

PN-ABX-375

**TRAINING AND SUPERVISORY
CONSULTANCY TO THE PLANNED
PARENTHOOD FEDERATION OF NIGERIA
(PPFN)**

JUNE 4-9, 1995

Michael Hall

FAMILY PLANNING MANAGEMENT DEVELOPMENT

**Project No.: 936-3055
Contract No.: DPE-3055-C-00-0051-00
Task Order No.: A1700 NGPPF**

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I. EXECUTIVE SUMMARY

The consultancy of the Family Planning Management Development Project [FPMD] June 4 - 9, 1995 to the Planned Parenthood Federation of Nigeria [PPFN] was part of an ongoing assistance plan that had been [re]implemented in February 1995.

FPMD had an approved, comprehensive Management Development Plan [MDP] and budget to work with PPFN in Jan. 1994. Indeed, work had commenced and an in-country Project Coordinator retained to supervise the implementation of the project. Overall technical oversight was to be provided by FPMD's Senior Program Officer for Africa through continuous communication with the Project Coordinator and quarterly visits to Nigeria. In the first quarter of 1994 technical assistance began but was abruptly suspended in April due to the decertification of Nigeria as a developing country eligible for family planning assistance. With this change in status, the Project Coordinator returned to the U.S. to oversee project close out activities.

The ban on activities was lifted in Aug. of 1995 but the Project Coordinator was not allowed to return to the country and resume activities pending a total review of projects by USAID Nigeria. That review was completed by Nov. and the Coordinator returned to Nigeria with a revised MDP to reflect the limited time left to the End of Project [EOP] date for FPMD [Sept. 1995]. Project activities recommenced in Feb. 1995.

The purpose of this consultancy was two fold. The first was to facilitate a two day leadership workshop for the National Executive Committee of the Board of Directors of PPFN. The second was to provide technical monitoring for project activities and to finalize a budget and list of activities to the EOP.

The workshop was well received and it is clear that volunteers are an asset to the organization that could be better organized and better utilized. While the training was an important first step, full utilization will only occur when volunteers and senior staff are afforded comprehensive and continuous training and follow up in all aspects of volunteer development. This is an area that is often the target of criticism or skepticism on the part of international donors yet rarely one in which they have been willing to invest their resources.

The Project Coordinator has done an excellent job in implementing management strengthening activities with PPFN. Indeed, given the short time that the project has been recommenced, an incredible amount of work has been done. A final draft of the Clinic Procedures Manual [CPM] has been completed, an orientation clinic for training established, commodity storage procedures revised and implemented, an in depth assessment of financial systems completed, and Local Technical Consultants identified to perform a wage comparability study and salary banding, determine an overhead rate for PPFN and to begin revising the chart of accounts and computerizing the financial systems. Clinic level procedures for money and logistics management have been draft and mid-level computer training has begun at headquarters.

The amount and quality of management assistance being provided in such a short time, in Nigeria, is a singular accomplishment. Much of it is being accomplished through the development and use of Local Technical Consultants. It is also important to recognize that it is having a direct and immediate impact on clinical services while at the same time strengthening the overall infrastructure of the organization.

II. BACKGROUND

Following a protracted period of prohibited U.S.-funded family planning assistance in Nigeria, FPMD returned to work with the Planned Parenthood Federation of Nigeria [PPFN] in Jan. 1995. During the first three months of 1994, prior to the cessation of activities in April, FPMD had begun implementation of its comprehensive Management Development Plan [MDP] with PPFN. Assistance was to be provided in a number of management areas with particular emphasis on strengthening systems, procedures and personnel that would have a direct and immediate impact on [enhanced] service delivery. High priority was given to the development of a Clinic Procedures Manual, the improvement of logistics tracking systems, the development of several "Orientation Clinics" [model clinics] for improved quality and training, updated and computerized financial and personnel systems and a more useful and relevant group of national volunteers/Board members [see MDF].

In addition to providing assistance in a large number of management areas, FPMD was also committed to developing local technical assistance by linking it with its own, expatriate expertise. FPMD technical staff for a given management area to be addressed would make an initial visit to PPFN. During that visit, a long term scope of work would be developed with and for local technical assistance individuals or groups previously identified by PPFN and FPMD. Local Technical Consultants [LTC] would then provide the bulk of the actual assistance under the overall technical guidance of FPMD technical staff.

Given the scope of the work to be done with PPFN, the extensive use of LTCs and the generally poor communication infrastructure in Nigeria, it was decided to place an in-country Project Coordinator. That person was chosen in Dec. 1993 and began working with the initial implementation phase during the first quarter of 1994. When all activities were suspended in April, she return to the U.S. to oversee close out activities. The ban on assistance was lifted in

Aug. 1994 and the Project Coordinator was allowed to return to Nigeria in Dec. All assistance had to be reprioritized and rebudgeted given the End-of-Project [EOP] date for FPMD of Sept. 1995. A revised MDP was developed with PPFN and USAID Nigeria. Actual project assistance recommenced in Feb 1995 with the approval of the revised MDP and its budget.

In addition to local supervision and coordination provided by in-country staff, technical oversight of all project activities is also provided by the FPMD Senior Program Officer for FPMD. That oversight is accomplished through regular communication with the in-country coordinator and periodic supervisory visits to Nigeria. The Senior Program Officer, in addition to overseeing the technical approach and content of the assistance provide PPFN, also occasionally provides direct assistance or training during his in-country visits.

III. PURPOSE OF VISIT

General Objective

The general objective of the visit was to provide on-site technical oversight to the content and approach of FPMD's management development assistance to PPFN. The Senior Program Officer was also to provide a two day leadership training to the National Executive Committee of the Board of Directors of PPFN.

Specific Objectives

1. Provide two day leadership training to the National Executive Committee of the Board of Directors of PPFN.
2. With Project Coordinator and PPFN Executive Director, review progress to date on [re]implementation of the MDP.
3. With Project Coordinator and PPFN Executive Director, revise and rebudget MDP given progress to date and EOP date.
4. Review with USAID Nigeria progress to date, suggest revised activities and budget and possible longer term role for FPMD in Nigeria.

IV. ACTIVITIES

A. Board Training [see attachments for agenda and materials used]

1. Participants

The 20 participants included those members/volunteers of State Associations that had been

elected by the overall membership [dues payers] of PPFN to serve for two years on the National Executive Committee.

2. Purpose

The purpose of the training was to better understand and have a consensus on the duties and responsibilities of Board members and their specific roles in advocacy.

3. Content

Session 1 - Introductions

The workshop began with a participatory introductory exercise where participants physically moved to numbers hung on the walls that corresponded to their answers to a series of questions about them as individuals and their personal values concerning family planning.

After the facilitator reviewed the purpose and agenda with the participants, they were divided into groups to develop and present a group drawing that represented the overall present state of PPFN.

Session 2 - Duties of a Board Member

Participants were divided into four groups for a two part task. The first task was to list the four most important duties of a Board member. After those were developed and presented to the group as a whole, a final list of duties was synthesized in the plenary session. The facilitator then gave the groups a methodology for prioritizing and weighing each of the duties. This session end with the group presentations and the finalized and prioritized list of duties.

Session 3 - Expectations of Board and Staff

In group work, two groups were assigned to identify expectation of staff [by volunteers] and two to identify expectations of volunteers [by staff]. Groups presented and discussed their work and two, final list of expectations, one of volunteers and one of staff, were developed.

This concluded day one of the workshop.

Session 4 - Advocacy: Representing PPFN to the Community

This session began with an extended discussion on the definition of advocacy and examples from other parts of the world. Participants were then divided into four groups to identify ten specific advocacy activities they had seen or participated in that were

particularly successful. In the plenary session, participants shared their success stories and a master list of specific advocacy activities was developed. It was particularly stressed that advocacy must have a specific change or action in mind to be useful.

Session 5 - Evaluating the Board

Participants were given two self-evaluation instruments used to identify the individual styles and values they bring to group Board work and decision-making. After doing the assessments individually, four groups were formed to discuss the individual results and to record the group frequency of responses. Those group frequencies were presented during the plenary session. This session closed with a discussion of how different styles and values work/don't work together and how members and leadership need to recognize and respect those differences and use them to the advantage of the organization.

Session 6 - Closing

The content of the workshop was reviewed and initial follow on activity identified. The group identified the need to use the lessons of the workshop in their business meeting which was to continue for the remainder of the week.

B. Supervision of In-country Project Coordinator

Two days were spent with the in-country Project Coordinator discussing progress-to-date with the broad spectrum of management assistance being provided to PPFN. Considering the EOP date of Sept. 1995, several future activities were modified and /or revised. A final, revised MDP to EOP was developed and budgeted [see attachments].

Given his experience in this area, the Senior Program Officer also took advantage of his visit to spent time reviewing specific changes, made and contemplated, for the headquarters clinic as a model for change throughout the PPFN system. Half a day was spent in the clinic with the Project Coordinator and PPFN clinic staff.

The last day of the consultancy was spent debriefing the Executive Director of PPFN, the Project Coordinator and USAID Nigeria.

V. **FINDINGS AND RECOMMENDATIONS**

A. National Executive Committee

It is clear that the training was very useful to the volunteers as it was a constant topic of conversation during their business meeting the remainder of the week. It was most helpful for them to consensually come to agreement on their duties and expectations. It sets the groundwork, for the first time, to have some formally recognized ground rules for their activities and

behavior. This can also serve as excellent modeling for the respective State Associations they represent.

This kind of training needs to be done on a regular basis and repeated at the State level as well. While an excellent first step, time did not permit getting to many of the specifics of volunteer leadership development; namely organizing and running meetings and structuring the use of volunteer time either, at the national or State level.

There are many, very capable and knowledgeable volunteers who are willing to give much time and energy to PPFN. This resource will be best utilized when adequate training and follow up is provided and when staff receives training in volunteer development as well. While many international donors theoretically recognize the importance and value of the volunteers, few have provided the resources or the expertise to provide for their systematic development.

B. Project Activities

The project has accomplished an impressive amount in the short period since it recommenced. A final draft of the Clinic Procedures Manual [CPM] has been completed, an orientation clinic for training established, commodity storage procedures revised and implemented, an in depth assessment of financial systems completed, and Local Technical Consultants identified to perform a wage comparability study and salary banding, determine an overhead rate for PPFN and to begin revising the chart of accounts and computerizing the financial systems. Clinic level procedures for money and logistics management have been draft and mid-level computer training has begun at headquarters.

With the fast approaching EOP, both the Project Coordinator and PPFN need to be realistic concerning what they can accomplish during the remainder of the project. A revised budget was developed during the consultancy which reflects the expected inputs to the EOP.

Both the Project Coordinator and PPFN should feel very proud of the amount of positive change that has occurred over a very short period of time. What is particularly impressive is how both parties have ensured that all inputs have had a direct and immediate impact on clinical services while at the same time strengthening the long term infrastructure of the organization. PPFN is uniquely positioned for a large growth in their client load and its challenge now will be to attract and retain clients in sufficient numbers to take advantage of its unused capacity.

ANNEX I - LIST OF CONTACTS

A. PPFN STAFF

National Headquarters

Dr. A. B. Sulaiman, Executive Director

Mrs. Foyin Oyebola, Program Officer/Service

Mrs. Tayo Olugbemi, Assistant Program Officer/Research and Evaluation

B. USAID/NIGERIA

Mr. Stephen Spielman, AID Affairs Officer

Mr. Felix Awantang, Health, Population & Nutrition Officer

Mrs. Bummi Dosunmu, Program Manager, Family Planning

ANNEX II - REVISED BUDGET ACTIVITIES

STAFF AND CONSULTANTS/TRAVEL/PER DIEM

• Michael Hall's TDY (10 days) + Home Office (10 days) = 50% NGPPF/CNC, 50% NGPPF/MAE	
Per Diem (7 days):	\$ 1,900
Travel/San Jose-Lagos RT:	\$ 3,800
Consultant Rate (Incl. HSV, OH and Fee):	\$ 30,311
• Betty Gonzales' follow-up TDY from July 11-25 & CPM work in US (+23 Days) = NGPPF/CNC	
Per Diem (14 days in country):	\$ 2,660
Travel/Newark-Lagos RT:	\$ 3,500
Consultant Rate (Incl. HSV, OH and Fee):	\$ 13,489
• Anyika's work (Incl. OH @ 50%) = NGPPF/LOG	\$ 18,000
Per Diem	\$ 1,464
Travel	\$ 750
Other	\$ 50

SUBCONTRACT

• Amos' follow-up TDY = NGPPF/FIN	
Subcontract:	\$ 21,403
Travel/Nairobi-Lagos RT:	\$ 1,155

PARTICIPANT COSTS

• MT Course Participants = NGPPF/FIN:	
Course fees	\$ 8,400
Travel	\$ 5,100
Per Diem/Allowance	\$ 5,354
HAC Insurance	\$ 400
Other NGPPF/LOG:	
On Job Training/S&L Man	\$ 700
On Job Training/St Man	\$ 2,200

OTHER COSTS

• Materials & Supplies = NGPPF/CNC	\$ 4,503
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• Telephone & Fax = (Divided among six FAs)	\$ 9,702
• Postage & Shipping (Divided among six FAs)	\$ 2,097
• Printing & Xerox = NGPPF/CNC	\$ 1,708
• Outside Services	
• Clinic PO's = NGPPF/CNC	
Orefo	\$ 854
Agbede	\$ 656
• Susan's Secretary PO (\$10/day through Sept.) = NGPPF/CNC	\$ 1,210
• Susan's Driver = NGPRG	\$ 6,120
• Accounting PO = NGPPF/FIN	\$ 15,000
• Personnel Management Firm PO = NGPPF/HRM	\$ 6,000
• Project Equipment (Sweethill PO + Shipment/related costs) = NGPPF/OPS	\$ 30,151
• Manual Draft = NGPPF/CNC	\$ 2,000
• Other Costs	\$ 1,197
• Balance of MOU = Divided between CNC/FIN/OPS	\$ 14,375
TOTAL	\$ 216,209

ANNEX III - ATTACHMENTS

- A. PPFN Workshop Agenda
- B. PPFN Workshop Rapporteur's Notes
- C. Competing Organizational Models
- D. The Work of the Board
- E. Values and Motivation
- F. The Problem-Solving Process

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WORKSHOP FOR THE EXECUTIVE VOLUNTEERS
OF
PLANNED PARENTHOOD FEDERATION OF NIGERIA
June 5 - 6, 1995

Monday June 5

- | | |
|---------------|--|
| 8:30 | Opening Ceremonies

President, National Executive Board
Executive Director |
| 9:00 - 9:30 | Introductions

Facilitator & Participants
Introduction Exercise
Purpose of Workshop
Agenda |
| 9:30 - 10:30 | Duties of A Board Member

Theory and Discussion
Group Work |
| 10:30 - 11:00 | Break |
| 11:00 - 11:30 | Group Work Continued |
| 11:30 - 1:00 | Prioritizing Board Duties

Group Work
Plenary |
| 1:00 - 2:30 | Lunch |

2:30 - 3:30 **Expectations of Board and Staff**
Theory and Discussion
Group Work

3:30 - 4:00 **Break**

4:00 - 5:00 **Expectations [cont.]**
Group Presentations
Plenary

5:00 **Closing**

Tuesday June 6

8:30 Opening

9:00 - 10:30 **Representing PPFN to the Community - Advocacy**
Theory and Discussion
Individual Presentations

10:30 - 11:00 **Break**

11:00 - 1:00 **Advocacy [cont.]**
Group Work
Presentations

1:00 - 2:30 **Lunch**

2:30 - 3:30 **Evaluating the Board: Problem Solving**
Theory and Discussion
Group Work

3:30 - 4:00 **Break**

4:00 - 5:00 **Problem Solving [cont.]**

5:00 **Closing**

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PLANNED PARENTHOOD FEDERATION OF NIGERIA
REPORT ON THE EXECUTIVE VOLUNTEERS LEADERSHIP WORKSHOP
HELD FROM 5TH - 6TH JUNE, 1995 AT AIRPORT HOTEL, IKEJA, LAGOS

BACKGROUND INFORMATION:

WORKSHOP OBJECTIVE

To improve the skills of PPFN volunteers in the execution of their roles as volunteers.

WORKSHOP PROCEEDINGS

DAY ONE

MORNING SESSION

OPENING

The workshop started at about 9.05a.m with an opening remark by the PPFN Executive Director (ED), Dr A.B. Sulaiman who welcomed all participants to the workshop. He disclosed that the workshop was funded by United State Agency for International Development (USAID) through Management Sciences for Health (MSH) for Planned Parenthood Federation of Nigeria (PPFN) volunteers.

He added that the workshop would focus essentially on leadership training. The ED informed participants that the MSH component was the only AID project currently being implemented by PPFN and that the other two components were being reviewed. He expressed his appreciation to Dr Susan Aradeon for her tireless efforts in making the workshop a reality.

CHAIRMAN'S OPENING SPEECH

In his opening speech, the National Chairman, Alhaji Abdulkadir Abdullahi disclosed that the workshop funded by USAID was the first of its type in PPFN. He Welcomed Michael Hall, the Chief trainer for the workshop to Nigeria and disclosed that the seminar would be in two parts.

Highlighting the seminars, he stated that the first one would be for selected board members with the main purpose of improving their skills, roles and functions as decision makers while the second would be for all National Council members with the purpose of developing their skills in advocacy and negotiation.

Concluding his remark, the Chairman thanked USAID and FPMD/MSH for sponsoring the capacity building workshop.

INTRODUCTIONS

Self introduction was carried out by both participants and trainer stating the following:-

- Name.
- State Association represented,
- Number of years as PPFN Volunteer
- Profession

Twenty-two senior PPFN volunteers and two delegates from the Planned Parenthood Association of Ghana participated in the workshop.

(List of participants is attached).

DEFREEZING EXERCISE

The main objective of this exercise which was a number game was to build team spirit among participants. With six numbers (1-6) placed on the wall, series of questions were asked for which participants were asked to stand in-front of the number that answered the question for them.

After the Exercise a handout titled "Competing Organizational Models" was distributed to participants. The handout highlighted the differences between a bureaucratic organization and a strategic organization. A bureaucratic organization as stated in the handout has the same features as what transpires in the industrial era while the strategic organization has moved into the information age where there is decentralization.

DUTIES OF BOARD MEMBERS

The chief trainer called on the participants to figure out what special roles they can perform which they think staff cannot do and identify ways in which PPFN as an organization can make the best use of their time.

Group Work I

To get a clearer understanding of the duties of a board member. participants were divided into 4 groups. Each group was to draw up the five major duties it believed PPFN board members should be involved in both at the National and State Levels.

Below are the presentations of the groups:-

Group I	Group II	Group III	Group IV
1. Policy Making	1. Formulate Policies	1. To communicate FP messages to various states and Local Government Areas	1. Overall Planning and Policy Formulation
2. Programme Development /Support.	2. Engage in Advocacy	2. To influence Government Policy and legislation on FP activities.	2. Sourcing for funds
3. Recruitment (Staff & Volunteers)	3. Engage in Resource Development - Fund Raising Facilities - Recruitment of volunteers /staff	3. To interpret I.P.P.F policies to suit local needs and norms	3. Review of programmes / Decision making
4. Advocacy	4. Monitoring/ Evaluation - Meeting - Field Visits	4. To improve on volunteer drive and enlightenment	4. Staff and Volunteer Recruitment
5. Evaluation/ monitoring	5. Implementation - Resource Person - Facilitator	5. To disseminate FP Information, goals and objectives of P.P.F.N. through media organizations.	5. Advocacy/ public Information, Education and Communication.

From the presentations, four major functions came out clearly as what board members should be doing. These are:-

- Policy making and planning
- Advocacy
- Monitoring/Evaluation
- Resource Development

Group work II:

Prioritization of Board Functions:

Each group was asked to prioritize the functions highlighted above. Each function was to be assigned points to make a total of 100. No two tasks should have the same point and there should be a minimum difference of five points between functions.

Highlighted below were the presentations of the groups:-

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5

Groups	Functions			
	Policy Making	Advocacy	Evaluation/ Monitoring	Resource Development
Group I	30 points	20 points	10 points	40 points
Group II	35 , , ,	20 , , ,	15 , , ,	30 , , ,
Group III	35 , , ,	20 , , ,	15 , , ,	30 , , ,
Group IV	35 , , ,	20 , , ,	15 , , ,	30 , , ,

From the various group reports and discussions that emanated after the presentations, it came out clearly that resource development was the most important function of the Board.

Proceeding further, the trainer asked the following questions concerning PPFN volunteers attitudes towards resource development drive:

- Current activities of PPFN volunteers concerning getting funds for the organization.
- The present percentage of volunteers time spent on sourcing for resources for the organization.
- The qualities/requirements a volunteer should have to qualify as board member.

Out of the three questions, the third question was treated in detail.

QUALITIES OF A GOOD VOLUNTEER

- Must be willing to sacrifice both his time and money
- Must be committed (conviction)
- Must be willing to serve the organization over his own needs
- Must be interested
- Must be adequately mobilized so as to be able to mobilize other volunteers and resources for the organization
- Must be ready to accept responsibility
- Must persevere

Roles of PPFN Board Members

Volunteers were called upon to view their roles in line with the following:-

- To always identify areas where their expertise and skills could be put to the best use in the organization.
- Board president to evaluate other board members and,
- To consider representation on the board based on suitability for the post through job description rather than through election.

Motivational Assessment Exercise:

The exercise involved participants assessing themselves in line with their opinion and the opinions others have about them. For this exercise, a motivation questionnaire was distributed to participants. The questionnaire consists of series of statements for which participants were to select the statement that best describes their interactions at work or in volunteer situations.

Presented below are the results:-

Groups	Affiliators	Achievers	Influencers
Group I	39 points	31 points	26 points
Group II	50 ,, ,,	28 ,, ,,	20 ,, ,,
Group III	44 ,, ,,	32 ,, ,,	16 ,, ,,
Group IV	54 ,, ,,	34 ,, ,,	22 ,, ,,

The Affiliators are those who have:-

- a desire to be popular
- a strong need for interaction
- a wish to avoid being alone
- a desire to help others

The Achievers are those who have:-

- a desire for excellence
- a preference for work he or she considers significant
- a need for advancement
- a strong wish for feedback

The Influencers are those who have:-

- a desire to give advice
- a need to lead
- the need to achieve status
- a desire to see their ideas predominate

The lesson learnt from the exercise was that a Board would require the three different groups of people to function properly while a Board that does not include some representatives of each motivational type will tend to function poorly. In addition, the trainer stated that having many people in a meeting does not necessarily mean that the meeting would be a good one. Rather, attention should be paid to:-

- who is there
- why they are there and,
- how they can work together as a team.

AFTERNOON SESSION

The session started at 2.30p.m. During the session, the topic "Expectations of Board and Staff Members" as regards the four highlighted duties of board members was treated.

Group Work III

Each group was asked to pick one function and highlight the part both board and staff members have to play under each function. To this end, the following results were presented by the groups:-

Groups	Board Functions	Staff Functions
Group I	- Define/Review Problems	- Drawing up of plan of action
<u>Topic:</u>	- Mission Statement	- Budget preparation
Policy Making and Planning.	- Set Goals	- Provides data for evaluation
	- Define Measurable Objectives	
	- Budgetary Allocation	
	- Evaluation	

Groups	Board Functions	Staff Functions
Group II	- Sourcing for fund	- Develop projects
<u>Topic</u>	- Recruitment of personnel (volunteers/staff)	- Facilitate the process (correspondence/follow up)
Resource Development	- Educate/convince authorities to give support both in cash and kind	- Implement projects
	- Monitor/evaluate	- Complement efforts of board recruiting personnel
	- Make optimum use of time	- Implement Programmes/project e.g Fund Raising.
	- Approval of projects	- Staff provide tech. input for monitoring/evaluation.
		- Take custody of plant, equipment, vehicle etc.
		- Making optimum use of time.

Groups	Board Functions	Staff Functions
<p>Group III</p> <p><u>Topic:</u></p> <p>Advocacy.</p>	<ul style="list-style-type: none"> - Carry out campaign and information to government officials, traditional rulers, opinion leaders etc. - Volunteers serve in committees and this is an effective pedestal to disseminate information on advocacy. - Volunteers deliver papers in public functions, schools, colleges, and universities. - Advocacy can be effectively achieved by closely liaising with the media both print and electronic. - Advocacy can be achieved by working closely together with govt. clinics and primary health care centres on family planning and population activities. - Formulate working relationship with traditional healers on effective distribution of modern contraceptives 	<ul style="list-style-type: none"> - The Programme officer (promotion) visits companies for advocacy especially on male involvement in FP - Programme Assistant in charge of community based distribution visits motor parks and markets for advocacy - Staff carry out advocacy to churches and mosques - Staff undertake advocacy visits to universities and tertiary institutions - Clinic service providers undertake advocacy to their clients and friends.
<p>Group IV</p> <p><u>Topic</u></p> <p>Evaluation and Monitoring</p>	<ul style="list-style-type: none"> - Involved in the development of tools for Monitoring & Evaluation. - Assist staff in data collection, analysis and interpretation as it relates to services rendered by volunteers. - Involved in review meetings aimed at strengthening or redirecting activities. 	<ul style="list-style-type: none"> - Development of tools for Monitoring & Evaluation. - Direct responsibility for implementation of M&E activities:- <ul style="list-style-type: none"> - Data collection, analysis and interpretation - Write up reports for review meetings - Feed back to staff and supervision of staff to ensure that new directives are carried out. - Send reports to Nat. Headquarters.

Deliberating on the presentations, Dr Aradeon called on volunteers not to rely only on government establishments for funds. Rather, they should try to attract funding from other groups and business concerns such as Rotary clubs, Lion clubs, oil companies etc.

Commenting further on the issue, ED stated that recently, sales of contraceptives had been the major source of revenue for PPFN. He enjoined volunteers at state level to pay special attention to this revenue collection drive and always to seek ways of maximizing the funds generated from commodity sales.

Clarifying issues on the monitoring and evaluation component, the ED stated that when dealing with this component it should be viewed from three perspectives that is :-

- Policy Monitoring
- Planning Monitoring
- Programme Implementation Monitoring which includes:-
 - Process
 - Procedure
 - Output
 - Impact.

Summarizing the presentations and discussions, the Chief trainer pointed out that the exercise had revealed that volunteers' skills, expertise and energy could be put to best use in advocacy and resource development activities rather than in providing services at service delivery points.

Closing

To end the day, each participant was asked to name the most important thing they would remember about the day's activities. Some of the answers given are as follows:-

- Lesson on Achievers, Affiliators and Influencers
- Aspect that deals with sourcing for funds for the organization
- The purpose of becoming a volunteer
- Role of board members
- How to become a good leader
- Clear understanding of role of board members and staff
- How to organize a good workshop
- Group learning
- Lesson on motivation.

A paper "Strategies for Advocacy" was distributed to participants. They were asked to read it and for discussion the following day.

DAY TWOMorning SessionWarm Up Exercise

The day started with the Chief Trainer asking Volunteers how they know when they are performing a good job as a volunteer. Various answers were given, some of which include:-

- When there is an increase in acceptor flow
- When set targets are met
- When positive results are get through feedbacks from the public
- When advocacy activities yield good results
- When volunteers and staff work together as a team
- When clients get satisfaction from services rendered

After this exercise, the participants from Ghana were called upon to talk briefly on Planned Parenthood Association of Ghana (PPAG) programmes.

Planned Parenthood Association of Ghana (PPAG) according to its National Vice President was established in 1967 and is currently operating from 7 regions. The staff strength was given as 160 while there are 1,300 active volunteers. The FPA has nine projects which it implements namely:-

- 1) FLE for youths (in school and out of School)
- 2) Male Involvement in FP
- 3) Sexual Health project
- 4) Community Based Distribution
- 5) Integrated FP Services (IFPS)
- 6) Integrated FP, Nutrition and Parasite Control
- 7) Voluntary Surgical Contraception (AVSC)
- 8) Empowerment of Women
- 9) Advocacy for Opinion Leaders.

Elaborating on the FLE, the National Vice president revealed that PPAG had managed to influence government to incorporate FLE into the National curriculum. Commenting further, she stated that PPAG also operates Youth centres where recreational activities and counselling services are provided for both in school and out of school youths.

The Vice President revealed Empowerment of Women project took over from PPWD project and that the Association works with other women organizations in the country such as NCWS and 31st December Women group. She also informed members that they had worked extensively with religious organizations and that the various activities they carried out had been documented with the help of UNFPA.

The Association's achievement was presented by the Ag Director of Administration. He said that the association operated through 45 clinics in 7 regions and served about 20,000 people in 1994. The Country's Contraceptive Prevalence Rate was given as 20% for all methods and 10% for modern methods, according to the country's 1993 DHS report.

Commenting on PPFN's Activities in 1994, the ED stated that about 135,000 visits was recorded out of which around 35,000 were new acceptors and that a CYP of 131,000 was achieved.

The trainer shared Planned Parenthood Association of America's experience in FLE with participants. He said that it took PPA of America time to convince school authorities and government officials to incorporate FLE into school system but that they were eventually able to get into the school system by putting teachers and parents together to develop an FP guide for FLE.

The trainer called on participants to think of how to exchange programme ideas among different countries in Africa. He suggested that IPPF Africa Regional Office could establish a data bank from which countries could get information about programmes in other countries.

GROUP WORK IV

This group work involved a needs assessment exercise on values. In the exercise, 4 scenarios were presented and participants were asked to imagine certain situations that could emerge in the board room. The position of two different groups of board members was presented and each participant was asked to select the group he/she would identify with.

The four scenarios as presented were as follows:

First Scenario: It imagined a serious crisis in an organization whose survival is threatened by the crisis.

Second Scenario: It highlighted serious financial problems facing the board

Third Scenario: It revealed programme expansion within the organization which require an up front investment of funds

Fourth Scenario: It imagined a serious challenge to the organization which threatens its survival.

Presented below is the outcome of the exercise:-

Groups	1st Scenario	2nd Scenario	3rd Scenario	4th Scenario
Group 1	Group A: 3 Group B: 3	Group A: 2 Group B: 4	Group A: 1 Group B: 5	Group A: 1 Group B: 5
Group 2	Group A: 1 Group B: 5	Group A: 4 Group B: 2	Group A: 1 Group B: 5	Group A: 2 Group B: 4
Group 3	Group A: 1 Group B: 4	Group A: 3 Group B: 2	Group A: 2 Group B: 3	Group A: 2 Group B: 3
Group 4	Group A: 2 Group B: 4	Group A: 2 Group B: 4	Group A: 1 Group B: 3	Group A: 3 Group B: 3

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Interpretation of the presentations:-

Scenario 1:

Group A: They are normative in values, which means they tend to uphold generally accepted standards.

Group B: They are novel in values, which means they tend to have an interest in innovation and new ideas as a means of solving problems.

Scenario 2:

Group A: They are in the category of those who champion participation as a means of solving problems.

Group B: They are in the category of those who recognize the urgency of a situation but never-the-less take a long range view of solving the problem.

Scenario 3:

Group A: is entrepreneurial

Group B: is fiscally conservative

Scenario 4:

Group A: Members of the group value consensus as a problem solving technique in stressful situations.

Group B: Members place a higher value on diversity of ideas as a means of solving problems.

The lesson learnt from the exercise is that by understanding the values of each board member, the board could move quickly beyond the recitation of values and focus instead on solving problems.

REPRESENTING PPFM TO THE COMMUNITY (ADVOCACY)

The paper on Advocacy was discussed in details with participants.

What is Advocacy?

- It is trying to commit other people to a cause
- It tries to sell ideas (exchange of values)
- It reaches out with information to people to bring about positive change
- It makes something known
- It is communicating with target individuals to make them take a positive stand.
- It is arousing interest in a new product

Difference between advocacy and communication

Advocacy is action oriented, that is, doing something while communication is just informing people about something.

Advocacy brings about change, it requires action to be carried out.

The trainer cautioned participants not to let personal moral values direct their deliberations while doing on advocacy as it might affect negatively, the desired result expected. He also warned that knowing what to do does not necessarily mean that there would be behavioral change among members of the community that they talk to.

Who are the Target Audiences for Advocacy

1. Policy Makers
 - Military
 - Parliamentarians
2. Religious Leaders
 - Christians
 - Muslims
3. Community Leaders
4. Opinion Leaders
5. Business Leaders
6. Donors

GROUP WORK V

Each group was asked to pick a topic and think about:-

- the specific action/change it would want to bring about,
- the outcome the change is expected to bring,
- the target group that needs to be informed, convinced and encouraged,
- how to bring about the change,
- what information/data would be required to convince the target audience to bring about the change.

AFTERNOON SESSION

The session commenced with presentations by each group.

GROUP 1**Problem Statement:**

The scenario is a village setting with:

- Male unemployment rampant
- Polygamous rampant
- Women do all the work and compete with each other to have children and as such have pregnancies that are:
 - too many
 - too early
 - too late
 - too frequent

Characteristics of the village:

There are two inadequate health centres in the village

Changes Desired

- a) Reduce Fertility rate
- b) Encourage spacing of pregnancies
- c) Discourage early pregnancy
- d) Discourage late pregnancy

Target Audience

- Policy Makers - to inform and convince them about the benefits of reduced fertility.
- Traditional Rulers - to inform and encourage them to adopt the principles of FP.
- Women groups - to inform and encourage them to adopt the principles of FP in their daily activities.

How to reach the target group**Policy Makers**

- Write letters to Local Government Chairman to request for a meeting to discuss issues on:
 - o high maternal and child mortality rates
 - o high fertility which includes:
 - too early pregnancies
 - too late ,, ,,
 - too close ,, ,,
 - too frequent ,, ,,
 - o malnourishment in children

The delegates, when they visit the LGA Chairman would try to convince him that something needs to be done to improve health of mothers, children and the community in general so as ensure healthy families.

One of the suggestions to be made by the delegates would be that nurses in the LGA be sent for training in family planning.

Traditional Community Leaders

The traditional rulers would be visited. The delegates that visit the rulers would speak in the local dialect and talk on the benefits of FP emphasizing the following:-

- That a healthy mother is an asset to the family
- That if the high fertility and mortality rates continue in the village, the traditional ruler would have a community of unhealthy and non productive people.
- That the little money available at this time of economic crunch would be spent on medical bills.
- That if the trend is not checked, many people in the community may die and the ruler may not have anybody to rule over.

Women Group

The approach for reaching the women group involved speaking to them about the benefits of FP, emphasizing specifically the following:-

- that the general belief that women must have a child each year to gain their husbands' attention is harmful to the health of mother and child.
- that if births are adequately spaced, the children are more likely to survive
- that if births are adequately spaced, the women would be healthier and more able to provide for the family
- that members of families who practice FP are healthier than those who don't
- that by not spacing their children's births adequately, women may die and leave the care of their children to other women.

Summarizing group 1 presentation, the trainer pointed out that the group used a multi-step strategy approach and that the action they recommended was the training of nurses.

GROUP 2Topic:

Teenage pregnancy

Change Desired

Reduction in teenage pregnancy

Target Audience:

Primary Targets: Teenagers in and out of school

Secondary Targets: Parents, School peer groups, religious and community leaders.

Approaches:

- a) Interpersonal approach, through group discussions and talks/lectures
- b) Print and electronic media, drama and folklore especially in the local areas
- c) Workshops, Seminars etc
- d) Production and distribution of educational materials e.g handouts etc
- e) Guidance and counselling in and out of schools.

Information or Data source

The source of information to convince the identified target group include:-

- data through hospitals
- data through demographic health surveys
- data from research works from both institutions and organizations on teenage fertility.

Information needed to convince the target group to accept change

Information needed include:

- Maternal mortality rate
- Infant mortality rate
- Complications resulting from child births
- Malnutrition due to poor care
- Family rejection due to STDs
- Termination of educational career
- Exposure to STDs due to early sex
- Dangers of early marriage
- Psychological problems associated with teenage pregnancy

The presentation was deliberated upon and it was suggested that data on abortion data should be part of the information that should be used to convince targets group to accept change.

GROUP 3**Identification of the problem:**

High Fertility rate

Reasons for the problem:

- High mortality and morbidity rates
- Pregnancy and child delivery complications
- Economic effect on the family. Families sometimes find it extremely difficult to eat or fend for their children thereby bringing about socio-economic problems.

Changes Desired

- To drastically reduce fertility rate
- Adoption of appropriate child spacing within the community

Action Required

To intensify Reproductive Health Education

Target Audiences

- 1) **Community Leaders:** They are very close to the grassroots and as such are in a better position to deliver the message to members of their community.
- 2) **Religious Leaders:** Due to their calling, they are in a better position to influence members of their congregations.
- 3) **Policy Makers**
- 4) **Opinion Leaders:** which will include family support programme, market leaders etc.

Approaches

- 1) **Through campaigns/Visitation**
The campaigns which will focus on individuals and/or groups would be carried out by volunteers.
- 2) **Through mass Media - print and electronic**
- 3) **Through organized rallies**
The rallies would involve distribution of IEC materials, sale of non prescriptive contraceptives, and teaching people how to use the contraceptives.
- 4) **Through drama groups with accompanying songs.**

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Information or Data source

The source of information to convince the identified target groups include:-

- data from National Population Commission on current population reports
- data from Demographic and Health Survey
- data from Ministry of Health
- data from local governments (information dept)

GROUP 4Problem:

Teenage pregnancy

Change/Action Desired

To reduce the incidence of teenage pregnancy

Who needs to be informed, convinced and encouraged

- i) **Policy Makers (for them to):-**
 - a) Legislate against activities that expose teenagers to danger e.g Street hawking
 - b) Legislate against teenage marriage and to put age at first marriage at 18 years
 - c) Make education to secondary school level mandatory
- ii) **Religious Leaders** to influence members of their congregations.
- iii) **Community Leaders** to arrange meetings with women groups for them to educate both parents and teenagers on dangers inherent in teenage pregnancy.
- iv) **Opinion Leaders** to impress the importance of first things first on the teenagers themselves.
- v) **Donors** for provision of funds and materials to run the programme

Approaches

- Getting together a whole package of information on the magnitude of problem of teenage pregnancy
- Formation of youth clubs in and out of schools where lectures on responsible parenthood should be given.
- To emphasize the implications of teenage pregnancy in terms of:-
 - o **Economic** i.e the inability of such youth to be gainfully employed

- o **Social** i.e the teenager would have a sense of failure and would be unable to perform as a responsible parent in future.
- o **Medical** i.e the complications resulting from such teenage pregnancy can cause mortality and morbidity as well as disabilities. Also they can contract STDs and AIDS
- o **Developmental** i.e the teenager would be unable to contribute to the progress and economy of the community

The other approach would involve paying visits to identified target groups to present information materials.

The policy makers would be asked to make provision for Family Planning in their budget

Ministry of Education would be asked to include FLE in school curriculum

Opinion Leaders would be asked to legislate against teenage marriage and actions that expose teenagers to risk.

Donors would be presented project proposals for funding

Lastly all identified approaches would be followed up to ensure that they bring the desired change.

What Information or Data needed

- i) Data on magnitude of the medical, social and economic problems of teenage pregnancy. These could be collected from Hospitals, Welfare offices, Ministry of Education.
- ii) Information on how to reach these various groups. Care should be taken to observe all necessary protocols.
- iii) Contents of the current school curriculum with special notes on subject matters that address issues affecting Family Life Education.

After the presentations by the four groups, participants were told to make use of the experience gathered during the exercise, in their advocacy activities.

EVALUATING THE BOARD

To treat this topic, participants were requested to participate in a game of throwing roses.

GROUP WORK VI

Each group was asked to:-

- give its group a name,
- state the mission of the group and,
- set group objectives.

Also, each member of the group was asked to set an individual objective, the collective total which would be the same as that set by the group.

The game involved throwing roses three times at 2, 4, 6, 8 and 10 point marks. The objective set would determine the point at which group members would stand and throw the rose. Members of the other groups were to distract the thrower from achieving his/her aim. Presented below are the achievements of the groups:-

Group 1

Team Name: Primus
Mission: Encouraging Team Spirit
Objective: To score 44 points
Actual Score: 38 points

Group 2

Team Name: Eagles
Mission: To conquer our opponents
Objective: To score 42 points
Actual Score: 26 points

Group 3

Team Name: Unity
Mission: To succeed
Objective: To score 62 points
Actual Score: 22 points

Group 4

Team Name: PPFN Lions
Mission: Achievers
Objective: To score 68 points
Actual Score: 22 points

The lesson learnt from the game was that in programme planning, attention should always be paid to setting measurable, realistic and achievable objectives.

CLOSING

The trainer commended participants for their patience during the workshop. He expressed his happiness in working with the group and stated that he hoped in future to work again with the group. He called on participants to show pioneering role in the management of the organization and asked them to use their time and resources adequately for the success of the organization. He said that by so doing, many NGOs in FP would look up to PPFN and the volunteers for technical assistance.

The National Chairman gave the vote of thanks in which he thanked the trainer on behalf of other participants for taking them through the leadership training workshop. While wishing the trainer safe journey and success in all his endeavours, he expressed the hope that volunteers would use the knowledge gained to improve on their contributions to the organization's success.

APPENDIX I

LIST OF PARTICIPANTS
EXECUTIVE BOARD LEADERSHIP WORKSHOP

NO	NAME	STATE	DESIGNATION IN PPFN	PROFESSION
1	DR MUSA DAWHA	ADAMAWA	STATE CHAIRMAN	PUBLIC HEALTH CONSULTANT
2	MRS I. E. AKPAN-IQUOT	AKWA IBOM	STATE CHAIRPERSON	SOCIAL WORKER
3	MRS HANNATU IBRAHIM	BAUCHI	NATIONAL VICE CHAIRMAN	ADMINISTRATOR/PUBLIC RELATION JOURNALIST
4	MRS MARIAM NGAGHEM	BENUE	NEC MEMBER	NURSING
5	MR PAUL MSHELBWALA	BORNO	NEC MEMBER	PUBLIC HEALTH TUTOR/EDUCATOR
6	DR EDET E. EDET	CROSS RIVER	STATE CHAIRMAN	FAMILY HEALTH PHYSICIAN/LECTURING
7	DR NOSA OMOREGIE	EDO	NATIONAL TREASURER	MEDICAL PRACTITIONER
8	MR M.A. AKPA	ENUGU	STATE CHAIRMAN	EDUCATIONIST
9	MR G.A. OBONNA	IMO	NATIONAL CHAIRMAN EMERITUS	SOCIAL WORKER
10	ALHAJI A. ABDULLAHI	KADUNA	NATIONAL CHAIRMAN	PROPERTY/FINANCIAL CONSULTANT
11	HANNATU MOHAMMED BIO	KANO	NEC MEMBER	NURSING
12	TAHIR S. ABDALLAH	KANO	STATE CHAIRMAN	JOURNALIST/ARTIST
13	MRS E.B. AHMADU	KOGI	NEC MEMBER	STATE FP CO-ORDINATOR
14	MR A.A. AMAO	KWARA	STATE TREASURER	AUDITOR
15	MR I.B. AKINOLA	LAGOS	NEC MEMBER	PHARMACY TECHNOLOGIST
16	CHIEF (MRS) O.O. ALABI	LAGOS	STATE CHAIRPERSON	PUBLIC HEALTH NURSE/HEALTH EDUCATOR
17	MR BARNABAS D. YISA	NIGER	STATE CHAIRMAN	PHARMACIST
18	DR O.A. ADENIJI	OGUN	STATE CHAIRMAN	MEDICAL PRACTITIONER
19	MRS D.M. OGUNNUSI	ONDO	NEC MEMBER	NURSE EDUCATOR
20	MR OYE OKUNLOLA	OYO	STATE CHAIRMAN	ECONOMIST/ADMINISTRATOR
21	MRS EDNA BROWN	RIVERS	NEC MEMBER	BROADCASTER (NTA STAFF)
22	MR ISA ALIYU	SOKOTO	NEC MEMBER	EDUCATIONIST
23	MR JEFF A. KITCHER	GHANA		AG. DIRECTOR OF ADMINISTRATION
24	DR GLADYS E. EKUBAN	GHANA		EDUCATIONIST

PPFN STAFF:

1. DR A.B. SULAIMAN - EXECUTIVE DIRECTOR
2. MR G.C. EZEUGU - ASSISTANT DIRECTOR (PLANNING AND EVALUATION)
3. MR AUSTINE OGHIDE - PROGRAMME OFFICER (PROMOTION)
4. MRS A.O. OLUGBEMI - ASSISTANT PROGRAMME OFFICER (RESEARCH & EVALUATION)
5. MR B.A. AFUWAPE - ASSISTANT ADMIN. OFFICER

MSH REPRESENTATIVES

1. MR MICHAEL HALL
2. DR SUSAN ARADEON

COMPETING ORGANIZATIONAL MODELS

By David Korten

	<u>BUREAUCRATIC ORGANIZATION</u>	<u>STRATEGIC ORGANIZATION</u>
SIGNIFICANCE:	DOMINANT IN INDUSTRIAL ERA	EMERGENT IN INFORMATION ERA
DOMINANT PRINCIPLE:	CENTRAL AUTHORITY STRONG CONTROL SYSTEMS	DECENTRALIZED STRONG VALUE COMMITMENT
DEFINING FEATURES:	CENTRAL POWER VERTICAL HIERARCHY ORGANIZATION BY FUNCTION DECISION MAKING BY RULES TOP MANAGEMENT SETS RULES LOW RISK TAKING ERRORS PUNISHED	INFLUENCE DISPERSED INDIVIDUALITY ENCOURAGED TEAMS VALUES AND "CULTURE" SEEK COMMITMENT ENTREPRENEURIAL INITIATIVE AND CREATIVITY ENCOURAGED

THE WORK OF THE BOARD

Definition of the non-profit board's work must start by clarifying to whom it is accountable. Nonprofit boards have no shareholders but they do have stakeholders, such as private contributors, tax payers, clients, advocates, other related service providers, legislators and others. Accountability is not related primarily to funding sources but to the agency's corporate character and its commitment and contract to its community. Non-profit Boards of Directors serve as the link between the agency and the community the agency serves. Boards are held accountable for the organization's products, services and activities on behalf of the community.

The primary Board focus is on long-term perspective and leadership. Leadership implies a focused vision of the major outcomes desired, commitment to a mission which is clearly articulated, the possession of competence, flexibility and imagination in the approach to problem solving and provision of services.

The work of the board changes as the organization changes. The board of a newly incorporated entity has different functions from the board of a well-established one. But any board of directors has certain basic duties. In delegating day to day tasks to an Executive Director and his or her staff, the board still retains certain functions to itself, based upon the organizational mission. These are :

1. Creating the organization's policies
2. Planning for the organization's programs and continuity
3. Providing adequate financial resources for the organization
4. Monitoring and evaluating the organization's effectiveness
5. Serving as an advocate of the organization and as an active link to the community
6. Defining and maintaining the Board's internal functions effectively

Although these functions are interrelated, let's focus on them one at a time.

CREATING THE ORGANIZATION'S POLICIES

Control of the values of an organization is the most efficient control one might exercise. That is what determining policy is all about. Policy is a collection of explicit statements of board values on various topics. A policy is a governing principle, a framework for carrying out work, a way for the Board to delegate authority and still maintain control. Values are by nature subjective; they relate to relative importance and to judgements of ethics and prudence. Individual values arise from individual learning and experience. Because of these differing perceptions, experiences and judgments, it is unusual for Boards to come to immediate agreement on policy issues. Agreement on policy issues takes time, careful deliberation and discussion.

Control of policy issues enables a board to attend to the big questions, to avoid trivia, to demand excellence in management and to define and improve the organization's relationship to its community and its mission. Proper attention to policy development does require discipline at the outset, but greatly simplifies the board's job. This approach forces boards to relinquish making one decision after another in favor of examining those values on which decisions are based.

The corporate idea of "outcomes," proof of results, has filtered down to the non-profit world. The primary statement of hoped for outcomes is the mission

statement. The question, "what business are we in?", is answered in terms of the human needs to which the organization will address itself. Nonprofit purpose is best stated in terms of what kind of difference the organization will make in the world. It is important that the nonprofit board speak clearly and deliberately to these issues, for they comprise the basic value questions of the organization.

Boards are often too busy with the details of implementation (means) while they avoid their primary responsibility to state organizational goals and outcomes (ends). Boards should, by and large, stay out of means except to prohibit the means that will not be tolerated.

There are three stages of policy definition. The first level deals with broader issues of organizational mission, objectives and values. The second level of policy deals with how tasks will be delegated, the empowerment of the Executive Director, the parameters of executive performance, ethical standards of operation, and evaluation of executive performance. Lastly the Board needs to address what principles will guide its own activities and how it will monitor its own performance.

Policy statements should be explicit; implicit policy is difficult to administer. Policy statements should be reviewed periodically, they are not to be considered final products. It is a good idea to document policy decisions in a policy book and to set a yearly time to review policies for possible revision or for reaffirmation.

We have enclosed a list of policy statement topics in this chapter.

PLANNING FOR THE ORGANIZATION'S PROGRAMS AND CONTINUITY

The Board should first ask: is our mission still valid? Should it be changed? When those questions are answered, the Board has the task of defining and protecting the corporation's future. The long range plan enables the organization to sustain its efforts over time while simultaneously responding to changing resources and needs.

The organization's long-range plan is usually the result of a joint Board and staff effort. The Board concerns itself with the big visionary questions, translating needs and values into major goals and assigning priorities. The staff, at the same time, is concerned with feasibility questions, fact-finding, and strategies. Together the Board and the staff answer the question, what good are we going to accomplish, for whom and at what cost? A plan is a written statement of intent to take specific actions in a specific time period by named people at a specific cost.

The major stages of planning are:

- o Define/review/reaffirm the mission
- o Develop major goals (general statements of intent)
- o Create measureable objectives (results statements; what will be different, by what date, and how will it be measured)
- o Develop action plans (strategies - how the objective will be achieved)
- o Develop budget
- o Design an evaluation tool/evaluate results

One of the pitfalls of planning is the creation of an over-elaborate plan which, due to its complexity and its unrealistic ambition, remains on the shelf,

unused. Another scenario includes a frantic Executive Committee and key management staff members hammering out, in one session, a long-range plan for the next Board meeting. The way to avoid these two pitfalls is to develop a planning team comprised of key Board and Staff members who will develop a timetable for planning, delegate responsibilities and keep the process on course by setting aside time for periodic planning meetings throughout the year.

We have included a planning outline in this section.

PROVIDING ADEQUATE FINANCIAL RESOURCES FOR THE ORGANIZATION

A major responsibility of the Board is to make certain that the agency's finances are properly administered. Sufficient revenue must be obtained from a variety of sources, funds spent economically, and accounting and auditing efficiently done. It is frequently necessary as well to take action in public affairs arenas to assure continued government support and to assure that laws governing non-profit organizations are favorable.

In order to ensure adequate resources, Boards have to participate in fund raising. This work of the board is often thought of negatively, but actually fund raising follows naturally from the public responsibility of the board member to present the organization's needs to the community and the community's needs to the organization. Fund raising is a natural extension of the Board's role as linkage to the community.

Board members should support the organization financially to the extent of their ability, and ask others to support it. Solicitating funds from others occurs after one's own contribution has been made. Some members will be better than others at actual solicitation, some will be able to give more than others. But the responsibility to create a climate of support for the organization is part of every member's job. Since there are a variety of ways to generate support and revenue for the organization, Board members can select a fund raising activity that best suits their skills.

It is important for Board members to realize that ideas for program amplification and improvement are dependent upon sufficient funds to create these new services. Too often Board members have good ideas for program amplification without the corresponding zeal for raising the required funds.

Included in this section is an overview of fund raising activities.

MONITORING AND EVALUATING ORGANIZATIONAL EFFECTIVENESS

The long range plan serves as an effective tool for monitoring whether the mission and goals of the organization have been effectively addressed through the organization's programs and services. Monitoring is the systematic estimation of whether the organization performance acceptably complies with the policies of the Board. How well is the organization doing with respect to its plan?

There are two major ways that Boards fail to accomplish their monitoring function. One is by believing that everything is all right and not investigating further. The other is to get trapped in endless, trivial information. Boards can learn to use carefully selected indices of performance as do their corporate counterparts. Particularly important data must be culled from less important information. Boards need to learn to ask the right questions to be sure that the organization's fiduciary and legal requirements have been fulfilled as well as the mission and goals of the agency. For example, the usual monthly financial

statement may contain little interpretable information. In such case, a useful course of action would be to determine exactly what financial monitoring would be helpful to the board; a meaningful fiscal report would be composed of answers to those specific questions. The financial report might consist only of variances from budgeted amounts and the reasons for the variance.

Monitoring can be conducted in several ways, including review of internal reports from the Executive Director, advice and appraisal from outside experts (like auditors), and direct inspection by board members. This last method might include random sampling to see whether a particular policy is being implemented. Monitoring should be limited to issues that the Board has addressed through policy statements. And monitoring should not be confused with meddling in the day-to-day operations of the organization.

The Board needs to develop an informed and independent view of the organization, its strengths and weaknesses, its management and its prospects. Yet, the ideal board cannot be what we want it to be -- independent and future oriented -- if "watching over" becomes the central focus. A monitoring system should enable scarce Board meeting time to be spent on the future, not on reviewing the past. Monitoring should be as automatic as possible. The board needs to be willing to speak out, to criticize, but also, very importantly, to praise and take pride in the achievements of the organization.

An effective monitoring system of compliance with Board policies may be all the evaluation of the Executive Director that is necessary. Some affiliates presently evaluate their Executive Directors in this way. Executive Directors may present a report to the Board about their accomplishments in light of the plan; approval of the report constitutes a performance appraisal of the Executive Director.

If your Board does not have a monitoring system in place, you might begin by assigning each of your policies a method of monitoring. For example, financial matters would be monitored by monthly internal reports from the Executive Director supplemented by annual reports from an auditor. It may take a certain amount of trial and error to establish a monitoring system that suits your needs. The important thing is to begin.

We've included in this section a list of documents and reports the Board will want to be familiar with, an outline of the process of selecting an Executive Director and a sample form for evaluating the Executive Director.

SERVING AS AN ADVOCATE FOR THE ORGANIZATION AND AS AN ACTIVE LINK TO THE COMMUNITY

In its sixty years of existence, there has never been a time when the Planned Parenthood mission has not been contested in the public arena by a militant, vocal minority. Over these years Board members have vigorously defended reproductive freedom, as they continue to do today.

Board members have a responsibility to provide leadership in educating our legislators about reproductive freedom and health care issues and mobilizing support for reproductive rights. Boards must seek to support public policy which enables the organization to achieve its ends and be aware of legislative and political threats to the organization and to the function of non-profit organizations in general. As in fund raising, the Board, as representative of the community, is a natural and appropriate spokesperson for the agency's interests.

Using whatever method we find most comfortable and effective, Board members should use their positions, status and contacts in order to influence the decisions

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of others. For some this might be direct lobbying of a legislator. Other Board members might attend candidate meetings, network with other organizations with the same mission or participate in an alert network. Regardless of what level, each Board member needs to participate in some form of advocacy.

In their day-to-day activities Board members have many opportunities to clarify and enhance the organization's image. Often times this is done quite casually at lunch with a business associate or when working with a small group on a church project. Before entering the public arena, Board members should be personally clear and comfortable with Planned Parenthood positions. New Board members may want to test their beliefs and understanding of the issues with seasoned Board members.

DEFINING AND MAINTAINING EFFECTIVE INTERNAL PROCESSES

A Board is a complex organism which requires a certain amount of self-appraisal and self-correction. The Bylaws are the primary statement of how the Board will conduct its business.

Boards should also have a yearly plan which includes when and how it will evaluate its performance and should develop an action plan for Board improvement. Some Boards survey their members and discuss the results at the yearly Board retreat. Others assign this responsibility to the Executive Committee or the Nominating Committee which in turn puts together a Board development plan. We've included materials which you might find useful in maintaining an effective Board.

Values

In the following exercise, you are asked to imagine certain situations that could emerge in your board room. In each scenario, the position of two different groups of board members is presented. After you've read each scenario, please select which group you identify with most strongly.

Clearly, the positions of the groups have been placed in opposition to one another, and you may not feel completely comfortable choosing one or the other. Just remember that your position, even as it moves toward the center, will tend to lean one way or another. Go ahead and commit yourself to a position. Use the score sheet following the scenarios.

VALUES EXERCISE

Scenario 1

Imagine a meeting in which an issue emerges that seriously threatens the survival of the organization. Opposition quickly forms between two groups of board members. Both groups can argue persuasively that each point of view has merit. This issue, which we are imagining, has no guaranteed answer, despite the fact that both groups will insist that their approach has the greater probability of being right.

Group A champions solutions which are time-tested; they argue that traditional measures have worked for others and therefore should be applicable to us. They tend to say, "This is not the time to try new ideas out, because if we're wrong, the organization will perish."

Members of *Group B* respond that this is like

throwing God, Mother, and Apple Pie at the problem. "We can't count on the conventional wisdom being right; in fact, we need to come up with novel or new solutions to save our organization."

Which group you would be more likely to join on any given issue?

Scenario 2

Your executive director comes to the board with a serious financial problem. Unexpectedly, the budget is in trouble. Funds have been spent, and income is down as the fiscal year is coming to a close.

The folks in *Group A* respond by immediately proposing that all board members contribute emergency funds, that a task force be assembled to create a special event to raise money, and that two or three board members, with appropriate skills, be asked to come into the office to help sort out the books and to draft proposals for grants.

Group B reacts differently. Members agree that the board should take action. They express concern for the state of the budget, but their suggestions are dramatically different. "Let's review the budget and the assumptions which we made when we adopted it," they suggest. "Then, let's take the time to draft some new policies which will prevent this problem from continuing or recurring. Having done that, let's encourage the staff to take whatever actions they deem necessary to solve this problem and to report back to us at the next meeting."

Sound familiar? Which group would you be inclined to join?

Scenario 3

Opportunity presents itself to your organization. A new program initiative by a local foundation means that you can rapidly expand your services by developing a new aspect of your current efforts. It is true that you must make a significant up-front investment of money to provide the service, but the potential gains are very appealing. Board members are once again divided.

Group A says, "Go for it." The investment is justified, they claim, by the opportunity. Members of *Group A* indicate that the risks of rapid expansion are far outweighed by the possible gain.

Group B claims that the organization should be cautious. "It is true that significant benefits may devolve from the investment, but we are a small organization. We might be overwhelmed by growing too fast. This initiative will drive us into outer space, and that would be terrible. Prudence requires that we limit our investment and move carefully into any new area."

Can you hear yourself offering advice to the other members of the board? Which group would represent your personal comfort zone?

Scenario 4

Challenges come in many forms. Governmental agencies are asking you to dramatically diversify your board. At stake is desperately needed funding for your organization, which may be lost unless your board includes people of different colors, sexual orientation, or income levels.

Members of *Group A* state their concern for the fiscal well being of the organization. They argue that in order to sustain the full budget, the board will need to forge a powerful consensus as it seeks alternative funding. This will require that members share common values and a singular focus on resource development. Concern is expressed that many likely candidates from other groups will bring powerful cultural biases with them when they join the board. "Serious struggles will take place, and there are indications that some organizations are already suffering the consequences of this strife. While bringing in new members is a wonderful idea, the practical consequences are disturbing." Faced with crucial financial problems this year, *Group A* urges solving the immediate problems before reaching out to others.

The financial problems are complicated, the members of *Group B* concede. "However," they argue, "by bringing in new board members, people with markedly different focus and experience, we may actually get help in finding more satisfactory solutions. Everyone knows that new board members from other groups are bound to have their own agenda. These can be honored. Even if it takes some time and effort, the contribution of new members will far outweigh the creative conflicts we may have. We are more likely to solve our financial problem with additional help, than staying with our present team."

What is your position?

V A L U E S

VALUES SCORE SHEET

Scenario 1

Group A _____

Group B _____

Scenario 2

Group A _____

Group B _____

Scenario 3

Group A _____

Group B _____

Scenario 4

Group A _____

Group B _____

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VALUES EXERCISE INTERPRETATION

The sum of the values of a group is reflected in the decisions that group makes. Taken together, the positions of the members constitute what might be called corporate values. While value positions are central to our definition of ourselves, the values which we hold are often situational. In one environment, for example, we may be very financially conservative, while in a second group, our position may be quite entrepreneurial. Both the circumstances confronting the group and the value position of others can influence our response.

So who's right and who's wrong? No one. The issue is one of understanding our values and those of other board members. When we do, we'll also know that if we want to change the culture of our group, recruiting people with different values will certainly spark some constructive conflict and refresh the debate. It is important, therefore, to know the values of the people we are recruiting.

Scenario 1

Normative or Novel

If you selected *Group A*, you are normative in your values, which means that you tend to have an interest in upholding generally accepted standards.

On the other hand, if you selected to join with *Group B*, you are novel in your values, which means that you tend to have an interest in innovation and new ideas as a means to solve problems.

Scenario 2

Participation-Oriented or Policy-Oriented.

Selecting *Group A* places you in the category of championing participation in solving the problem. This is the "hands-on" approach which many people value as a means to deal with the anxiety caused by complex problems. Action in the moment is highly prized.

Group B reflects a much more policy-oriented value system. You recognize the urgency of the situation, but even in the heat of the moment you take a long-range view of problem-solving. Creating a system or structure to address the problem and letting the staff implement your policies feels more comfortable.

Scenario 3

Entrepreneurial or Fiscally Conservative

Interestingly enough, many people find themselves being either more entrepreneurial or more conservative in the board room than they are in other areas of their life. The nature of nonprofit work, balancing mission with fiscal solvency, may be one reason for this.

Group A is entrepreneurial. If you selected this group, you may well have a high tolerance for financial risk within your nonprofit organization.

Group B is fiscally conservative. Your tolerance for risk is low in this situation. Prudence seems the wiser course.

Scenario 4

Exclusive vs. Inclusive

The members of *Group A* value consensus as a problem solving technique in stressful situations. In this situation, they tend to be exclusive. They frequently assume that diversity automatically brings conflict. This does not mean that they are intolerant people. Rather, they reflect a value that consensus is more difficult to achieve as diversity increases.

Group B is inclusive. Members place a higher value on a diversity of ideas as a means to solve problems. What is lost by not having a consensus, these people contend, is gained by expanding the group's point of view. For these people, creativity is linked to diversity, and the potential for conflict is worth risking for finding new solutions.

WHY DO VALUES MATTER?

Values may need to be broadened through recruitment. If we are all fiscal risk takers, who is going to help us mind the store? Without balance, we may struggle to fulfill our mission while retaining our fiscal solvency.

Over the years, I have observed that as much as thirty percent of the "air time" in meetings is taken by people who are using the topic at hand to express, and in some cases, re-express their value positions. While this makes for interesting monologues, it often slows the meeting down.

It may be helpful for the group to understand that we quickly learn the values of others. Having articulated a value position once or twice may be enough for others. By understanding our values and those of others in the board room, we can more quickly move beyond the recitation of values and focus instead on solving the problems.

Motivation

This exercise tells us important things about ourselves. It reveals how we and others view our membership in a group. Understanding motivations gives us one key to determining how people will perform in the board room.

Use this brief, self-scored exercise for identifying motivations for participating in groups.

MOTIVATIONAL ASSESSMENT

Instructions

Choose the one statement that seems the most true for you in your interactions at work or in volunteer situations. There are no right or wrong answers. Circle *one statement* for each number.

1.
 - a. I like to work alone.
 - b. I like to work with others.
 - c. I can work alone or with others.
2.
 - a. I'm happy working closely with people to develop and complete a project.
 - b. Just give me directions and let me "go at it."
 - c. Let me plan a whole project and get it started myself.
3.
 - a. I like to influence other people.
 - b. I like knowing that what I do makes people happy.
 - c. I like the feeling that I'm doing an excellent job.
4.
 - a. I enjoy getting to know people by working with them.
 - b. I enjoy wrestling with problems.
 - c. I like a strong feeling of camaraderie.
5.
 - a. Before I begin, I want to see the standards against which I'll be judged.
 - b. Before I begin, I want to see the organizational goals.
 - c. Before I begin, I want to know with whom I will be working.
6.
 - a. I want to be perceived as a competent leader.
 - b. I want to be perceived as an effective worker.
 - c. I want to be perceived as a good person.
7.
 - a. A successful job for me is one where we feel like a family.
 - b. A successful job for me is one where I've taken a leadership role from start to finish.
 - c. A successful job for me is one where I've exceeded expectations.
8.
 - a. I enjoy being able to direct others.
 - b. I enjoy being sensitive to the needs of others.
 - c. I enjoy competing with others.

M O T I V A T I O N

9. a. I appreciate having made friends while working on a project.
b. I appreciate a tangible reward at the end of a project.
c. I appreciate being given a clear line of authority.
10. a. I like a good challenge.
b. I like a good strong argument.
c. I like a strong feeling of camaraderie.
11. a. I want to be popular.
b. I want a position of status and respect.
c. I want to do important work.
12. a. I would like my ideas to predominate.
b. I would like to know that my work has helped others.
c. I would like to be promoted because I've done a good job.
13. a. In meetings, I'm most comfortable leading the discussion.
b. In meetings, I get bored until we finally decide which action to take.
c. In meetings, I enjoy taking on the detail work, especially serving refreshments and making everyone feel comfortable.
14. a. I lose track of time when I'm involved in a challenging project.
b. I lose track of time when I'm working with interesting people.
c. I lose track of time when I'm involved in a good argument.
15. a. I like to start a project on my own initiative.
b. I like to work on a project with other people.
c. I like to complete a project well.
16. a. I prefer to work with people I know well.
b. I prefer to work with people with a proven track record of getting things done.
c. I prefer to work with people who will listen to me.

MOTIVATION

KEY TO MOTIVATIONAL ASSESSMENT

Look at your answers. Next to each number on this page, circle your response. Total each column. You tend to be motivated by the need at the top of the column with the largest number.

	I	II	III
1.	a	b	c
2.	b	a	c
3.	c	b	a
4.	b	a	c
5.	a	c	b
6.	b	c	a
7.	c	a	b
8.	c	b	a
9.	b	a	c
10.	a	c	b
11.	c	a	b
12.	c	b	a
13.	b	c	a
14.	a	b	c
15.	c	b	a
16.	b	a	c

Total:

MOTIVATIONAL SCORE INTERPRETATION

Column I : Achievement

Column II: Affiliation

Column III: Influence

These, like the thinking styles definitions, give us a basis for understanding ourselves and the interactions and needs of others on our board.

MOTIVATIONAL MODEL

Generally speaking, there are three different motivations for people to become volunteers:

Achievement motivated individuals like success in improved or excellent performance.

Affiliation motivated individuals enjoy working with others.

Influence motivated individuals like to have an impact or influence on others.

Achiever. The achievement motivated individual can be characterized as having:

- a desire for excellence.
- a preference for work he or she considers significant.
- a need for advancement.
- a strong wish for feedback.

To feel successful, the *achiever* needs:

- a specific goal to work toward.
- to work alone.
- to stick to the task until completed.
- feedback.
- responsibility.
- to solve problems that are seen as challenges.
- a tangible reward.
- specific parameters set to measure success.

Affiliator. The affiliation motivated individual is characterized by:

- a desire to be popular.
- a strong need for interaction.
- a wish to avoid being alone.
- a desire to help others.

To be successful, the *affiliator* needs:

- personal interaction.
- to make friends.
- to be involved with group projects.
- to have a personal relationship with authority figures.
- to work with people he or she knows.
- to be liked.
- to make people happy.
- social opportunities.

Influencer. The *influencer* is characterized by:

- a desire to give advice.
- a need to lead.
- the need to achieve status.
- a desire to see their ideas predominate.

To be successful, the *influencer* needs:

- to see that he or she is having an impact on others.
- to work alone or with others.
- to teach others.
- to respond to the needs of people or programs.
- to keep an eye on overall goals of the organization.
- to respond to titles that denote authority.
- to seek and accept positions of authority and responsibility.
- to be persuasive.

Are you an affiliator, an achiever, or someone motivated by the desire to influence others? What motivates you and what blend of motivations characterizes your board members are important indicators of how you will function together.

IMPACT ON THE GROUP

Affiliators

You can't really have a healthy group without affiliators. They are the glue that binds a group together. Affiliators will tend to emphasize

the social aspects of the board. (The potlucks will be wonderful!) Affiliators will be more concerned with the interactional dimension of the board's business than with achievement.

Achievers

Achievers are great. They work hard to get the job done. But they almost always resist working through committees. Their efforts are frequently uncoordinated with the rest of the board. Achievers will tackle a project with great zeal. If they sense that their hard work is not rewarded by the group, they will move on quickly.

A board dominated by achievers is going to struggle as it tries to reconcile everyone's different agenda. Officers and staff will need to be particularly alert to make sure that both the mission and the fiscal solvency of the organization are not jeopardized by the enthusiasm achievers bring to the board.

Influencers

Influencers use their energies to persuade others. They see their role as convincing others of the value of their ideas. They often bring insight and experience which is valuable to the organization. However, they also frequently rely on others to perform the tasks at hand.

With too many affiliators, people sit around and enjoy the coffee, the cookies, and each other. Little gets done. With too many achievers, all sorts of things happen, but coordination becomes difficult. A board room full of influencers is going to ring with great advice. But unless the staff is prepared to accept all the delegated work, not much will get done.

M O T I V A T I O N

Balance is the key. This balance differs from board to board. Each board needs to find its own proper balance of motivational types. There is no hard and fast rule for what is correct. The mission and the requirement for fiscal solvency

will influence the mix more than any arbitrary standard. Nonprofit groups vary greatly. But one thing is certain, boards that don't include some representatives of each motivational type tend to function poorly.

THE PROBLEM-SOLVING PROCESS

