reasons for what they do. They exist in a state of constant flux with society at large. Some are open to participation and are very democratically based. Others are more closed, with only special groups participating.

The breadth of CSOs in Denmark is reflected in the group working with development issues. Scouts, ornithologists, architects, dentists, pensioners, people with different religious beliefs and different forms of collective convictions are all examples of Danish organisations which support and work with groups in the South.

CSOs in developing countries are also composed of many different types of organisations, which vary enormously from country to country. Poorer countries emerging from war or conflict may only have a few CSOs, as in South Sudan, for instance. In other countries, CSOs can be very strong and highly varied. In Bolivia for example, where organisations based on the ethnic population and peasants have developed their organisations over decades.

### WHY ORGANISE?

When people organise themselves in a CSO, it is usually because they have a cause, provide a service to another group of people, or have a common interest. Getting organised is the first step along the road, and creates a better framework from which defined goals can be realised.

Organisation into CSOs is an indication that people can achieve more together than individuals.

Organisational development concerns to a large degree developing and adjusting



the strategies used to reach their goals. This process requires taking a close look at internal relationships within the organisation and externally - i.e. relationships with the state, the market and other CSOs, plus those groups within society which the organisation works with or supports the cause of.

## MULTIPLE ROLES

CSOs have a large number of different roles in today's society. Some work with themes they feel strongly about, such as running a local boxing club for members. Other focus on the 'bigger' socio-political issues, such as climate change or the inequalities of global trade politics. We believe that it is important to make room for all types of organisations, and that such diversity only strengthens civil society.

Some of the roles we believe CSOs can take with regard to development work include:

**Strengthening self-organisation.** They provide the basis for people to organise themselves, tackle problems or promote interests in common with others.

**Strengthening voluntary commitment.** They promote and strengthen voluntary commitment of major importance to society and development.

**Promotion and defending of rights.** They can expand public awareness of individual and collective rights, and protect and defend them when they are threatened.

**Creating a network and trust.** They can create trust and build networks within their own organisations, between other bodies within society and between different population groups and interests.

**Alternative solutions.** They can promote alternative solutions based on collective thinking and an understanding that our choices affects us all.

**Defend democratic processes.** They can educate, promote and defend democratic processes, including via organising stakeholder groups representing the interests of the individual.

**Hold the state and market responsible.** They can act supporter and opposition to the state and the private sector, helping to balance priorities and interests and find solutions to conflicts of interest which are a feature of any society.

**Being a watchdog.** They can act as watchdogs over the state and private sector, highlighting violations against the civilian population by the state or industry. Examples can include construction projects, the exploitation of natural resources, or the incorrect and illegal administration of state funds.

**Provision of strategic services.** They can provide services to private citizens, including those the state cannot or will not provide. Examples include education or access to clean water.

Some organisations apply their roles in a very direct manner, such as targeting anti-corruption as the object of their work. Others contribute in more indirectly, e.g. via sports clubs organising their members to pursue a common interest, thereby supporting networking and confidence building.

## OPPORTUNITIES AND CHALLENGES FOR CSOS

CSOs currently face a wide range of opportunities and challenges. We take a closer look at a couple of these in this guide.

### **Pressure from the authorities**

In recent years, CSOs have been subjected to increased pressure and demands from the authorities. This has been the case for example in Uganda and Ethiopia. The authorities justify their actions in the interests of combating terror, but they can also reflect a desire to constrain the power and influence of the civil society. In other words, the powers-that-be apply restrictions imposed on illegitimate CSOs as an excuse to make life difficult for legitimate organisations, with which there is political disagreement.

### **Mutual contribution to a partnership**

Increasing focus has been placed in recent years on partnerships between CSOs working with development being based on mutual contributions. That means that it is no longer acceptable for e.g. a Danish organisation to provide funds and a partner in the South to provide 'everything else'. Northern organisations must contribute more than just the distribution of funds. If not, they are no more than an expensive link between donor and recipient. That's why it is important for organisations in the North to identify specifically what they and their partner put into the partnership. This should be done via dialogue with their Southern partner.

### **New media**

New media borne by the internet and mobile technology have given many people much wider opportunities to receive information, and to communicate. They give CSOs new ways of organising themselves, including the means to communicate quickly and en masse, and to include a much wider audience in the exchange of news, information and experience.

The new media also provide CSOs with new ways of working in a network. This could include other organisations in their own country, or in neighbouring countries with whom they share an interest, or anywhere else on the planet.

### **International networking**

The ability to network internationally is particularly important in a globalised

world, in which some of the problems in a Southern country can be related to developments in and the interests of the North. Oil production is an example of such a scenario. The corporation producing oil locally and which causes problems for the local population, is owned by a multinational corporation, with its headquarters and shareholders in a country a long way away.

### **Challenges and opportunities require change**

Whether there are challenges to be taken up or opportunities to be exploited by CSOs, they will often mean change for them. Change can require a redefinition of priority and new ways of organising.

An organisational development process can help organisations to adapt to change, to be better at tackling new problems and to make the most of the opportunities which present themselves.

### **Credibility and impact**

Credibility and impact are two key elements in tackling the challenges faced by CSOs at this time. A CSO with both finds it easier to set the agenda, perform its activities, reach its goals and effectively work towards its vision. The same applies when the aim is to provide access to water at a local level, promote respect for human rights in a given country or to lay the foundations for a civil society to work at international level.

To ensure credibility and impact for an organisation, an ongoing process of reflection and action is needed with regard to the way it operates. They help ensure that the organisation will develop and can dynamically deal with opportunities and challenges as they occur.

## 3. KEY TERMS AND MODELS IN ORGANISATIONAL DEVELOPMENT

Before starting an organisational development process, it is important to gain a good understanding of the organisation and the challenges and changes it faces. A good feeling of where the problem is most acute is required. Knowing that narrows down the choices when it comes to identifying the process needed to develop the organisation.

In this chapter, we look at the essentials needed to understand a CSO. Understanding an organisation is an excellent starting point for preparing an organisational development process. We present understanding by introducing a range of models which describe the various aspects of an organisation and its development process.

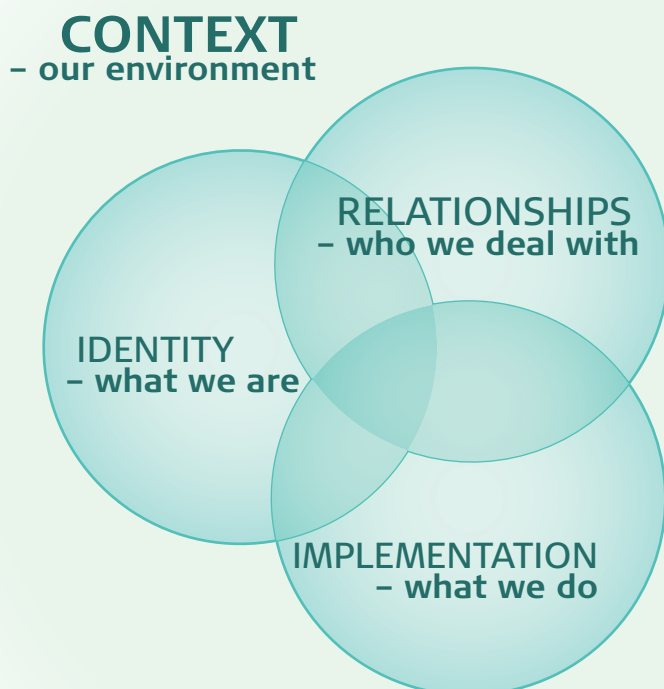
### KNOW YOUR ORGANISATION - THE THREE CIRCLE MODEL

Ask any group of people what is the first thing that comes into their heads when you say the word "organisation", and you

will get a long list of words and expressions, such as people getting together, articles of association, committees and officers, a shared culture and standards, mission and visions, tasks, decision-making hierarchy, volunteers and staff, finances, network and so on. What people associate with "an organisation" can seem to be as different and diverse as to almost make it impossible to describe what an organisation actually is.

Nevertheless, it is possible to filter so many diverse opinions down to a few key elements which define an organisation.

INTRAC is an organisation which developed the Three Circle Model, which provides a general description. The model describes an organisation using three overlapping circles, that represent the identity, actions and relationships to the world at large an organisation has. These three circles are encapsulated by the context affecting the organisation, and which the organisation itself wants to influence and change.



#### The Three Circle Model

- was developed by INTRAC to describe the relationship between different parts of an organisation and its context.

### **Identity – what we are**

This circle describes the internal organisation, and the different parts it consists of. i.e.:

- The formal policy and programmes expressed via the organisation's vision and aims, for example
- The organisation's culture and values which can be expressed in the self-awareness shared by those active in the organisation
- Structures and systems within the organisation, such as its decision-making structure and the various areas of accountability it bases its work upon
- Human and financial resources within the organisation

These elements are often deeply rooted in an organisation and the personnel who 'populate' them. They will often be expressed in the way they describe their organisation. Their descriptions and thus the value-based elements of the organisation's self-awareness are the core of its identity. Even though elements such as structures, systems and resources are also important, they do not carry the same weight as identity, and are rarely as fundamental as the more value-based elements.

### **Actions – what we do**

The actions performed by the organisation are another central element in understanding our organisation. Actions include the very specific actions performed, and their outcome. An example: Actions for an organisation working with juvenile education can include the actual education provided, plus the expertise and skills juveniles acquire as a result. In other words: when an organisation reflects on its actions, reflection should include the actions and results. Questions that could be posed: Is what we do what we want to do? Do we achieve the results we want from what we do? Do we achieve the results in the way we would like to?

### **Relationships – who we deal with**

The relationships an organisation has to other elements of society are the third element of the model. This concerns, for example, relationships with the state, market and civil society. These can include CSOs that represent other target groups. The civil society network of which the organisation is a part, or enterprises

it works with. State or international institutions and donor represent yet another important group of relationships.

### **The context**

Surrounding the three elements of identity, actions and relationships, is the context - or the environment - in which the organisation operates. This contains the bodies to which the organisation has no direct relationship to and includes the trends and situations in society which affect an organisation, and which it reacts to.

### **Use**

The Three Circle Model helps us gain a better understanding of our organisation, the different elements it consists of and the relationship between them. The model can also help us to initially identify those areas which are going well, and those where things are not going so well. Examples can include internal conflicts, poor results, a lack of respect from the organisations we relate to or poor backup from the members. Identification of these problems is an important part of the reason why there is a need for an organisational development process, and what this process has to address.

## DEVELOPMENT PHASES

The Three Circle Model helps clarify an organisation's characteristics and situation based on internal and external aspects and bodies involved. It is also relevant to clarify where an organisation is in its development process. The problems and challenges an organisation which has only existed for a short period faces are often different to those of one with many years of experience.

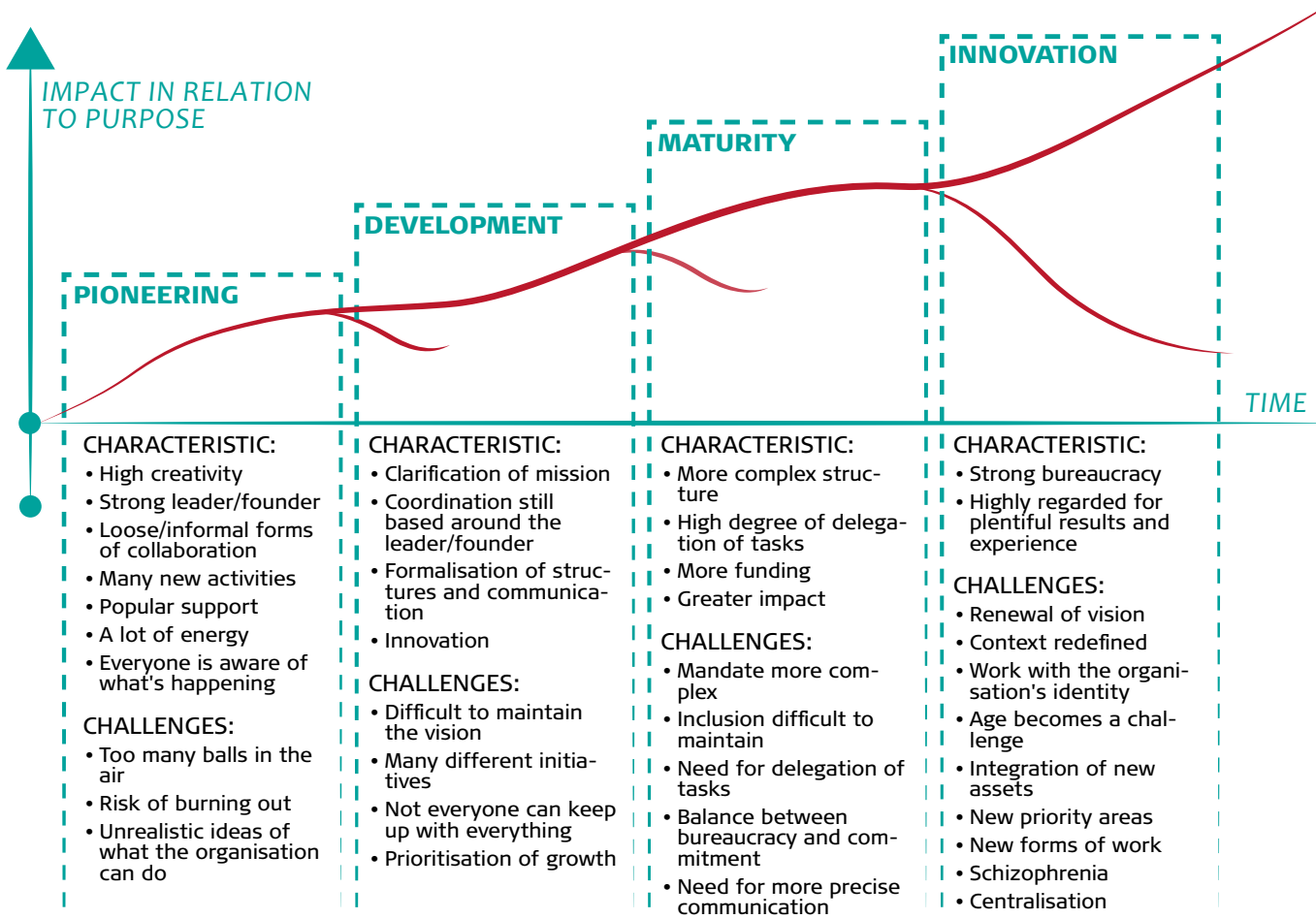
Organisations are said to develop in four phases: Pioneering, development, maturity and innovation.

Breaking development down into four successive phases should not be perceived as a mechanical process, which all organisations go through. There can

be overlaps between the various phases. An organisation in the mature phase can have elements of the pioneering and development phases at the same time.

Neither are there any rules which dictate how long it takes for an organisation to go from one phase to the next. That can differ from organisation to organisation. And some organisations will not go through all the phases.

Every phase contains a risk of the organisation losing momentum, inclusion or the financial basis required to carry out its activities. Each phase also has its own specific characteristics, which can lead to special challenges.



### **The pioneering phase**

The organisation is relatively small and new. There is lots of energy and dynamism. There is a family-like atmosphere - everyone knows each other. This is a period in which new ideas are tried out, without there necessarily being a large, complex strategy in place. Activities are characterised instead by creativity and informal processes. The energy in this phase can easily result in initiatives being developed, which are hard to realise in the final analysis, and a lot depends on the opportunities and possible limitations for individuals within the organisation and outside to be able to commit.

The pioneering phase can also return in later phases of the organisation's development, e.g. if a new department is established, if a number of new members join, or if there are more activists in the organisation. Some organisations never come out of the pioneering phase. That can be a conscious choice on the part of the organisation to maintain clarity and an active environment. However, most organisations will develop towards more formalisation.

### **The development phase**

Commitment continues to be the driving force in this phase, but the organisation begins to formalise the way decisions and activities are organised. The mission may have been more sharply defined, and departments or groups formed for the prioritised areas of work. Procedures and policies may be introduced to guide the work to be done.

If rapid growth occurs, the family atmosphere which characterised the pioneer years can disappear, which means that everyone will not be as involved as previously. It can be said that the organisation becomes less personal and more formal. The leadership is often the same as in the pioneering phase, and the first signs of conflict can arise if the leadership fails to delegate accountability, and continues to want to have the final say in all decisions.

### **The maturity phase**

The organisation becomes mature. It is established with a set of values shared by its members and with efficient systems to help organise the work. Firm relationships with other organisations have been built up. The actions implemented correspond to and reflect what the organisation is and wants to be. The organisation takes an active and realistic attitude to the world around it.

This phase often contains the best of the pioneering and development phases. There are good, effective relationships between the different departments, and a clear, familiar structure within the organisation. There can also be elements of the pioneering phase's creativity and exploration in some departments or groups, which will drive them forward and thus ensure that the organisation continues to develop. The original leadership may have been replaced, or have developed in line with the organisation.

During this phase, problems can often arise when external factors have a negative effect on the organisation. This can be because the organisation competes with other organisations for influence or money, or because it established new relationships with organisations which have other interests or ways of working, and which therefore create tensions. There can be problems within the organisation retaining the commitment of members and staff, because of what has become a well-developed bureaucracy.

### **The innovation phase**

Organisations in this phase have been around for a number of years, and will have well-developed systems and a high degree of delegation of tasks. To the outside world, the organisation will probably be well known and respected because of its results and long experience. Redefinition of the contract could challenge its way of working.

Within the organisation, the well-developed bureaucracy can risk becoming too important, and get in the way of the commitment which has so far been an importance driving force for the organisation.

In such a situation, the organisation will often have to find ways to rediscover itself to re-find the original strength and subscription to the vision and mission. Whether the visions ought to be reformulated or redefined a little can be considered as part of this process.

Organisations in this phase will often be characterised by tension between "traditionalists" and "renewers", who can have highly conflicting interests and perceptions of what the organisation is and what it should do.

Some organisations - although not many - will find that they have fulfilled their mission, and will therefore be able to dissolve themselves with a pat on the back.

### **Circular processes**

The model is based on four phases which follow each other logically. But sometimes it may be necessary to go back to one of the earlier phases again. For example if redefining the organisation's objective and identity. There's nothing wrong with this, in fact, it can be a sign that an organisation is 'reinventing' itself, and thus is once again in a pioneering phase and therefore reacting to the context it finds itself in.

### **Use**

Understanding an organisation's development phases can help clarify some of the potential and challenges it can face. There are probably only a few organisations which can recognise all the elements of a phase, but most will be familiar with some of the characteristics described in the different phases from their own organisation.

## **MOTIVATION TYPES**

When an organisation decides to perform an organisation development process, identifying what the motive is can be relevant moving forward.

There are a number of different factors which can motivate organisational development. Some of them are related to the above approach to organisational development.

### **Qualification of decisions/priorities**

When the motivation to perform an analysis is the result of a desire to qualify a specific decision or priority, or to create consensus on the basis required to make a decision.

### **Crisis-motivated organisational development**

An indication that the organisation faces a crisis - either internally or as a result of redefinition of the context the organisation wants to resolve. A crisis-motivated organisational development process can beneficially attract the support of an external facilitator, to give one or more neutral people who can facilitate the process, and everyone involved can concentrate on the best way to analyse what is needed, and decide how the organisation will get through the crisis.

### **Opportunity as a motive**

An organisational development process can also be motivated by new opportunities and potential in the organisation and

its context. There may be a group of new, active members, or an opening in relation to more dialogue and collaboration with government institutions on causes.

The main characteristic of an opportunity-motivated process is that it is usually constructive, and that it reflects an organisation with a certain amount of resources, self-understanding and its role in relation to society.

### **Partnership-motivated organisational development**

Partnership-motivated development processes can be created in different ways. If there is a constructive process, the focal point can be what the organisations can each contribute to their common goal. If it is a more crisis motivated process, it can concern how one of the two parties can live up to the expectations of the other organisation.

### **Motivation in implementation**

Motivation is not just an important parameter to include when defining why we perform organisational development. Motivation is also essential in relation to implementing and executing the priorities decided upon. We'll look at this in more detail in chapter 6.

## **APPROACHES TO ORGANISATIONAL DEVELOPMENT**

There are a number of different ways to start work on organisational development in a CSO. Different organisations prefer different approaches, depending on resources, culture and objective of the organisational development process in question.

In this guide, we will work with the following approaches:

### **Experience-based organisational development**

Firstly, organisational development can take place through experience. This is an activity-oriented means of learning, which occurs constantly in an organisation. Development occurs by building on experience, and adjusting according to redefinitions taking place either internally or externally. Such a development and learning process often occurs without being noticed or planned within the organisation. Few organisations can manage with this form of organisational development, and most will experience a need for thinking more strategically and

structured at some point. Experience-based organisational development is an organisational process, which is constantly at work in all organisations.

### **Ad-hoc development processes**

Another way of working is to qualify experience-based organisational development through ad-hoc development processes. That means planned, short-term processes, which are primarily designed to ensure that the organisation is on the right track, or to make minor changes and corrections without necessarily having to make major changes. An example is a joint analysis of the context performed prior to an annual general meeting, and which can help ensure that there is common understanding of the context in which the organisation operates, and thus qualify joint decisions and priorities.

Ad-hoc processes raise experience-based processes to a more structured level, and the idea behind them is that they can qualify the purely experience-based learning within the organisation.

### **Crisis-based development processes**

Changes can also be made by crises or new, major challenges. Such a process can grow out of a crisis, which could arise from internal aspects within the organisation, or from challenges and changes arising from the context around the organisation. Such crises typically arise after a situation which unexpectedly reveals new challenges the organisation needs to react to. Typically, the organisation will have to go through a process of revising the visions, attitudes and values which hold it together, or find solutions in some other way which work given the new situation.

### **Structured development processes**

There is a structured development process if an organisation needs to develop a new department, renew its structure or has the motivation and resources to perform a thorough review of itself to ensure that changes are made in the best possible manner, and that the organisation is on the right track. This is a process deliberately set in motion by the organisation. The initiative can come from various sources, e.g. personnel, members, the board or committee.

### **Partnership-focused processes**

Organisational development processes can arise from collaboration with partners. A partnership-focused organisa-

tional development process is characterised by two different partners with a close working relationship agree to enter into a mutual development process. The vision or interest they share, will then become the basis of a joint discussion on how they can develop individually to contribute to the visions and partnership in a constructive manner.

### **Find the approach which suits you best**

This guide primarily looks at the last four forms of approach to change in organisational development processes: Ad-hoc, crisis-based, structured and partnership-focused organisational development processes. We want to inspire the reader to work consciously and constructively with all four types of change processes. That's why it is important to identify which approach will suit your organisation best given its context and situation.

This guide describes in principle a structured development process. The tools described can be used for other approaches to organisational development processes, and it is up to the organisation to define which tools and analyses are the most relevant to make qualified choices, and to prioritise as transparently as possible. The available resources - financial and human - should be included in the consideration an organisation gives to which approach will be the most appropriate.



## 4. THE CLARIFICATION PHASE

As described earlier, there are four phases in an organisational development process: Clarification, analysis, reflection/decision-making and implementation.

Based on the models presented and understanding, it is possible to determine where primary focus our organisational development (the Three Circle Model) should be placed, which phase we are currently in as an organisation (organisational development phases), which stakeholders we can consider involving (stakeholder analysis), what resources we have in relation to the organisational development process (resource analysis), and what our primary motivation is for performing it (list of motivation forms).

Given this knowledge, you can choose an approach to organisational development and what to focus on for the organisational development process. An organisation can thus begin to structure a process, and choose the tools for analysis of what is most relevant. You are now in the process of moving into the next phase of the organisational development process – analysis.

The time used for clarification must always be weighed against how much energy you generally have. Sometimes, detailed clarification can also mean the choice of a short process, postponing a

longer one to a later date, when there may be more resources and time available within the organisation.

In part 2 of this guide, "Tools", we include a detailed description of how you can perform a clarification process.

### Stakeholder analysis

Organisations are dependent on other organisations and bodies which they either work with, try to influence or are financially dependent upon. A stakeholder analysis helps gain an overview of the bodies which can influence your organisation - internally and externally.

### Resource analysis

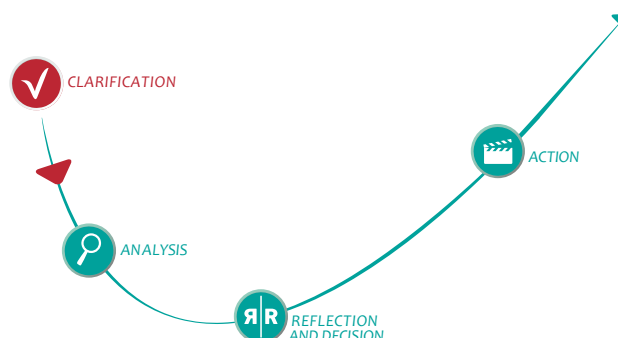
- An organisational development process requires resources. To ensure that we can do what we want to do, a resource analysis is necessary.
- The stakeholder and resource analyses are described in details in part 2 of this guide.

### The clarification process consists of the following steps:

- Clear-cut focus on the organisational development process using the Three Circle Model
- A list of the stakeholders who should be involved (see stakeholder analysis in part 2 - tools)
- Reflection on which phase we are in as an organisation using the phase model
- Consideration as to what resources we have available (see resource analysis in "Clarification" in part 2 - tools)
- Consideration as to what motivates us to enter into an organisational development process.

### Using the considerations above, the following can be chosen during the clarification phase:

- Approach to organisational development (ad-hoc, opportunity-based, structured, etc.)
- Focus for organisational development which will also indicate what tools can be used for the analysis.



## 5. THE ANALYSIS PHASE

We describe the process in this chapter which will increase knowledge and understanding of an organisation and the context or environment it finds itself in.

We have included a selection of tools which cover various aspects of an organisation analysis, and which are also relatively easy to work with by the organisation itself.

It can be appropriate to combine several tools, to be able to obtain different aspects out of an organisation analysis. By using several tools, it is possible to assess whether the knowledge gained points in a certain direction, or whether further analyses should be made before the next phase of the organisational development process – reflection and decision-making.

### Facilitating the analysis process

The people or group given the accountability of running the organisation analysis, must resolve the following before involving a large group:

- Which tool(s) should be used?
- Who will act as facilitator and learn the tool in detail?
- How will the tool be adapted to the specific situation and organisation?
- What preparation and communication to those involved will be needed ahead of the actual processes?

Even though all the tools can be facilitated by one person from the organisation, it can be beneficial to bring in a neutral facilitator in some instances. This particularly applies in instances when the reason for performing organisational development arises from a crisis within the organisation, when there is no common understanding of which direction the organisation ought to develop towards and why.

### Adapting tools

Regardless of which tools are chosen, they will have to be adapted to the purpose. Things to consider:

- **The participants.** Who will take

part in the analysis? Does the exercise suit the participants, or are there parts which need to be looked at in particular - for example an introductory explanation?

- **Equal access.** Everyone should have the same opportunity to take part. Will that mean that participants will have to be divided into groups, e.g. men and women, young and old or the like?
- **Plenum or groups.** It is possible to divide the participants into groups for most exercises, which can subsequently compare results and conclusions. The groups can be formed according to different factors, e.g. sex, position/relation or representatively, e.g. by ensuring that there are board members in both groups.
- **Materials and aids.** Are there any materials which are familiar and can be used for facilitation and execution of the exercise?
- **Time.** The time each exercise takes will depend a lot on how many will be taking part, and how deep they will delve.
- **Coherence.** How well do the different tools go together? How can cohesive compilation and a procedure be ensured, which will facilitate a process moving forward and ensure the inclusion of participant comments and considerations?
- **Conclusion.** The deeper one delves into the organisation's core elements – identity, self-awareness and vision – the more important it is to conclude the process properly. See chapter 6-7.

## SCHEMATIC TABLE OF TOOLS

For the sake of simplicity, we have listed the tools we recommend for analysing your organisation. The list describes what each tool focuses on, and what they are good for.

Go to page 29 to see the list.

## SUMMARY OF ANALYSIS

The analysis identifies knowledge of and acknowledgement for the organisation being analysed. That knowledge has to be gathered to form the basis for reflection and decision-making, as described in chapter 6.

The following table can be used to gather the knowledge generated by the analysis. The actual work of filling out the table can in itself be good acknowledgement, and help to assess the strength of the analyses made. If, on the other hand, there is a lot of agreement on the main points, and they point in a certain direction, there will be a clear indication of how an organisation can be strengthened.

### SUMMARY OF ANALYSIS

Tool	Main points/main conclusion	Remarks
<b>TOOL 1</b>		
<b>TOOL 2</b>		
<b>TOOL 3</b>		
<b>ETC.</b>		

**COMPILATION** – general objective(s) to move forward with?

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## 6. THE REFLECTION AND DECISION-MAKING PHASE

This chapter concerns how we move from analysis and understanding of the current situation to taking decisions on the changes we want to see.

It is now that we really decide what will happen, when it will happen, why we want it to happen and the costs or consequences the changes can entail.

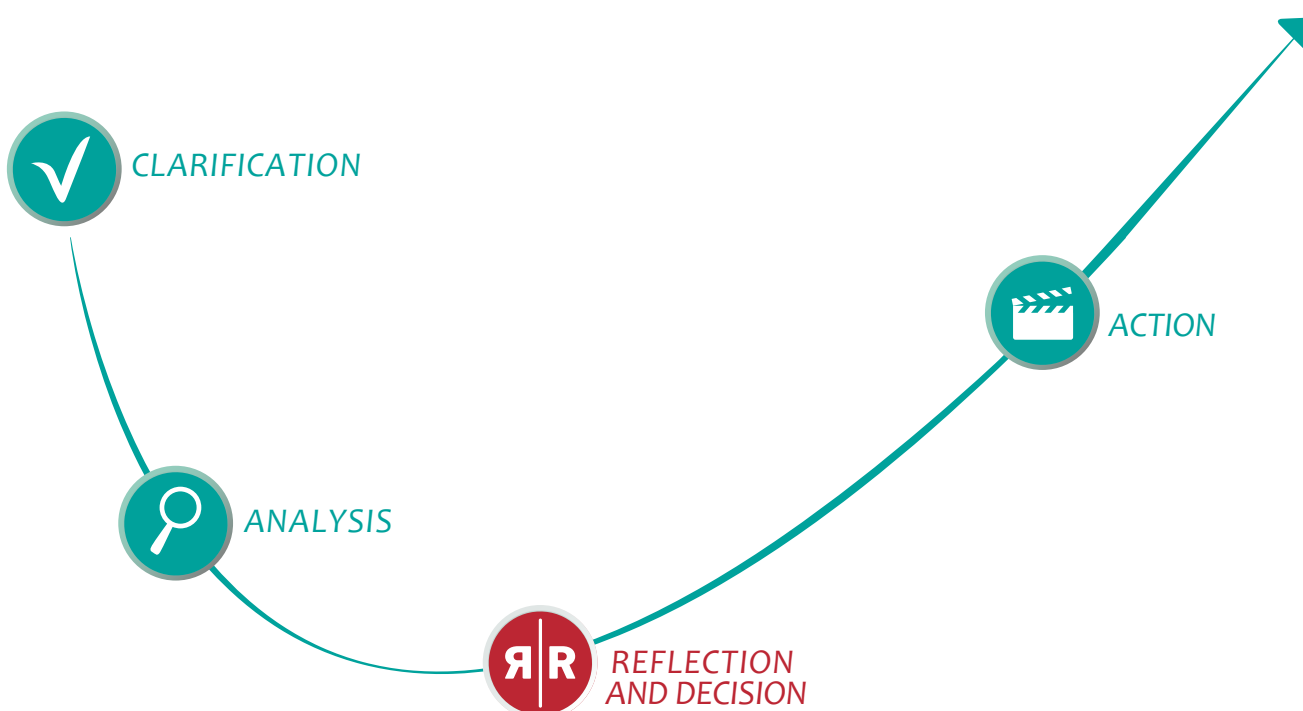
It is tempting to move directly from the analysis to action, and to compile an implementation plan. Instead, we recommend that time is invested on reflecting on the analysis, and considering the areas where the need is greatest for action and how to go about it. Reflection is necessary to ensure that the implementation plan developed later will be precise, and have clear priorities. Otherwise, there is a risk of creating frustration and confusion amongst staff, members and key personnel, rather than changes aimed at reinforcing the organisation.

Another risk of skipping the reflection phase, is that the implementation plan could then end up expressing needs for the future which can only be shared by

certain members and key personnel of the organisation. Without broad support, the implementation plan can be difficult to implement. It may be opposed, or even worse, can cause divided opinion and conflict.

If the changes under consideration are of a more practical nature, and mostly concern improvement or better efficiency for doing what you do, the reflection phase could be skipped. But you cannot ignore that even apparently minor changes can actually have major significance. For example, employing someone to rationalise the work of a 100% volunteer-based organisation can be a major decision which affects the actual identity of the organisation.

To get the most out of the efforts you have already been through, time should therefore be set aside to think through, discuss and define an objective for the changes to be worked towards.



## THE ANALYSIS WILL FORM THE BASIS OF UNDERSTANDING

If work has been done on clarification followed by analysis using the tools recommended from Part 2, you should now have a fairly good picture of your organisation. Strengths and weaknesses are known, and the successes and fiascos of the past have identified.

Analysis can be seen as a process which gives an even clearer picture of the organisation, its surroundings and some of the opportunities which can be selected for closer examination. As soon as the clarification procedure was started, there were ideas and requirements for changes. Analysis should have clarified where problems arise. It could be that what seemed to be a problem is only one minor problem out of several, or perhaps that it is a symptom of something else.

It could also be that analysis has shown more weaknesses in the organisation than were believed to be present. Or analysis could have pointed to a number of positive opportunities which can be exploited. We are therefore in a situation in which the picture we had of the organisation and its opportunities has changed considerably since we started.

## SCENARIOS AND PRIORITIES

If it transpires that there is a need or opportunity for extensive changes, clear prioritising will probably be necessary of what needs to be worked with and in what order. Assessing the resources available in the form of people, time and perhaps financing will be important here.

We presume that key personnel within the organisation (active volunteers, management, board members and staff) will have taken part in or been represented during the analysis performed to the greatest extent possible, and that they are also active participants in this phase. And of course, it is also possible that a small working group has been given a mandate to make one or more suggestions or scenarios for the ongoing process.

The form on the next page can help with prioritisation. If comprehensive change is going to be needed, the formulation of an overall objective for it will be a good idea. The Appreciative Inquiry (see "Tools") as

a method makes extensive use of working with objectives based on what has already proved to work well. This approach could be a help in this process. If the change process is not so comprehensive, noting down the specific objectives and leaving out the overall objective can suffice.

The form can help, because it indicates areas which matter when prioritising. It is important to address the question of resources, and whether any changes are needed to the articles of association. It could be that this phase will include trying to find the right combination of sub-objectives, which will contribute to a realistic implementation plan (see chapter 7).

If it makes sense to work with separate scenarios, two or more forms can be used, each representing one scenario.

Every effort must be made to ensure that all parts of the organisation - and particularly any stakeholders who may not have taken part - are familiar with the process, and can understand it. That will ensure maximum backing for it, and debate on how to move forward. This applies in particular if there are various scenarios for the future, which affect the entire organisation, whilst minor changes could possibly be initiated using the mandate the working group has already been given.

<p><b>OVERALL OBJECTIVE:</b></p> <p><b>THESE ARE THE SPECIFIC ASPECTS WE WOULD LIKE TO SEE CHANGED</b> (sub-objectives)</p>	<p>(OVERALL OBJECTIVE FROM COMPILATION OF ANALYSIS)</p>			
<p><b>SUB-OBJECTIVE 1</b></p>	<p>Why is it important?</p>	<p>Formalities – which? E.g. changes in the articles, presentation to the AGM, "cultural change" etc?</p>	<p>Is there general agreement and support?</p>	<p>Risk analysis – what risks will changes imply, and what can be done to prevent them? Can there be any unforeseen consequences?</p>
<p><b>SUB-OBJECTIVE 2</b></p>				
<p><b>SUB-OBJECTIVE 3</b></p>				
<p><b>ETC.</b></p>				
<p><b>RESOURCES</b></p>	<p>Describe here where resources not currently available could come from.</p>			

Form for reflection and decision-making - enter opportunities and priorities for each sub-objective derived from discussion.

## DISAGREEMENT AND CONFLICT

Most people will probably say that they believe in change and development. These are normally words with positive associations. But the perspectives which appear through analysis will typically be to the delight of some, whilst others will be more sceptical. Change implies that we have to say goodbye to something. That could be the way things have always been done and decided, principles and methods which have proved to be useful and valuable, and which people within the organisation identify with the actual culture or bearing values of the organisation, but which no longer have the same meaning in the future. Finally, change can of course affect the privileges, position and duties of an individual. That's why it is important to remember in a change process, that although something no longer seems to work, it has previously been significant and had value.

It's not unusual for disagreement on future scenarios to be based on different

perceptions of the organisation's core and mission, nor on which forms of work and principles have traditionally been its hallmark. It's only natural that someone who may have been the leading proponent of a method or viewpoint, can feel personally criticised when they discover that what they stood for no longer has the same value for others. In the final analysis, everyone has to decide whether they want to stay on board, whether they can positively support the process moving forward, or whether they should simply leave the organisation or adopt a more passive role for a while.

It is important to remember that conflict is not necessarily a bad thing. Conflicts often arise from aspects which no longer work the way they should. That's why they open the way for change which can improve an organisation. Conflicts can be painful, they can hurt, but a constructive approach can lead to improvements.

When there are conflict situations and opposition to change, the use of a Force Field analysis can be useful.

## THE CHARISMATIC LEADER

A lot of influence can be wielded in some organisations by one or only a few people. They could be the ones who founded the organisation, and who played a key role in it getting off to a good start.

A lot of experience shows that it can be very difficult to spread influence when such a person (or persons) have been making most of the decisions for some time. It is hard for others to propose changes, and to tell people who have been very active and given a lot that it may be time for them to find another role. In other words, how do you tell people you respect (or have respected) that they have moved from being part of the solution to becoming part of the problem? There is no easy answer. But it is impossible to go through a change process if the main problem is that a change in leadership or succession is needed, and that the matter is not addressed in a constructive manner.

## ORGANISATIONAL CULTURE

Different organisations have different cultures. When we work with organisational development, we sometimes find that it's the culture of the organisation we are trying to change. And an organisation's culture is one of the most difficult things to change. Articulating the cultural changes needed is a job in itself, and changing cultural norms and habits in a given organisation is a major task. To achieve success, acknowledgement is essential of the fact that working on change the culture of an organisation (or large part of it) is a common goal.

Culture is characterised by being in constant movement and development. That's also why parallel cultures can arise within the same organisation, and why an organisational development process can also aim to bring such parallel cultures closer to each other, and create a feeling of commonality and of working within the same organisation, with the same objectives and culture.

When working with organisational development processes related to cultural aspects within the organisation, putting special emphasis on the inclusion of all relevant bodies is a good idea, along with ensuring that the staff/volunteers and others are aware of how implementation of new measures will work.

## COLLABORATION FOR CHANGE

Change is a sensitive issue, and if the circumstances allow, we recommend the prioritising of reflection and discussion, which have been the focus of this chapter. This helps to ensure that any problems, such as opposition to change, a desire to maintain the status quo, power and influence, are discussed.

Finding consensus and falling into step are not always possible for implementation of change. Sometimes, it is not even appropriate, as there can be conflicting interests within the organisation which cannot be resolved by consensus. But the principle should be that working towards change should be done collectively, to find solutions which have the backing and ownership of a wide circle.

### CASE: OBJECTIVE FORMULATION IN A DEVELOPMENT PROCESS

The JEEP Folkecenter (Joint Energy & Environment Projects, Folkecenter) performed a structured development process in Uganda over a two year period entitled "Strengthening Organizational & Operational Capacities of JEEP Folkecenter, Uganda". Some of the specific sub-objectives were:

- Writing a five year strategy plan for the organisation
- Reconstructing the board with new, younger members, and optimisation of board meetings
- Involve members and target groups through holding meetings
- Improve skills levels through individual and collective training for staff, and the inclusion of trainees

The development process raised the skills level of the organisation, and it moved from being an organisation in which all accountability lay in the hands of the principle and founder, to being an organisation with an active, responsible board of directors, with widespread inclusion of the staff.





which stretch over a long period. Doing so means a constant check can be kept on change implementation.

When sub-objectives are specified with an implementation plan, it can transpire that the plan is too ambitious and therefore not realistic. If this is the case, it is necessary to go back to the objective form, and revise the sub-objectives to ensure implementation will be possible.

## TIMELINE FOR ORGANISATIONAL DEVELOPMENT

Another way to illustrate an organisational development process is to draw a timeline. As in the form above, a timeline can contain the activities, results and details of the people responsible and taking part. A timeline is a highly visual tool. It can be put in a very visible place within the organisation, making it possible for everyone to track developments and implementation of the prioritised changes.

Devising a routine for when the timeline is to be discussed and reviewed is a good idea. Initially, it may be necessary to refer to it often - e.g. once every 14 days. But later on, discussing it once a month or every 6 months may be sufficient.

## COMMUNICATION

Communication on impending processes and change is key to a successful organisational development process. It helps to boost participation, visibility and thus supports the inclusion of organisational changes. Communication must therefore be unambiguous and clear, and directed at the relevant recipients. Consideration should thus be given as to how to communicate with the various parties involved, to include everyone in organisational development in the best way possible.

Writing a plan which describes who will be communicated with and when, about what and in what way, is a good idea.

When writing a communication plan, basing it on the stakeholder analysis can be recommended. This can be used to devise the plan to communicate development processes within the organisation. The form below is a good tool for devising a communication plan.

### COMMUNICATION PLAN FOR:

STAKEHOLDERS (target group)	Communication purpose	Communication primarily through	Communication secondarily through
MEMBERS			
OTHER ORGANISATIONS WITHIN THE ENVIRONMENT			
PARTNERS WE SUPPORT			

Differentiating between internal and external stakeholders is a good idea. Some processes will focus on internal aspects. If this is the case, that's where the main thrust of the communication should be aimed. Other processes will have a bearing on external aspects and priorities, and of course, there must be communication with bodies outside the organisation.

The form above is based on the inclusion of relevant stakeholders in the analysis, and that they have been given the chance to comment and submit their own proposals and input during the process. Communication should be based on a plan, and it is important that internal and external communication concerning the changes to be made within the organisation are given high priority.

## MOMENTUM

Sometimes during an organisational development process, maintaining momentum in the initiatives and ideas to be implemented can be a challenge. People can find that the process stretches over too long a period, becomes too troublesome and feel that they are not getting anywhere. On the other hand, an organisational development process can also go too fast. This can be the case, for example, if no proper analysis is performed, or if insufficient time is taken for reflection and decision-making. Or if an attempt is made to implement too many changes within a limited period.

It is up to the people responsible for any organisational development process to ensure progress, without too much haste. If the staff or volunteers in an organisation continue to find that the process is under way without any real progress or conclusions, they will ultimately become frustrated. If the organisation is volunteer-based, it will probably lose some of its volunteers. If the organisation employs paid personnel, they will probably lose commitment and interest in the changes agreed.

The person responsible for an organisational development process ought to maintain momentum continuously, inform and listen to stakeholders and colleagues. This ought to be factored in to the communication plan above and could be achieved, for example, as part of a review of the implementation plan, when the people responsible for individual changes present what they are, what the next step is and receive feedback from

relevant stakeholders on how they perceive the process.

If it is thought that the organisational development process is moving too slowly, or there are some people who find it is going too quickly, the best thing to do is hold an open discussion. Any adjustments necessary can then be made with common understanding, and in the knowledge that everyone is still on board. It can be necessary in large-scale and long-term organisational development processes to make room for reflection - e.g. during special meetings - so that the most important stakeholders can join in, and actively support the development processes in progress.

## Ownership and inclusion

People will rarely support processes they do not understand, or which they feel they have not been consulted about. Ownership and inclusion in change processes are important to maintain working towards the objectives, motivation and progress in an organisational development process.

## FOLLOW-UP AND EVALUATION

An important part of working with organisational development processes is follow-up and evaluation of the processes set in motion. Follow-up and evaluation ensuring learning within the organisation, which should be taken into account moving forward when processes are structured and planned.

If the process is internally facilitated, we recommend regular follow-up and monitoring, with a final evaluation of the overall picture. If the process has been externally facilitated, it can be good for the organisation in the middle of the process and the external bodies involved to check whether everyone can learn from the process moving forward.

There are a number of different approaches and methods of monitoring and evaluating progress and development processes. To avoid ending up with one long evaluation process in what is a long development process already, we recommend referring to the four phases of the organisational development process described in this guide. Questions to be asked initially can include:

- What did we want to achieve with the organisational development process we have just been through?
- Did we achieve what we wanted to?

In most instances, going just a little deeper can be recommended, and for each of the four phases in this guide, the following questions can be applied:

- What worked well in this phase?
- Did we get what we wanted out of the phase?
- What would we do differently another time?
- What have we learned from work-

ing with this phase?

CISU and DPOD recommend sharing experiences gained from organisational development processes with us and with each other. Feedback helps us to improve, and be better equipped to provide advice and guidance to the member organisations of CISU and DPOD.

Organisational development processes in CSOs can often feel as if they are large and fancy. We give our take in this guide on how they can be done a little more simply. It is also important to us to emphasise that an organisation should always consider how large a part of the overall package should be looked at to achieve the results and changes you believe will move it forward in the way intended or chosen.

A healthy organisation can: Balance the amount of energy used for internal processes and changes with that used to fulfil the organisation's purpose.

*Enjoy!*

## PART 2: TOOLS AND EXERCISES

The guide and its tools are available on [cisu.dk](http://cisu.dk) & [handicap.dk](http://handicap.dk). All relevant forms and figures can be downloaded.

- [www.cisu.dk](http://www.cisu.dk)
- [www.handicap.dk](http://www.handicap.dk)

### Symbols

The following symbols are used in the review of tools:

- |  |   |
|--|---|
|  Time   |  Focus   |
|  Advice |  Purpose |

We present the tools in the second part of the guide which are referred to in the first part. They are presented here in detail, and with instructions on how to use them, and perform exercises related to each tool.

### FACILITATING

The guide is primarily aimed at organisations running an internally-driven process. That means that no one is usually involved from outside to support and facilitate the process and use of the different tools.

Such an internal process makes heavy demands of how facilitation must be performed. We recommend that two people within the organisation are made responsible for improving the process. One person can be from the organisation with experience in facilitation, and the other need not be part of the organisation, but someone familiar with it and its field of work. These two can then prepare the process together.



# LIST OF TOOLS

TOOL/METHOD	FOCUS	GOOD FOR	PAGE
<b>CLARIFICATION WORKSHOP</b>	Focus, motivation, stakeholders, starting point as an organisation	Focus subsequent analysis and create ownership for the process you are embarking on	30
<b>CONTEXT ANALYSIS</b> (environmental scan)	The context we operate within	To form an overview of our environment and options for exerting influence upon it	34
<b>SWOT</b>	Focus on internal strengths and weaknesses, external threats and opportunities for an organisation	A relatively easy method of obtaining a picture of the organisation	37
<b>OCTAGON</b>	Looks at the entire organisation	Gives an overview of all corners of the organisation	39
<b>APPRECIATIVE INQUIRY</b> (appreciative inquiry)	The vision and dreams of an organisation, and how we realise them	Inclusive and participatory methods which create energy and initial change	40
<b>ACCOUNTABILITY STRUCTURES</b> (accountability)	Definition of structures for accountability	Defines the framework for a discussion on how accountability structures can be strengthened	43
<b>CREDIBILITY CHECK</b>	Reflects how an organisation's credibility is perceived by various bodies	Give input on how the organisation could improve its credibility, particularly with focus on members/target group	44
<b>PARTNERSHIP ANALYSIS</b>	Organisational development in partnership	Mutual analysis of interests and roles in a partnership	46
<b>PURPOSE CHECK</b>	Reflection on the organisation's purpose and whether it still describes and contains what you want or whether adjustment is needed	Grasping the fundamentals of the organisation and confirming or adjusting them Rediscovering collectivity and cohesion	51
<b>STAKEHOLDER ANALYSIS</b>	Analyses the stakeholders around an organisation	Ensures that all perspectives of working with organisational development are obtained	53
<b>THE THREE CIRCLE MODEL</b>	Analyses central aspects of an organisation: What we are, what we do, who we associate with	Illustrates the relationship between the different elements of the organisation, and how they should/can be strengthened	55
<b>DIALOGUE-BASED APPROACH TO DATA COLLECTION</b>	Through dialogue, e.g. focus group interviews, to obtain data for analysis	Good for obtaining different perspectives and ensure everyone is consulted	58
<b>FORCE FIELD ANALYSIS</b>	Measures the forces working for and against change in an organisation	Deciding whether it is possible to implement a change, and if so, what resistance can be encountered	59

# CLARIFICATION WORKSHOP

## ➔ Purpose

Clarification of focus and priorities related to a planned organisational development process. This workshop helps ensure the best possible basis for the organisational development process, with regard to focus, priorities such as the resources required and a general assessment of expectations.

## Use and description

Prior to the workshop, there must be a preparatory process. This is where the board or management will take decision on whether an organisational development process should be started. Appointing 1 or 2 facilitators to prepare a suggested process can be a good idea. How and when the organisation is widely involved can be discussed here, along with drafting a process plan for the entire procedure. E.g., using the model for phases in organisational development.

The actual workshop will contain the following elements:

- 1 The Three Circle Model
- 2 Phase model for CSOs
- 3 Stakeholder analysis
- 4 Resource analysis

## 5 Motivation type

## 6 Summary and filling out the clarification form

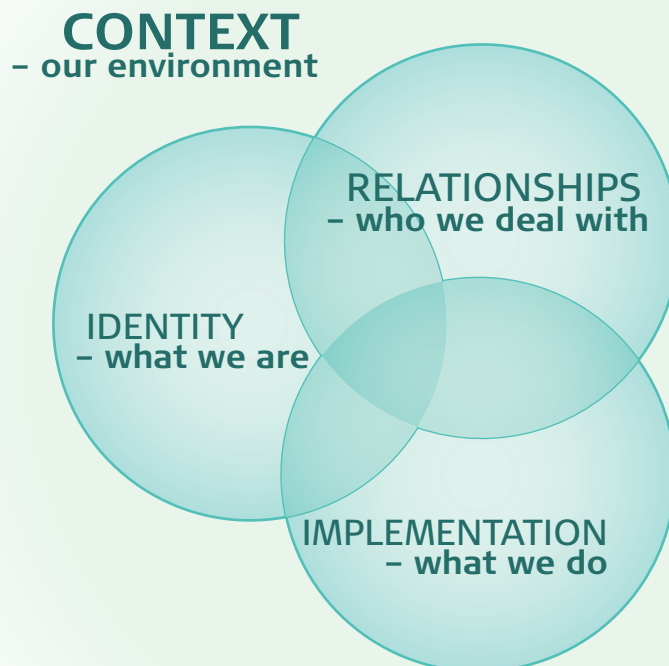
The tools used in the clarification workshop are also discussed and presented in chapter 3. Here in the second part of the guide, we focus on the practical implementation of exercises with regard to the tools.

## Clarification workshop

A clarification workshop will typically take 3-5 hours. It can be performed in connection with an AGM or other ordinary meeting within the organisation.

The description below of the five recommended steps is scheduled for approx. 4½ hours, including a one hour break. I.e. 3½ hours of workshop work. A good long break is important, as the workshop topics will often spark off a number of discussions, which can be continued in the more informal setting of the break. We recommend putting the break after step 2.

With regard to motivation and the background for an organisational development process, it is important to consider whether it is relevant to run a more extensive clarification process. If an ad-hoc organisational development process is



planned, it can be inappropriate to expend too much energy on point-by-point review of the clarification process as we describe below. In other instances, we can warmly recommend allocating time for the clarification process, to be able to qualify the entire procedure.

### **Step 1: The Three Circle Model** (1 hour)

The facilitator introduces the Three Circle Model. The introduction can make use of a specific example from another organisation. (20 minutes).

Two rounds of group discussion then follow. The first group's question is:

Describe the organisation's strengths and weaknesses in relation to:

- 1 Identity (what we are)
- 2 Actions (what we do)
- 3 Relationships (who we deal with)

Give one of the three marks to each circle: Good – satisfactory – poor – in relation to what describes the current situation (20 minutes).

The second question to work on is: Name three things in the context which will either positively or negatively affect the organisation in the future (10 minutes).

The facilitator will summarise each group's responses in plenum. Observations on the three circles should be discussed, and a preliminary conclusion drawn, which can be fleshed out during step 5. The conclusion will summarise the reflections of the participants in relation to what is good, satisfactory or poor, and which aspects of the context the organisation ought to be aware of.

### **Step 2: Phase model** (30 minutes)

The facilitator will quickly review the phase model (see chapter 3). Focus should be on explaining the phases and describing possible strengths and weaknesses in the transition between each phase. It should also be obvious that not all organisations necessarily go through the different phases.

Discussion on where the organisation is located based on the various phases. The facilitator will collect the various statements from the participants.

The idea of the exercise is to reflect and discuss to create a common understanding of where the organisation is located in its development, and which challenges and characteristics it has as a result. The exercise can also inspire a discussion of where the organisation wants to go.

**Step 3: Stakeholder analysis**  
(45 minutes)

The facilitator makes a brief introduction of the stakeholder analysis.

A stakeholder analysis is then performed, with the aim of revealing and identifying all stakeholders. The stakeholder analysis is based on the form in chapter 4, which can be expanded by the relevant number of stakeholders.

To follow up on the stakeholder analysis, two plenum discussions are held based on the following questions. If there are more than 20 participants, splitting them into groups can be considered, with a joint round-up to conclude.

- Which stakeholders within the organisation should be directly involved, and who should merely be kept informed?
- Are there external stakeholders who should be involved or informed?

The facilitator will write up suggestions made in plenum so that everyone can see them, and then control a process which decides which groups should be involved and which should be informed. The form below can be expanded to include the round-up.

**Step 4: Resource analysis**  
(15 minutes)

The resource analysis is designed to quickly identify which resources - human and financial - are available for the organisational development process. There may be a budget already made which can be used to work with. Otherwise, what is available must be established.

With regard to the human resources, it is important to consider how long people can be expected to take part in the process, and how it can be ensured that those taking part perceive that the process is progressing, to avoid them losing interest.

The human and financial resources available for the organisational development process should be allocated to various items, in many instances with individuals responsible for them. Creating an overview of this aspect relatively early in the process is a good idea. The sheet for rounding-up the clarification process includes the option of entering which resources are available, and what the organisation expects to have to invest.

STAKEHOLDER	Relationship to organisation	Relationship to organisation development process	Interest/motivation related to process	Possible opposition related to process
Stakeholder A				
Stakeholder B				
Stakeholder ...				



### Step 5: Motivation type and approach to organisational development

(30 minutes)

The approach and motivation exercise comes at the end of the workshop. That's because it is often useful for the participants to conclude on 'how and why we want to go through an organisational development process', once the organisation has gone through the initial considerations in steps 1-4.

We recommend that the motivation for entering into the process is considered first. The facilitator presents the different forms of motivation (see chapter 3). The participants can then discuss in plenum or small groups what types of motivation type they believe are best suited to the organisation. The facilitator rounds up and concludes by creating ownership for the motivation type for which there is most backing. Sometimes, there will be elements of different motivation types present.

An approach should be decided after considering motivation. The facilitator presents the five different approaches to organisational development processes, which indicate the depth of the process (see chapter 3). The participants can then discuss in pairs which approach they believe is most suitable to use in the current situation.

The discussion on motivation and approach will be based on reflections from the Three Circle Model, phase model, stakeholder and resource analyses.

You need to decide whether to continue working with an experience-based, ad-hoc, crisis-based, structured or partnership-based organisational development process. The facilitator will summarise motivation and approach in plenum.

### Step 6: Summary – clarification form (45 minutes)

The facilitator will have a sheet prepared with the clarification form on it. The facilitator will control a summary, and write directly on the sheet the formulations and analysis results agreed upon.

The clarification form should help to ensure:

- Good communication within the organisation on the background for the organisational development process.
- A base on which the board and/or management can choose between the different analysis tools presented in chapter 5.

The clarification form used for summarising the results obtained can be downloaded from the CISU and DPOD websites.

#### Good advice

- The clarification phase must be planned to measure up to the subsequent phases in the organisational development process. It is important to avoid putting all your energies into clarification, and never reach the crux of the matter through subsequent analysis.
- There can of course be incidents in which the clarification process leads to continuing with an experience-based or ad-hoc approach. In such instances, the clarification phase can well overshadow the following work, but going ahead with a large, structured process can be avoided, and a process planned instead which corresponds to the current situation and resources available.
- Many organisational development processes suffer from insufficient awareness and time. They are abandoned to concentrate on the day-to-day provision of services. An organisation can certainly function well in that manner for a while. But in the long run, we believe it is necessary to invest time and resources to a process which ensures that the organisation is on the right track. It can be well worth it.

# CONTEXT ANALYSIS

## Purpose

The purpose of a context analysis is to analyse the context in which an organisation operates. Focus will be on what aspects the organisation itself can influence, and which are dictated by circumstances outside it. The organisation can form an overview via context analysis of the factors it can influence, and those which exist wholly as a result of the context.

## Use and description

Many development organisations encounter threats which arise in their external environment. These can include lack of support from donors, the inability to retain staff and volunteers (who may for example apply for other and better paid positions), new and tougher rules for organisations introduced by the government, etc.

Such negative aspects (threats) arising in the external environment can heavily influence the organisation. They are important to identify, even though the organisation has no direct control over them. By knowing what the threats are, and having a common understanding of their significance, they can often be minimised.

On the other hand, there are also positive factors (opportunities) in the external environment, which have or can have greater influence on the organisation's work. For example, there can be more interest/awareness amongst the target group, more backing from local authorities, better political stability at national/regional level etc. It can be useful to acknowledge and explore such positive factors (opportunities), such that the organisation can exert even more influence on them where possible. This can be done by focusing on the positive opportunities via direct activities (e.g. through more education and strategy clarification).

The context analysis can be used within all approaches to organisational development, ad-hoc, crisis-based, structured and partnership approach.

## 🕒 Time

The actual analysis can be performed within a couple of hours. A very thorough analysis with the inclusion of a number of different bodies to qualify the analysis

can take up to a couple of days.

## Resources

The context analysis requires that the facilitator is very familiar with the analysis method and able to explain the model to the participants. A little work is required to understand the model and the various steps and categories worked with.

## Explanation of figure

The external factors which influence any organisation can be divided into four categories:

- Factors concerning the organisation's ability to deliver input, for example in the form of staff or volunteers, equipment and capital.
- Factors concerning the output, for example in the form of which services the target group needs and asks for.
- Politicians or regulations which exert influence on the organisation's ability to fulfil its objectives.
- Factors related to collaboration or competition with other bodies, and which exert influence on the organisation.

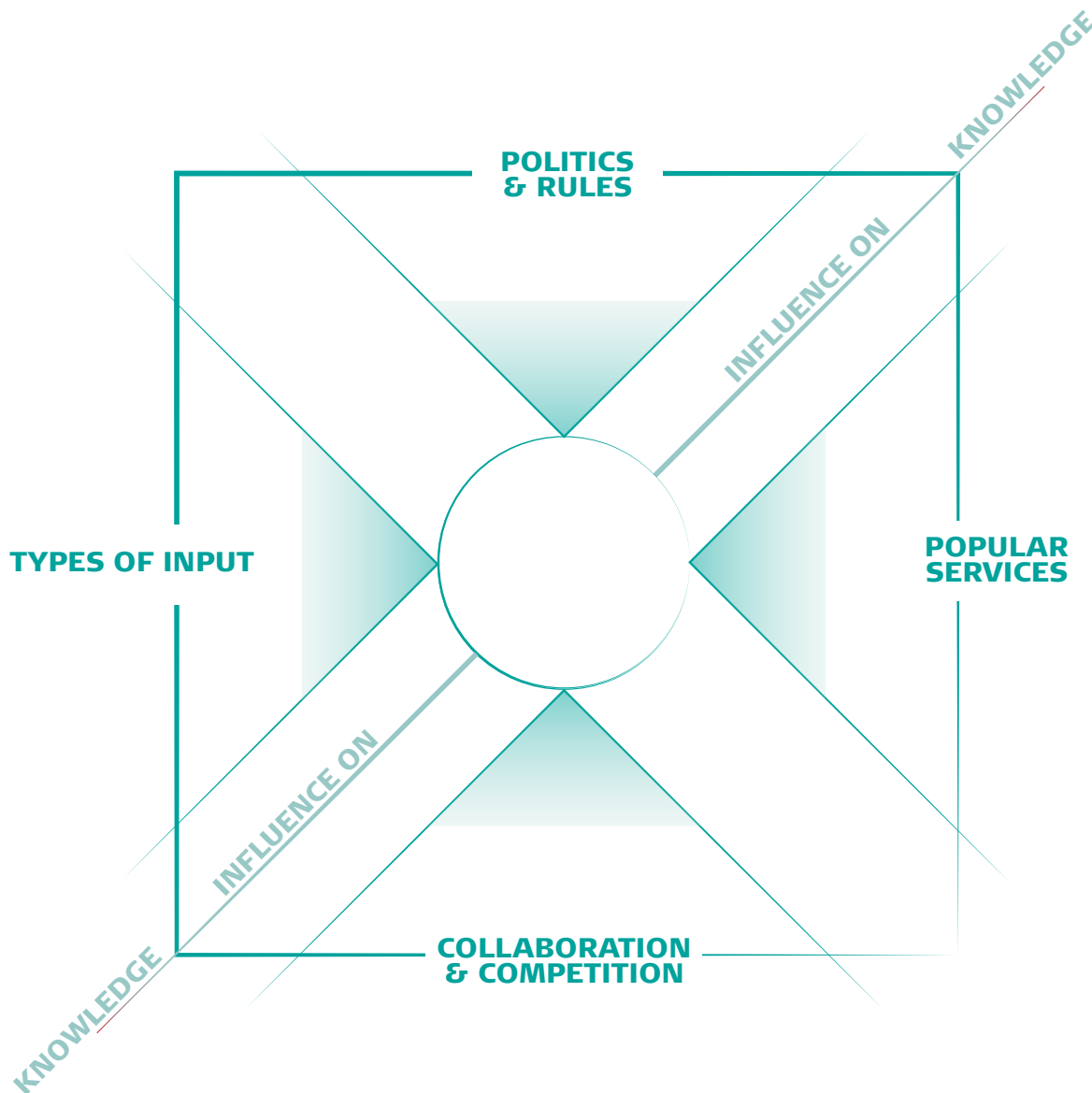
The context analysis will identify various factors according to categories and create a picture which allows the organisation to see how much influence it has over the various factors.

The area inside the square is what the organisation has influence over. Outside the square is that which it acknowledges has significance, but which is outside the organisation's control.

## Procedure

### Step 1. Explanation of the analysis model

The first step of performing a context analysis is a thorough explanation of the model using a drawing on a flip chart or the like. The explanation should clarify the four different categories of factors. Understanding that the closer you get to the centre circle, the more control you have, and the difference between the negative and positive factors, illustrated by different colours.



### Step 2. Definition of the context analysis focus

Defines the focus to be analysed. The focus for the analysis can be the entire organisation, or a part of it, e.g. its ability to act as an advocate. This is written in the centre circle.

### Step 3. Factors which exert influence on the organisation/analysis focus

Write a list of the external factors which exert influence on the organisation/analysis focus. The list can include political, financial, infrastructural and social/cultural factors.

### Step 4. Identify the positive and negative effects of the external factors

Use different coloured card or paper to indicate whether a factor is positive or negative in relation to the organisation/analysis focus. Write a factor on each piece of paper, to create a line of pieces

which represent positive effects of external factors, and a stack which represents their negative effects.

### Step 5. Categorising factors and possible influence

Identify now where each factor belongs in the four different categories of possible influence factors. Once you have identified where a factor belongs - e.g. in "collaboration and competition", discuss to what degree you can influence it. Place those factors you have complete control over in the square, those you have no control over outside, and those over which you have partial control on its border. The more a factor is within the square, the more control you have over it.

**THE CATEGORIES ARE:**

- Politics and rules
- Types of contribution
- Collaboration and competition
- Needs requested

**Step 6. Discussion and conclusion**

Mark the factors (opportunities and threats) with a star which have the biggest effect on the organisation. Discuss on the basis of these questions:

- What are the most important positive factors (opportunities)?
- What are the most important negative factors (threats)?
- Which factors can the project/organisation gain influence over - and which can it not?
- How can the project/organisation react to the factors it CANNOT influence (e.g. via which other bodies)?
- Who should we form a network/alliance with to acquire influence over the factors we currently have no direct influence over?

**! Good advice**

This is a particularly useful tool for more experienced organisations working with rights-based projects, where the ability to effectively act as an advocate will typically rest on its ability to seek influence via collaboration and enter into alliances.

Secondary questions: If it is difficult to define and discuss factors, the person responsible for the organisational development process and context analysis can draw inspiration from using the following questions to open the debate:

- What relevant factors in the external environment (positive and negative) exert influence on the organisation?
- What significance do they exert on the organisation's ability to perform its duties?
- To what degree does the organisation exert influence on the various factors? What can be done to define the factors?

The questions will lead the participants into the context, and the aspects to be discussed and considered.



# SWOT ANALYSIS

## ➔ Purpose

SWOT is an abbreviation of Strengths, Weaknesses, Opportunities, and Threats. SWOT provides a framework for an analysis, which does not identify any detailed organisational aspects to be analysed in advance.

The basic idea of SWOT is to generate dialogue in which the participants analyse the organisation's internal strengths and weaknesses, and external opportunities and threats. SWOT gives the participants a realistic picture of the organisation and the opportunities offered by its context. SWOT is a good diagnostic tool, which give input on what needs to be addressed for strategy and organisational development.

## Use and description

SWOT is an open approach, and in our experience is easy to use. It can be used extensively on the organisation, on a partnership or focused on a specific element within an organisation. For example: How can we boost the membership? Or how can we improve sustainability?

SWOT is applicable within ad-hoc, structured and partnership approaches to organisational development.

## Time

➔ SWOT analysis is a relatively flexible tool, and a short analysis can be run within 1-2 hours, or one day.

## Resources

The resources needed to run a SWOT analysis are primarily logistical (gather participants, find a suitable room, allocate time, etc.)

## The four steps of SWOT

There are four steps in a SWOT process: Analysis, reflection, strategic plan and execution and monitoring.

We will focus on the first step here - analysis. Reflection and strategic plan correspond to our reflection and decision-making phase, and execution and monitoring correspond to what is described as the implementation phase in this guide.

## PROCEDURE

A SWOT analysis is based on a simple matrix, which provides an overview of the four aspects of an organisation in the course of the process. Strengths and weaknesses concern the internal aspects of the organisation, whilst opportunities and threats concern external factors.

### Step 1. Decision on organisational issues

Establishing the purpose of a SWOT analysis first is important. Which "organisational questions" are to be answered? This is where the clarification process we described earlier can be a help. The questions can be very broad. For example: How can our organisation make more impact? Or more focused questions: How can we attract more volunteers? If the question is broad, it is a good idea to coordinate with the organisation's articles of association (constitution), and/or formulated vision/mission.

### Step 2. Analyse internal aspects

The second step in a SWOT analysis is to look at internal capacity. In relation to the organisational question defined in step 1, analyse: What makes the organisation good? What are our strengths?

When strengths have been identified, you can turn to weaknesses and ask what weaknesses there are in relation to the organisational question. What can we do better? What are our weak sides?

The individual different strengths/weaknesses should be explained. The results of the exercise can be grouped into categories, e.g. if the item is 'members', group strengths in relation to recruitment in one category, and strengths related to retaining members in another.

### Step 3. Analyse the surroundings/context

The third step is to analyse the surroundings or context. The focus here is on what opportunities and threats there are in the context.

The analysis is performed by asking what opportunities can be seen in the surroundings/context. Opportunities can be in relation to new partnerships, new types of work, a global alliance or the like.

Once opportunities have been analysed, threats can be analysed in the same manner. What threats exist outside our organisation which we ought to consider? This can include changes in political priorities, which shift focus from the organisation's causes. Or it could be another organisation attempting to take over some of the functions you have handled up to now.

**Step 4. Discussion and "action"**

The fourth and last step of the analysis concerns exploiting strengths and opportunities, whilst limiting weaknesses and threats.

Using the picture created by the SWOT analysis, you can ask each other:

- How can we use our strengths to limit and prevent the threats/weaknesses we have identified?
- Which opportunities should we try to use and realise to make the organisation even stronger?

Finally, a summary is performed. You can perform supplementary analyses, go into a reflection and decision-making room, or if using SWOT to qualify an ad-hoc approach, lay a plan for the actions you will be implementing.

**Things to be aware of:**

- A SWOT analysis can be met with resistance from some of the participants, especially when weaknesses within the organisation are involved. If you expect that this will be the case, having an external fa-

ilitator can be an advantage, who has no interest in the internal politics of the organisation.

- SWOT is a very open approach. It can be the disadvantage that sensitive matters can be touched upon. If the process is motivated by the settling of a particularly sensitive issue, make sure that it is included in the analysis.

**! Good advice:**

- A major role for the facilitator is to ensure that the organisational issues are kept in focus.
- A defined strength – e.g. "we are volunteer-based" can often take the form of a weakness if using another perspective – e.g., continuity of work. In such instances, you can opt to carry on working with the different perspectives, or define which are the most important.
- If there are more than 10 participants in the exercise, the analysis can be broken down into groups, which can then discuss their results in plenum.
- It is important to present results on flip charts or the like, to ensure the analysis is visible to everyone.

**INTERNAL CAPACITY**

**1. STRENGTHS**

What are we good at?  
What do we know about ourselves?  
Members, previous results, feedback from target groups

**2. WEAKNESSES**

What can we do better?  
What do we know about our weaknesses?

**EXTERNAL FACTORS**

**3. OPPORTUNITIES**

What factors outside our organisation can help us?

**4. THREATS**

What external factors can be an obstacle or prevent us from being better?

# OCTAGON

A tool developed to assess strengths and weaknesses within organisations. Designed to measure the organisation against predefined criteria in a relatively simple manner. It can also be used to identify the changes needed to improve an organisation's ability to work efficiently.

## Focus

The Octagon is designed to analyse four basic aspects of an organisation using a total of eight variables, hence the name 'Octagon':

### The organisation's base:

- 1 Identity: The organisation expresses its basic values, and has formulated a reason for its existence.
- 2 Structure: The organisation's leadership and allocation of tasks and accountability are explicit and visible.

### The organisation's activities and results:

- 3 Implementation of activities: The organisation has the capacity to plan and implement planned activities.
- 4 Relevance of activities: Activity content and methods used are relevant in relation to the organisation's vision and objectives.

### The organisation's capacity for development:

- 5 Competences: Volunteer and paid personnel and management have the necessary skills and qualifications to pursue and develop the organisation's objectives and vision.

- 6 Systems: The organisation has the financial resources and administrative routines to perform its activities.

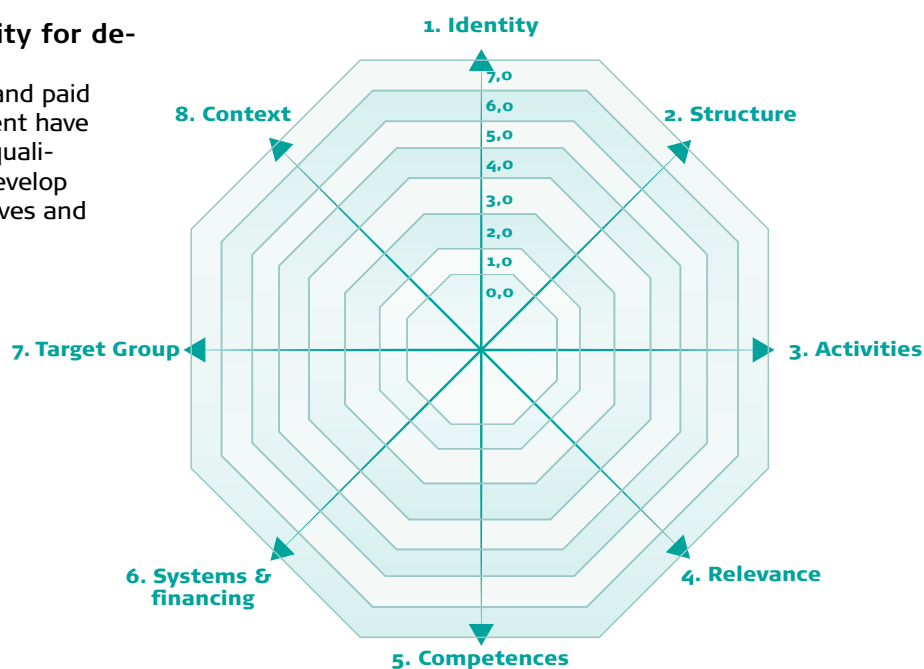
### The organisation's relationships:

- 7 Target groups: Target group perception of the organisation and demand for its activities give the organisation legitimacy.
- 8 Context: The organisation is accepted and receives backing and support for its work.

### Things to be aware of:

The Octagon is useful because it gets into every corner of the organisation. No areas can be missed which may not be up to par, or where there are problems. It therefore provides a good, general impression of the organisation. The overall impression can be supplemented by one of the other tools which go more into depth with various aspects of the analysis.

The Octagon requires a guide asking a number of questions, which is too comprehensive to include here. It can be downloaded from the CISU and DPOD websites. The guide is written in English.



# APPRECIATIVE INQUIRY

## (APPRECIATIVE INQUIRY)

### ➔ Purpose

To create positive development processes based on organisational and human strengths, and what previously proved to work well within an organisation.

### Use and description

Workshops based on appreciative inquiry are motivational and strengthening for the participants in themselves. Adherents of the appreciative enquiry see it more as a general approach - almost of a philosophical nature, rather than as one method amongst many.

The appreciative enquiry is often described as a process divided into four phases, described as the 4-D model, derived from Discovery, Dream, Design (plan) and Destiny (realise) - the figure below adds a fifth D - a preceding definition or decision on what the enquiry will address.

If there are major conflicts in an organisation, the appreciative enquiry will always be conducive, as the method requires a certain portion of trust and the willingness to change. An appreciate enquiry is used within ad-hoc, structured and partnership approach to organisation development.

The tool is useful for the development of a North-South partnership, thanks to its focus on resources and strengths. It is also very good for working directly with poor target groups, who can prove to have more resources than immediately apparent.

### Time

To get through the four phases in a group of people can take between half and a full day, and preferably more. If you do not have so much time, or want to involve other tools and methods, a useful exercise is to work with the Discovery phase, to be able to remember to appreciate what actually works.

### Resources

The primary resources needed to undertake an appreciative inquiry are paper sheets, writing implements and the like. One facilitator per group is required.

### Procedure

The participants in the process will be led by the facilitator through the following:

#### Step 1. Definition of focus

It is important that everyone agrees on what the analysis is to focus on. Is it the whole organisation, or elements such as membership inclusion, partner relationships or impact in relation to the purpose? This will normally be defined before a workshop with a lot of participants is started. In relation to the structure of this guide, it will usually be the result of the clarification phase described in chapter 3, but it is important that the decision and its background are explained to the participants.

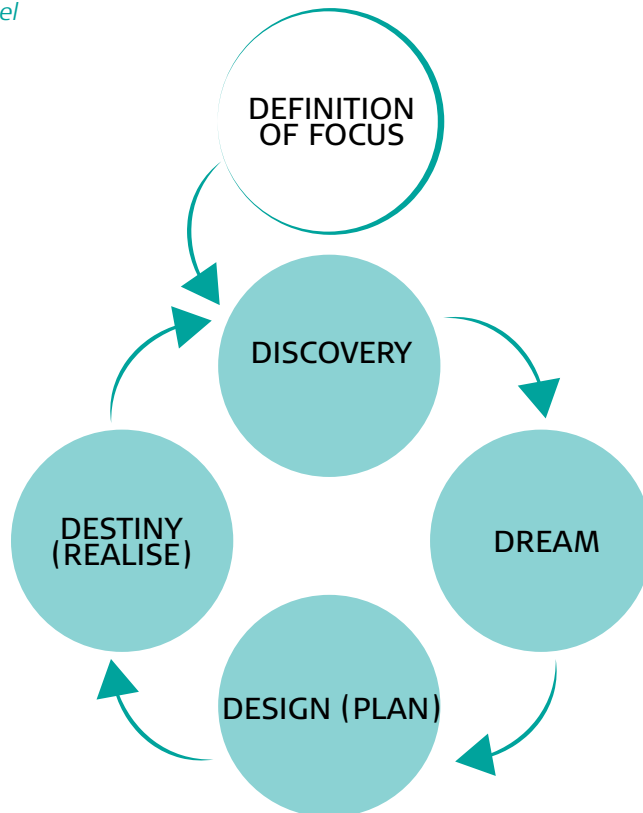
If you have not defined in advance what you want to analyse and learn about, the participants should discuss what the analysis will be based on, and a common focus theme agreed.

#### Step 2. Discovery

The participants should be paired or in groups of three. They will describe in turn what their best or most specific experiences have been in relation to the focus theme. They can be encouraged to go into more depth with their descriptions along the way to illustrate what made the experience successful or something good and constructive. It is therefore also useful to find out who contributed, and what the speaker's own role was. The participants should be instructed to stick from their own specific experiences and avoid generalisation. Each person should be given at least 30 minutes to speak.

When everyone has finished, the most important points will be reiterated in plenum, and the facilitator will categorise and summarise all the descriptions.



*The 4D model*

**Note:** What can seem to be a form of "eureka" exercise or self-congratulation is more serious than it may seem. Organisations rarely concern themselves with things that work well, or why they work well. This exercise tries to capture, describe and delve into good experiences to enable us to learn from them, and ensure that we use them moving forward.

### Step 3. Dream

Using a range of techniques, we can work with the ideas and dreams of the participants for the future of the organisation or focus theme. The idea is to take what already works, and imagine how the future will look if working further on these recognised strengths. Inspiration is provided to think specifically, and in the short term. But it is also important that participants do not allow themselves to be limited by the existing context, and are open to being able to change the situation.

One technique to get the participants to develop specific ideas is to get them to close their eyes and try to imagine themselves on an ordinary day in their organisation in three years time, for example. It could be a meeting they will be attending

- what will be discussed? Who is attending? And where is it being held? Altogether based on the most desirable but not totally unrealistic situation.

Another technique is to let participants describe in the form of scenarios how the organisation works at its best - still at a given point in the future.

A third technique is to imagine that the organisation in three years time has won a prestigious award - what will you say to the TV reporter asking how you did it? (knowing of course that the explanation cannot last more than 1 minute!)

There is no simple recipe for how you can go from multiple statements on the future to paring them down to common ideas and objectives. It can be done in plenum by discussion, if deemed to be possible. If the descriptions have been written on notes, it can be an advantage here to group those which are similar. The participants can also be allocated a certain number of votes in the form of rating the descriptions they like best by awarding them a number of points according to predefined scale. This can result in a rough form of sorting, which can then be given to a smaller working group to refine further.

The result of this phase should be a relatively clear, and preferably ambitious, objective for where the organisation will be in e.g. 3-4 years time - either in general or within certain areas/focus themes.

#### **Step 4. Design (plan)**

The design phase concerns pinpointing and prioritising. What is needed for the descriptions taken from the dream phase to become reality? What needs to be done, and who will do what?

The idea is to bring in the strengths and positive experiences from the Discovery phase, to discuss how to reach the Dream phase. This will link what we are good at with what we want to achieve, and indicate clearly how we get where we want to be.

This could involve working with indicators, and there is more focus on choosing the first step and approach correctly, and building in regular evaluations and adjustments, rather than a detailed plan, which might not be implementable. Chapter 5 of this guide contains several general considerations on the reflection and decision-making phase.

#### **Step 5. Destiny (realise)**

The plan will be realised in this phase through mobilisation of the participants' resources and active participation. Based on assessment of whether objectives and resources match each other, realistic planning can be done, which includes gathering and adjustment, plus a repeat of the process or parts of it along the way.

We introduce a number of simple tools and considerations in chapter 6 which can be used in this phase.

#### **! Good advice**

- Dividing people into groups, e.g. according to gender or age can be a good idea, if you think it will help bring extra perspectives and information to the analysis.

#### **Things to be aware of:**

- The appreciative inquiry can also be used for formulation of a project or partnership. If the method is facilitated well, with inclusion of the target group, it can be more change-creating as it will be based on the strengths of the people themselves, and discusses how they can apply them to reach the objectives desired.
- There is abundant literature on the appreciative inquiry, and plenty of opportunity to draw inspiration for its use on internet.

# ACCOUNTABILITY STRUCTURES

## ➔ Purpose

The purpose of an accountability structure is to reveal which decision-making levels there are within an organisation, and who holds who responsible in that organisation.

Accountability can be defined as: "Being accountable for actions, obligations and decisions to the stakeholders." Clear structures for accountability within an organisation make it easier to keep up with decision-making processes and procedures, and are a strength for an organisation – internally and externally.

In order for accountability structures to work, those accountable have to be willing and able to hold their inferiors accountable, and, in principle, to apply sanctions if necessary.

## Use and description

This is a tool which in a preliminary manner is good for creating clarity regarding lines of accountability within an organisation. Having clearly distinguished levels or roles within an organisation is important, to avoid too much influence and control of resources being concentrated in the hands of one or only a few people.

## 🕒 Time

The exercise can require a couple of hours, but can well be more.

## Resources

There must be one person leading the exercise. Participants from every level of the organisation is recommended.

## Procedure

**Step 1.** Ensuring a common starting point

The facilitator will ensure that everyone understands and agrees what is understood by 'accountability'. A typical organisation can then be drawn to show the typical levels found in an organisation.

**Step 2.** Draw an organisation in groups  
Groups can then be formed with no more than five participants in each. The participants will draw their organisation, keeping all levels separate (use flip charts). Draw arrows between the levels of accountability.

**Step 3.** Discussion on accountability

The groups will then discuss how the different levels are responsible or held responsible respectively. Address the following questions:

- What written procedures or guidelines exist which describe these aspects?
- How can transparency be promoted through communication and sharing information in the organisation?
- How can we ensure that target groups and participants can hold the organisation responsible?
- Organisations which are not member-based: Who is your board responsible to, and what mechanisms are accordingly in place?

**Step 4.** Round-up and discussion in plenum

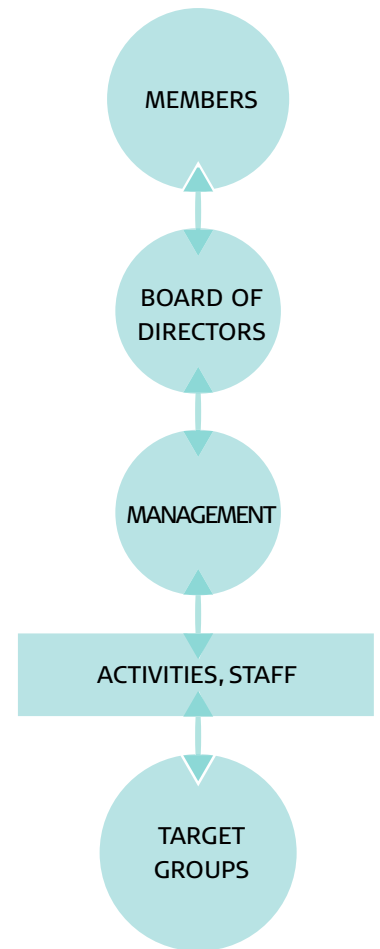
Conduct a round-up in plenum and discuss strengths and weaknesses in your structure. Are there aspects which could be improved, and how could that be achieved?

## 📌 Good advice

This tool can be jointly used by Northern and Southern organisations, e.g. for a workshop. It will help understand each other's basic structure.

After each organisation has presented the picture of itself, they can be combined using arrows to illustrate accountability levels between them.

There are more exercises and tools on accountability structures at [www.corruption-agenda.org](http://www.corruption-agenda.org).



*The accountability structures illustrate who holds who accountable in the organisation, and what decision-making structures exist from members and board to the target groups.*

# CREDIBILITY CHECK

## Purpose

This tool performs a check of how major stakeholders perceive the credibility of the organisation.

## Use and description

It is quick and easy to use, and can be used to create overview or start discussion. It is a relatively easy way of gaining input on how different stakeholders perceive an organisation, and gives a good basis on which to decide whether it is important to address as part of organisational development.

## Time

The accountability structure exercise can be used without a lot of preparation. Performing it will take minimum one hour, and to be thorough, can take up to three hours or more, depending on the number of participants and whether group work might be involved.

## Resources

The exercise can easily be performed with the personnel available – for example a board or secretariat. That requires describing how the various bodies and personnel are involved, and decide self-critically whether it can be improved. The exercise will be improved by directly involving others, to get other perspectives directly represented in the analysis.

## Procedure

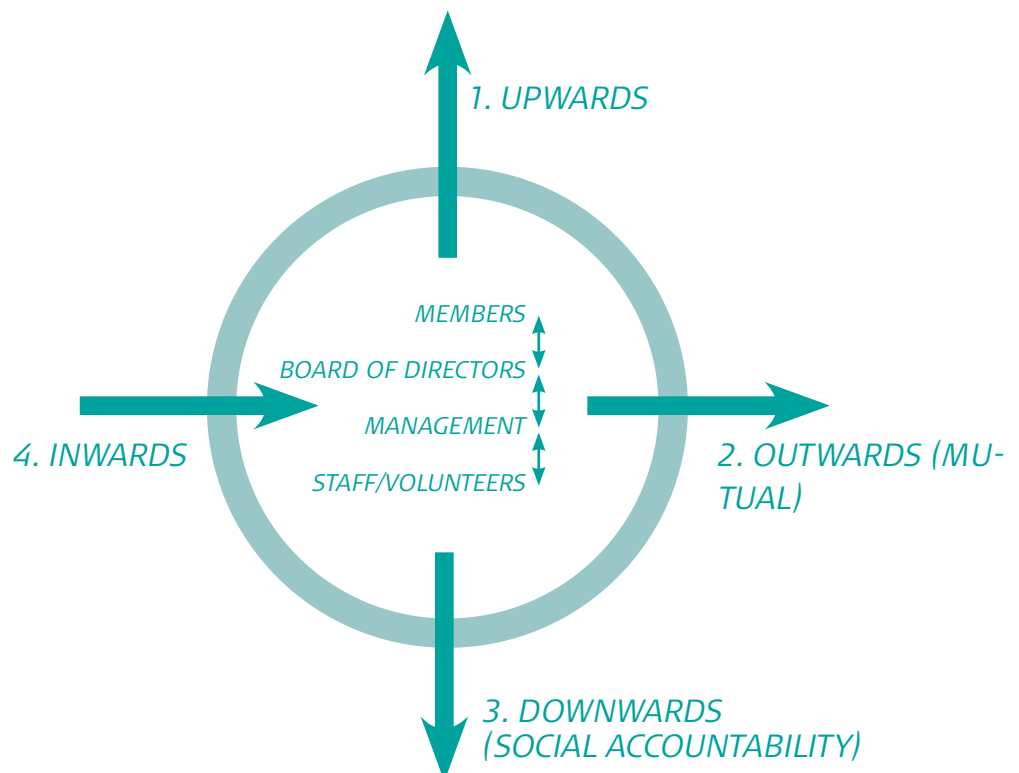
### Step 1. Explanation of exercise/ figure

Draw and explain the figure. What the exercise will focus on must be made plain. E.g., how the organisation works at being credible in relation to various bodies.

### Step 2. Put in the relevant bodies

Place the key bodies in relation to the organisation on the axes upwards - downwards and outwards - inwards (see illustration). Involve the participants in this part of the exercise and define who are the central bodies. The bodies should be placed according to affiliation - see the explanation below.

- Downwards. Bodies which expect services, inclusion or to be represented. Often described as target groups or participants.
- Inwards. Within the organisation. Members, staff, the board etc.
- Outward. Partners, other organisations, networks and resource personnel.
- Upwards. Those who provide resources or legal basis for the organisation's work. For example: donors, the authorities or the government.



*A credibility check illustrates the various roles stakeholders can have in relation to the organisation, and highlight how the organisation works by including them.*



**Note:** In some instances, it can be difficult to define where it is most relevant to place a body. In such instances, discuss where it is most relevant, and perhaps keep a body in two places, to be able to look at credibility in relation to the various places it is relevant in relation to the organisation.

### Step 3. Describe credibility

When all the bodies have been found, ask each individual the following question: "How does body X perceive us, as more or less credible?" Note what strengthens or weakens credibility for each body. Falling credibility can be due, for example, to a lack of visibility, not performing well enough or simply a lack of openness displayed concerning the work done.

The answers gathered can identify areas where the organisation fails to appear as sufficiently credible in the eyes of the participants.

### Step 4. Discussion of cause

When it is apparent where there are particular weakness and strengths in relation to credibility, how a positive situation is retained can be discussed, or how a negative situation can be improved.

and insight into the organisation can be addressed. It can of course also be a tool to highlight where there could be an argument for limiting the information under special circumstances. One example could be in strongly political or conflict-filled areas, where the security of the bodies involved is threatened.

- With regard to accountability, it can involve taking a look at which stakeholders we are obliged to report to at each level, or involve in decision-making processes. Information-sharing and openness are natural tools here.

**Note:** We use the terms "bodies" and "stakeholders" in this guide. Stakeholder is used to describe a person or organisation which has a specific interest in an organisation/theme/matter. We use bodies in a broader sense for a person or organisation in the context an organisation/person/theme matter operates in.

### ! Good advice

- The focus word in the middle of the tool (in this instance, credibility) can be changed, to openness or accountability, for example.
- With regard to openness, which ways and which media can be used to give the various bodies information on

# PARTNERSHIP ANALYSIS

## ➔ Purpose

The purpose of a partnership analysis is to qualify a joint analysis of stakeholders in a partnership, to be able to decide what is needed to strengthen the partnership and the two or more CSOs involved in it respectively.

## Use and description

Focus in a partnership analysis for both parties is to gain an overview of your own organisation, the partner's organisation and the content of the partnership. The analysis should inspire CSOs in the North and South to:

- Form an overview of and discuss a common vision, interests and strategies
- Reconcile expectations and discuss mutual contributions
- Clarify role division and delegation of accountability
- Be aware of mutual influence

We understand partnership as collaboration between two or more CSOs, who help each to perform specific activities and to develop each other's competencies and strengths as CSOs, based on a common, negotiated basis.

Experience has proven that strong partnerships are a good precondition for working towards realising the visions CSOs may have. Good partnerships between the South and North are also a necessary foundation to address the global challenges we currently face.

## 🕒 Time

Working with partnership analyses requires thorough planning, preparation and follow-up from all the parties involved. The actual analysis can take from one day to two weeks, depending on how thorough the parties want to be when working with it.

## Resources

Working on a partnership analysis is resource-intensive. The analysis requires that the parties meet and discuss, mutually challenge and learn from each other. The budget will depend on the organisations and how thoroughly the analysis is to be performed.

Depending on the specific context and partnership, the work of running a partnership analysis can be included in a project or partnership activity, for which a funding application can be made to the Civil Society Fund.

## Procedure

The tools used for a partnership analysis represent a cohesive procedure. We recommend going through the various exercises and steps systematically. If it is not possible to go through all the steps, the most relevant can be chosen, and discussed within the partnership in the course of a shorter period of activity.

The analysis can be used at the start of new partnerships and when entering into new types of collaboration/projects, and in the consolidation and maturity phases of any partnership.

### Step 1. Partnership seminar

The starting point for working with a partnership analysis is a meeting between two partners who have expressed interest in working on the development of their organisations.

The first step is to draft a programme, compile a budget and ensure the necessary resources, agree the physical venue for a seminar, invite the correct participants, develop materials and so on. In this slightly technical part of the process, it is important that both organisations take ownership, and that there is clear agreement on work to be done and mutual expectations.

### Step 2. Drafting a programme for a partnership seminar

When you are working with a partnership analysis, it is important to select the right tools and analyses, and that both organisations can present their input. We will use a "standard" programme below. As is the case for the other tools in this guide, the programme and analyses you choose must be adapted to your organisations and context.

A programme can contain the following elements:

- Presentation of different types of partnerships
- The value-based partnership, based on common values, for example a

religious or political movement.

- The specialist partnership, based on a common specialist theme, for example sustainable energy, health or education.
- Partnership as part of an international organisation. A collaboration in which the Danish organisation and a local organisation are part of an international network, such as an international fatherhood organisation.
- Allies, when the specialist or political standpoint is the common denominator.
- Discussion of strengths and challenges in various types of partnerships
- Discussion on your own partnership – what type is it, and what strengths and challenges can it give?

From here, the following steps can be taken.

### Step 3. Clarification of mutual values and vision

Clarification of the mutual values and visions a partnership is based on can lay the foundations for a long-term and respectful partnership. The intention is not that desires, values and vision should be the same, but hopefully, they can mutually support each other, such that the foundation for the partnership is mutual interest and a desire for change shared between the organisations.

Depending on the number of participants, the objectives, values and visions of the organisations and partnership respectively can be described in plenum or groups. You can draw inspiration from the following questions:

- Where do you want to go?
- What values are you applying independently and jointly?
- What is your common vision – in the short and long term?

A schematic illustration will help define what belongs to each organisation, and what you have in common within your partnership.

### Step 4. Clarification of expectations for the partnership

A mutual clarification of expectations is essential for a successful partnership. The clearer we are about what our partner can expect of us, and what we expect of our partner, the better. Clarification of expectations and reconciliation are essential with regard to preventing or limiting the risk of conflict within the partnership. Holding regular expectation reconciliations is a good idea, and remember clear communication with your partner if the organisation temporarily cannot live up to the expectations agreed.

When discussing expectations, use the following questions for inspiration:

- What are your expectations with regard to: Communication, reporting, obtaining funding, monitoring and evaluation, planning and implementation of activities, development of the partnership over time, joint advocacy campaigns etc.?

You can use the form below for inspiration if it can help you with the process and partnership moving forward. Use it to determine expectations and to reach a decision on the grounds you choose to work on.

### Step 5. Clarification of mutual contributions to the partnership

Mutual contributions to the partnership are becoming more important, as indicated by the first two chapters of this guide. 'Mutual contribution' means what each organisation will put into the partnership. To make contributions visible, transparency around what each CSO contributes is important.

When discussing mutual contributions, you could look at what each organisation can and has the capacity to do, and then discuss what that will bring to the partnership.

### Step 6. Allocation of roles and tasks

There are clear guidelines pertaining to North-South partnerships which define the roles each organisation must have. For example, a Danish partner cannot engage in direct implementation without the involvement of a local partner. Clarity concerning roles and tasks is a necessity for a healthy and stable partnership. Some roles and tasks can be agreed ad hoc, whilst others are dictated by the

partnership and the two organisations involved.

In the course of a partnership analysis, it can be a good idea to take a close look at the various tasks that have to be performed during the course of the partnership, and pinpoint who is responsible for each task and what it will involve. You can use the form below for inspiration for this process.

When discussing roles, it is important that the two organisations mutually respect each other's ability to independently plan and execute their work within the framework of common understanding.

### Step 7. Cataloguing knowledge and mutual influence

A partnership analysis of the type described above generates a lot of different knowledge which can be used moving forward. An important point about partnership analyses is that partnership also makes demands of the organisations themselves. That means that some roles and tasks might require the organisation to find new capacity, or joint discussion of values and visions within a partnership can influence those of the partners.

Openness to such influence is important, along with accepting that CSOs develop partnerships and that we develop as a result of them.

Cataloguing knowledge can take many different forms. One option is to use a form such as the one below. In this instance, the inclusion of values, expectations and roles has been prioritised.

Cataloguing and drafting a plan for the rest of the process are important before the seminar is convened. We recommend setting up a follow-up committee for this purpose, with representatives from both or all the partners. They can carry on working on experiences, which can result in a partnership agreement, defining values, expectations and roles.

### ! Good advice

- Performing a partnership analysis requires that the organisations do not rush onwards and skip the reflection and decision-making phase. The analysis can indicate factors which should be changed in one or both organisations, and it is therefore important to respect the phases in organisational development. CSOs ought to carefully consider the requirements made of them for a partnership, and plot in a reflection and decision-making phase before making changes within their organisation which can have major ramifications moving forward.
- Experience indicates that the partnership analysis should last one or two days, depending on the level of familiarity, trust and experience between the partners. If the analysis is performed in a hurry, there will not be sufficient content in the process. Remember to prioritise the process. Everyone should be given the chance to express their views. Have the programme facilitated by an external consultant if at all possible. Ensure that someone takes minutes of the main points, and that there is clear agreement on what the next step for each organisation will be.
- The process is important. Sufficient time and resources must be allowed to clarify and reconcile values, expectations and roles. Realistically assess the resources of North and South with regard to personnel, time and money.
- Ownership to enter into a partnership analysis is a necessity for a good process. That ownership must be shared between the parties involved.
- In common with the other tools in this guide, representation in connection with a partnership analysis should take into account that there can be different stakeholders and perspectives in terms of sex, age, religion and so on.
- Repeating an analysis again after a few years can be recommended, to adjust and follow-up on the decisions made the first time around.



<b>CSO A'S EXPECTATIONS OF</b>	<b>THE PARTNERSHIP</b>	<b>CSO B'S EXPECTATIONS OF</b>
Development of the partnership...	We will jointly develop the partnership towards...	Development of the partnership...
Communication...	We will communicate by...	Communication...
Joint advocacy campaigns...	We will run joint advocacy campaigns focusing on...	Joint advocacy campaigns...

<b>CSO A</b>	<b>THE PARTNERSHIP</b>	<b>CSO B</b>
We will...	We will jointly...	We will...
Our core values are...	Our mutual core values are...	Our core values are...
Our vision is...	Our mutual vision is...	Our vision is...

<b>CSO A'S CAPACITY</b>	<b>A'S CONTRIBUTION TO THE PARTNERSHIP</b>	<b>B'S CONTRIBUTION TO THE PARTNERSHIP</b>	<b>CSO B'S CAPACITY</b>
Awareness of funding modalities...	Optimal utilisation of modalities	Local inclusion	High level of inclusion in the local community...
Awareness of the advocate organisation's work within disabled rights	Practical experience with rights access within the disabled field	Experience of communication with and involvement of the state	Experience with national advocacy campaigns...
...	...	...	...

**Note:**

- A position paper is available for download from CISU's web site on partnerships for inspiration.
- Examples of collaboration and partnership agreements are also available on the site, which can be used by organisations when drafting agreements covering a partnership
- Apart from the different reflections described above, a number of the other exercises and tools referred to in this guide can also be used when working with a partner. They can include a context analysis or an Octagon, which can be jointly used by both organisations, and the results compared and discussed.

	CSO A'S CONTRIBUTION	CSO B'S CONTRIBUTION
Values		
Expectations		
Roles		
...		

TASK/ROLE WITHIN THE PARTNERSHIP	PERSON RESPONSIBLE	DESCRIPTION OF TASK/ROLE
Monitoring and reporting	Project coordinator X	X's role is continuous monitoring of implementation of ... and reporting to... every three months
...	...	...
...	...	...

# PURPOSE CHECK

## ➔ Purpose:

Everyone within an organisation should be aware of its purpose. I.e., a shared vision of the world, and what it is the organisation wants and can give to move in the direction its vision points in. In many cases, this will involve the organisation's vision and mission, but in other associations, the values and objects clause will more or less cover the same. The purpose check tool combines this, by looking at whether we agree on the vision and purpose of an organisation.

## Use and description:

A purpose check can help organisations to define or rediscover their purpose. If there is no reasonable level of agreement on an organisation's purpose, there is a risk of pulling in different directions with no common direction and objective. The exercises below can be performed together or individually. Each can help raise awareness and increase understanding of the organisation and its work.

## Time:

➔ A couple of hours at least should be allowed for each of the exercises below.

## Resources:

Including representatives of different levels and/or departments in a purpose check is recommended. Otherwise, the most important resource is time.

## Procedure:

**Step 1. Vision** – what we want to achieve  
An organisation's vision defines what we want to achieve. The objective we are aiming to reach. The situation we are working towards. The more clarity and agreement there is concerning an organisation's vision, the easier it becomes for the organisation to attract volunteers and committed individuals to work towards its realisation.

The exercise is based on an organisation which has not yet formulated its vision. If the organisation has already formulated a vision, the exercise can still be performed if deemed to be beneficial. In such instances, the exercise can be concluded by comparing the two visions.

- If necessary, divide the participants into two groups of suitable size (5-6 people).
- The participants will use keywords to describe the values they think best characterise the joint belief – a word on a Post-it stuck on a wall. If there are many words (e.g. more than 15), the total can be reduced by then giving each group member a certain number of votes in the form of rating the words they like best by awarding them a number of points according to predefined scale.
- By comparing the keywords/values together, the 'ideal world' can be described for the field concerned. Imagining that the organisation (along with others perhaps) has enough resources and skills to make a difference is permitted here.
- If there are several groups, comparison, discussion and notation can be used to arrive at a common result.
- If there is a lot of disagreement on how to describe the vision, an inner schism within the organisation may have been revealed, which will need more work.

A vision will often - but not always - be included in the articles of association. It ought to be on the agenda of the AGM to ensure that it complies with the wishes and understanding of the members.

## Step 2. Purpose/mission – what we do:

The purpose is derived from the vision, and will describe what the organisation can best contribute.

- If necessary, divide the participants into two groups of suitable size (5-6 people).
- Discuss the following:
  - What type of organisation are we?
  - What resources do we have?
  - What ways of working do we believe in?
  - Who do we work with?
  - What changes can be detected as a result of our work?
- If it is difficult to achieve agreement on the above, you may have revealed a deep-seated internal schism, which will need more work.
- Based on what transpires during the discussion, try to quickly, precisely and preferably firmly describe what characterises what you do.

The purpose or mission of an organisation can often be found in the articles of association. It ought to be on the agenda of the AGM to ensure ownership and compliance with the wishes and understanding of the members.

### Good advice:

When the process of defining vision and mission is completed, we recommend taking a look at the relationship between vision, mission/purpose and activities. The Three Circle Method could be used for this purpose (see below). Discussion on

vision and purpose/mission is essential to an organisation. If there is no agreement, relationship and common understanding at these levels of an organisation, it will often have a knock-on effect to other levels.

## EXAMPLES:

### **Red Barnet (Save the Children Denmark):**

Our vision is a world in which every child's right to participate, survive, develop and protection is realised.

Our mission is to ensure immediate and lasting improvements for children at risk in their lives and to fight for positive changes to the way the world treats children.

### **International Aid Services**

The vision of IAS is a 'godly, transformed society'. We see a transformed society built on love, justice and peace, in which people live in respect and care for the integrity of the individual and can develop themselves in a holistic perspective (spirit, soul and body).

IAS' mission is to 'save lives, promote self-reliance and dignity through human transformation, going beyond relief and development'.

### **Uganda National Action of Physical Disability (UNAPD).**

UNAPD envisions a society where people with physical disabilities are accorded rights enjoyed by all citizens

Mission

UNAPD works to remove barriers that prevent people with physical disabilities from enjoying, on an equal basis, all the rights enjoyed by the citizens of Uganda.

# STAKEHOLDER ANALYSIS

## ➔ Purpose

A stakeholder analysis can create an overview of external and internal stakeholders and bodies with influence on an organisation, which can be useful in deciding which bodies and stakeholders need to be involved in an organisational development process, and to identify challenges, opportunities, opposition and support for organisational development processes.

## Use and description

A distinction is usually made between external and internal stakeholders. External stakeholders can be partner organisations, the authorities or donors. Internal stakeholders can be members, (possibly divided into new and old members), supporters and contributors, and the board.

A stakeholder analysis seeks to analyse at a level which reveals various attitudes or interests. This can mean, for example, dividing members up into young and old, and the target group into men and women.

## ⌚ Time

A thorough stakeholder analysis can take up to three hours. If involving representatives from all stakeholder groups to qualify the results, it can take much longer.

## Resources

What resources are needed to run a stakeholder analysis depends on how many bodies and stakeholders are directly involved in it. If you are fairly familiar with the various bodies or can include them in the analysis, it is possible to assess their attitude to the changes to be made.

## Procedure

### Step 1. Stakeholder brainstorm

Start by brainstorming which stakeholders could be relevant to consider with regard to the organisational development process you need to perform. Write the names of stakeholders below each other (one on each line).

### Step 2. Analysing stakeholders one by one

Analyse each stakeholder working down the form, focusing on their relationship to the organisation, their attitude to the organisational development process, and their motivation and interest in it, plus any opposition to the process.

### Step 3. Stakeholder analysis results

The stakeholder analysis can now be used to decide which stakeholders ought to be included in the organisational de-

velopment process moving forward, and which ought to be included in relation to the analysis, reflection and decision-making, and implementation phases. If required, the form below can be supplemented by an extra column to describe how and when the stakeholder or body will be involved in the organisational development process.

The list of bodies can also be used to decide whether there are any which require special consideration, or to include in the process in a certain manner, to get through the organisational development process as efficiently as possible.

**! Good advice**

- Perform a stakeholder analysis during the implementation phase of the organisational development process, for example. The analysis is relatively simple to perform, and can save the organisation a number of problems at a later date, by being aware of who can be involved in the development process at an early stage.
- A stakeholder analysis also helps in the planning of projects and the like, by changing the focus of some of the columns which concentrate on organisational development.

STAKEHOLDER	RELATIONSHIP TO ORGANISATION	RELATIONSHIP TO ORGANISATIONAL DEVELOPMENT PROCESS	INTEREST/ MOTIVATION RELATED TO PROCESS	POSSIBLE OPPOSITION RELATED TO PROCESS
Stakeholder A				
Stakeholder B				
Stakeholder ...				

# THE THREE CIRCLE MODEL

## ➔ Purpose

Using the Three Circle Model allows detailed analysis of the organisation and its context. The analysis is designed to ensure that the main elements of an organisation are analysed, and to focus on how such elements influence and are related to each other. The aim is to identify strong and weak aspects of the organisation as it stands, to be able to designate important areas for organisation development initiatives.

## Use and description

This is a relatively simple model, which can be used by any size of organisation. It is especially good for focusing on the 'inner life' of the organisation, and forcing you to regard your organisation as a whole, along with the cohesive strength

linking the various elements. It can be compared with the Octagon, as it also examines the various elements of the organisation, but is more open and promotes more discussion in its approach.

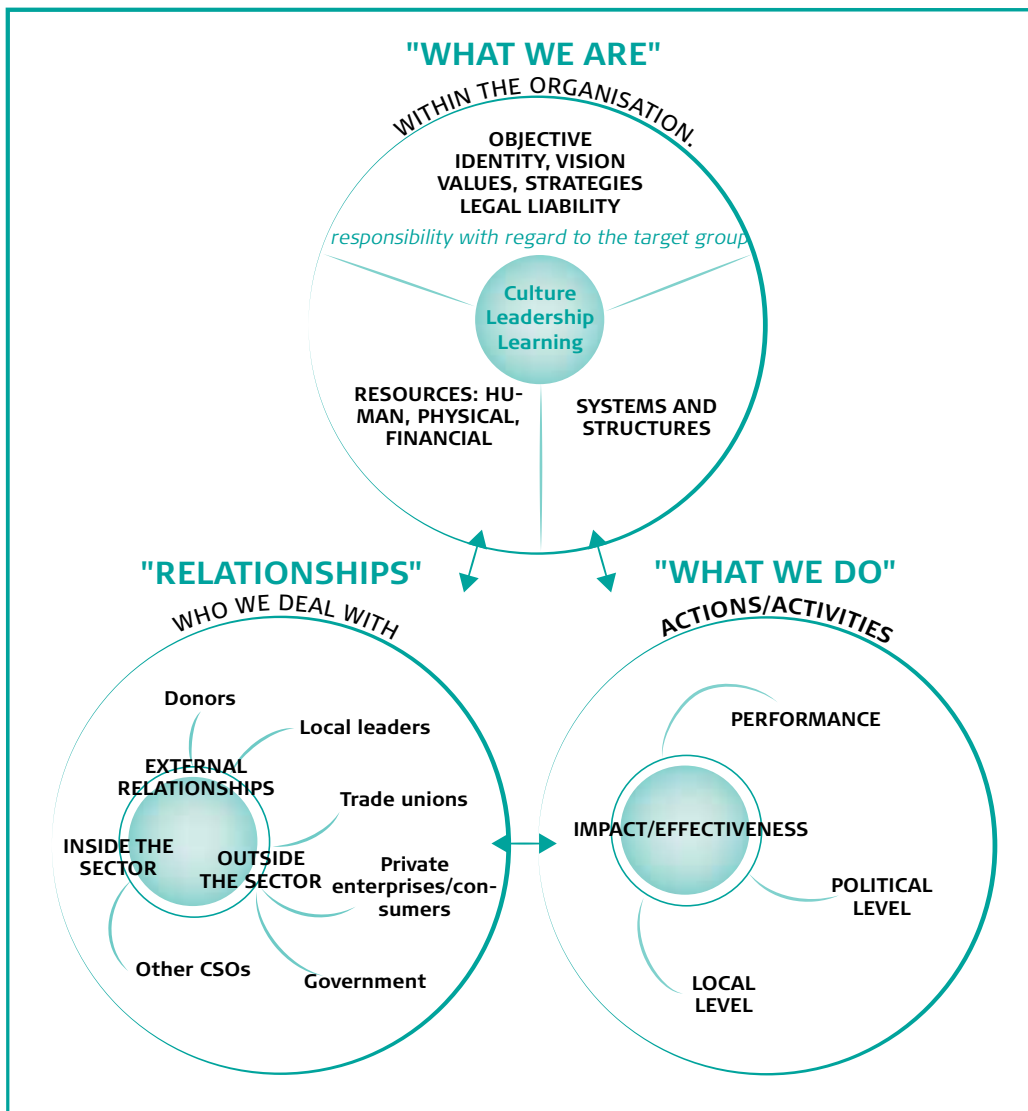
## 🕒 Time

The model can be used during a single workshop, or as a process in which a number of selected key stakeholders are involved and which is concluded with a workshop.

## Resources

The process described here will require one or two people from the organisation to become familiar with the model, and to facilitate the process. The following proposed process is based on how the model can be used for a one-day workshop.

## CONTEXT



**Procedure**

**Step 1. Preparation before the workshop.**

The board or management of the organisation will appoint one or two facilitators for the process. Consideration is also given to which groups ought to be included in the meeting. They can be board members, staff, a selection of members etc. deemed to be relevant for inclusion.

In contrast to the exercise described above, the facilitators will prepare by being able to describe several details of each of the elements in each of the three circles. The facilitators need to find specific examples from the organisation of what is meant by the sub-elements in the model in advance. For example: a detailed explanation of what "culture, leadership, experience-gathering" could be in the organisation should be at hand. There could be a "volunteer culture" with a flat management structure.

**Step 2. Workshop introduction**

The facilitators introduce the background and objective of this particular exercise. The objective is to identify the strong and weak aspects of the organisation as

it stands, plus its cohesive strength. Once this has been done, the major areas for organisation development initiatives can be designated.

The Three Circle Model is then presented, and questions invited to ensure that all participants have a clear picture of what the circles symbolise within their organisation. The facilitators will supplement presentation of the model with specific examples related to the organisation.

**Step 3. Group work on identity, actions and relationships**

A group of 4-6 people will work on each of the three circles. Group work will be based on the questions below.

**Step 3A. Group work on the circles**

Each group will be given a large diagram of the three circles and a Post-it block, used to stick their observations on the diagram. Group discussions are divided into two phases. The groups are asked to discuss the content of the three circles in the first phase. They are allowed an hour for this phase. The facilitator will keep discussion on each of the circles going. The idea is that all groups look at all three circles.

IDENTITY	ACTIONS	RELATIONSHIPS
<ul style="list-style-type: none"> <li>• Is our objective evident to everyone?</li> <li>• Does our organisation have a special culture?</li> <li>• Is the management and decision-making structure clear?</li> <li>• Have we got the relevant strategies to achieve our objective?</li> <li>• What human, financial and material resources do we have? And are they relevant according to our objective?</li> <li>• What internal systems do we have for learning, monitoring and accounts?</li> </ul>	<ul style="list-style-type: none"> <li>• Is what we do what we want to do?</li> <li>• Are we capable of executing our planned activities/projects?</li> <li>• What are the organisation's typical methods of working?</li> <li>• Do we achieve the results we want from what we do?</li> <li>• What are our specific results?</li> <li>• How does the work we do with members and target groups function?</li> </ul>	<ul style="list-style-type: none"> <li>• Do we appear credible to the public?</li> <li>• How do we work with our partners?</li> <li>• How do we collaborate with donors and the relevant authorities?</li> <li>• What relationships do we have to similar organisations?</li> <li>• Are we active in relevant networks and political fora?</li> </ul>

With regard to the influence exerted by the context/surroundings:

- Identity:** Are there any aspects of our surroundings which can affect our identity?
- Actions:** Are there any aspects of our surroundings which can affect our actions?
- Relationships:** Are there any aspects of our surroundings which can affect our relationships?



### **Step 3B. Group work on context/surroundings**

Using the findings from the first phase, the groups now focus on how the context/surroundings can influence actions, identity and relationships respectively. Initially, the groups can brainstorm how context exerts influence. They can then use Post-its to mark the most dominant or important influences from the context.

### **Step 4. Joint analysis and identification of organisational issues**

The facilitators gather the participants in plenum for a joint round-up. If possible, a large Three Circle Model laid on the floor or a table can be used to illustrate the findings of the round-up. Let one group present their observations in relation one of the circles. The other groups can then comment. Another group can then present its observations on the next circle to be commented by the others, and so on.

Once all three circles have been considered and commented, the participants are asked to assess the cohesive strength linking the three circles in their

organisation, and to suggest how it could be bolstered.

Conclude the analysis by looking at the context, and what the organisations have each defined as being the major external influences.

The facilitator should summarise the results of the analysis. The results will summarise strengths, weaknesses or dilemmas in relation to each of the three circles, the cohesive strength between them, and the effects of (and interplay with) the context.

### **Step 5. Summary of analysis observations**

Conclude the workshop with a summary of the results gleaned from the analysis, and give the participants the opportunity to comment on what they think could be the next step to address some of the weaknesses, or to utilise some of the potential defined.

## DIALOGUE-BASED METHODS OF DATA GATHERING

Alternatives to the tools described in the guide are interviews and dialogue-based methods of data gathering. Interviews with individuals and/or focus groups can be used. These methods are based on dialogue which is more or less structured for either an individual or a group. They can also be used for a mutual "interview" role, in which two people take turns to interview each other.

What these approaches to obtaining knowledge or analysing the organisation have in common, is that they can quickly result in a large volume of data, which requires a lot of work to analyse. Neither will they necessarily set the same joint reflection processes in motion, which we want to inspire when working with tool-oriented methods of creating an overview of the organisation.

There are a couple of things to bear in mind if using a more dialogue-based approach to understanding an organisation.

- Keep the number of interviews and volume of data at a level at which

thorough analysis is possible

- Ask questions which help create the basis for reflection, and which can strengthen motivation in relation to working with a change process
- Ensure that the people interviewed represent a wide cross section of the organisation, to get the full picture of the whole organisation and not just a small part of its current status.

The dialogue-based methods can be combined with some of the tools described in chapter 4. You could opt to supplement the analysis performed using tools in plenum with a couple of interviews for example, which could go into more depth on opportunities highlighted by the analysis. Or you could hold interviews as part of the clarification process, to qualify the basis on which the tools are chosen for the analysis phase.



## **GUIDE TO ORGANISATIONAL DEVELOPMENT IN CIVIL SOCIETY ORGANISATIONS**

This guide is aimed at associations and organisations which want to work on their own development to be even better at fulfilling their objectives, and reaching their strategic goals.

It presents a model for organisational development, plus a series of tools and exercises which can be used in the various phases of a development process.

The guide was developed by CISU – Civil Society in Development and Disabled Peoples Organisations Denmark.

