

PN. ACB-261
95069

Appendix III-A: Training Materials

*Human Resources Development
English language text*

Final Report to
the United States Agency for International Development
of the Private Voluntary Organizations Initiatives for the Newly Independent States Project
World Learning Inc.
1992 - 1997



World Learning Inc.

*Second Annual
Conference*

**World Learning - USAID
(U.S Agency
for International Development)**

PVO Initiatives in the New Independent States

HUMAN RESOURCES DEVELOPMENT

**Trainers for the training workshops of the Conference -
Pedagogical Union "Raduga"
Information Center of the Independent Womens Forum
Workshop leader - Michael Flyamer**

**Printing of Conference materials -
Pedagogical Union "Raduga"**

**Translation of Conference materials -
Marina Burkova**

**4 - 7 October 1995.
Yaroslavl', Russia**

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Training lectures

WORKBOOK FOR CONFERENCE PARTICIPANTS



World Learning Inc.

1. Introduction (red #1)

- a. Welcome letter from Scott Charlesworth, Field Director, Moscow, World Learning
- b. Welcome letter from Trainers
- c. Human Resources Development: General impressions
- d. Personnel Policies and Management in World Learning Subgrantee Projects (survey results)

2. Logistics (yellow #1)

- a. Schedule
- b. Site-plan of sanatorium "Sosnovy Bor"

3. Participants and Guests of the Conference (blue #1)

4. Trainers, lecturers, and group leaders (gray #1)

5. Training lectures (green #1)

- a. "Human relations in organizations: ideals and problems" (yellow)
 - 1) *"The Longer I Live..." (Attitude quote - Author unknown)*
 - 2) *Vera Pavlovna's Sewing Shop*
- b. "Organization as an instrument for using human resources" (green)
 - 1) *Methods and Logic of Working with Human Resources in an Organization*
 - 2) *Human resources - Discover Total Resources*
- c. "Democratic leadership and decision making (orange)
 - 1) *Democratic Leadership and Decision making*
 - 2) *Management Style*
 - 3) *A model clarification on illicit harassment including sexual harassment*

6. Small groups (red #2)

- a) Preparing staff for organizational change (yellow)
 - 1) *Working with Staff as an Organization is Changing*
 - 2) *Personnel Problems in the work of an NGO*
 - 3) *Employee Empowerment*
 - 4) *Jenson's Dozen Gems*
- b) The Culture of working relations (green)
 - 1) *The Culture of Working Relations*
 - 2) *Management for the 90s*
 - 3) *Evaluating Your Company's Culture*
 - 4) *Six Keys to Successful Work Relationships*
 - 5) *Healthy Expressions of Anger*
 - 6) *Basic Guidelines for Communication*
 - 7) *Nine Keys to Good Listening*
- c) Leadership and Team Building (orange)
 - 1) *Leadership and Team Building*
 - 2) *Leadership Development*
 - 3) *8 Signs that You're a True Leader*
 - 4) *Principles That Make Teams Work*
 - 5) *Model evaluation*
- d) Motivating staff and rewarding their actions (blue)
 - 1) *Motivating Staff and Rewarding Their Actions*
 - 2) *Motivation and Rewards in NGOs*
 - 3) *Volunteers Assistants: How to Find and Retain Them*
 - 4) *Evaluating Your Employee's Performance*

7. Presentations (yellow #2)

a) Employee Assistance Programs

- 1) *Developing An Employee Assistance Program Approach in Russian NGOs*

8. Management By Objectives: practical approach (blue #2)

- 1) *Management By Objectives: A Perspective for New NGO Managers (yellow)*

- 2) *Performance Appraisal Process (green)*

- 3) *Performance Summary sample (orange)*

- 4) *Full Time Performance Appraisal (blue)*

- 5) *Job Descriptions (brown)*

- a) *Finance/Administration Supervisor*

- b) *Assistant Program Officer*

- c) *Secretary*

- 6) *Development or Personnel Policies (pink)*

9. World Learning Materials (gray #2)

- a) World Learning Fact Sheet

- b) PVO/NIS Project Fact Sheet

- c) World Learning Staff List

- d) World Learning Moscow Statement of Principles

- e) PVO/NIS Subgrantee Projects

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Introduction



World Learning Inc.

October 4, 1995

Dear Conference Participant:

On behalf of World Learning, I want to welcome you to our second All Subgrantee Conference. This year's conference focuses on the theme of **Human Resource Development** which is a key component in World Learning's Institutional Strengthening Training Program. During the coming months World Learning will be conducting a series of training workshops, including the Human Resource Development Conference in which you are participating, which examine key elements of good organizational development. The other training themes include strategic planning, financial management, public education through the media and working with the external environment.

We at World Learning are particularly excited about this year's conference theme as effective human resource development and management are critical to the success of all NGOs, both practically and philosophically. As advocates for the betterment of our communities (local, national, and international) we have a responsibility to not only work professionally but also to exemplify our organizations' principles by the way we work with our staff and volunteer colleagues. Working with people in order to help people is what makes NGO work challenging, unique and satisfying.

I hope you will find the Human Resource Development Conference to be both stimulating and appropriate to your organization's needs. In addition to the experienced conference leadership, an essential ingredient in the success of this training experience is the active involvement and shared wisdom of the participants themselves. I thank you for your willingness to enhance our program by your participation and for your commitment to work toward the strengthening of your organization and the NGO sector.

Have a successful workshop!

Sincerely,

Scott H. Charlesworth
Field Director
World Learning - Moscow



World Learning Inc.

Dear Conference Participants:

The Human Resource Conference is addressed to those who do the "hands on work", provide daily guidance to the non-profit organizations' employees and work side by side with them, not to those who administer NGOs from their distant offices. The key objective of the conference is to bring together NGO staff and volunteers in order to share experiences and common concerns in order to address the following question: How can human resource management be improved in your organization in one of the following aspects?:

- 1) Preparing staff for organizational change.
- 2) The culture of working relations.
- 3) Leadership and team building.
- 4) Motivating staff and rewarding their actions.

We believe by the time the conference starts you will have identified the difficulties of human resource management in your organization and looked into the root causes of these difficulties. The decision on which of the aspects to choose for practical work (develop a project to improve human resource management) is something more than the choice of a group (project workshop): it is the first step in our collaborative work.

The conference also includes active training in all aspects of human resource management. We believe gaining broader competence in these issues is the prerequisite for successful projects, in whatever areas an organization may be working.

We hope you have accepted both the proposals and, in addition to practical work on one of the aspects of human resource management, you will be able to get a good perspective of those implied links between the above aspects; no changes should be made in an organization, and no projects should be proposed unless this understanding is achieved.

We are also convinced that your professional experience and competence in the practices of human resource management in an NGO will emerge as an essential ingredient in our collaborative work, in the identification and discussion of actual problems and solutions of human resource management in NGOs.

Sincerely yours,

Andrei Vakulenko
Marina Liborakina
Mikhail Fliamer
Workshop Organizers

HUMAN RESOURCES DEVELOPMENT: General Impressions

Human resource development is an organization's continuous activity to select staff members and involve volunteers, prepare and develop jobs, train staff and volunteers, and create a favorable emotional climate and opportunities for personal development.

Human resource development in a non-profit organization is a prerequisite for its existence and the pivot of development. Opportunities for self-expression and personal growth is among the strongest motivations for people to join the non-profit sector, a factor that makes this sector different from business with its dominating "utilitarian" approach to the use of specialists, and from the government service that restricts personal initiative. Non-profit organizations attract many individuals by the opportunities they provide for self-expression and skills development, as well as for understanding the social and cultural significance of one's activity, the human and humane aspects of interpersonal relations, and attractive communication.

Contributions to human resource development are the most effective investments in the entire non-profit sector, not in one individual organization. The organizations' participants include volunteers and contractors as well as paid staff.

The key components of human resource development include:

- the organization's vision and mission accepted by the staff as their own;
- democracy in decision-making; the opportunity to participate in the organizational goal-setting and, respectively, to shape one's individual objectives, and integrate one's individual interest in the organizational one; structures that secure democracy of management (including the board, etc.);
- leadership, work in groups and team work according to the roles and the circumstances of each activity;
- functional division of labor and responsibilities; division of "routine" assignments and "heroic efforts;"
- motivation of activity (for the staff, volunteers and members of the board; "executors" and "heroes," etc.);
- compensations and benefits;
- hiring and termination of employment; involvement and release of volunteers, orientation in the organizational activities, performance reviews and self-appraisals;
- staff development, training and retraining; forming the culture of work relationships, including tolerance, conflict management, respect for cultural differences, protection against sex, age, race, religion, and sexual preferences discrimination;
- personal growth and development of creative potential.

The key areas of the human resource development to be discussed during the workshop include the following:

- Working with the staff when the organization's activities change.
- Leadership. Working group and team building.
- Staff motivation and compensation.
- The culture of work relationships.

Human resource development is currently carried out in the process of professionalization of the third sector and the transition from pro bono work to contracted efforts.

PERSONNEL POLICIES AND MANAGEMENT
IN WORLD LEARNING
SUBGRANTEE PROJECTS

THE PRESENT STATUS

Posing the Problem

A small survey on Personnel Policy and Working With the NGO Staff was made to cover organizations participating in the World Learning programs, with the view of the upcoming conference on Human Resource Development. The survey was targeted at revealing the status of the following:

- techniques and technologies of staff recruiting and working with the NGO employees, and the range of their objectives;
- the degree of development of personnel policy in NGOs as a specific sector of management (with the possible identification of principles of this policy).

The researcher had to do more than get formal information from the personnel unit and study the executive's personnel policies. He had to find out whether the personnel policy issues are a matter of concern for the NGO executives, whether personnel issues are handled in a sensible and targeted way, and what priorities (if at all) have organizations formed in this area.

Another aspect of these initial issues was related to "technologies." It did not imply requirements of NGO executives' high personnel management qualification. What it did imply was some standardization of activities in typical situations, and a clear understanding of the sequence of activities to lead to the desired result, be it the selection of the best applicant or team-building for a new project.

Description of Results

The questionnaire was addressed to organizations' leaders, and implied free answers to questions related to various situations in which decisions on personnel issues were required. The overall results of the quantitative processing of questionnaires, based on the content analysis method, are provided below. In answering the questions, respondents missed some of them; therefore, we had to provide absolute figures to indicate the number of respondents who chose this or that variant of the answer. In addition to the description of the quantitative answers, and with them as the background, we shall describe the most typical characteristics of personnel work in NGOs.

Organizations covered by the survey are newly-established, mostly founded after 1990. They include 11 NGOs with a staff of 10 employees, 6 NGOs whose staff ranges from 10 to 25, 3 organizations with the staff ranging between 25 and 100, and 1 organization whose staff exceeded 100. Almost all covered NGOs involve volunteers, some report a large volunteer corps, though data on volunteers are scarce. In some organizations, the number of volunteers by far exceeds the paid staff. On the whole, volunteers are involved in occasional actions related to working with the community (distribution of humanitarian aid, organization of shows or festivities - 7 NGOs). Fewer organizations involve specialists, such as psychologists or lawyers, to volunteer for them (5 NGOs). Three NGOs have volunteer boards or presidiums. Two NGOs

"Human Resources Development"

include members of local authorities, police, etc., as their volunteers. Auxiliaries and interns are also mentioned among volunteers.

Thus, we have small young organizations, staffed mostly by their initiators and founders. Some of the NGO have increased their staff over years of activity, and managed to involve many participants of different social and professional status to work on the pro bono basis. This proves their social relevance and noble goals.

I will now move from the "personnel unit" information to the study of answers to questions on personnel management situations that require decision-making.

The first question handled the problem of hiring new employees, recruiting and selecting the right candidate, and focused on selection criteria. Few NGOs (3 of the covered) advertise their vacancies in the Job Opportunities. People related to the organization, most often its volunteers, make the main source of new staff members (8 NGOs). Another source is friends and friends' friends (6 NGOs). Interview (10) and recommendations made by friends or partners (8; corresponds to the previous) proved to be the most popular tools in selecting the right candidate. Competition (5) and testing (5) are widely practiced, too. Other methods mentioned by the respondents included selection commission (1), collective decision (2), probation period (2 for a job, 1 for volunteering). Two NGOs asked for resumes.

Requirements can be grouped in the following way:

- professional (professionalism, experience, competence, etc.);
- motivation to work in this particular organization or program (the wish to work, loyalty to profession, etc.);
- communication skills (ability to work in a team, ability to communicate);
- business characteristics (initiative, responsibility, ability to learn);
- personal qualities (decency, kindness, honesty, altruism).

While the first group requirements are considered the most relevant (22), which is only natural, other groups rate very closely in importance (14, 10, 14, and 12, respectively). Despite the great public relevance of their activity, NGOs clearly remain relative closed, self-centered entities that reach their own "inner circle." It is this factor that can explain why personal acquaintance with the candidates is preferred to any other form of recruiting. Very high requirements refer not just to the candidates' professional qualifications of potential employees but to their personal characteristics as well, their values and goals; understandably, these requirements prompt actions for which close acquaintance with the would-be colleague is expedient. This aspect could be considered as typical for the entire non-private sector which attaches less importance to people's formal characteristics than to their stance in life (this, however, does not denigrate the importance of professionalism). Moreover, this factor prevents the candidate selection procedure from becoming relatively formal, or makes such formalization more difficult.

The next question was related to the reasons to prompt termination of employment (i.e., it was targeted at revealing the candidate's characteristics unacceptable for the organization). As well as requirements, the would-be employee's negative characteristics could be split into several groups:

- ineligibility for the job; incompetence;
- lack of loyalty to the organization and its programs (discreditation of the programs, violations of the Charter, instructions, decisions, etc., moral and physical damage);
- inability to work in a team (conflict-mongering, lack of communication skills);

- non-observance of the organization's ethics;
- negative business characteristics (negligence, irresponsibility, slack performance, neglect of duties);
- negative personal characteristics (dishonesty, callousness, indifference).

The group of faults and deficiencies that characterize the individual's lack of loyalty to the organization, its cause and programs came out to be the absolute leader in the survey (9). It is followed by characteristics of ethical violations and negative business qualities (7 and 1,, respectively). The negative professional qualities group, leader in the previous question, is insignificant among the deficiencies (6). Likewise, negative personal qualities (4) and inability to work in a team (3) are viewed as problems of minor importance.

This prioritizing indicates, first and foremost, that NGOs' primary concern is their employees' "destructive behavior" that undermines the organization's authority and discredits its programs. Hence increased attention to safety problems and concern about loyalty and ethics. On the other hand, considerable importance attached to the value aspect of activity has been mentioned. It steps up ethic vigilance and concern about loyalty to the organization and its cause. NGOs' tendency to focus on "inner circle" might seemingly cause slackened requirements to business qualities, but in practice it is offset by close attention to the culture of work relations and high discipline.

Another group of questions was related to developing new areas of activity and related personnel movements. Whenever a new area appears in an NGO's work, its leaders take steps that belong to three groups of actions:

- actions to involve employees, emotionally and informationally, in the new activity (orientation; discussion of prospects);
- actions to involve employees, on a routine daily basis, in the process of improving the project and preparing them for the new type of activity (requests for counterproposals, meetings, role plays, training and retraining);
- administrative actions (control; appointment of supervisors).

The first group exceeds the second and third taken together by almost twice (24, 11 and 4, respectively). Employees' own interest and wish serve as the most relevant factor in the process of assigning them to a new job area. Almost all the respondents mention this factor (14). Competence and previous experience are also frequently named (7 and 6). Other answers can be summed up along two lines: first, readiness to changes (ability to learn and be oriented in the new area; proposals; ability to take decisions independently) (4); second, business and personal qualities not specified in the answers (responsibility alone was named) (10).

NGOs' informal nature of activity is particularly revealed in the answers to questions of this group. On the one hand, immense attention is paid to discussions, explanations, efforts to make people interested, employees' wish; on the other hand, surprisingly few steps are taken to secure the collaborative finalizing of the project and delegation of initiative to the participants themselves. Equally surprising is the fact that very little attention is focused on making employees ready for changes, as well as on their skills development (this, however, is compensated by the appeal to their previous experience and results). Thus, leaders do not view changes in the organizational activity as a chance for their employees' personal and professional growth. Conversely, the respondent often sound sorry about the need to move their employees from the activity areas they have mastered.

The summing-up group of questions required an overall assessment of the organizations' personnel policies, their failures and achievements. Most of the leaders named a concerted well-working team as their unquestionable achievement (8); friendly informal relations are particularly praised (3). Four leaders failed to define any specific characteristics, and hid behind the answer "everything's OK." In general, this group of questions produced significantly fewer answers than the rest.

Speaking about their failures and faults in working with employees, respondents outline two groups of circumstances:

- working conditions of the "I wish we had ..." type (time, money, large wage, good laws, much available information, equipment, etc.);
- one's own mistakes and activity problems (lack of experience, lack of precisely defined goals and objectives, problems with the newcomers, etc.).

The first group has twice as many answers as the second (18 against 9). Concern about employees' overload is revealed in 2 answers. Four respondents see no problems in their personnel front ("everything's OK").

Unlike other questions that asked to describe familiar and frequent situations, this group appealed to the respondents' managerial reflection. However, answers turned out to be amazingly monotonous and undifferentiated (the question of achievements). Clearly enough, respondents hardly ever give a thought to their organizations' work in this area, and they do not identify it as the leader's specific activity. Furthermore, many respondents missed this question completely, or said "OK." Answers to the question about problems are also characteristic enough, in the sense that they size problems down to "inadequate external circumstances" (which, as everybody knows only too well, are always inadequate). However, answers that differ from the above are also reported frequently, thus inspiring hope that leaders and their allies will gradually develop understanding of the need to improve personnel policies and make them systematic.

Summing Up and Posing the Problem

Let us go back now to initial assumptions and tasks. Our interest laid in the following groups of problems:

- techniques and technologies of staff recruiting and working with personnel in NGOs, and the range of objectives they achieve;
- the degree of development of personnel policy in NGOs as a specific sector of management (with the possible identification of principles of this policy).

The obtained results lead to the following summary. The key factor of the personnel policies in NGOs, the element that determines problems and advantages alike, is orientation at the "inner circle" for staff recruiting. The second aspect of this same factor is an enhanced attention to, and development of, informal friendly relations. This approach may have the following consequences. First, it helps to avoid staff problems and conflicts altogether - for a certain while, by exploiting the stock of personal sympathies, attachments, and enthusiasm. However, all good things end one day. If organizations that step up their activities and professional requirements fail to pay due attention to thorough development of their personnel policies, they are taking a risk to face major problems and various conflicts one day.

Secondly, an increased number of programs and projects that are overflowing the third sector make an increasingly heavy load on its participants, thus reducing the number of available professionals. The range of sympathizers, narrow enough, remains the same, and the chances of recruiting new employees drop dramatically. One of the questionnaires emphasized that available professionals to be hired as program staff members are not available at all, whereas other questionnaires made a point about overloaded staff. Most of the organizations will face this problem before long, particularly in recruiting professionals. Therefore, organizations that wish to sustain their development, will have to think about the techniques of announcing their vacancies and arrange for a fair transparent competition. This, in turn, will require more general and formal criteria of selecting employees and providing skills development programs. This means the organizations will face a new type of tasks to develop personnel management principles and techniques and look internally for human resources, thus finding a new powerful impetus for their further development.

2

Logistics

15



World Learning Inc.

**"HUMAN RESOURCES DEVELOPMENT"
(4-7 OCTOBER 1995)
Seminar Program and Agenda**

OCTOBER 4 - Wednesday

13:00 - 15:00

Registration of all participants. 8 groups will be organized (approximately 13 people per group) and 2 streams (4 groups per stream - according to the number of small group leaders and classroom instructors).

THEMES FOR WORK IN SMALL GROUPS

A. Preparing staff for organizational change

(Small group leader - Marina Liborakina)
(Classroom instructor - Andrei Gorev)

B. The Culture of working relations

(Small group leader - Andrei Vakulenko)
(Classroom instructor - Natalya Khodyreva)

C. Leadership and Team building

(Small group leader - Vera Demicheva)
(Classroom instructor - Svetlana Kupryashkina)

D. Motivating staff and rewarding their actions

(Small group leader - Vladimir N. Yakimets)
(Classroom instructor - Scott Charlesworth)

STREAM 1

Group A - Theme A
Group B - Theme B
Group C - Theme C
Group D - Theme D

STREAM 2

Group A - Theme A
Group B - Theme B
Group C - Theme C
Group D - Theme D

The participants will remain in the same small groups during the Training Classes and will study other themes in addition to the specific theme chosen in the small group.

16:00

General Welcome [Auditorium]

1. Yekaterina Greshova/Alexander Borovykh - Welcome and Present local officials
2. Representatives of Local Administration
3. Tom Kelly and Scott Charlesworth - presentation of Trainers & WL Staff & YMCA staff
4. Yekaterina Greshnova/Alexander Borovykh - details

17:15 - 19:00

Sector Group Meetings

GROUPS:

- Disability projects - Denise Rosa & Galina Bodrenkova [hall #1]
- Women's Issues - Marina Kolmakova & Marina Liborakina [hall #2]
- Small Business - Jeff Jacobs [hall #3]
- Social Services - Scott Charlesworth & Alexander Borovykh [hall #4]
- Health - Donna Barry & Irena Boskar [hall #5]
- Communications/Networking - Yekaterina Greshnova & Yevgeniy Yakushev [hall #6]

19:00 - 20:00
DINNER

20:15 - 22:00
Materials and videos on display for those who wish to browse or watch
[Main building, display hall]

OCTOBER 5 - Thursday

09:00 - 09:30
Plenary meeting Objectives and program of the workshop
[Main building, auditorium]]

09:30 - 09:45
BREAK

09:45 - 11:00
Lecture of the Day (for both streams) Theme: "Interpersonal Relations in an Organization:
Ideals and Problems" (T.A. Klimenkova)
[Main building, auditorium]

11:00 - 12:45
STREAM 1

Work in small groups

Group A [hall 1]
Group B [hall 2]
Group C [hall 3]
Group D [display hall]

13:00 - 14:15
LUNCH

14:15 - 16:00

Discussion: Effectiveness of an organization: history and future.
Presentation from small groups.
[Main building]

16:00 - 16:15
BREAK

16:15 - 18:00
STREAM 1

Training classes

Group A - Theme B [hall 1]
Group B - Theme C [hall 2]
Group C - Theme D [hall 3]
Group D - Theme A [hall 4]

18:00 - 18:15
BREAK

STREAM 2

Training Classes

Group A - Theme B [hall 4]
Group B - Theme C [hall 5]
Group C - Theme D [hall 6]
Group D - Theme A [hall 7]

Work in small groups

Group A [hall 4]
Group B [hall 5]
Group C [hall 6]
Group D [hall 7]

STREAM 2

Discussion: Effectiveness of an organization: history and future.
Presentation from small groups.
[Main building]

18:15 - 19:30

Summing up the results of the day. What was accomplished during the day? (for both streams, with comments from lead trainers and all participants).

[Auditorium]

19:30

DINNER (SHASHLIK)

OCTOBER 6 - Friday

09:00 - 10:30

Lecture of the Day (for both streams). Theme: Organization as the Basis for Using Human Resources (Shcherbina)

[Auditorium]

10:30 - 10:45

BREAK

10:45 - 12:30

STREAM 1

Training classes

Group A - Theme C [hall 1]

Group B - Theme D [hall 2]

Group C - Theme A [hall 3]

Group D - Theme B [hall 4]

STREAM 2

Work in small groups

Group A [display hall]

Group B [hall 5]

Group C [hall 6]

Group D [hall 7]

12:30 - 12:45

BREAK

12:45 - 14:30

Work in small groups

Group A - Theme C [hall 1]

Group B - Theme D [hall 2]

Group C - Theme A [hall 3]

Group D - Theme B [hall 4]

Discussion: Development of Human Resources in Organizations: experience, concepts and plans.

[Main building]

14:30 - 15:30

LUNCH

15:30 - 17:15

STREAM 1

Discussion: Development of Human Resources in Organizations: experience, concepts and plans.

[Main building]

STREAM 2

Training classes

Group A [hall 4]

Group B [hall 5]

Group C [hall 6]

Group D [hall 7]

17:15 - 17:30

BREAK

17:30 - 18:45

Summing up the results of the day. What was accomplished during the day? (for both streams, with comments from lead trainers and all participants).

[Auditorium]

18

18:45 - 20:30

DINNER

20:30 - 22:00

General Q & A session with World Learning staff and all trainers for further consultation.
[Display hall & Auditorium]

OCTOBER 7 - Saturday

9:00 - 10:30

STREAM 1

Practical Presentation: Employee Assistance Programs (Dori Dysland)
[Main building]

STREAM 2

Training classes

Group A - Theme D [hall 4]

Group B - Theme A [hall 5]

Group C - Theme B [hall 6]

Group D - Theme C [hall 7]

10:30 - 10:45

BREAK

10:45 - 12:15

STREAM 1

Training classes

Group A - Theme D [hall 1]

Group B - Theme A [hall 2]

Group C - Theme B [hall 3]

Group D - Theme C [hall 4]

STREAM 2

Lecture and discussion on the theme:
Democratic Methods of Management and
Decision Making (L. Fedorova)
[Main building]

12:15 - 12:30

BREAK

12:30 - 14:00

STREAM 1

Lecture and discussion on the theme:
Democratic Methods of Management and
Decision Making (L. Fedorova)
[Main building, auditorium]

STREAM 2

Practical Presentation: Employee Assistance Programs (Dori Dysland)
[Main building, display hall]

14:00 - 15:30

LUNCH

15:30 - 17:00

Work in small groups (preparations for final presentations and discussion of follow up options)

17:00 - 17:15

BREAK

17:15 - 18:30

Discussion on workshop and plans for the future. Work on conference evaluation forms.
[Main building, auditorium]

18:30 - 20:00

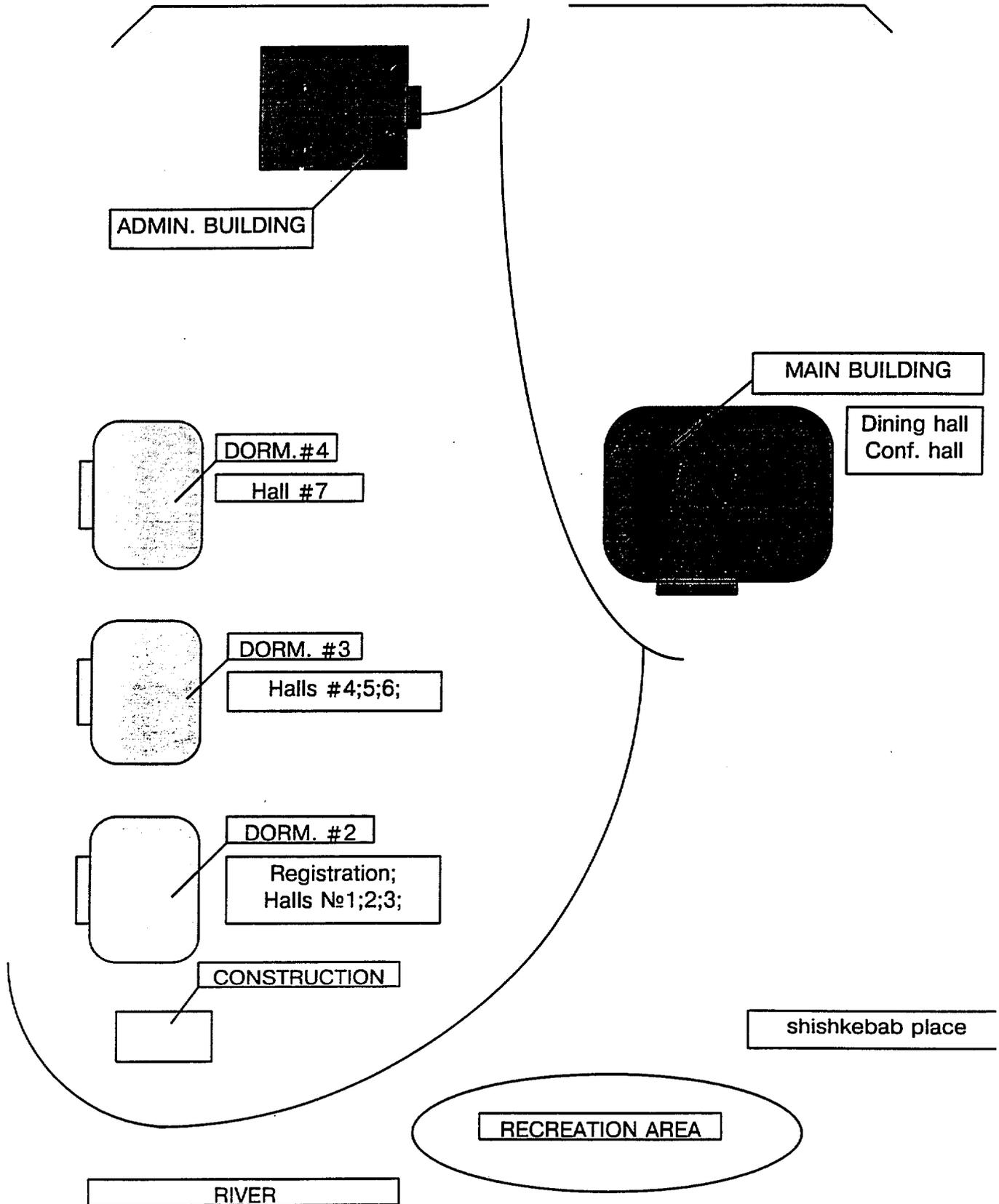
Collection of conference evaluation forms by WL and trainers and reimbursement to participants for tickets.

20:00

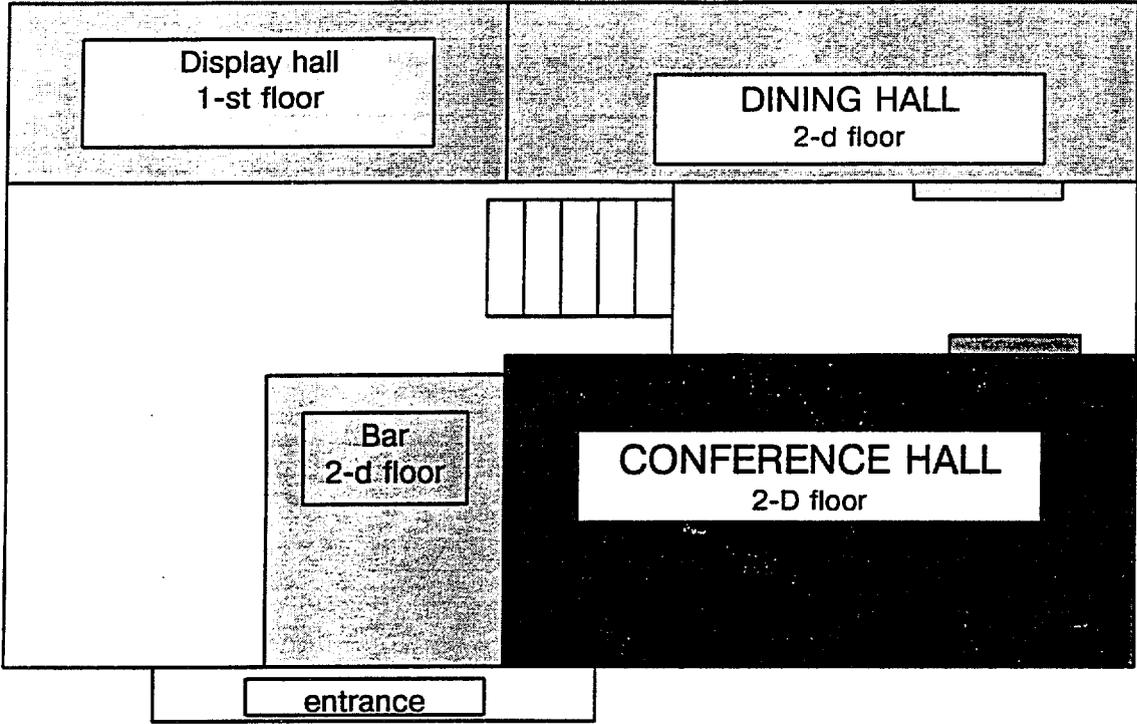
BANQUET and awarding of certificates to seminar participants
[Dining room]

**PLAN FOR THE BUILDINGS IN SANATORIUM "SOSNOVI BOR". SITE
FOR THE ANNUAL WORLD LEARNING ALL-SUBGRANTEE
CONFERENCE.**

Yaroslavl October 4-7, 1995

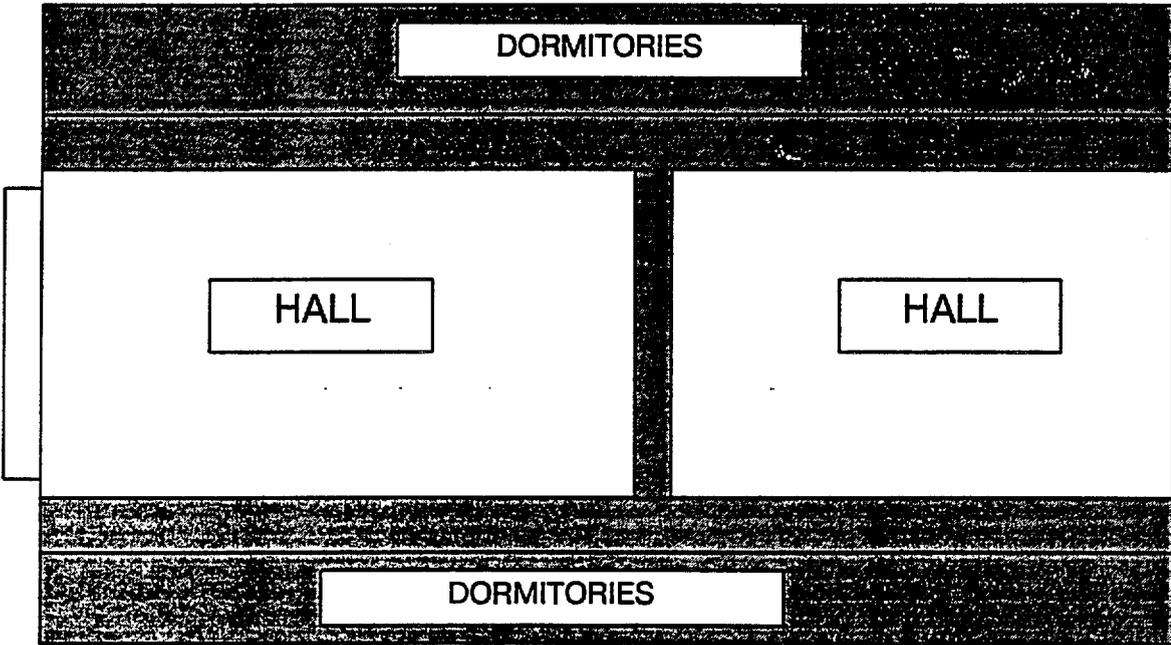


PLAN FOR THE MAIN BUILDING



PLAN FOR THE DORM.SPACE

(BOTH FLOORS HAVE THE SAME LAYOUT)



3

**Participants and
Guests of the
Conference**



World Learning Inc.

**PARTICIPANTS AND GUESTS
OF THE CONFERENCE**

| First Name | Last Name | Organization |
|-------------------|------------------|--|
| Valentin | Prokhorov | Association of Obstetricians and Gynecologists |
| Ludmila | Kutyavina | Association of Obstetricians and Gynecologists |
| Igor | Simakov | Association of Physicians of Don |
| Victor | Smirnov | Association of Social Pedagogues and Social Workers |
| Valentina | Bocharova | Association of Social Pedagogues and Social Workers |
| Natalya | Morova | Association of Social Pedagogues and Social Workers |
| Svyatoslav | Grigoriev | Association of Social Pedagogues and Social Workers |
| Lubov | Lokashkova | Byelorussian Children's Fund |
| Lydia | Litvinovitch | Byelorussian Children's Fund |
| Galina | Popova | Vozmozhnost |
| Irina | Maslova | Palace of Youth and Creativity |
| Lubov | Nikitina | Parent Association of Disabled Children |
| Vera | Terebova | Parent Association of Disabled Children |
| Maria | Belykh | Human Soul Charitable Foundation |
| Svetlana | Korukina | Human Soul Charitable Foundation |
| Vyacheslav | Grafenkov | Goodwill (Rybinsk) |
| Andrei | Medvedenko | Goodwill (Moscow) |
| Nadezhda | Gazetdinova | Ekaterinburg Public Nursing Association |
| Svetlana | Kulba | Ekaterinburg Public Nursing Association |
| Mikhail | Guskov | YMCA (Moscow) |
| Alexander | Lagutin | YMCA (Bryansk) |
| Nikolai | Kurochkin | YMCA (Yaroslavl) |
| Olga | Koryakovtseva | YMCA (Yaroslavl) |
| Maria | Perfilieva | Interlegal (Moscow) |
| Vadim | Ni | Interlegal (Kazakhstan) |
| Pavel | Zhovnirenko | Interlegal (Ukraine) |
| Valeri | Nanobashvili | Educational and Informational International Center (Georgia) |
| Nika | | Educational and Informational International Center |
| Ludmila | Savinova | "Krug" Center for Psychological |

| | | Support |
|-----------|----------------|---|
| Irina | Kosova | "Krug" Center for Psychological Support |
| Mila | Shumilova | International Women's Center |
| Olga | Klimenko | Salus International Health Institute |
| Vladimir | Goroshkov | "Healthy Family" Center (Ekaterinburg) |
| Galina | Bodrenkova | Moscow Charity House |
| Tamara | Lavrova | Moscow Charity House |
| Elena | Zakharova | Moscow Charity House |
| Galina | Venediktova | Moscow Center for Gender Studies |
| Elena | Kochkina | Moscow Center for Gender Studies |
| Madina | Bikboulatova | Dubna Educational Center |
| Tamara | Zhitnikova | Dubna Educational Center |
| Nadezhda | Smirnova | Dubna Educational Center |
| Anna | Anokhina | Woman and Family Educational Center (Moscow) |
| Ludmila | Zatsepina | Woman and Family Educational Center (Moscow) |
| Tamara | Bogdanova | Woman and Family Educational Center (Izhevsk) |
| Natalya | Sereda | Woman and Family Educational Center (Barnaul) |
| Kulyan | Ischanova | Red Cross and Red Crescent Societies of Central Asia (Kazakhstan) |
| Adilbek | Chotbaev | Red Cross and Red Crescent Societies of Central Asia (Kirgizstan) |
| Zulfia | Daviyatbekova | Red Cross and Red Crescent Societies of Central Asia (Tadzhikistan) |
| Klavdia | Kurbandurdieva | Red Cross and Red Crescent Societies of Central Asia (Turkmenistan) |
| Ludmila | Hashimova | Red Cross and Red Crescent Societies of Central Asia (Uzbekistan) |
| Tatiana | Ivanitskaya | Operation Smile (Moscow) |
| Victoria | Machkevskaya | Operation Smile (St. Petersburg) |
| Andrei | Stepanov | Russian Care |
| Andrei | Krupin | Russian Care |
| Pavel | Orlov | Russian Care |
| Denis | Averin | Russian Orthodox Church |
| Margarita | Ivanova | Russian Orthodox Church |
| Natalia | Sidorova | Sluzhenie |
| Lubov | Rubinchik | Socio-Ecological Union |
| Tatiana | Ryabikina | Alliance of American and Russian Women |
| Maria | Esmont | Creativity Association |
| Stanislav | Pachgin | "FINIST" Disabled Sports Club |
| Victor | Semenko | "FINIST" Disabled Sports Club |
| Valeri | Lyashenko | Fund of Ukraine for the Protection of Invalids |
| Galina | Tazaratcheva | Fund of Ukraine for the Protection of Invalids |
| Vasili | Kopitin | Health and Environment Foundation |
| Dmitri | Durmanov | The Foundation for Agrarian Development Research |
| Evgeni | Yakushev | The Foundation for Agrarian Development Research |

| | | |
|------------|--------------|--|
| Irina | Kazakova | Center for Curative Pedagogics |
| Larisa | Fomichova | Center for Curative Pedagogics |
| Eduard | Korukhin | Compassion Center |
| Nora | Gordon | Compassion Center |
| Valentina | Shelkova | Center for the Formation of Sexual Culture |
| Albina | Shimina | Center for the Formation of Sexual Culture |
| Marina | Nikitina | Aesop Center |
| Kevin | Gardner | Aesop Center |
| Oleg | Frolov | Aesop Center |
| Valentina | Vishnyakova | Chita Public Nursing Association |
| Gia | Tsilosani | ACTS (Georgia) |
| Guram | Amiridze | ACTS (Georgia) |
| Gia | Tomadze | ACTS (Georgia) |
| Anna | Miholap | United Way International |
| Alexander | Harkov | Salvation Army |
| Ludmila | Glushankova | Salvation Army |
| Irena | Boskar | World Vision |
| Irina | Maltseva | World Vision |
| Elizabeth | Gardner | PSI |
| Oleg | Kazakov | Civic Initiatives Programs |
| Dori | Dysland | trainer |
| Marina | Liborakina | trainer |
| Mikhail | Flyamer | trainer |
| Andrei | Vakulenko | trainer |
| Andrei | Gorev | trainer |
| Vera | Dimicheva | trainer |
| Svetlana | Kupryashkina | trainer |
| Natalya | Khodyreva | trainer |
| Larisa | Fyodorova | trainer |
| Vladimir | Yakimets | trainer |
| Vladimir | Sherbina | trainer |
| Tatiana | Klimenkova | expert |
| Scott | Charlesworth | World Learning |
| Donna | Barry | World Learning |
| Jeffrey | Jacobs | World Learning |
| Yekaterina | Greshnova | World Learning |
| Alexander | Borovikh | World Learning |
| Tatiana | Galkina | World Learning |
| Marina | Gulyaeva | World Learning |
| Patricia | Donnelly | World Learning |
| Thomas | Kelly | World Learning |

4

Trainers, lecturers and group leaders

TRAINERS, LECTURERS AND GROUP LEADERS

Vyacheslav V. Shcherbina, Dr. of Sociological Studies. Professor at the Faculty of Sociological Studies of the Moscow State University. Dominant interest: Sociology of organizations. Long-term experience of research, teaching, and consultancy in the following areas:

- Social engineering and organization-building.
- Organizational personnel management programs.
- Comprehensive diagnosis of employees and managers.

Marina Liborakina. Co-director of the Information Center of the Women's Independent Forum. Director of a sector in the Russian Institute for Cultural Studies. Research interests: protection of women's civil rights and educational and consultative support to non-profit organizations. Studies of the position of women 1994 and 1995; senior consultant to IREX's Effective Management and Fundraising in Non-Profit Organizations program and the Feminist Orientation Center; leader and trainer in several workshops of this program, 1993 through 1995; trainer and organizer of discussions and workshops, participant in the actions of the Women's Independent Forum and other organizations; organizer and leader of Women in Transition Economies workshop at the Non-Profit Organizations Forum of the Fourth Conference on Women's Position, 1989 through 1993; participant (as an expert) in intensive seminars and organizational activity role plays of the Cultural Policy School on City Planning and Development of Cultural and Educational Initiatives in the NIS, 1983 through 1995; employee of several research organizations including the Center for Philanthropy Studies at the University of New York (International Fellow, Researcher in Women and Philanthropy program, 1995). Ph. D. in Economics, European Degree in Cultural Management. Background: Moscow Institute of Management, Cultural Policy School; several training courses in European and US. cultural and educational centers and non-profit organizations. Author of about 40 publications in Russian and English on the position of women, history of charity, cultural studies and policy, and management including role play in setting and achieving the goals.

Andrei A. Gorev. b. 01.09.63.

Educational background: Faculty of Psychological Studies of the Moscow State University, 1986-1992.

Employment. 1994-1995: Yuzhny Dvor Real Estate Agency (manager, promotion campaigns, reaching the clients, business negotiations, staff recruiting, real estate agents training), 1990-1994; Cultural Policy School consulting company (project officer: social and marketing research; evaluation; development of the projects for reorganization of enterprises and organizations; development and implementation of focus-groups, organization of problem seminars, conferences and contests; organizational consulting; business and communication training sessions; organization of the Cultural Policy School's regional offices), 1991-1993; Family and Marriage consultation (psychologist; family consultant: emotional correction; family consulting; business and communication training sessions - testing, psycho-diagnosis).

Andrei Vakulenko. Education: Faculty of Cybernetics of the Moscow Institute of Radiotechnics, Electronics and Automatics. Internship course in NGO management in the

Institute for Political Studies of John Hopkins University (Baltimore, Maryland). Participant in the Training for Trainers Program in Advocacy Institute, Washington D.C. Much experienced in working with NGOs. As a trainer and consultant, actively participates in workshops and conferences of United Way International, Moscow Club of Charity and Non-Profit Organization Leaders "Profile Non-Profit", Eurasia Foundation, and Independent Women's Forum.

Mikhail Fliamer. Researcher at the Russian Institute of Cultural Studies of the Russian Academy of Sciences. Education: college degrees in technical sciences and management. Since 1985, involved in evaluations and consulting in education, municipal and government management, and development of industrial and non-profit organizations. Very experienced in carrying out intensive educational programs for adults, including NGO staff. Specialist in organizational project and program development.

Natalia Khodyreva. Education: Faculty of Psychology of Leningrad State University, 1982; Ph.D. (Psychology), 1988 (dissertation of psycho-linguistics). Lecturer at the Faculty of Psychology; courses in Women and Management, Economic Behavior Psychology, Health Psychology. Since 1988 studies women's problems. Participant in the First and Second Independent Women's Forums. One of the founders of the first St. Petersburg division to help victims of social violence, 1982. Since 1993, works at St. Petersburg Center of Gender Problems, trainer and lecturer in: Women's Psychology, Feminist Psycho-Therapy, Women's Health and Reproductive Rights. In 1994, jointly with a group of friends, organized the Crisis Psychological Center to provide social and psychological help and legal advice to women who have suffered sexual and household violence. Participant in research studies: Gender Situation in the Town of Mirny; Sexual Violence in St. Petersburg; Myths on Rape; Microeconomic Relations in the Family; Parent Studies; Socialization of Women in Russia. Participant in the conferences: Violence Against Women (Prague), Intensive Search for Sisterhood (Glasgow), in the program Violence Against Women (USA), Hippopotam Women's Camp (Lyubliana), in the California Psycho-Therapeutic Exchange. Publications in research collections, media, and All People Are Sisters bulletins.

5

Training lectures

5. a.

Human relations in
organizations: ideals and
problems

The longer I live, the more I realize the impact of attitude on life. Attitude, to me, is more important than facts. It is more important than the past, than education, than money, than circumstances, than failures, than successes, than what other people think or say or do. It is more important than appearances, giftedness, or skill. It will make or break a company... a church... a home...

The remarkable thing is we have a choice every day regarding the attitude we will embrace for that day... We cannot change our past... We cannot change the fact that people will act in a certain way. We cannot change the inevitable... The only thing that we can do is play on the one string we have, and that is our attitude. I am convinced that life is 10% what happens to me and 90% how I react to it. And so it is with you...

We are in charge of our attitudes.

AUTHOR UNKNOWN

VERA PAVLOVNA'S SEWING WORKSHOP

or Modern Glimpses of History

(Human Resources Development in a Non-Profit: Nikolai Chernyshevsky's Novel "What To Do?")

Russian charity has solid social and cultural traditions. Its emergence is linked to reforms of 1890s when public organizations could be developed on a massive scale, and charity turned from aristocratic activity in which few were involved into one involving thousands of people.

It was a dire need of life. Elimination of serfdom, accompanied by court, Zemstvo, and other reforms changed more than the economy; they changed entire life styles in Russia. Social contrasts between the rich and the poor intensified dramatically, poverty was enhanced, whereas the traditional social security system, mostly based on kindred relations, was rapidly disintegrating. "Aristocratic nests" scattered throughout the country could no longer provide shelter for poor relations, unmarried maidens, orphans and widows. Nor could elderly house servants rely on a peaceful life under the protection of a master landlord. Few government charity institutions could cope with the mounting poverty. Taken as a whole, government policy was not socially-oriented; one can rather speak about government protectionism towards the developing capitalism in Russia of the day. Zemstvo reform, as well as reform of education, facilitated setting up organizations that took care of health and education; however, these reforms provided no funds.

At the same time, the reforms awakened the social consciousness. Ideas of transition from the state based on serfdom and government service to a free state were developed. The formation of "a highly moral, independent and active individual as the basis not just for the civil and public arena but for any human existence" (Kavelin) was among these ideas. The concept of "society" found its way into reality in the activities of hundreds of private associations of citizens who shared the same values and interests. Numerous public organizations mushroomed throughout Russia to handle cultural and research issues. Charity played a special role. It provided an opportunity to channel one's energy and talents to the solution of social problems. Charity was among the few legally permitted civil activities. Until 1905, the Russian Empire had no representative authorities, nor did it have suffrage. Political parties and professional unions were banned, while associations and "societies" bred suspicion. Charity was more than an act of mercy, it was almost the only activity possible for volunteer organizations. As such, it was often comprehensive and combined with the civil rights movement. Thus, female charity was a part of the movement for women's rights. The Russian Women's Mutual Charitable Society of the early twentieth century embraced educational and professional training courses for women, an employment bureau for women, a council on hostels, and a legal advice commission.

Charity in Russia developed mostly along the lines of setting up *artels* (cooperative associations of workmen or peasants) and other cooperative organizations. This was related to a specific approach of the democratically-minded intelligentsia to man and his needs. John Stuart Mill's observation that self-assistance is more important for a poor man than outside assistance was immensely popular. The St. Petersburg Diligence House for Educated Women pointed out in its report, "The most expedient, the only rational form of charity should be expressed in providing paid jobs, not alms, nor free aid, to the needy." (Women's Movement Chronicle. Zhenskoye Delo, p. 166).

"Charity entrepreneurship" was founded on a cooperative basis, the principles of self-development and self-help. This form of charity did not treat the poor as objects of "outside" assistance. Instead, it focused on the idea of assistance through labor, self-assertion and self-realization in professional activity. Expressed in contemporary language, it was the task of human resource development in a non-profit organization set up on the basis of a mutual assistance group. NGOs count in the hundreds today, and this makes history lessons very helpful. Let us view Nikolai Chernyshevsky's novel "What to Do?," the one which we have been dozing off, as we read, from this angle. Let us re-read it as a fascinating manual in human resources development, and try to understand what Vera Pavlovna was doing as the social initiative leader, NGO manager, and personnel policy expert.

A few introductory remarks to start with.

Today, we can hardly imagine Chernyshevsky's immense influence on his contemporaries, and the heated discussions on the "immorality" of the novel. The book brought to the limelight the problems of the day, including the emergence of the assistance-through-labor movement. Vera Pavlovna's sewing shop is an artistic description of numerous professional artels that sprang up in the 1860s, such as St. Petersburg Women's Publishing Artel. It was to provide interesting jobs for women (translation, editing, publishing, etc.) and publish "good reading matter for the young generations", including Darwin's "Origin of The Species." Chernyshevsky's character inspired young people to set up labor communes. The best known communes included Mrs. Garshin's laundry artel and Znamenskaya Commune (Vasily Sleptsov, Yekaterina Makulova, Maria Kopteva and others). Artels provided jobs and earnings, while at the same time they secured moral and intellectual support and communication.

Why was it that the artel in Chernyshevsky's novel was set up by Vera Pavlovna, not any other character? Why did seamstresses cooperate in it, not shoe-makers? In other words, what are the social characteristics of the leader and employees in the non-profit organization we are interested in?

A sewing shop was not arbitrary. Women's charity was developing rapidly and extensively in those days as the movement of mutual assistance that was prompted into existence by a dramatically worse position of women in post-reform Russia. Collapse of "aristocratic nests" and peasant households caused massive migration to large cities. Given the situation in which independent earnings meant survival, job opportunities for women were very scarce. The czar ruled in 1871 that women were not allowed as clerks or to take other positions in government and public institutions, with the exception of the network supervised by the Ministry of Institutions of the Empress Maria Fyodorovna (i.e., charity institutions). Positions of primary school teachers, obstetricians, doctor's assistants, and tailors' cutters were almost the only jobs available for educated women; the uneducated could work as maids, cooks, or laundresses. The government's conservative policy dampened the energy and initiative of thousands of women, doomed many of them to poverty and hardships, and thus encouraged prostitution that was as much as protected by the state through the "yellow tickets" system.

In the new social situation, the government's policy caused protest against unfair treatment of women. The "women's issue" surfaced, and democratically-minded intelligentsia started pressing for equality of the sexes. The first women's unions and societies were founded. They were mostly involved with charity, mutual support, assistance through labor, and education. Charity was a form of emancipation for women, the school of leadership, social responsibility, and social recognition at the turn of the 19th and 20th centuries. In fact, all Russian feminists participated in various initiatives related to women's mutual assistance. "Why were artels founded? Because

all the Russian people's initiatives of the day viewed it [this form of activity] as the most fair, real, natural, and simple," said Nadezhda Stasova, one of the first Russian feminists, a well-known philanthropist, financial manager of the Society of Fundraising for the Higher Bestuzhev Courses. Over twenty years of her management, the Courses' property increased from Rub 222 to Rub 1,510,000. (Stasov, p. 122).

Vera Pavlovna's Sewing Shop
(comments on human resources development
are provided in square brackets)

"Vera Pavlovna's shop was settled. Its underlying principles were simple - so simple that there's no need to speak about them. Vera Pavlovna did not tell her first three seamstresses anything except that she would pay them wages somewhat higher than seamstresses get in shops. [When an employee is hired, COMPENSATION is discussed as one of the characteristics of the JOB]. These girls found three or four more, and chose them with the discretion Vera Pavlovna asked for [Employees' REFERENCES are a well-proven, effective, and inexpensive method of involving new employees; there is no need to pay for ads] because she wanted the girls to have a frank and kind nature, common sense, and the ability to get along together [any social and psychological requirements are announced IN ADVANCE]. Vera Pavlovna met these girls herself, and made a good acquaintance with them before telling them they were hired [a thorough INTERVIEW is mandatory when a new employee is hired].

So they worked for a month. Vera Pavlovna was always present in the sewing shop, and they had a chance to know her as a prudent, economical, sensible woman, with all her kindness, so that she commanded complete trust. [MUTUAL TRUST between leader and employees is essential for effective work, particularly for INNOVATIONS]. "Thus, I can tell you my thoughts frankly," said Vera Pavlovna [A LEADER is one who thinks one step ahead of today's activity. EMPLOYEES are encouraged to take part in planning the changes FROM THE VERY START]. "Good people say sewing shops can be arranged in such a way the seamstresses will get a much better benefit from them [the principle of MUTUAL BENEFIT is introduced, so that employees' success would depend on the company's success]. Judging by the first month, they surely can." Vera Pavlovna read out the income and expense account {TRANSPARENCY of financial information contributes to strengthened trust and starts as well dividing the responsibilities}. "You see now, I get so much money in the end. I set up this shop so that these profits would go to the seamstresses whose work is paid for by the clients [LEADER explains the PURPOSE of the organization]. That is why I distribute them among you; for a start, equally, and separately to every one. We shall later find out if this could be done in any other way, more profitable for you." [Principles of paying compensation are explained IN THEIR RELATION to the organizational goals and principles; perspective is set at the start].

For a while, the seamstresses could hardly recover from surprise, then they started expressing their thanks. Vera Pavlovna gave them enough time to speak about gratitude, so as not to insult them by refusing to listen [a wonderful way to establish COMMUNICATION IN THE GROUP], then she went on, "Now there is one most difficult thing I have to tell you. What's the reason for me to set up this shop if it did not earn profits? [the LEADER would then clarify to the employees what the "non-profit sector's VALUES" are. A page and a half was enough in Chernyshevsky's days].

Of course, it would have been decent in itself, were I to give you the profits every month, like today. But better things could be done, and the profits could be put to better use. So, we'll live and see. I will explain things to you, little by little, and you yourselves will take a close look,

and as you see that something good can be done, we'll try to do it [COLLABORATION is encouraged]. But I will not start anything new unless you are in it, too. We'll do only those new things you will want to do. [DEMOCRATIC DECISION-TAKING is the prerequisite for effective work].

We need to keep accounts and see there would be no unnecessary spending. I did this by myself last month; I don't want to do it alone any more. Choose two girls among yourselves, so that they will do it with me [DIVISION/DELEGATION OF RESPONSIBILITY: the LEADER is not afraid to "delegate the power," and very soon he or she will get good results, as employees will accept the organizational goals as their own]. This is something new; we do not know yet which of you is best suited for it, so we just do it for a while, and you'll see in a week, whether we should choose other girls or leave the job with these [a new employee must have a PROBATION PERIOD].

Things moved on. The girls who made the core group of the shop had been chosen carefully, they were good seamstresses, and they benefited directly from the job; therefore, naturally, the shop performed well [THE RIGHT CHOICE OF EMPLOYEES + PROFESSIONALISM + PERSONAL BENEFIT = SUCCESS].

One of the first things that followed from the final delegation of management power to the girls themselves [management principle in the arte] was the decision that should have been expected: the girls decided that it was no good for Vera Pavlovna to work with no compensation [democracy brings fruits to the leader]. They wanted to assign a third of the profits to her. She saved it for some time, while she was explaining to the girls that this opposes the key idea of their work [reiterated explanation of how compensation is paid IN RELATION to the goals and principles of the organization's activity]. The decision was to pay Vera Pavlovna a cutter's wage. Her earlier savings from the profit were taken back, except for what was due her as a cutter; the rest were used for a bank account.

How were profits to be distributed? Vera Pavlovna wanted them to be divided equally among all. But they managed to do so only in the middle of the third year; before that, they had moved through several stages, starting with dividing the profits in proportion to wages. First, they saw that it would be unfair to strip a girl of her share of the profits if the girl missed a few days because she was sick. Then the general agreement was, that the cutters are well compensated, as they are, by their special wages, and it would be unfair for them to take even more from the profits. Seamstresses were so tactful that they never pressed for a change when they realized how unfair the earlier order had been, though they had set it up themselves: executives felt how awkward it was for them to get extras. [Compensation patterns depend on the level of development of internal democracy and work relationships]. This temporary tact - patience of some, refusal of others - was not a special endeavor at all, because things turned for the better for all of them [NO-CONFLICT performance].

The shop understood that earning profits was the result of its general character, the way it was set up, its goal. The goal was to make everybody benefit equally from the work, no matter what individual characteristics the girls had; the shop, its spirit and order is made by the unanimous efforts of all, and every participant is equally important for this unanimity; the silent consent of the most timid one, or of the least talented, is no less useful to maintain and develop order than the active fussiness of the most business-minded or most gifted. [SUCCESS is the result of team work].

Vera Pavlovna managed the shop step by step, and was patient and firm in following her rule: not to command but to advise, explain, offer assistance, help in doing what her team had decided [LEADER!!!].

A small capital fund appeared and kept growing; the shop started thinking how it could be used. It was immediately understood that it could be invested in interest-free loans. A procurement commission followed the bank. Some eighteen months later, almost all the girls lived in one large apartment, and had meals together.

Thorough records were kept, so that the whole team would be sure that no one owes anybody, no one is a loss to anybody. [the way TO PREVENT CONFLICTS].

One aspect in the shop's life should be described in more detail. Since the very first days of its work, Vera Pavlovna started bringing books. Assignments made, she began reading aloud. The girls liked reading, and it became regular. Later, reading turned into informal educational courses in different sciences. Later, Vera Pavlovna saw a chance to start proper training [i.e., PERSONNEL DEVELOPMENT started in the shop].

"Alexei Pavlovich," said Vera Pavlovna when she visited the Mertsalovs once, "could you do me a favor? Natasha [Mertsalov's wife] is with me [a sensible step to involve a volunteer]. My shop is turning into a lyceum of various knowledge. You are needed as a specialist; you will serve as a shield of good morale and proper direction of our studies [Alexei Pavlovich is a priest]."

"This is so, indeed. I see, morale will suffer without me. Well, assign the chair."

"Russian history, for example."

"Wonderful. Perfect. Two jobs: professor and shield. [wonderful indeed: a perfect member of the board].

Teaching was combined with entertainment. Parties were arranged, and out-of-town trips; boxes were taken in the theater.

Vera Pavlovna was most pleased at the order in her shop when she explained to somebody that the order was set and maintained by the girls themselves; that the shop could well have managed without her; that other similar shops could appear quite autonomously.

Literature:

K. D. Kavelin. *Our Frame of Mind*. Moscow, Pravda Publishers, 1989, p. 310.

N. G. Chernyshevsky. *What To Do?* Moscow, OGIZ, 1947, p.p. 165-175.

5. b.

Organization as an
instrument for using Human
Resources

METHODS AND LOGIC OF WORKING WITH HUMAN RESOURCES IN AN ORGANIZATION

Modern tradition of organization and management views the human component of an organization as its major element and a special type of resource. Specific characteristics of this resource lie in the fact that, firstly, it is the only type of resource that has inherent spontaneous activity, ability to be engaged in purposeful activity, ability of self-organization, learning, change, development and inventiveness. Secondly, it is the only type of resource to increase in value in the process of being used. These characteristics of personnel are certainly positive for an organization.

At the same time, human activity does not always act as a positive factor in an organization, because the human resource is capable of opposition, destruction and sabotage. Goals of an individual who has joined an organization would usually differ from the declared and implemented organizational goals, and this makes a peculiar problem of working with the human resource. Typically, an individual joins an organization to reach his own goals, and participation in the activities targeted at organizational goals is for him but a means to resolve his own problems and achieve his objectives.

This social resource is homogeneous. Its value for an organization is determined by a number of factors. The latter include the ability to be involved in activity, readiness to do so, and loyalty to the organization. This last one, in its turn, is likewise determined by many factors. The major ones include: 1) loyalty to the organization, acceptance of the organizational goals, level of development, type and degree of accepting the organization's culture, his business ethics and general culture; 2) satisfaction with the work, status, working conditions and remuneration; 3) consistency of the pattern of individual motives and needs with the opportunities provided by the organization, and flexibility of the appraisal and disciplinary methods; 4) business qualities, abilities, qualification, education, professionalism, responsibilities, level and type of socialization, personal qualities. The difference of these personnel characteristics clearly determines the form of managerial influence. The questions of how high the personnel's activity is, and to what extent it is constructive if viewed from the angle of the organization's goals (R. Merton) is among the pivotal issues tied up to the problem of choosing the form of managerial influence on the personnel. Ideally, management should take proper consideration of both factors. In reality, restrictions in social activity are often determined by the fact that the given type of human resource, the one that has to be handled, is frequently unable to combine the freedom of business and social activity with constructive action, and his behavior is often destructive. However, before moving on to this issue, let us try to define the area of work with the personnel.

Personnel management typically discerns between "broad" and "narrow" approaches to personnel management. The broad approach traditionally embraces a substantial area of management. Ever since the publications of the classical school of organization and management (from the turn of the centuries until the '40s and '50s of this century) this area had been viewed as a large one, a most essential area of management in an organization. Thus, for Ph. W. Taylor, management and personnel management overlap almost completely because, in his view, "nothing but man can be managed, in the long run." The following problems stand in bold relief within the framework of this activity: job qualification requirements, recruiting placing the personnel, performance appraisal, remuneration and motivation, performance standards and evaluation, personnel training. For A. Fayole who viewed human activity as an object of management, personnel management is an extensive area of managing an organization, though not the only one. It is first and foremost related to "administrative management" that includes staffing the organization and selecting employees for the jobs in line with their qualifications; personnel training; supervision of their activities; and motivation. Work with personnel is done along each of the managerial functions that

include planning, organization, coordination, and control. Academics of this school pointed out that working with personnel, in its broad meaning, involves the problems of organizational project-making and reconstruction, i.e., the system of creating jobs, securing standard professional and job requirements, responsibilities, accountability, and qualification requirements. The stress is put on standards and formalization of relations in management and in personnel management in particular.

The next major stage in the process of developing a broad personnel management concept started when publications of the "human relations school" came out between the '30s and '60s. Typical for this school is a shift of focus from projecting the formal frameworks, relations, means of outside supervision and control of behavior and activity to an individual, group, and processes of self-organization (E. Mayo, Ph. Rottlisberger, D. McGregor, Ph. Herzberg, R. Likert, etc.). In the studies of this school, as well as in later organizational models including the social systems school, neo-Marxist, game, phenomenological, neo-institutional and other approaches, the range of personnel management problems is significantly broadened. This is done by involving the problems of conflict and social tension management, employee's social adaptation, the use of mechanism of informal organization and informal leadership, programs of working with initial small groups, development of the favorable socio-psychological environment in the organization, social integration of the task groups, development of organizational morale and culture, employee planning, expanded mechanisms of motivation encouragement, involving employees in the managerial decision-making process, special socio-psychological training of officers and supervisors, etc. The complex of the above areas of activity makes the content of personnel management in the "broad" meaning of the term.

Parallel to the "broad" approach to working with personnel, the "narrow" approach has been shaping itself since the beginning of the century. It involves only the functions of a special service known as staff, or personnel, service. Despite a wide gamut of approaches used in this country and abroad, relatively established areas of work can be defined. They can be presented in the form of two sets of activities: 1) those targeted at improving the organization's effectiveness; 2) those targeted at creating and maintaining a stable organizational core as the subject of activity. Both sets are taken into account when personnel policies and plan are developed. With the view of the above, areas of working with personnel can be outlined as follows: 1) long-term personnel policy goals as an element of subgoals of the organization's long-term development; 2) personnel planning. A plan is understood as a complex of policy actions targeted at meeting the organization's need to have employees of any level of responsibility and, therefore, including actions to recruit, select, promote, train, motivate, and evaluate employees.

3. The first set is represented by such areas as: 3.1) staffing the organization (professional orientation, recruiting, selection, and placement); 3.2) development of policies and procedures related to compensation, benefits, and rewards; 3.3) staff development, including training (skills development, education, professional training, re-training, special executive training programs, internship, training courses, professional adaptation, and career planning; 3.4) decisions on re-training, personal development and movements (promotion, rotation, termination).

4. Social programs include: 4.1) socio-psychological adaptation; 4.2) employee satisfaction development; 4.3) stabilization of the collective and core-building; 4.4) tension-easing and conflict management; 4.5) special executive training programs. In addition to the above, most of the domestic (until 1991) and foreign personnel services focused on securing good labor conditions and amenities (medical care, labor safety, meals, hygiene, etc.). However, the content of the narrow approach to working with personnel is determined by the type of concept and approach to the human resource, which is shared by the executives in the given organization. Despite a wide range of these concepts, they can be brought down to two

major opposites, concepts X and Y (McGregor), that are closely connected to different understanding of the nature of the human resource.

Thus, the logic of working with personnel in the classical model of an organization develops within the pattern of building an instrumental system (Fayole's "machine model"). It views man as a means to achieve the organization's goals, whereas the organization itself is seen as a rationally designed machine to prepare and implement managerial decisions ("bureaucratic model of organization," as M. Weber called it). In this model, the logic of working with personnel is closely related to the specific understanding of characteristics of the human resource used in the organization. Examples include the idea of a typical employee as a lazy, irresponsible, infinitely greedy, primitive, unambitious, uncollaborative-minded individual who has limited abilities, while at the same time he is egoistic, cunning in trying to cheat administration or colleagues, and eager to avoid work and minimize labor efforts (Ph. W. Taylor).

It is this particular type of individual that the above managerial model is shaped for. The logic of management is related to the maximum simplification of activity, rigid assignment of an employee to a particular function, tight regulation of labor functions, total control, undivided authority and one-man management, standardization of activities, all-embracing outside supervision and control of the process and results, separation of mental labor from executor's functions, separation of programming and creative activities, the use of money as the key motivator.

The other model, the one that originated in the human relations school (Mayo, Rotlisberger, Likert, etc.) is based on an entirely different concept of the specific characteristics of the human resource. It states the need and possibilities of a more complete use of human potential by an organization. The above authors view man as a social animal, and believe that striving for cooperation is his natural state. Man can be free and happy only when he is a member of a group. He is endowed with creative abilities, he is inventive, he perceives labor as game that pleases him if labor is interesting and meaningful, and if he is interested in its results. He strives towards responsibility and cooperation, and he has a complex motivational system in which the needs satisfied through money do not play the key role. He can view success in his activity as a reward.

This approach was revealed in the concept of an organization as a community, a complex social organism. To fulfill its productive function, the latter must survive. Such an organization has democratization of management and a lowered level of outside control for its foundation. The efficiency of activity was regarded simply as one among many social functions required for the organization to survive. Other functions included, as an example, keeping the system's integrity.

The core problem of this personnel management concept was to make an individual interested in his activity. Managerial emphasis in this model is shifted from the total outside control to self-control and self-organization. Management is reduced to coordination of the conscious activity. Some supervisory functions are delegated to the collective and individual. Employee is involved in the decision-making process. The logic of labor organization is changed from the maximum division and simplification of labor to the maximum enrichment of all types of labor by various functions including creative ones. Effectiveness is placed in close relation with employee's satisfaction. The nature and content of activity, as well as professional development and career, are used as encouragement factors. This logic of working with the social resource stipulates for a lowered outside control, and a transition to individual and group control, i.e., a transition from control over the process to control over the result. This concept was further developed by other schools, such as the social systems school, and became known as concept Y.

As can be clearly seen, the first model describes the human resource as destructively passive or destructively active, with no developed labor ethics. Therefore, the logic of working with personnel in concept X is to limit the destructive activity and encourage activity within strictly established brackets and pre-determined forms. The second model (concept Y) describes the social resource as constructively active, the type of personnel characterized by a high degree of self-restrictions and well-developed labor ethics. Therefore, working with personnel will minimize restrictions in social and business activities and make any effort to use employee's social and creative potential to the utmost.

Things are far more complicated in practice. Firstly, the real personnel handled by an organization can seldom be described in the black and white of models X and Y. Personnel's real characteristics would rather range between the two extremes. Secondly, absence or underdevelopment of labor ethics, on the one hand, and its development on the other hand, do not explain all the aspects of choosing the behavior-regulating forms. Today, we can identify at least two developed models of labor ethics which, however, prompt different forms of working with personnel: 1) Western model. Its best developed form is represented in the labor ethics of Protestantism, the cult of professionalism, competition, and individual success (M. Weber). This ethical code produced an ideal type of formal organization known as bureaucracy, related to formalization of power relations, rationing of power, and professionalization; 2) Eastern model. It is best epitomized in the developed feudal labor ethics of Japan. It is the ethics of feudal service, power relations, and community forms of activity. The feudal community type of a modern Japanese organization corresponds to this model. These two types of ethics and organizations represent two cultures in their most developed forms. The interval between the two is taken by a large number of less clearly-defined cultural differences that determine the forms of working with personnel. The variety of domestic culture is present, too (A. Itskhokin).

I would now go back to conclusions on concepts X and Y. Long-lasting efforts to introduce the two concepts revealed the following: 1) while the second model could not be implemented anywhere in its pure form, some of its elements were used and scored certain success. Taken on the whole, it is assessed as perspective (R. Likert), but its use was substantiated only in the organizations characterized by a very high level of ethics and personnel self-organization; 2) the first model proved effective in organizations with a high degree of routine activity, low level of personnel development, and simple labor; 3) effectiveness and usefulness of the two models was to a great extent determined by the quality of personnel. It included the nature and type of the organization's culture, employees' educational and qualification background, and their identification with the organizational goals; 4) the first model is most useful in organizations that use simple unqualified labor, with low professionalism and labor morale, and sufficiently structured and stable activity. The second model could be used, if with certain reservations, in companies characterized by very high levels of self-organization, morale, employees' identification with the organization, and their interest in achieving the organization's goals, whereas activity changes frequently, and is not tightly structured; 5) organizational and national cultures restrict the use of the above two models, as well as interim models.

The following main conclusion can be made. The authors of the above concepts had to deal with different types of the human resource. Other conclusions can be worded as follows:

The level of development and type of labor ethics in the organization, as well as its employees' ability to be self-organized and self-restricted is the key issue to be handled when selecting the logic of personnel management.

The second issue, closely related to the first one, is the question: To what extent is labor resource, as embodiment of a certain culture, capable of constructive social activity? The

answer to this question will determine the acceptable degree of democratization in management.

The third question to be answered by the manager is: To what extent do the nature and content of the labor make it possible to view successful performance as inner reward and encourage the employee's constructive activity?

The fourth question is: Does the organization have a developed corporate culture that guides the employee in his activity, and how integrated is the employee in the norms, values, models, and meanings of this culture?

The fifth question is particularly interesting for public organizations. It deals with the degree of development of an organization which, in the same way as live organisms do, goes through such stages as youth, maturity, and old age (I. Adizes). Enthusiasts who completely identify themselves with the organizational goals are at the cradle of any organization; this is where the second model logic can be somewhat substantiated. At the later stages, as the organization grows, its employees' high identification with its goals becomes problematic because their members' goals increasingly drift apart from those of the organization. The logic of public organizations development proves that they acquire characteristics of typical administrative organizations, such as parties, labor unions and the like, as their professionalization and institutionalization develop. The reverse aspect of this question is: Why do public organizations professionalize, formalize and institutionalize themselves? The answer to this question is related to the fact that the organization founders' enthusiasm wanes, and the respective forms of activity turn to be ineffective whenever viable activity in a developed organization is to be sustained. Enthusiasts will be inevitably ousted by professional officials, and weakly-structured organizations characteristic for these frameworks will grow into administrative systems (trade unions).

Finally, the last generalized statement to be offered to the conference participants could be worded in the following way: there are no universal forms of working with personnel. While choosing and modifying specific forms, the organization's executives should be aware of at least the following variables: the type and quality of the social resource used in the given organization; goals and objectives; the situation in which the organization works; and stages and directions of the organization's cultural development.

Introduction

The more things change, the more they stay the same. There is no better example of this time-proven paradox than the charitable nonprofit organization. The greater the change in external forces that affect its stability—government policies, economic and social conditions—the greater the need for *internal strength and flexibility* to ensure that stability. Not every nonprofit* survives. The established fail along with the new. Those that make it have a number of characteristics in common. Perhaps foremost is the *ability to make the most of community resources*.

The purpose of this guide is to help you—board members, staff, volunteers—discover resources and techniques Mellon Bank has seen used effectively by a variety of nonprofits. We want to change your way of thinking . . . take you beyond traditional "checkbook philanthropy" to the concept of *total community resources*.

To make our point, we've shifted from the traditional emphasis on volunteers, corporations and foundations to focus on total resources—*money, people, goods, and services*.



Self-examination is the first step toward discovering total community resources. Determine who and where you are, where you want to be, and what you need to get there.

This evaluation should occur regularly—at least *annually*. More often in times of stress. The examination should be *internal and external*, involving feedback from everyone connected with your organization. And it must be *honest*. You have to answer difficult questions and face hard realities. The result will be greater strength and flexibility, regardless of external factors.

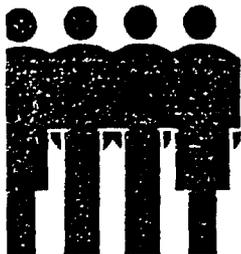
Table 1 offers a checklist for evaluation.

Table 1: Self-Examination

| | |
|--|--------------------------|
| State your purpose in two or three sentences. | |
| List major accomplishments. | |
| What community need do you serve? | |
| Whom do you serve (include age, sex, race, income level, etc.)? | |
| What services do you provide? | |
| Who delivers your services (paid staff, volunteers)? | |
| List strengths and weaknesses in each service area. | |
| What other organizations (profit or nonprofit) provide the same services? | |
| What is your performance rating compared to other providers? | |
| Can you demonstrate public demand support for your services? | |
| What are your short- and long-term goals? | |
| Are they consistent with your purpose and services? | |
| Were your goals developed with input from: | |
| Board? | Staff? |
| Consumers? | Volunteers? |
| Contributors? | External consultants? |
| Members? | |
| Do you have an annual action plan, which includes: | |
| Program objectives for each service? | |
| Performance schedule? | |
| Will your goals require a change in: | |
| Number type of persons served? | Financial support? |
| Services? | Volunteer support? |
| Staff? | Other? |
| What internal and external factors could have a positive impact on your ability to achieve your goals? | |
| What factors could have a negative impact? | |
| What are your funding sources? | |
| Memberships? | Businesses/corporations? |
| Service fees? | Foundations? |
| Income-generating activities? | Government? |
| Individual donors? | Religious organizations? |
| Federated campaigns? | Other? |
| What non-cash support do you receive? | |
| Volunteers? | Services? |
| Goods? | Other? |

If you answered "no" to any of these questions or were unable to complete them, encourage your organization to commit more time to *planning and evaluation*, which should occur *concurrently with resource development*. A healthy organization continually reviews program goals in light of available resources and other external factors. It's this ability to *adapt resources* to needs that distinguishes the *successful*.

The identification and development of these community resources will be discussed in subsequent chapters.



People are the key to all resources—money, more people, goods, and services. For the purpose of this guide, people resources will be defined as persons giving their time free of charge, for a minimal fee, or for payment by a third party on a nonprofit's behalf.

Because people are everywhere, know everyone, and do everything, their resource potential is unlimited. The challenge is to discover how to utilize the most people in the best combination, to your organization's greatest advantage.

Start with Table 4, which lists primary people resources and sources. Review the list with your organization in mind. Are you taking advantage of every resource? Have you tried all sources?

Table 4: People

| Resources | |
|--------------------|---|
| Board of directors | Loaned executives |
| Volunteers | Interns |
| Consultants | |
| Sources | |
| Employees | Small businesses |
| Members | Corporations |
| Clients | Doctors lawyers other professionals |
| Consumers | Foundations |
| Family and friends | Government (city, county, state, federal) |
| Alumni | Schools colleges universities |
| Auxiliaries | Unions |
| Contributors | Professional organizations |
| Volunteers | Police/fire/emergency departments |
| Retirees | Political organizations |
| Neighbors | Religious organizations |
| Vendors | News/entertainment/education media |
| Civic groups | Other nonprofits |

Once you've considered the possibilities, use the chart to develop two profiles: one, current resources; two, needed resources. Plan a strategy for obtaining the people resources you need. As with money resources, the degree of success depends on creativity and organization. A summary of the primary people resources and some basic clues follows.

Board of Directors
Leadership prize indicators

A strong, informed board of directors is fundamental to any organization's success. It's essential to every aspect of your operations. Whether advisory or administrative, the board has the power to exert a positive—or negative—influence on everything you do. Don't settle for less than the best.

The ideal board is made up of skilled, dedicated persons actively involved in your organization or community, and sincerely committed to your purpose. It represents a broad range of community interests and skills, e.g., business, community service, financial, legal, philanthropic, and political. Members live up to the Junior League's three G's of board membership: give, get, or get off.

4/6

Board members must be chosen according to how they can help—as donors, fundraisers, policy makers, or advisors. Everyone should have *something to offer*—money, time, expertise, or valuable contacts. Nonprofits no longer can afford the luxury of inactive board members.

A few clues toward developing a better board:

- Be creative and practical in your selection. Avoid cliques. Consider all sources in the resource list. Don't be afraid to try the unconventional.
- Apply the three G's test to everyone. List assets by individuals, e.g., financial expertise, consumer experience, important contacts, money.
- Orient members to your organization: history, purpose, services. Provide an information packet including your constitution, bylaws, organizational structure, budget, and other planning documents. Offer retreats, seminars, site visits, and similar learning experiences.
- Tell members what's expected of them, including a board charge and individual assignments.
- Make a wish list of needed resources: money, people, goods, services. Ask directors to help secure these resources.
- Provide regular updates on important issues, events, and resource needs. Ask again for guidance and support.
- Don't underestimate the value of the board. Make use of everyone's assets.
- Show appreciation. Treat members to a thank you social event. Recognize outstanding efforts with a special award or presentation.
- Limit membership terms to generate fresh ideas and prevent leadership stagnation.
- Consider creating a special ad hoc advisory group to supplement your board for special purposes, such as major construction campaigns. Honorary celebrity chairpersons are effective in this role.

Volunteers

Time is more than money

Volunteers are the cornerstones of America's nonprofits. Most owe their origins to individuals who cared enough about a community service to donate time to make it available. Some still are totally volunteer operations. Most use volunteers to supplement paid staff. *Every nonprofit needs volunteers.* Volunteers are touchstones to the community, reinforcing the fact that an organization is important enough to warrant their valuable time.

Volunteers are *changing*. They're becoming more aware, more selective about the things they're willing to do. They still want personal rewards, but some are asking for flexible hours, reimbursed expenses, training, and practical experience.

This doesn't mean volunteers won't continue to do the basics—stuffing envelopes, selling tickets, baking goodies. But they're looking for opportunities for greater personal expression and growth. The organization that appreciates all their talents will win their allegiance.

To begin, develop an action plan. Make a list of all the ways you use volunteers. Review the people list in *Table 4* and note how each source category might be helpful to you. *Dare to dream* of the ideal volunteer program and go after it. Some clues that may help:

- Survey staff to determine the need for volunteers. Remind them that no job is too large or too small. High-priced specialists volunteer along with busy homemakers.
- Develop volunteer job descriptions and training procedures.
- Itemize groups within the primary people categories, for example:
 - Professionals*—attorneys, doctors, artists, accountants, corporate retirees;
 - Schools*—instructors, students, parent groups;
 - Civic groups*—Kiwanis, American Association for Retired Persons, Junior League, and so on.

Continue to list within lists until you get to individual names.

- Plan a recruitment strategy, including personal visits, phone calls, letters, newsletter articles, posters, brochures, public service announcements, etc.
- Tap volunteers available through community volunteer programs, such as Pittsburgh's Volunteer Action Center, Retired Senior Volunteer Program (RSVP), and Generations Together. Check the phone directory for volunteer listings.
- Orient all volunteers to your organization. Train those unskilled at assigned tasks. Provide ongoing supervision and encouragement.
- Treat volunteers as if they are paid staff; assign real responsibilities and hold them accountable.
- Regularly inform volunteers about expenses that may be tax deductible, e.g., mileage, parking fees and tolls, donated money and goods.
- Show appreciation in every way possible: coffee and donuts, thank you notes, newsletter features, recognition dinners, special awards, etc.
- Try to smile through the no-shows and simply-socializers. The pluses of a good volunteer program really do outweigh the minuses.
- Have fun!

consultants

Wise of all trades and masters of some

Though consultants fall into several *people* categories—directors, volunteers, loaned executives—they're important enough for special mention. The successful nonprofit considers consultants as *essential* to its operations as money. Like money, they offer both short- and long-term benefits. They also provide an organization greater depth and credibility.

Whenever possible, obtain consultants free of charge, or at someone else's expense. When you must pay, at least *ask* for a nonprofit discount.

Broaden your concept of consultants to include everyone with a skill or knowledge to benefit your organization—professionals, tradespeople, merchants. Ask an electrician to donate electrical plans for a capital building project. Ask an accountant to help modernize your bookkeeping system. Review every aspect of your operations—facilities, staff training, marketing, fundraising, etc. Ask appropriate experts to help make them better.

Consider everyone. No one is too important to ask. If one prospect is too busy, ask for a referral to someone else. *Keep asking* until you get what you need. Remember special interest groups such as professional organizations, unions, retired executives. The Executive Service Corps is a network of retired and loaned executives in cities throughout the country, available at no charge or at a sliding fee based on ability to pay (see Chapter 8, Print Resources).

Be flexible, creative and considerate. Make it easy for a consultant to give an hour, a week, a month, or whatever time is available. Remember that a brief consultation by phone can be extremely effective for short-term solutions, but long-term progress requires a greater time commitment. Learn to know the difference.

Loaned Executives

*If they don't have the money,
ask for their time*

One people resource with lots of room to grow is the loaned executive. A company lends personnel to a nonprofit in lieu of a monetary donation. A precious few do both. The employee is loaned for a specific purpose for a set period of time, ranging from a week to a year. The company continues to pay normal salary and benefits directly to the individual.

Loaned executives work at either the company or nonprofit site, or both, according to the terms of the agreement.

Some loans take the form of an executive exchange. An example is a corporate specialist who guest lectures a college course, while the regular instructor learns the latest corporate technology. Both gain through higher quality graduates as entry level employees.

Loaned executives are *not easy to come by*. They are not tax-deductible as a contribution, and represent a considerable expense to their employer. Therefore, you must prove they're worth the company's effort. This should be increasingly easy to do. Companies are becoming aware of the positive impact of community service programs on their employees' lives and productivity. It's your job to hasten their awareness, to your advantage. The following clues may help:

- Find the corporate connection. List all the ways your organization helps Corporation X, directly and indirectly. Also list all the ways their executives can help your organization, to your mutual benefit.
- Present your executive wish list to the appropriate corporate representative: community relations director, personnel manager, various departmental managers. It varies by company. First contact the department most closely tied to your need.
- Use personal contacts whenever possible. Ask members, consumers, directors, everyone associated with the organization for names, phone numbers, introductions.
- Keep trying till you succeed. Follow through with a thank you and a final progress report, listing the benefits to your organization, the corporation, and the community.
- Make executive assignments worth their time and talents.

terns

aking inexperience work for you

Though their value is debated by nonprofits and for-profits alike, there's no doubting the resource *potential* of interns. Generally, they're students nearing graduation or individuals seeking a career change. They offer their time at no charge, or for a stipend, in return for practical, on-the-job experience. The internship usually is limited to the length of a school term or its equivalent.

Some nonprofits complain that interns require too much management, and that they're no sooner trained than they're gone. Other organizations, including corporations and foundations, use interns effectively, occasionally retaining their services on a permanent basis.

Because of their potential, both as workers and future contacts in the community, *interns are worth the effort*. Increase your chances for success with the following clues:

- Allow adequate lead time—at least several months or one semester.
- Contact local colleges, universities, institutes, technical schools, job advisory services. Compile a list of available internships and their requirements.
- Develop a job description listing specific projects and tasks.
- Meet with the intern program manager and prospective interns. Discuss individual requirements, goals, time schedule, and rate of payment (if paid position).
- Provide ongoing supervision, guidance, and evaluation. Be candid about strengths and weaknesses.
- As much as possible, assign specific work projects, rather than general duties. They're easier to manage and evaluate...and more meaningful to the intern.
- Remember, you're in charge. Don't take the easy way out by doing it yourself. You'll both lose in the long run.
- Ask the intern to evaluate your program and performance. Learn how to do it better the next time.
- If dissatisfied with one intern program, shop around for another. Though essentially the same in theory, programs can be quite different in practice. A new advisor may make the difference. Don't be afraid to ask for skills and terms that work best for you.
- Ask a corporate contact for advice.



Obviously this doesn't begin to list the ways people are important to nonprofits... more than a substitute for money... more than a helping hand. People are individuals with ideas, talents, money, contacts, goods, services. They are the source of all resources. Discover how to use them most effectively for your organization.

As you do so, try to keep in mind the following points:

- People are not some impersonal, mass public. They are individuals known to you, your members, consumers, friends, volunteers, etc. They have names, addresses, phone numbers. Identify them.
- Most people won't know you need their help unless you ask. And they'll forget you need their help unless you ask again. Keep asking until you succeed.
- People are too valuable to waste. They need to know how, when, and why you need their time, talents, and other assets. Tell them, as concisely and as often as possible.
- Be organized but flexible, creative but practical. Have a people development plan and follow it.

One final point to keep in mind. In order to succeed, you must make people an integral part of a total resource package, along with money, goods, and services. *But people are the place to start.*

5. c.

Democratic leadership and
decision making

DEMOCRATIC LEADERSHIP AND DECISION MAKING

The democratic process of decision taking is a value per se. It is opposed to bureaucracy, hierarchic structure, and tight control, i.e., to everything that is not acceptable in social initiatives. At the same time, democratic process of decision taking is the prerequisite for effective management.

RELATIONS SCALE

On one end of the spectrum is the authoritarian style that fosters "passive sabotage" when decisions are to be implemented; the other is taken up by a total lack of structure that does not make a decision happen. The two extremes are more than ineffective management; they mean squandering (non-use) of human potential.

The democratic process of decision-taking is the balance that allows for effective management, provides distribution of responsibility and high degree of motivation, and encourages creativity and initiative.

EXAMPLE: TAKING DECISIONS ON CHANGES IN THE ORGANIZATION

Authoritarian model:

- * Indifference to the organization's mission and goals.
- * Utilitarian attitude of the leader to employees, and employees to the leader.
- * Hierarchy in management (fraught with the danger of inadequate assessment of the organization's potential). Changes, jobs reorganization, and staff retraining are announced "from above."
- * Passive sabotage. Conflicts.
- * Changes are ineffectiveness or impossible to implement. Assessment of the consequences.

Democratic model:

- * Joint interest in achieving the organization's mission and goals.
- * Collaborative relations. Participation.
- * Open discussion. The need of changes in the organizational activity is analyzed, and the organization's potential is evaluated. Whenever necessary, ways and means of enhancing the resources are determined, including issues of staff retraining and skills development.
- * Personal acceptance of the need to change, positive attitude to changes, readiness to make efforts to re-profile, retrain, and develop skills.
- * Effective changes. Appraisal of success.

The democratic process of decision-taking is secured through the appropriate organizational structures. The new legislation provides sufficiently broad powers to the organization to determine the functions and responsibilities of its supreme authority, the collective board that is formed pursuant to its Charter.

Pros and cons of different models (organizational structures and decision-taking processes):

- * general meeting - executive directors - employees;
- * board - executive directors - employees;
- * trustees board - executive directors - employees;
- * consultative committee - program committee - executive directors - employees;
- * other models.

MANAGEMENT STYLE

My specific approach to managing is a 'management by planning' strategy, similar to management by objectives. Once goals and objectives are established, all aspects of management - whether on a day-to-day or long-range basis - are planned. The primary function of a leader or CEO is to get things done. This system of planning has allowed me to be results-oriented and successful in all the different positions I have held.

Although the YMCA is a not-for-profit human service organization, my overall approach is very businesslike. The best-managed YMCAs are certainly more successful, and the more successful the YMCA, the more people are served and our mission is achieved. I believe that YMCA volunteers and supporters should accept nothing less than sound management and leadership.

My three-part operating philosophy is direct, easy to understand and proven to be successful:

- deliver a quality product
by presenting the best possible programs and facilities
with a specific emphasis on the YMCA mission

- deliver quality customer service
through consistent attention to each and every member,
volunteer and constituent

- deliver quality maintenance
through clean and well-maintained facilities

Some key management principles that I practice are:

1. People are our greatest resource. Developing a strong staff management team and having the ability to relate and work with each staff member are the primary ingredients to success in any business.
2. Give centralized direction but develop decentralized management or entrepreneurship.
3. Surround yourself with the best possible staff; delegate with accountability and responsibility, then get out of the way.

4. Communicate effectively with staff what is expected of them and motivate them to exceed those expectations.
5. Demonstrate enthusiasm for the organization and its mission.
6. Motivate staff by example, demonstrate quality leadership and fairness.
7. Deliver quality training at all levels.
8. Listen.
9. Complete annual performance appraisals and individual goal reviews.
10. Emphasize team-building.
11. Encourage creativity and risk-taking.
12. Look beyond the bare credentials of each staff member; look for personal qualities and moral values.
13. Wander around to maintain informal contacts, learn what is really going on and be available for questions and support.
14. Have a sense of humor - have fun!

A MODEL CLARIFICATION ON ILLICIT HARASSMENT INCLUDING SEXUAL HARASSMENT

We, employees of Employer X, share the view that each of us should work in the atmosphere free from any discrimination and harassment based on race, color, religion, age, sex, pregnancy, nationality, disability, or marital status.

To prevent any of us from becoming an object of harassment and create comfortable environment, Employer shall prohibit any insulting physical actions, written or verbal statements related to any of the above criteria, including sexual harassment. Such actions include:

1. Actions and proposals, including sexual ones, that are unpleasant or undesired for the person. These mean patting, pinching, stroking, embracing, kissing, caressing, or any other similar physical contacts, with the exception of cases when the person does not object.
2. Requests and demands, including sexual ones, that are undesired for the person. These include explicitly or implicitly expressed expectations and demands, particularly sexual ones (including the unwanted requests for a date), regardless of the fact that they may or may not be combined with explicit or implicit promises of benefits or negative impact on the person's career.
3. Verbal abuses or jokes related to illicit harassment, including sexual abuses and jokes that are unpleasant to the person. These include comments on the nationality, figure or appearance when such comments go beyond regular polite remarks; dirty jokes that are unpleasant or insulting to any of the employees; any sexually vulgar remarks, hints or actions insulting to any of the employees.
4. Actions to create threatening, hostile, unbearable or insulting environment by talks, assumptions, requests, demands, physical contacts or attentions that are unpleasant or insulting to any of the employees, or that are sexually- oriented or otherwise illicit.

Normal, polite, mutually respectful, pleasant and uncoercive relations among employees, particularly among males and females, acceptable for both parties, are not qualified as harassment, nor as sexual harassment.

If any of the employees believes he or she has been harassed in any way, or that he or she is discriminated against, because other employees, say, benefit from sexual services, he or she should bring this fact to the appropriate executive. The nature of harassment itself will never help to reveal it unless the victim places its grievance with Employer's representative. Therefore, to have these problems resolved, Employer expressly requests that such illicit actions or situations be reported to the Personnel Manager or directly to the President. At least one male and one female should be among those eligible to give attendance to these reports.

Written grievance and the executive's conclusions should be part of the grievance investigation file, to be kept separately from the employee's personal file.

It should be kept in mind that the employee who has placed a grievance will be heard with the utmost attention, the conflict will be resolved as soon as possible and as confidentially as could be possible with regards to the appropriate measures; the grievance will never be used against the employee and will not have any negative impact on his or her status.

A MODEL CLARIFICATION OF EMPLOYER'S POLICY IN SEXUAL HARASSMENT MATTERS

To: All Employees

Subject: Sexual Harassment Policy

Sexual harassment includes a) sexual proposals unacceptable for the person, asking for sexual service, and other verbal or non-verbal actions of sexual nature, when submission to such actions becomes a prerequisite of being hired or keeping one's job; b) when a person's submission or opposition to such actions is the background for a decision to hire or keep this person, and this decision will have an immediate impact on this person; c) when the purpose or result of such an action is unsubstantiated influence on the productivity or creation of threatening, hostile, or insulting working environment.

Below are listed examples of sexual harassment:

Verbal: sexual insinuations, implications, abuses, threats, jokes about sexual specifics, sexual proposals

Non-verbal: insulting or indecent sounds, meaningful looks, whistles, indecent body language

Physical: touching, pinching, patting, stroking, forcing into copulation, or attempted rape.

An employee who believes himself or herself to have been sexually harassed, should report this at once to Mr. X or Ms. Y of the Personnel Department. Any grievance will be considered immediately and confidentially.

Any employee found guilty of sexual harassment will be appropriately disciplined, ranging from a warning reported in his or her personal file, to termination.

Any attempts to take revenge on the employee for his or her grievance are prohibited.

The organization agrees that the question whether sexual harassment has actually happened is subject to comprehensive consideration based on all the available facts. The organization also agrees that false accusations of sexual harassment may entail grave negative implications for those males and females who are not guilty. We hope all the employees will demonstrate continuous responsibility and professionalism, so that the organization will have favorable working environment free of any discrimination.

6

Small groups

6. a.

Preparing staff for
organizational change

WORKING WITH STAFF AS AN ORGANIZATION IS CHANGING

I. Working with the organization's staff when the organizational activities change.

Personnel retraining and skills development.

1. Changes in the organization's activities include termination of activity as well as development of new areas (e.g., some projects are completed and others emerge). In most cases, they are accompanied by organizational changes including jobs restructuring (termination of employment for some staff members, release of volunteers), re-profiling, new jobs, and development of new types of relations in the organization).

2. If no special work is done in the human resources management area, reorganization is viewed as a "threat" or calamity, it has a negative impact on self-evaluation, provokes conflicts, deteriorates psychological climate in the organization, and questions the very possibility of mastering a new area of activity. Changes are typically initiated by the organization's leader. Leader and employees (staff members, volunteers, contractors) differ in their understanding of tendencies in the organizational development, external environment (including amendments of legislation, financial climate, and information environment), and the corresponding strategic plan of changes in the organization itself. Situations may develop when employees have illusions about the organizational stability, and see no need to introduce changes. Likewise, the leader (founder) of the organization can "play on the theme of development", while focusing on promotion and fundraising, and loses the sense of reality of working with clients and fails to be realistic in evaluating the organization's potential.

3. The above two "gaps", one in the understanding of the need to change, the other in evaluating the potential for their implementation, can be bridged if the organization keeps to the values of caring, trust and mutual responsibility, and when it provides democratic management i.e., if conditions have been created for goal-setting and responsibility-sharing. (A simple example of such conditions: meetings of the board or trustee board that take decisions on the changes must be open for employees and volunteers.

4. PERSONNEL RETRAINING is carried out when it is known what goals should the organization strive for.

5. SKILLS DEVELOPMENT is necessary in the dynamic situation. The need for new skills, such as project development, conflict management or communication in a foreign language, is permanent, but cannot be rigidly planned. These skills cannot be assigned to one specific job.

Skills development tasks emerge at a certain level of stability of the organization, when ideas of development have been defined, and it is necessary to "make long-term investments."

6. PROFESSIONALIZATION AS CHANGE OF NGOs' ACTIVITY

Working with human resources is carried out in a specific context today, namely, in the context of professionalization and shift to work on a contract basis. Professionalization itself is a cardinal change of the type of activity of many organizations. They were often founded on the basis of informal clubs, or shaped themselves as mutual assistance groups, or social initiatives. Today, functional division of labor, shaping of current management principles, and delegation of assignments and responsibilities came to the forefront as objectives. Strengthening of the

organization, receipt of grants and other funds, and shift from volunteer to paid work produce a new situation, often fraught with a conflict. The organizations split is their leaders differ in views and approaches or new types of activity develop; newcomers fail to integrate into the established relations system; the organization's founders are annoyed because their contribution is no longer appreciated; newly-hired staff fail to perform properly - these are problems that many organizations face.

Andrei Gorev

PERSONNEL PROBLEMS IN THE WORK OF AN NGO**(Aspects to be considered during training)**

1) Identification of key situations that NGO employees face in their activity.

a) Information and intellectual aspects.

When the candidate is selected for any position within an organization, recruiters usually try to visualize what skills and educational background he or she should have. However, entirely different people, with entirely different personal characteristics, can successfully achieve the organizational goals; they just do it by employing different ways and means. Therefore, the personnel recruiter should focus not so much on drawing the best psychological portrait (to be used later as the criterion for selecting the necessary situations), as on identifying the main working situations which the would-be employees will face.

Let us say an organization requires an employee to liaise with various counterparts, i.e., seek and find possible sponsors and develop contacts with them, and make arrangements with managers and executives to get support and possible use of infrastructure of the organizations headed by these executives. This work can be done successfully by an elderly experienced person, with many useful connections; or otherwise, it can be done by a celebrity; at the same time, however, it can be done by a young girl who can command trust and win people over. Thus, different people can achieve the objective by using different means.

Therefore, a question is raised: What intellectual potential should a personnel recruiter have to identify the key working situations? Many leaders do their work in the unreflecting manner; they have no need to contemplate over their methods of gaining the desired results. The work intuitively, and every time they handle the situation in different ways. They have to reflect only when they face a problem, or when they have to share or gain experience. Reflection is a main way to identify working situations. Given this, reflection can be used to gain thorough understanding of one's own experience as well as other people's working strategies. Notions and organizational schemes are the main means to organize reflection. They include the concept of situation, position card, work process, mechanisms of triggering the work process, etc.

b) Psychological aspects.

Once the main working situations are identified, various communication training sessions can be arranged with the employees, so that they would master the required communication techniques.

Candidates for various jobs can also be selected during these training sessions. A possible procedure can be described as follows: once the main aspects of the working situations and key figures involved in these situations are identified, simulation role play in these situations is arranged, and the potential candidates are to play the role they are claiming. Under time and funds constraint, the candidate can be asked to describe his or her behavior in the given situation.

2) Situations should be described and classified by type, so as to make them objective for the individuals to assert their professional position.

Once the employees have reflected on their working strategies and identified the situations which they typically face in their activities, these should be described in the objective form (so that they would be understandable for individuals who have never faced such situations).

After the employee has classified the situations, he or she can be said to have become a specialist capable of handling situations of a certain type, involving certain means.

3) Various types of activities in which the given NGO employees can be involved should be identified. This include the problem of converting one's previous experience.

What is meant whenever "saving the human resource" is mentioned? What is understood by "man"? The organization's initiators view human resources as people who have specific experience. In this case, man is substituted by position. Yet, man's value lies in his ability to be free from experience. He is not a set of professional position, but he keeps the possibility to manifest himself in different ways. To keep human resource, it can be sometimes necessary to separate man from his position, to deliver him from the need to identify himself with a certain idea or focus on a problem. The professional position should turn into a means to achieve a goal, not to be one among many variations of man's "self-realization."

Psychological aspect. Man's earlier self-determinations and identifications are barriers in his orientation. Possessed with a goal or problem, man can be definite in his existence; he can concentrate all his efforts on one task. On the other hand, this possession bars him from a certain type of reflection and, consequently, from orientation in the outside world. To find new forms of manifesting his activity, man must, in a reflective way, arrange everything that is happening to him and to those public systems of which he is an element.

In a dynamic society, man has to live in at least two regimes. One is the regime of action, with no particular reflection to engage in. The other is self-orientation (when man has to change the direction of his activity). In this case, he bans himself from activity, and reflects on the situation he faces.

4) The strategy of presenting his professional activity to other positions, as well as the strategy of integrating his position to the contexts of existing activities, should be developed.

It is also necessary to develop possible options of employment and integrating in the social context for the NGO employees after the organization changes its activity. A training session could be held for the employees to invent different versions of their micro-stories. This could be followed by a role play in which they will reveal themselves in different situations to different people. Except for the role play and simulation, the situations at the training session should be real and realistic.

5) The strategy of retraining NGO employees should be developed, so that they would be able to participate in other types of activities.

Employee Empowerment

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"If you cannot work with love but only with distaste, it is better that you should leave your work."

Kahlil Gibran

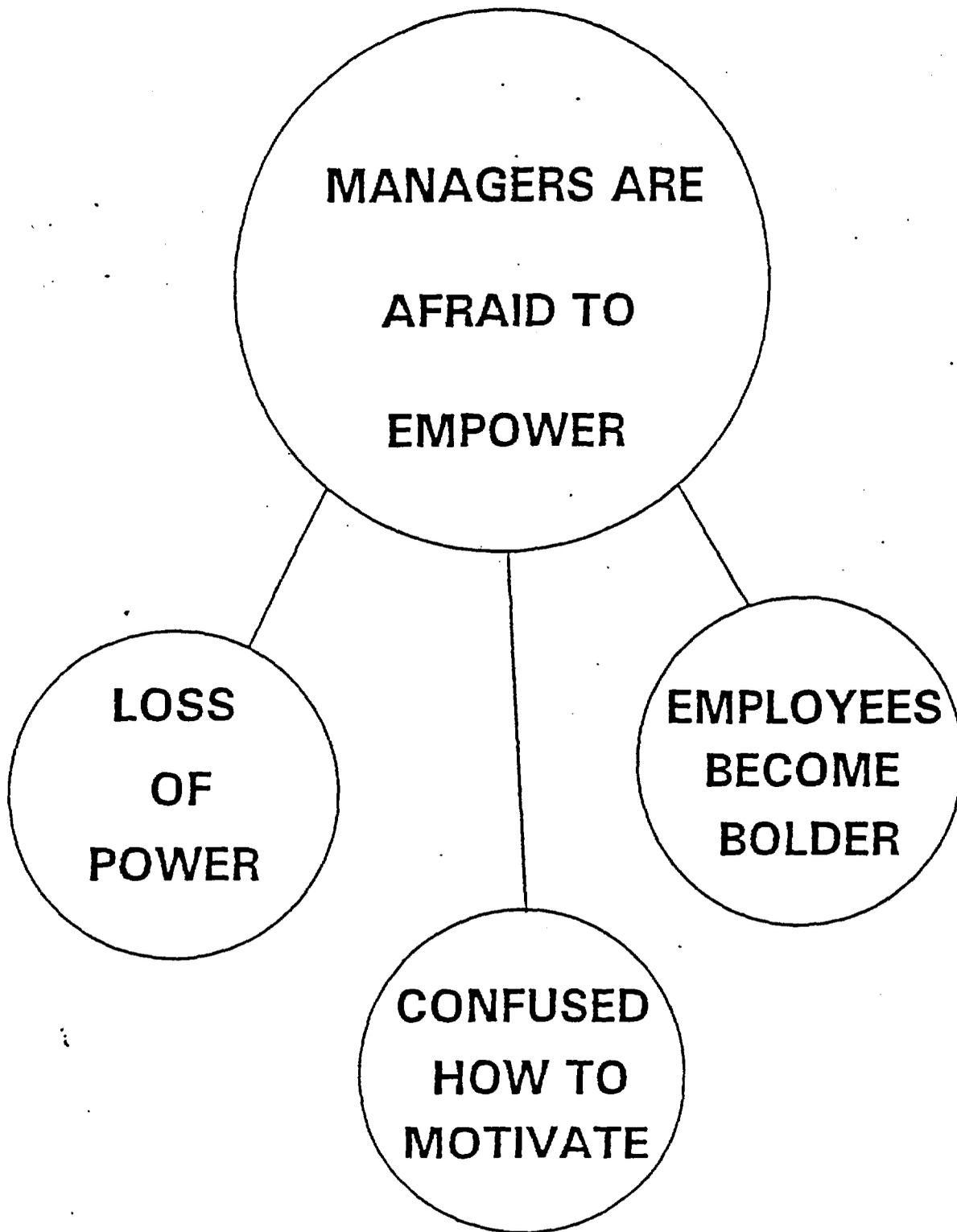
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BARRIERS TO EMPOWERMENT

**RESISTANCE
FROM
SUPERVISORS**

**LACK OF
ACCEPTANCE
FROM
EMPLOYEES**

**BIGGER
WORK
LOADS**





Internalizers

- = See life within their control
- = See a relationship between behavior and performance
- = Take personal responsibility for the department's, the organization's performance.

Externalizers

- = See life outside their control
- = See no relationship between behavior/success
- = Are not easily motivated by change

WHAT DOES NOT WORK WITH EXTERNALIZERS

| | |
|--------------------------------|--|
| 1. THREATENING | 2. PLACING PERSON IN SINK-OR-SWIM SITUATION |
| 3. EXTERNAL REWARDS | 4. REASONING |

EXTERNALIZER'S EXCUSES :

- 1. "NOBODY TOLD ME"**
- 2. "IT'S NOT MY FAULT"**
- 3. "YOU DIDN'T TELL ME
TO DO THAT."**

**BECOME
RESPONSIBLE**

**RESPOND
POSITIVELY**

OVERCOMING

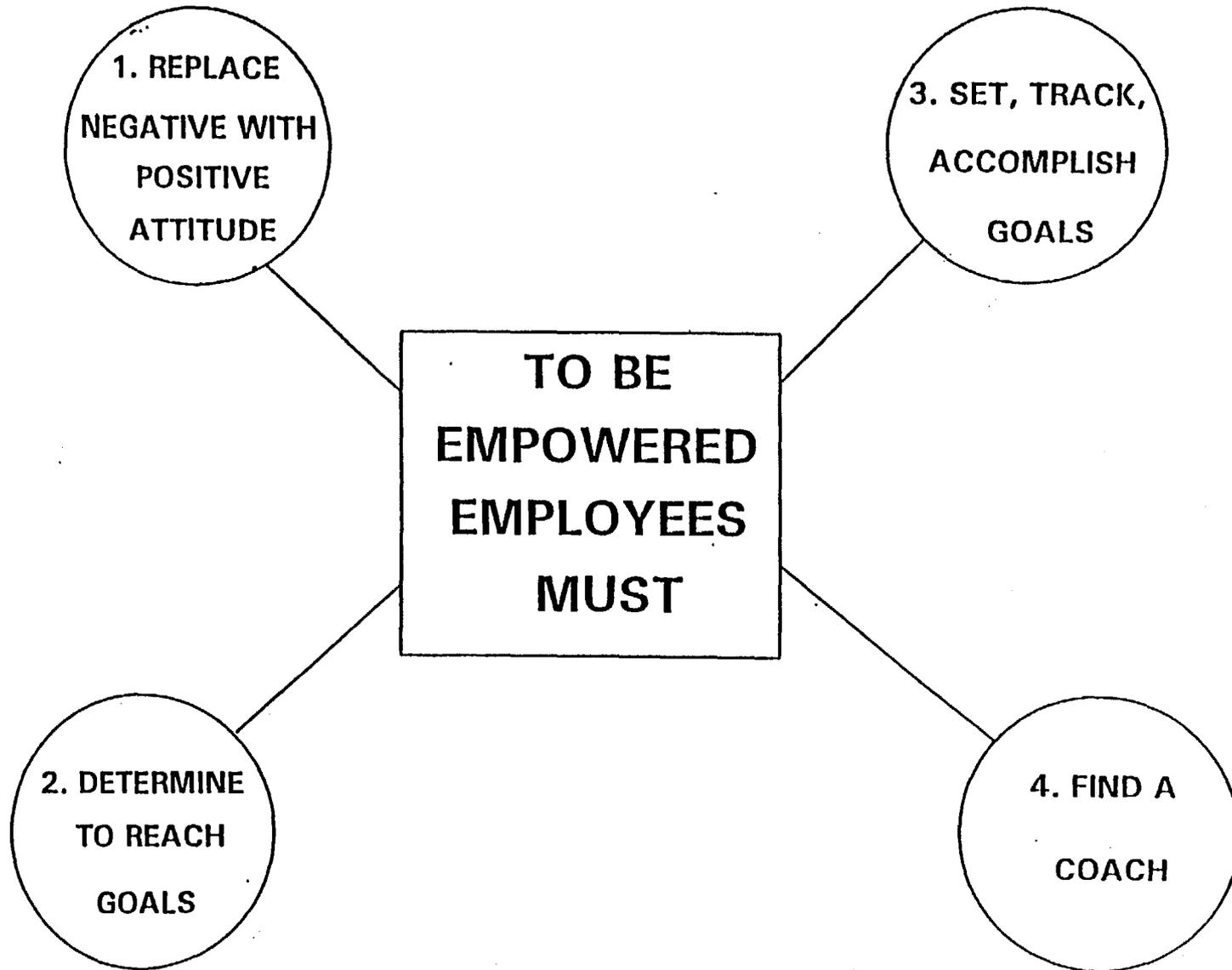
FEAR

**PRACTICE
POSITIVE
THINKING**

**CONSIDER
SETBACKS AS
CHALLENGES**

Steps To Self-Empowerment

1. Making a commitment to find ways of changing the behavior.
2. Learning new thinking and doing skills brought to their attention.
3. Listing strengths.
4. Identifying experiences and accomplishments that have brought satisfaction in life.
5. Setting, tracking, and accomplishing goals.
6. Visualizing and creating a desire to succeed.
7. Replacing negative, limiting thinking with a "can do" confidence.
8. Writing down when something good happens to focus on the positive.
9. Acting "as if." We become what we pretend to be.
10. Assessing current opportunities to develop self-empowerment.



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"NO ONE CAN MAKE ME FEEL
INFERIOR WITHOUT MY CONSENT"

**JENSEN'S DOZEN GEMS
TO BUILD A WINNING ORGANIZATION**

1. **ENTHUSIASM** - Enthusiastic people can overcome nearly any obstacle. Enthusiasm and the ability to stay focused are an unbeatable combination. Keep in mind Ralph Waldo Emerson's point of view when he said, "Nothing great was ever achieved without enthusiasm."
2. **ATTITUDE** - How you approach a project or job in terms of attitude will have a tremendous impact on its outcome. A great attitude is similar to being highly motivated, and Lou Holtz says it best - the greatest way to motivate people is not to have those around who cannot be motivated.
3. **"ENTREPRENEUR VERSUS INTRAPRENEUR" LEADERSHIP** - By creating an organizational atmosphere where intrapreneurship is encouraged, you inspire people to take risks, to be creative and to solve problems in ways that no one has tried before.
4. **RECRUIT THE STARS** - Any organization wanting to be successful in the long term must learn how to recruit and retain good people, not hire mistakes. The top staff members in the organization should always aspire to improve and to reach the top position. This is particularly true of board members as well.
5. **TRAINING IS NOT A PERK, IT IS A REQUIREMENT** - The greatest myth about training is that it is expensive. Managers must keep in mind the following points (all of which are free!):

- daily contact with those they supervise
- annual performance appraisals
- annual goal-setting sessions
- regular opportunities for feedback (positive and negative)
- well-planned staff meetings
- regular consultations
- teach and demonstrate organizational skills
- implement leadership development program

6. **COMMUNICATION** - It is difficult for any individual or organization to be successful if there is unclear communication toward vision, goals, plans and expectations. The greatest breakdown in our personal and professional lives occurs when there is a lack of communication.

7. **LEADER VERSUS MANAGER** - Currently, there is a national trend in organizations to seek leaders rather than managers.

- **Managers do things right; leaders do the right things.**
- **Managers get people to do the things that need to be done; leaders get people to want to do the things that need to be done.**
- **Leaders are people that bring out the best in others.**

Failing organizations are those that over-manage and under-lead. The world of the 90s will be driven by passionate, hard-driving, dedicated leaders with strong management skills.

8. ABILITY TO BE VISIONARY - A visionary has the ability to look to the future. In the final analysis, the greatest accomplishments in history have been achieved by people with a capacity for vision. Never fail to look to the future - we'll spend the rest of our lives there.
9. CHAMPION OTHERS - Rather than accepting all the credit, it is important to give credit to others who deserve it. Employees who are given the respect and acknowledgment they deserve will "go to the wall" for you time and again.
10. KNOW YOUR OWN MANAGEMENT STYLE - Just how do you get things done? No matter what organization, we are all measured by what we accomplish. A results-oriented style, a "just do it" approach, will not only succeed, but will win the perks, benefits, salary increases, promotions and job satisfaction.
11. TEAMWORK - While individuals can pull a company apart, it takes a strong team to put a company back together. In the business world, teams are made, not born - there is no place for individual stars. YMCA volunteers and staff are great partners for success.
12. "BOSS BASHING" - By far the most negative force in a workplace, this trend can be reversed by creating an atmosphere in which both positive and negative feedback are accepted and encouraged. By handling criticism in a dignified and professional manner, management must set the example for positive interaction and good communication.

6. b.

The Culture of working
relations

II. THE CULTURE OF WORKING RELATIONS

1. A conscious approach to developing the work relations culture is also related to professionalization (work relations are separated from personal, club-type and other relations as specific and set along certain standards) and the organization's business reputation. Therefore, the organization should observe human rights and freedoms in its own activity. This includes training in tolerance development, ways of settling conflicts, respect to cultural differences, and ban on sex, age, race, religion, and sexual orientation discrimination.

Management for the 90's should emphasize the 5 C's:

1. **CHANGE** Don't be status quo. Grow with progression—things change, times change and you have to change to be successful.
2. **COMMUNICATION** The lack of communication is the greatest enemy facing every organization.
3. **CARING** You have to care for your clients. Care for your staff and it has to be reci-take care of your people.
4. **COOPERATION** People working together can accomplish more than any individual.
5. **CHRISTIAN VALUES** Hire good, honest, hardworking people with high morals and great values.

3

Evaluating Your Company's 'Culture'

Effective supervision begins with an understanding of your workplace environment. The surroundings in which work takes place and the morale of the workers will have a profound effect on how your employees perceive their jobs and how they view you—the supervisor.

Look first at the company as a whole. Every company has a culture—a climate or atmosphere that sets the tone. Maybe it's formal—quiet and sedate, or perhaps it's casual, noisy and fast-paced. Whatever it is, however, within that atmosphere morale develops among employees. Morale, good or bad, may pervade the whole company or it may vary from one section or department to another.

But remember one thing—it's contagious. No epidemic was ever more infectious, and if morale is low as exhibited by an unhappy or dissatisfied employee or group of employees, that negative feeling or attitude can be easily caught by others. If a problem of low morale exists within an area under your supervision, you need to do something about it, promptly and effectively.

But, how do you know if morale is low? The best way to find out is by activating two things that are always powerful weapons in your supervisory arsenal—watching and listening. Employees with low morale often do their work slowly or reluctantly. They're often excessively critical of supervisors and management. Sometimes they're overly concerned with safety issues, or complain of being underpaid. Maybe they voice fear that they see themselves with no future with the company.

A good clue to judging the morale of any organization is to listen to employee conversation with an ear particularly attuned to the word "we." If they're talking about the company and the

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ly enough. Rather than ask again, he just does it his way.

As a supervisor, you need to realize that there are some communications between yourself and the employee that need additional help. Issuing instructions may be one of those situations, and if you have an employee with a problem following instructions, ask him or her to repeat them to you. In a group situation, try taking the employee aside after the meeting and suggest the following: "Sometimes I sense you don't fully understand my instructions or you disagree with them." This gives you an opening to discuss them further. This employee might benefit from a written memo or work order covering your instructions. It may be clearer on paper for him and also be a sign that you mean business. Closer supervision of the employee, at least temporarily will also reinforce the message that your instructions are to be followed.

As a supervisor, you have every right to expect employees to act according to your instructions. But do take a look at yourself and be sure you are clear when communicating instructions. Let your employees know you are willing to repeat them, answer any questions or doubts, and discuss alternatives. But if an employee repeatedly fails to follow instructions and you've exhausted all reasonable means of getting him to comply, you must let him know the seriousness of the situation. You are the supervisor, and you must, ultimately, have your instructions followed.

might entail rescheduling, shift changes, job rotation or, in some cases, a recommendation to management to hire more people or to change procedures. In any event, it's a problem *you* have to be alert to and willing to tackle.

A lack of trust also destroys morale. Employees must be made to feel that supervisors and management have faith in them. However, trust that amounts to a lack of supervision can be interpreted as "My boss doesn't care how well I do the job, so why should I." The wrong kind of trust can also make less confident or introverted employees anxious and stressed. Sometimes they worry that they will be unable to fulfill that trust. As a supervisor, you've got to get to know your employees well enough to be aware of their capabilities. Let them know that you trust them to do the job, but that you're not about to abandon them. You're there for any problems, and you'll be checking the final results to see that the job has been done as agreed.

The only way that you're going to solve morale problems is if you're interested and motivated enough to help. Employees will be quick to spot someone just going through the motions. It helps to be prepared with a plan. Let's take a look at two of the most common causes of morale problems and review how you might handle the problems.

Low morale: budgetary requirements

A supervisor's hands often are tied due to tight controls on salaries and fringe benefits, and it should come as no surprise that employees may be unhappy about this. To deal with the problem, check out what the comparable wages in the area are for the same type of work. Call a local employment agency or the nearest Bureau of Labor Statistics and if you learn that your company's pay structure is similar or higher than that of other companies, point this out to those in your department.

If the pay is lower than average, this should be pointed out to upper management. Still, if belt-tightening is unavoidable, and wages cannot be raised, other types of compensation may help

show employees the company is doing the best it can. Some firms have had success with such amenities as the establishment of a small lounge area from an unused space or office, or providing a refrigerator for lunches and snacks, or a TV for lunch-hour use. Some have turned to awarding weekly or monthly prizes such as ballgame tickets, free restaurant meals, theater tickets or even a paid day-off for increased productivity or special services.

Offering something that other companies don't can help make the employee feel "his" company is trying to do something special for him. Don't forget the option of awarding cash bonuses as well. The yearly cost to a company of bonuses or other one-time financial rewards is much less than the cost of across-the-board pay increases.

Low morale: lack of opportunity

Many employees become discouraged when they've been in the same position for a number of years and see no chance to advance further. What advice can the supervisor give, and what can you do to bolster morale?

Good employees are often lost because supervisors or managers are too slow to act to reward the good performer. When an employee deserves recognition, the supervisor should try to provide it promptly. Is a promotion necessary, or simply a raise to make the person feel the present job has more status? Perhaps a raise can be justified by giving the employee some added responsibility and altering his job title.

Probe to determine what kind of work the discouraged employee would like to do. Discuss the obstacles that might be in the way and how to overcome them. Perhaps further education or training is required. A transfer to a different area that offers more upward mobility is something to be considered. Offer the employee learning opportunities in the present position to help meet the challenge of moving up in the company.

The supervisor who takes the trouble to learn how people are feeling about their work can help them to adjust, surmount the

hurdles and improve sufficiently in order to take advantage of opportunities that arise.

If you're a supervisor who takes the time and effort to foster a positive climate of employee morale, you've probably already found that your employees not only meet the company's goals and objectives but often go well beyond the call of duty to exceed them.

Make the most of meetings

Meetings—staff meetings, committee meetings, board meetings, and impromptu casual meetings—are a fact of company life. You would do well therefore, to evaluate how effectively you are communicating in meetings, and how to best plan, organize and control them. Just think of how often you've sat in meetings waiting for them to end so you could get to work. But a productive meeting can be a valuable supervisory and management tool, an important link to subordinates and to the successful operation of your department. Why? Well, let's take a look at some of the benefits that come from an effective meeting:

- Information is delivered to a group directly and promptly. Time is saved this way, as opposed to writing and delivering memos or making calls.
- A supervisor is able to get an immediate reaction to whatever news or message is communicated.
- The chances for misunderstanding are lessened and any questions can be answered promptly.

- It provides an opportunity to air and resolve disagreements or conflicts.
- It offers employees a forum to air their opinions about what is on the agenda and therefore gives them a sense of belonging and importance.
- It aids in promoting a spirit of teamwork.

But meetings do take time and therefore can be costly, so be aware of how to make the most of them. Think back to the last staff meeting you had, and ask yourself some questions. What was the specific purpose? Did the meeting accomplish its objective? Who did the talking; both you and your employees, or was it one-sided on your part? What specific results came from it? Could you call that last meeting a useful communication tool?

What were the reasons for holding a meeting? Maybe it was informational for either disseminating facts or getting them. Perhaps its purpose was to make decisions, gather ideas, or in the case of a more generalized routine meeting, to keep people up to date.

But whatever the purpose, did you announce the reason for the meeting and have people come prepared with ideas or facts?

- Did you ask yourself whether the meeting was necessary and was the best way to accomplish what you wanted?
- Did you plan an agenda and communicate this in advance to participants so they knew exactly what was to be discussed?
- Did you restrict the number of participants to those you felt should really be there? The more participants, the more likely it is to get sidetracked and have much discussion without resolution. As the group grows larger, the chance for participation gets smaller. In a large group, a person with a good idea may not be able to voice it readily. On the flip side, the more people, the more ideas or information. But for problem-solving and decision-making, there is growing evidence that meetings of small odd-numbered groups of five to nine people are most successful. Perhaps you might consider two or more separate group meetings rather than one large one for these instances.
- In your last meeting, did you consider the time you scheduled

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the meeting? A meeting scheduled for 1 or 2 p.m. may run all afternoon simply because the time is available. Scheduling it later in the afternoon may get things moving since people want to leave by 5 p.m. A mid-morning scheduling is often best because of the mid-day lunch break.

- Did you set a time limit and let all participants know you planned to stick to it? Doing so often helps keep things on track.
- Did you consider the physical setting of the meeting, the participant's comfort, the arrangement of chairs and tables, and the lighting?

Even with consideration of all of these points, any meeting eventually becomes an exercise in group dynamics. How you handle spontaneous situations that arise will determine the success or failure of your meeting as a supervisory tool.

Here are some situations that frequently come up during a meeting and how to deal with them.

Conflict among two or more members of the group. If you find a heated discussion is getting out of hand, getting off the point, or is creating discomfort among the group, you've got to act.

"Let's get some comments from others about what you two have been discussing," is an effective way to shift the spotlight away from the combatants. Ask the group how they feel. If they remain silent, you've got to pick up the slack by making a comment of your own and steering things back on a track where others can participate.

The speaker who abuses meeting time by taking over. Often this dominant individual thinks he or she is just getting things done. If the group is close-knit and comfortable, the best approach may very well be a smiling interjection such as, "Hey, Joe, could you let me get a word in now?" But if you're not at ease with a jocular approach, you've got to gain control with something more formal, "Okay, I see what your position is, but I haven't heard from Tom or Linda and I'd like to know what they think about this."

The silent participants. Frequently, vocal participants are intimidating and cause quiet, shy members to withdraw. These peo-

ple may feel no one really cares about their opinions, and this could create bad feelings. Yet, they may be able to make useful contributions. They just need some help in getting them into the open. Your supervisory role must be one of tact in eliciting the views of these reticent participants so as not to embarrass them or seem pushy. You might say, "Sue, you look as if you've been giving this some thought. I'd like to hear what you have to say. That is, if you want to." This gives Sue the option to speak or not, but at least she knows you've noticed her.

The person who's been shut off. Often in a meeting, an individual offers a comment but someone interrupts and then carries the ball. As soon as possible the supervisor should get back to the person cut off and say, "Linda, did you get to finish your point? Anything you want to add?"

The objector or challenger. Don't rush in to defend yourself. Look straight at the person and listen carefully to what he or she is saying. Don't interrupt even if you know they've missed your point or are wrong. The best thing to do is to pause and make it obvious you've considered what they said. Do, however, use this pause to make certain in your own mind that you understand their point. Then respond.

Keeping to the agenda. All too often, participants go off in different directions and stray from the course you've set to meet your objectives. As the meeting leader, you've got to stay alert to such meanderings and remind people as often as necessary of the purpose of the meeting. Offer to put whatever else crops up on the agenda of the next meeting. Side roads can sometimes be explored in the meeting, but it's the main road that will ultimately carry you to your destination.

Confronting hostility from an individual or the whole group. Sometimes you can win over the hostile person or group by seeking advice and thereby allowing the hostility to settle down. Perhaps you might say something like, "I see what you mean. What are some of your suggestions? What would you do?"

Don't forget, however, that a hostile person will sense your tension and be energized by it. In any difficult situation, you must

remain in control, at ease and even relaxed. It's mighty hard to do, but essential because sometimes, the hostility of one person can spread to the group. If, however, you remain at ease and in control, the aggression of others in the group may switch to the hostile person himself. A calming comment such as, "Joe is disturbed because of ----," tends to put you in rapport with the group and isolates the hostile individual.

A participant who tries to achieve her own personal objectives in a meeting. If you sense this happening, or if it's sufficiently overt as to affect the group, try something like, "Linda, I'd be glad to speak to you after the meeting," or "Linda, let's set aside time later to discuss that."

How to cope with office politics

Office politics is a particularly troublesome issue because it's rooted in the individual's concern for self rather than company goals and the job at hand. Typical office politics include the "I'll support your project if you'll support mine" syndrome, and the self-serving alliance with an individual because she is likely to be promoted and you want to "get in good" with her. Either way, its core is self-interest. Cliques often arise within companies, pitting faction against faction in office politics. Although there is bound to be a certain amount of this within most companies, it must not be allowed to become a dominant force. If you or your department fall victim to it, there are some things you can do to control it:

- Confront the politickers. Let them know you are aware of what they are doing or saying and that you don't appreciate it, whether it involves you or not. Be certain your employees know you expect them to work together as a group to meet company goals and not be at odds with one another.

- If you are the victim of office politics or unwillingly caught up in it, you may appeal the issues to management. You can't do it with "they're ganging up on me," but, instead, by expressing the problem in terms of how it is affecting job quality. Stress

the adverse effects it is having on work, not your own personal disadvantages.

People will always form alliances and cliques, and situations will arise that you're likely to interpret as office politics, but one must not automatically assume the worst. These associations arise in every organization, but a supervisor must learn to be attuned to the pattern of "real" office politics before it becomes disruptive to your department.

Handling specific communication problems

Rumors. The company grapevine exists in almost every office, plant and organization. The grapevine itself isn't a problem, but distortions that may develop within it are. Your interests as a supervisor can be well served, however, by listening to grapevine communications. It often provides an insight into what employees are thinking, what misperceptions they have and what rumors have arisen. Rumors, of course, are particularly dangerous because they can lead to serious problems, such as embarrassment, hard feelings, lowered morale and reduced productivity.

A supervisor must anticipate situations that can cause concern and discussion among employees. Almost any kind of expected change—lay-offs, wage-freezes, and so forth—are grist for the rumor mill. You can prevent rumors by giving out accurate information about upcoming situations before distorted meanings and unsubstantiated guesses are generated. If you're in the dark about a certain situation, let employees know that you will pass on information as soon as possible.

Rumors usually get started in times when employees are experiencing apprehensions, anxiety, frustration or insecurity. You should beware of this and act to allay their fears.

Investigate where and why the rumor originated. Is there any validity to it? Tell your boss about it and consult others if necessary. You dismiss rumors by providing facts. If there's no truth to the rumor, tell your people so. Let them know you are looking into it, but ask your employees to make it a policy not to repeat rumors.

Sometimes, you find a particular person who is the "company gossip." A compulsive talker who seems to relish originating and passing on "news." You've almost surely encountered one of these types. Of course you can't stop people from talking about company and department matters but watch for telltale signs that you can zero-in on. If this person is wasting time stopping to converse continually or is slower on the job than others, talk to the individual. Put it in a performance review. In other words, use whatever means are available to get this message across strongly. "Don't gossip! It hurts others *and* it hurts you!"

As a supervisor, you, too, should be careful to avoid making statements or comments that can be misinterpreted. A useful tool used by many supervisors is a weekly or monthly memo or newsletter reporting your departmental news. It can be a means of preventing rumors. Through it, employees can obtain facts on many issues that could be potential grapevine material.

- *Bad news.* As a supervisor, you occasionally will have to deliver some unpleasant or disappointing news to subordinates. You're best served by doing so in a straightforward manner, supported by all the facts behind the bad news. But of equal importance as how you deliver the news is when you deliver it. Your goal must be to make sure the employees' productivity and effectiveness on the job is not adversely affected by the bad news. For example, coffee breaks, lunchtime or just before lunch is usually not a good time. Those work breaks may provide employees with the chance to unleash their immediate hostilities, resentments and frustrations to fellow workers. The early part of the day is often a more suitable time since it gives the employee time to think over the news and let it settle, yet it allows for further discussion or questions later in the day.

Remember, also, to give some thought, if the circumstances demand, whether to break the news individually, in small groups, or in one large meeting. Your decision depends on the type of news and your perception of how your subordinates will take it. While there's not much the supervisor can do to affect the content of the bad news, you will help the employee deal with it by giving thought to the circumstances and timing of its delivery.

- *Criticism.* Nobody likes to be criticized, but carried out properly the criticism will be constructive and beneficial to the recipient. Effective criticism should accomplish four objectives. First, it should prevent recurrence of the error or pattern of behavior. Second, it should increase your subordinate's efficiency. Third, it should be informative and instructive. Fourth, it should indicate the supervisor's concern for the worker as an individual as well as for his or her contribution. Effective criticism should be delivered in a spirit of helpfulness, not to berate or humiliate. There are some basic guidelines to consider when you're faced with the difficult task of having to criticize.

- *Commend first.* Criticism is tough for any of us to take. It can wound pride, cause insecurity and arouse resentment. You should therefore, start off by assuring the employee that you do have regard for him or her, and recognize the problem as something that can be rectified or improved.

- *Criticize in private.* Never embarrass an employee in public. Private criticism will get better results and both parties will be able to discuss the matter more constructively.

- *Get all your facts right.* Don't rely on hearsay.

- *Remain patient* but keep your objectives in mind. An employee may become hostile or defensive. Be considerate but always bring the session back to its purpose which is to rectify the situation.

- *Try to criticize promptly.* Act as soon as possible while the incident is fresh in the minds of you and your subordinate. Don't allow rationalizations and anxieties to grow.

- *Make sure the subordinate understands the point of your criticism and the seriousness of it.*

- *Agree on plans to correct or avoid the problem.*

- *Failure to follow instructions.* In most supervisory situations, you probably believe that you've delivered your instructions thoroughly and clearly. You probably have, but often there's an employee or two who doesn't follow them.

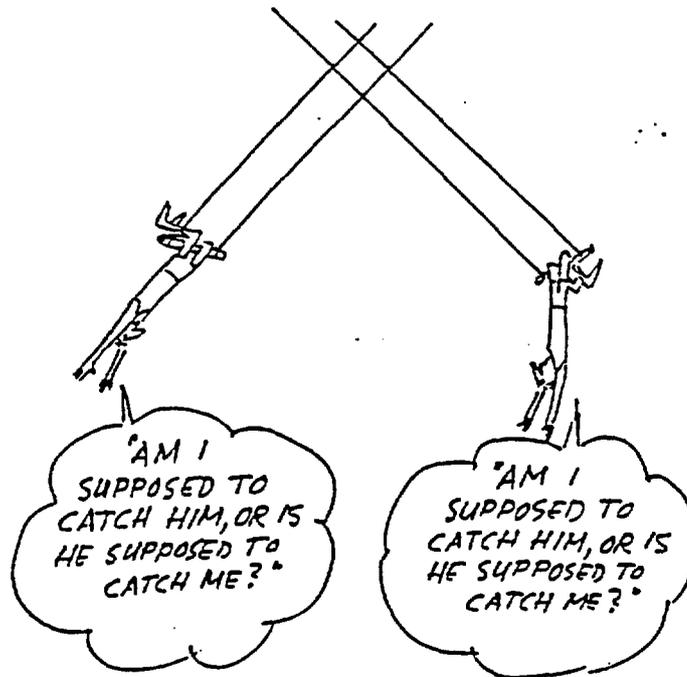
The reasons may be that the employee thought he knew better, or he simply forgot the instructions, or he didn't listen careful-

ly enough. Rather than ask again, he just does it his way."

As a supervisor, you need to realize that there are some communications between yourself and the employee that need additional help. Issuing instructions may be one of those situations, and if you have an employee with a problem following instructions, ask him or her to repeat them to you. In a group situation, try taking the employee aside after the meeting and suggest the following: "Sometimes I sense you don't fully understand my instructions or you disagree with them." This gives you an opening to discuss them further. This employee might benefit from a written memo or work order covering your instructions. It may be clearer on paper for him and also be a sign that you mean business. Closer supervision of the employee, at least temporarily will also reinforce the message that your instructions are to be followed.

As a supervisor, you have every right to expect employees to act according to your instructions. But do take a look at yourself and be sure you are clear when communicating instructions. Let your employees know you are willing to repeat them, answer any questions or doubts, and discuss alternatives. But if an employee repeatedly fails to follow instructions and you've exhausted all reasonable means of getting him to comply, you must let him know the seriousness of the situation. You are the supervisor, and you must, ultimately, have your instructions followed.

THE SIX KEYS TO SUCCESSFUL WORK RELATIONSHIPS



SERIOUS COMMUNICATION PROBLEMS #02

RICHARD F. MCGOURTY, PH.D.

Motivating staff and rewarding their actions

1. The role of personal motivation in NGO activity. Motivation and orientation.
2. Understanding of motivation and behavior of people in groups. Types of motivation.
3. The connection between "types of organizations and types of motivation". Organizational models based on motivational principles.
4. Relating personal motivation to organizational motivation. Motivating leaders, employees and volunteers. 6. d. 1
6. 2. 1
5. Rewarding employees and its role in motivating personal goals. Types of rewards: moral, material, and other.
6. "Old" and new types of rewards. Personal motivation and rewarding.
7. Conflicts as a source of motivation. Conflicts and rewards.
8. Reporting and rewarding.
9. Ways to develop motivation. History of the NGO, organizational perspective and motivating staff. Motivating people and small groups and the organization's effectiveness.
10. Psychological atmosphere in the NGO and motivation.

SENDING GOAL-ORIENTED MESSAGES



1. Let the other person know what needs to be accomplished (why).
2. Clearly spell out their part (what, when, needed resources).
3. Discuss how this can best be done (how).
4. Check for understanding.
5. Summarize, if necessary.

ACTIVE LISTENING



1. Listening requires attention.
2. Look like your listening!
3. Hear what's being said - content and feeling.
4. Communicate your understanding.

PROBLEMS IN LISTENING

1. Faking understanding.
2. Waiting too long to respond.
3. Responding inaccurately.



EFFECTIVE FEEDBACK IS

1. Descriptive of specific behavior.
2. Well-timed.
3. Non-judgemental .
4. Checked to insure clarity.
5. Offered with clear intent.
6. Positively motivated.

IS NOT

THE JOY OF FEEDBACK

FEEDBACK IS A BUSINESS TERM WHICH REFERS TO THE JOY OF CRITICIZING OTHER PEOPLE'S WORK. THIS IS ONE OF THE FEW GENUINE PLEASURES OF THE JOB, AND YOU SHOULD MILK IT FOR ALL IT'S WORTH.



THANKS FOR REVIEWING MY REPORT.

IT'S GARBAGE.

I'LL SPRAY PAINT THE REALLY STUPID PARTS.

AND WHAT FLEA MARKET SOLD YOU THAT GOD-AWFUL DRESS?

HEALTHY EXPRESSIONS OF ANGER

How do you express anger when you want a relationship to continue?

- ◆ Wait until you cool down - don't go to someone else in the "heat" of your anger.
- ◆ Think through exactly what you are angry about and what you want to say to the other person. Ask yourself: "What do I hope to accomplish by expressing my anger to this person?"
- ◆ Use "I" statements - don't blame the other person for your anger.
- ◆ Be specific about exactly what you are angry about.
- ◆ Openly communicate your anger soon after the incident - don't let things build up until you explode.
- ◆ Reaffirm that you care about the other person and are expressing this anger so that you can resolve it and continue to move forward in your relationship.
- ◆ Indicate future actions/statements that would feel more appropriate than the actions/statements that you are angry about.
- ◆ Give equal time. Allow the other person to respond and don't interrupt them while they are responding.

UNHEALTHY WAYS TO EXPRESS ANGER

What are unhealthy/unacceptable ways to express anger? If someone is mad at you, what behaviors/actions do you prefer them not to use when expressing their anger?

- ◆ Yelling/shouting.
- ◆ Tantrums - private or public.
- ◆ Blaming you for their anger.
- ◆ Calling you names.
- ◆ Telling you all the things they don't and never did like about you anyway.
- ◆ Using physical violence of any kind.
- ◆ Threatening you verbally or physically - or your family or others you are responsible for.
- ◆ Blackmailing you (public exposure, secrets, releasing confidential information, etc.).
- ◆ Physically intimidating you by moving into your physical space.
- ◆ Spreading gossip/rumors about the argument or disagreement.
- ◆ Trying to make you feel guilty about your feelings.
- ◆ Attempting to manipulate your response to suit their needs.
- ◆ Not allowing you to respond freely.

These unhealthy/unacceptable ways to express anger are separate from:

- ◆ Crying.
- ◆ Expressing emotions/having feelings.

EXPRESSING ANGER IN THE WORKPLACE

How is it appropriate to express anger in the workplace?

- ◆ Wait until you cool down - don't go to someone else in the "heat" of your anger.
- ◆ Think through what you are angry about and what you want to say to the other person. Ask yourself "What do I hope to accomplish by expressing my anger to this person?"
- ◆ Make sure the anger you express is appropriate to the incident - screaming at someone because they borrowed and didn't replace your stapler is not appropriate. However, screaming may be appropriate if someone is threatening you.
- ◆ Use "I" Statements - don't blame the other person for your anger.
- ◆ Be specific about exactly what you are angry about.
- ◆ Openly communicate your anger soon after the incident - don't let things build up until you explode.
- ◆ Reaffirm that you care about maintaining a good working relationship and are expressing this anger so that you can resolve it and continue to work together effectively.
- ◆ Give equal time. Allow the other person to respond and don't interrupt them while they are responding.
- ◆ Indicate future actions/statements that would feel more appropriate than the actions/statements that you are angry about.
- ◆ Use any grievance processes that are in place.
- ◆ *If you are protesting the way a certain situation was handled at work, give the SOLUTION as well as your COMPLAINT or GRIEVANCE.
- ◆ Make a conscious decision NOT to use your power to get your way. Both supervisors and employees have areas of influence/power that can be used negatively to impact outcomes of arguments.

LETTING GO OF ANGER

Anger is healthy and there are times when it's important for you to recognize and express your anger. But there are also times when it's important to let go of your anger. What do you do when there's a conflict that's irresolvable? Do you forgive, agree to move on, have a civil war, say the relationship is too important for this to get in the way?

Questions to ask yourself:

- ◆ Can you admit that there was a better way for you to have handled a particular situation?
- ◆ Can you admit it when you make a mistake?
- ◆ Are you comfortable apologizing for your mistakes?
- ◆ Can you remember a time when you were forgiven for something that you didn't feel you deserved to be forgiven for?
- ◆ Do you deserve to be the kind of person who forgives?

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BASIC GUIDELINES FOR COMMUNICATION _____

1. Say "I" when you are expressing something that you think or feel or have done instead of using words like "you," "they," "people," etc. Thus, you acknowledge that what you are saying is about you, and thereby let people get to know you.
2. Avoid asking questions unless you really need information or need to know something. Often, questions are an indirect way of making statements and a way to shift responsibility onto someone else. For example, "Don't you think that . . .?" is a sneaky way of making a statement without taking responsibility for it.
3. Avoid discounting, which is acting as if what you think or feel is more important than what the other person thinks and feels, or denigrating yourself and acting as if the other person is more important than you are. Some examples of discounting are:
 - a. interrupting (discounting the person talking).
 - b. not speaking because you think you'll sound stupid (self-discounting).
 - c. not taking the other person's desires into account; e.g., deciding what you will do on a date (discounting the other person).
 - d. saying things that put yourself down (self-discounting).The opposite of discounting is accounting — taking you, your feelings, thoughts, and desires into account, along with the other person.
4. Don't rescue — which is doing for someone what he or she can do for him/herself. This is discounting the other person because you are acting as if he or she can't take care of him/herself.
5. Avoid interpreting. An interpretation is when you tell someone what motivates them, why they feel or think or act the way they do; for example, "You are an angry person." The

main reason this is not a very good way to communicate is that the other person will probably feel defensive. (Example: "You're a defensive person.")

Instead, tell the person how you feel or what you *think*; make your statement from an "I" position ("I think . . .") or describe what makes you think as you do. (Example: "I notice that you argue and disagree with most of the things I say, and it's hard for me to talk to you.")

6. Feelings and thoughts are two different things, although we often confuse them in language. For instance, "I feel that you are wrong about that" is actually a thought, not a feeling. Use "I feel . . ." only when expressing feelings (anger, sadness, fear, happiness, fatigue, etc.).
7. Avoid using exaggerations or exaggerated words such as "always," "never," "incredible," "the most . . . in the world," etc. This is often a way of justifying your ineffectiveness, avoiding a problem, or avoiding responsibility for your behavior. For example: "I was so angry, I couldn't help myself." The fact is that you *could* help yourself.
8. Avoid qualifying statements or phrases such as "perhaps," "maybe," "I guess," unless you *really* are unsure. Such words are often a way of avoiding responsibility for what you say. Likewise, the word "try" is often used as a way of really saying, "I won't do it." Trying is very different from *doing*.
9. Avoid such statements as "I can't" and "I have to" unless that is really the case. Rarely are we actually unable or incapable of doing something, and rarely do we "have to" do anything, unless someone is physically forcing us. Actually, we choose to behave the way we do in most cases, often because if we did not we would suffer unpleasant consequences.
10. Confront other people's misstatements. Confrontation is a sign of caring. When you ignore or go along with someone's game-playing, discounting, and so on, you are actually hurting that person and acting as if you don't care. You can

confront in a caring way without attacking the person or his or her behavior.

11. Take responsibility for how you feel, think, and behave. Don't say "You made me angry," because that makes your feelings someone else's responsibility. Instead say, "I am angry because . . ." (stating your reasons). Avoid saying "make(s) me feel."

NINE KEYS TO GOOD LISTENING

1. Stop Talking
2. Remove Distractions
3. Maintain Eye Contact
4. Paraphrase What Speaker Says
5. Validate Feelings Through Empathy
6. Stay Objective
7. Refrain From Advice Or Criticism
8. Ask Questions To Seek Understanding
9. Stop Talking

6. c.

Leadership & Team
building

III. LEADERSHIP AND TEAM BUILDING

Need brings great leaders.

- Abigail Adams.

1. Leadership is a mystical talent but habits and skills that can be mastered. Leadership and team spirit are role circumstances of activity.

2. How does a leader think? A leader thinks one step ahead of the current activities, he focuses on problems that have not emerged yet but the solution for which must be found already. By thinking this solution over in the most precise way, the leader makes himself/herself indispensably useful.

3. What does a leader do? A leader works on enhancing effectiveness of the work time. The leader's main concern is to draw precise lines of a working group's autonomy and, consequently, of his/her own involvement.



CHAPTER DEVELOPMENT REPORT #18

Leadership Development

The need for leadership development within NOW is critical to the long term stability and effectiveness of our organization. The most often-asked questions asked by chapters involve the evolution of members into activists and then into leaders.

For some of us, our own progression from member to leader was so subtle that we often can't specifically describe it, much less explain it to others. One thing is certain-- nothing is more frustrating for chapter leaders than to have women come to a meeting or two, join NOW, and then fade into the background of the chapter, seemingly unwilling to take on chapter responsibilities. How do we capture the interest and enthusiasm of new members to make them activists, and leaders?

It is essential to understand power, and learn how to make women aware of their own power and their ability as a group to change institutions - and why they might want to be leaders. It is equally helpful for women and men who are currently in leadership positions in the chapter to review criteria for effective, feminist leadership. This report will examine both aspects of leadership development.

The Transition

A major component of leadership in NOW is the use of action-oriented techniques to identify and mobilize people and resources. For nearly twenty-five years, we have been empowering feminists to "take action" - we have been helping them to realize their own political efficacy as women - a sense that they "can make a difference." This awareness of power will inevitably alter the relationships within which we all work in society.

Once we understand that we as individuals can do something that expresses our views - participating in an action, for example, we can see that we are not alone. We experience first-hand the feeling that as a member of a group we can alter the power relationships that affect our lives. This realization can have a powerful, positive influence - "I know I can make a difference and I will do it again." The ability to organize individuals to work toward a such a goal requires leadership. Leadership is not just one skill, but many. Some leadership skills come naturally to individuals, others are skills which must be learned or developed.

Power

In our society, women often never experience power. The promise of becoming so powerful as to effect societal change brings women to NOW. Chapter leaders express frustration when women express interest, but then disappear. *It may actually be because the activities of the chapter in which they are invited to participate do not involve power or change.* All too often, they are invited to help assemble the newsletter or make four phone calls. This is why a new members' initial experiences should involve joining in a lobbying visit or participating in a fact-finding visit to the County Health Department - something which promises to bring about change.

Power is a tool used to effect change. The power of a NOW chapter lies in its members and their ability and willingness to take direct action. The responsibility of a NOW chapter leader is to effectively channel and utilize the power of the organization to influence others to change society.

Effective Leadership

Women and men who assume leadership positions in NOW must have a knowledge of NOW's issues and must be willing to expand that knowledge. An excellent place to identify and develop leaders is through NOW Feminist Consciousness-Raising. Simply being aware of the basic guidelines of CR can help foster respect for others and remind us to communicate in a non-confrontive, non-threatening way. One of the first steps a chapter should take toward a good program of leadership development is to establish a ongoing CR program. (See the Chapter Development Report #16 on Feminist Consciousness-Raising).

Women and men who come to NOW bring with them a tremendous and rich variety of backgrounds and experiences. Many will have views that do not fit neatly into our issue and position categories. They will have the same general end goals, but often vastly different ideas or "means" which with to get there! As leaders we must often invest significant amounts of energy into helping a meeting room of these folks blend all these ideas into a common set of objectives. Leadership is not a process of choosing the women and men you want to work with and getting "rid" of the rest. Further, a "silenced" member is not a "converted" member. Try to bring everyone along!

Leaders must know or be willing to learn our organizational structure. They should know how to set goals, communicate clearly with others, follow through with responsibilities and analyze problems. They should not underestimate the importance of good record keeping and personal organization, which is essential to the chapter's continuity and stability. This "herstory" can be a valuable resource in motivating new members who need a sense of continuity. They must have a vision of the chapter's role in the local community. Above all, they must understand the importance of inclusiveness, delegation, and of leadership training.

The following is a short list of some of the qualities of a good leader:

- ♀ respect for and recognition of others
- ♀ ability to plan and set goals
- ♀ communication of clear expectations for self and others
- ♀ commitment to NOW and ability to delegate
- ♀ understanding the importance of good record keeping
- ♀ good follow-through and evaluation practices
- ♀ ability to analyze problems
- ♀ ability to visualize the role of the chapter in the local community
- ♀ commitment to ongoing leadership training

Training Your Replacement

Among the first things a new leader should do is to identify and cultivate the members

of the chapter she would like to have in chapter offices next year. This doesn't mean to imply that the present leaders aren't good or wouldn't want to continue in office. What it does do is to broaden the potential leadership base of the chapter. It maintains chapter stability and growth, lessens chances of burnout, and gives the chapter expanded possibilities of expertise and skill.

A primary leadership skill is motivating others to take action. Key ingredients for motivating others are enthusiasm and a positive attitude. Usually the leaders' attitudes set the "tone" for the chapter. Bringing about the desired change, "winning" an issue, gaining personal satisfaction, learning new skills, and being recognized by one's chapter are key benefits to taking action. Make sure your leadership brings about these benefits to your active members.

A leader can demoralize chapter members and diminish the effectiveness of the chapter if she or he:

- takes all the credit for a project or action
- fails to delegate responsibility
- expects all leaders to be "just like her/him"
- constantly criticizes the contributions of others
- ignores newcomers or "puts down" their ideas

It is important to identify leadership skills that members have and to delegate appropriate activities that will help develop these abilities and develop new ones. Above all, provide a safe environment where potential leaders can make their own decisions (and their own mistakes), and develop their own leadership style.

Structured training might include participation in chapter leadership retreats where outgoing and incoming officers have an opportunity to share information and experiences. It is critical to encourage participation in state and national conferences and in the leadership and issues training and chapter development workshops generally offered at such events.

NOW state and chapter organizations that promote ongoing leadership training and development will be able to maintain stability for the chapter and to remain effective in the community. Many of us realize that the initial commitment we made to NOW - perhaps to work on the ERA or to stop a parental consent bill in the state's legislature - has become a way of life for us. Even as the political, economic and social change we seek requires "eternal vigilance," activists move, or change their lives, responsibilities, and interests.

There are many written resources which are available: policy manuals, chapter organizing information (the Chapter Organizing Manual contains a section of suggestions of officers' job descriptions, other chapter development reports such as this one, and other materials about NOW. The existence of these resources is really no secret, but many leaders, for a variety of reasons, don't know about them.

Evaluating Leadership

In recruiting and developing leaders, it is important to evaluate both organizational and interpersonal skills possessed by each prospective leader. This leadership self-evaluation is a sample of an assessment chapter leaders might use.

1. Do you prefer to find someone new to do a job, or would you rather do it yourself?
2. Do you like delegating responsibility, or do you feel that it is more like asking someone to do your job for you?
3. Do you take on too much work and find yourself burning out quickly, but then feel like the organization asks too much?
4. Do you like taking on new jobs, or do you find you keep performing routine tasks that others could easily do?
5. Are you able to push yourself to do things you don't like to do, or delegate them to someone - or do you put them off and find yourself not doing them at all?
6. Do you enjoy passing on leadership skills to others?
7. Do you keep yourself informed by attending planning meetings and conference workshops, reading organizational publications, and taking notes you can use?
8. When you have a problem, can you ask for help from other leaders?
9. Is recruiting members and volunteers and delegating responsibility specified in the written job description for your organization's leadership? (If not, do you believe it should be?)
10. Do you agree that there is some role in the organization within the capabilities of every member?
11. Do you believe a feminist organization should attempt to provide opportunities for its own members to experience working together in what might be their first feminist experience with other women and men (and with women as the leaders)?
12. Have you drawn up a written list of all the separate tasks your committee(s) could be performing so that members can be recruited directly for specific activities?
13. Before asking someone to do a task, do you prepare a few simpler alternatives to offer, to increase the likelihood of a "yes" answer from the member and provide an opportunity for another member to make some positive contribution?
14. Have you distinguished between the delegation of short-term tasks (like finding a location for a press conference) and the delegation of on-going responsibilities (like typing the newsletter each month) so that you do not have to repeatedly recruit for the same tasks?
15. Have you used every method of recruiting activists, including direct contact, newspaper

publicity, sign-up sheets at every gathering, attendance sheets at meetings, and sponsoring an interesting action that attracts new activists?

16. Are you making every effort to plan ahead, set goals with a timetable for completion, line up needed help, regularly follow up with those who are helping, avoid surprises, and offer encouragement, praise, and criticism when warranted?
17. Are you comfortable working with others who exhibit non-traditional characteristics such as competitiveness, managerial and executive ability, assertiveness, ambition, self-esteem, power, and brains?
18. Do you invite new activists to "tag along" on press interviews, legislative visits, etc. as an initial step in leadership development?
19. Are you comfortable with issues involving diversity in NOW? Is creating a positive environment for women and men of vastly different backgrounds, races and ethnicities, and sexual orientations a goal you feel you can work on?
20. Are you training your replacement?

Conclusion

Leadership in NOW chapters is an ongoing process of identifying and mobilizing people and resources to take direct action to change a sexist society. To mobilize human and material resources to take action, NOW leaders must have an understanding of the issues and the community, have the ability to plan and set goals, and must delegate responsibilities of the organizing process to encourage leadership development in others.

An effective leader recognizes that not all leadership styles are alike. An effective leader motivates and influences the chapter and community to effect positive changes in society. An effective leader uses power and influence to accomplish NOW's goals. Finally, an effective leader knows when to step aside to make room for others.

Additional copies available from
Chapter and State Development and Services
Kim Gandy, National Executive Vice-President
1000 16th Street NW, Suite 700
Washington DC 20036

8 Signs That You're a True Leader



Stephen R. Covey,
an expert on
leadership.

What are the common denominators of a true leader besides the obvious trait of "vision"? We asked Stephen R. Covey, author of *Principle-Centered Leadership*, for his thoughts. Covey says leaders can be found at all levels of business, not just the top, and that the best leaders share a certain set of values: "fairness, equity, justice, integrity, honesty, and trust." How do you know if you're leadership material? Look at Covey's eight signs, below.

1. **You look for ways to improve yourself** through reading, asking questions, or getting additional training. "Most people have a tendency to rest on yesterday's learning," says Covey, "rather than to get into the spirit of continuous improvement." When you aren't working on improving yourself, it's hard to urge others to do so.
2. **You are service oriented**, no matter what you do for a living. In other words, you ask yourself what other people need, not just what you need.
3. **You radiate positive energy** and "sidestep negative energy," says Covey.
4. **You believe in other people.** "You affirm, see the worth, goodness, and potential in others."
5. **You work on balancing your life** between work, home, and community.
6. **You see your life as an adventure**, are inwardly secure, and look at each day in a fresh new way.
7. **You value differences.** You realize that your way is not synonymous with the "right" way and see new alternatives as exciting, not threatening.
8. **You take care of yourself**, physically, through exercise so that you're healthy; intellectually, through reading (turn off the television, says Covey); and spiritually, through prayer or simply meditating on the inspirational.

PRINCIPLES THAT MAKE TEAMS WORK

- the people who perform the work are the "experts" when it comes in their areas
- the combined experience and talents of people working in teams is of any one individual
- most people will take more active interest in a project if they can upon the decisions that affect them
- all people have creative potential which can be systematic participation in a problem-solving group

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6.6.4.
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Groups are helpful -

- in expanding information
- in generating ideas
- in surfacing ideas
- in creating synergy
- in gaining commitment
- if there is no "right" answer
- in recommending alternatives

Groups are not helpful -

- in contracting information
- in synthesizing data
- in situations requiring quick action
- if there is a "right" answer
- in reducing alternatives
- in writing a report
- in making a final decision

TEAM BUILDING CHECK-LIST

- knowledge
- skills
- diversity
- cohesion
- process management
- conflict management

TEAM BUILDING

What helps -

- listening
- sharing
- facilitating
- identifying common ground
- clarifying terms
- reducing variables
- open mind and flexibility

What hinders-

- dominating/arguing
- announcing
- identifying idea as bad/dumb/wrong
- need to be right
- need to win
- war stories/jokes/asides
- indifference/apathy/boredom

6. d.

Motivating staff and
rewarding their actions

Motivating staff and rewarding their actions

1. The role of personal motivation in NGO activity. Motivation and orientation.
2. Understanding of motivation and behavior of people in groups. Types of motivation.
3. The connection between "types of organizations and types of motivation". Organizational models based on motivational prin
4. Relating personal motivation to organizational motivation. Motivating leaders, employees and v
6. d. 1 ders and their
6. 2. 1
5. Rewarding employees and its role in motivating personal and
organizational goals. Types of rewards: moral, r
6. "Old" and new types of rewards. Personal mo arding
7. Conflicts as a source of motivation. Conflicts and rewards.
8. Reporting and rewarding.
9. Ways to develop motivation. History of the NGO, organizational perspective and motivating staff. Motivating people and small groups and the organization's effectiveness.
10. Psychological atmosphere in the NGO and motivation.

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MOTIVATION AND COMPENSATION IN NGOs**ON THE TOPIC**

Man is a universe, with all its nuances of socio-psychological specifics, unexpected responses to simple events, behavioral aspects open for all to see, a multi-layered pie of emotions, feelings, passions and cold reason that is deeply hidden from outsiders. Nobody and nowhere could, and hardly will, ever achieve complete comprehension of an individual's universe.

Motivation of man's behavior and actions in any organization, as well as his striving towards collaboration and creative interaction as opposed to conflict-based behavior, are directly linked to the individual's inner universe. Organizational effectiveness depends on how one person's motivation is integrated in the motivation of a group.

Put in plain words, motivation is a set of personal characteristics unique to particular individual, and values he or she is guided by in his behavior or action. The topic of my presentation is Motivation and Encouragement, and I shall try to approach it from two angles, while answering the following questions:

- Does encouragement (and which form of it) influence changes in an NGO employee's motivation?
- Does a person's inner motivation determine the type of encouragement that makes him "go to the wall" to reach the common goals?

WHAT HAPPENED IN THE "BRIGHT" PAST

Let's digress from the topic into some reminiscences.

Certificates that honored good work, badges and medals, appreciation of one's work, expressed before a Young Pioneers or Komsomol unit, vouchers to a rest and recreation camp are painfully memorable awards. This is how pro bono public work was encouraged. Bonuses, wage raise, the chance to buy goods that were otherwise in short supply were also practiced. These rewards were fairly popular among the newly affiliated, or young, member of the public organizations.

Let us, however, ask ourselves a question: did they often encourage us to enhance and improve our performance? Did they lead to dramatic positive changes in the work? The answer would be "no" rather than "yes." Insufficient effectiveness of these and other awards was determined mostly by the fact that they did not encourage FREEDOM and the individual's creative manifestations. In most cases, the awards followed when the individual stuck to "correct" principles.

Two groups of organizations more than any other were outside the general framework of the party and bureaucratic obedience in exchange for compensation that was typically meager. These were various informal (and/or "underground") clubs based on common interests, such as the bard song clubs, and research institutes whose fundamental studies were driven forward by talented individuals' brains and free creativity, not by "party and government guidelines" I led the best of my conscious life in such organizations and, while I am still working in a research institute, I have for 5 years volunteered for a very powerful NGO. Therefore, I will speak from personal experience.

WORKSHOP STRUCTURE. KEY CONCEPTS.

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The key concepts essential for understanding the processes that influence the psychological climate and effective performance of a small group (most of NGOs are small groups) are the group members' value orientations, individual and collective motivation, appraisal and self-evaluation of one's contribution (result), and reward.

In other words, a more or less objective analysis of MOTIVATION AND REWARD in an NGO would require a study of the following scheme:

NEEDS ---> MOTIVES ---> PROJECT ---> RESULT
(ASSIGNED SHARE OF THE WORK)

I should point out that PROJECT is placed between MOTIVES and RESULTS in this scheme. This is more than "following the latest fashion" at the current stage of development of the NGO movement, with the project approach seen as the most effective path of NGO activities as well as the way of its development (which, in principle, is true). If followed, this is the path on which a relatively short period can prove to be enough to assess the proportion of individual and collective motivations. (I will elaborate on this later). I believe it expedient to note that the phrase ASSIGNED SHARE OF THE WORK is deliberately placed below the word PROJECT because not all NGO members work directly on projects, some PROVIDE FOR this work. Sometimes their roles happen to be significant.

While studying this scheme within the context of human resource development in an NGO, I should expand it as follows:

NEEDS ---> MOTIVES ---> PROJECT ---> RESULTS
(ASSIGNED SHARE OF THE WORK)
APPRAISAL
REWARD
(FEEDBACK) <-----

I will not elaborate in this presentation on clarifying the essence, role and importance of the elements in the upper chain. I take it that the readers will accept them as self-evident.

However, due attention will be given to this aspect during the workshop. It is currently essential to make a close study of the lower chain components, namely, APPRAISAL, REWARD AND FEEDBACK.

First, a few notions should be explained.

Different approaches to the term MOTIVES are known in psychological and sociological studies. Sociologists discern in them man's subjective attitude to his activity and judge the goals that determine and explain his behavior. For psychologists who separate compelling and meaning-forming aspects of motivation, a motive is primarily the factor that meets a certain need of an individual and administers his activity (Leontiev).

As follows from these definitions, the analysis of NGO members' MOTIVATIONS should separate their energy POTENTIAL revealed in impelling factors from a combination of PURPOSES and their priorities, which reflects THE MEANING of motivations. This is the most difficult moment in managing human resource development in a group because it has for its background an NGO member's complex inner world that is never completely open to influence from the outside world. The role of the NGO leader and collective is TO DO EVERYTHING POSSIBLE to increase energy potential and maintain the balance between the goals of the group and objectives of its individual members.

It should be borne in mind that the sources of inner motivation include the following:

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- an NGO member's interests, striving, and needs;
- social factors that influence him and determine his choice;
- consistency of the share of his assigned work with his interests and potential.

However, in addition to INNER motivation that can hardly be managed, OUTSIDE motivation should be encouraged by ways and means available to the group leader. This brings us to the second key concept of the topic, the one of REWARDS.

While taking part in an NGO's activity, either in a specific project or in such "secondary" areas as secretarial work, administration, communication, etc., every NGO member has OUTSIDE MOTIVATION.

OUTSIDE MOTIVATION is something that guides him toward ACHIEVING the best results in his area, and their FAIR EVALUATION (bonuses, moral encouragement, financial benefit, etc.).

EVALUATION, REWARD AND FEEDBACK.

EVALUATION

The role of evaluating the project results and NGO activity is essential for human resource development. Evaluations are divided into internal and external ones, and the workshop will go into deeper detail on them.

The essence of the evaluation process is to identify how effectively the group has been working, and set the objectives for further improvement.

The process of evaluating the results should be understandable for the participants, the criteria of appraisal should be precise, unequivocal, interpretable, and understandable to the group members. Openness and transparency must be mandatory for the process. It would be much better if the opinions of all, or at least of the principle, performance are taken into account.

It is often important to separate several stages in the evaluation process. More on this will be said on the seminar.

Organizationally, evaluation mechanisms are significantly different for different types of NGOs. Examples will be provided at the workshop.

It is important not to bring evaluation of the results to tearing individuals or their personal characteristics to pieces. It is the group member's CONTRIBUTION that should be evaluated, as well as the degree of its synergetic effect for the work of the group.

REWARD

This is a most important ingredient in an NGO's activity, and is meant to encourage NGO members and develop their interest in cooperation.

At the trivial level, moral and material forms of encouragement are discerned. They will be discussed in more detail at the conference.

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The most important in the reward is to make the group member feel SATISFIED by the fact that his role is recognized and his contribution is evaluated ADEQUATELY to his expectations and outside motivation. It is equally important that the group should perceive the EARNED reward and its amount as a signal for further, and more effective, cooperation.

The role of NGO supervisor and informal leader is very important. These are often not the same, and the art of the supervisor who is aware of the informal leader's weight in the group is to involve him in the appraisal of results and identifying the type of reward.

Examples of a personal approach to identifying the type of reward will be provided at the workshop. Thus, an initial participant of a completed project would appreciate it much more if an autonomous area of work or project would be assigned to him as a reward. Another participant may appreciate the leader's words of approval spoken in public, particularly if the leader is charismatic. Yet another one would be pleased with some material reward.

The workshop will go in some detail into the types and nature of rewards, their mechanisms, and links of reward with the appraisal of results and areas of further activities.

FEEDBACK.

This is the most difficult and important element, if studied from the point of view of NGO and human resource development.

It is typically not discussed in its explicit form, though it is implicit in the discussion of the organizations' strategic and tactical plans. For sure, this element is permanently on a true NGO leader's mind.

FEEDBACK is a non-structured combination of actions and mechanisms (both at interpersonal and organizational levels) that promotes a new idea to develop from a completed project, evaluation of results and their appraisal, and, on the other hand, stimulates encouraging and meaningful motivation of individual members and the NGO as an entity.

I provided this definition before discussing two variants. The definition includes the POSITIVE role of feedback. However, FEEDBACK can cause NEGATIVE consequences, when a destructive process starts in lieu of new ideas, and depression develops instead of increased and strengthened motivation. These variants will be discussed at the seminar in detail. I would like to point out the following: experience of working in the third sector proves that destructive nature of the feedback can at times result in the "self-purification" of the NGO and a change in its personnel, which sometimes turns out for the best in the organizational activity.

Mechanisms of implementing the feedback are ambivalent. They depend on the nature of an NGO's activity, its goals, internal order of interaction, and available human resources.

Feedback plays the role of INNOVATION in a process if it helps to develop and produce positive changes of the NGO's own human resources, and new creative personalities are involved.

CONCLUSION

The development of an NGO's human resources is a comprehensive multi-component process. It determines the psychological climate and effectiveness of the NGO's performance. This process is significantly broader than "with the personnel", though it does

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not exclude its elements. From the point of view of importance, ADEQUATE EVALUATION of the results of the work, and DESERVED REWARD are essential in this process, driving it toward DEVELOPMENT and IMPROVEMENT of the NGO's human resources.

Going back to the second scheme, one can state that a gap in the chain, or even a loose link, can be fraught with destructive consequences for the project and the NGO as a whole. In fact, let us assume that a RESULT is appraised that has not been thoroughly EVALUATED (this link was missing from the chain). This is fraught with the following consequences:

- the size and type of the reward is inadequate to the magnitude of the result and employees' contributions;
- the reward was distributed on the "same to everybody" principle;
- the reward did not encourage the strengthening of motivation.

The list of variants can be extended, but those discussed above make it clear that human relations in the NGO will eventually be corroded.

Information about the present status of NGOs in each element of the scheme is expected to be obtained at the seminar. Links and contacts will be identified and, should the need and chance arise, a joint adjustment of this area of NGO's activity in the human resources development and cooperation will be made.

VOLUNTEER ASSISTANTS: HOW TO FIND AND RETAIN THEM

Is your organization developing rapidly and successively?
Do you serve an increasingly large number of clients and customers?
Are you desperate for helping hands?
Are you short of funds for the new staff's paycheck?
This is the time to speak about volunteer supporters.
They are many - people waiting for your cry for help.

This presentation is focused on:

how to find volunteers

how to work with volunteers

how to keep them.

Schedule

I. Role of volunteers in the non-profit sector.

II. How to be prepared to the volunteer-recruiting program?

1. Volunteer recruiting to a non-profit: pros and cons (brain storm, discussion).
2. Volunteer recruiting planning (assignment)
 - a) how to prepare the board and staff for volunteer recruiting;
 - b) appointment of the volunteer program leader;
 - c) setting up a planning group;
3. Volunteer job description (assignment)

III. Interviewing and selecting volunteers

1. The reason of becoming a volunteer; why do volunteers get disappointed in the volunteer activities (brain storm, discussion).
2. The initial session with a volunteer.
3. Orientation
4. Training of a voluntary supporter.

IV. Methods and places of recruiting volunteers (assignment, discourse, brain storm, discussion)

V. A thank you event for voluntary supporters (discourse, brain storm, discussion)

WAYS OF FORMING THE STAFF'S ACCEPTANCE AND POSITIVE THINKING TOWARDS VOLUNTEERS

- involve the staff and supervisors in the planning, shaping and evaluation of the program
- involve the staff in the volunteers' job descriptions
- hold a staff orientation meeting
- whenever possible, organize joint training for staff and volunteers
- involve staff in volunteer training
- plan for regular meetings or informal social events for staff and volunteers
- involve staff in volunteer encouragement
- encourage volunteer-supporting staff members

VOLUNTEER PROGRAM LEADER'S RESPONSIBILITIES

- plan a recruiting program
- determine areas of using volunteers
- write descriptions of every volunteer job
- whenever possible, arrange for joint training experience for the staff and volunteers
- interview, select and place volunteers
- plan and carry volunteer orientation and training
- monitor volunteers' progress on a daily basis
- share information about the program in the community
- provide continued support to volunteers, whenever necessary
- evaluate the volunteer program progress
- support liaisons
- provide staff orientation, recruit volunteers' supervisors

JOB DESCRIPTION SHOULD INCLUDE:

- position
- objective and link to the organization's vision
- responsibilities, including a description of equipment, or personal requirements, such as non-disclosure of information
- skills, qualification or expertise required for the job
- specific characteristics, such as eligibility of the work for the disabled, family, a group of friends, or for working at home
- weekly commitment and expected total commitment, in months
- volunteer's supervisor
- what expenses will be refunded
- orientation procedure
- training
- initial job description and its subsequent revision

VOLUNTEER HAS THE RIGHT:

- to be treated as a colleague
- to get a suitable assignment
- to know as much as possible about the organization
- to be trained for the job
- to get additional training
- to have regular performance appraisals
- to be supervised and guided
- to be promoted and gain various experiences
- to be heard
- to be encouraged
- to have his task financed if necessary

VOLUNTEER HAS THE RESPONSIBILITIES:

- to be candid in offering services, and believe in the value of his/her assignment
- to be dedicated to his/her organization
- to maintain the organization's dignity and public relations
- to do a good creditable job
- to accept the supervisor's guidelines and decisions
- to be eager to learn and participate in orientation, training sessions and meetings, and keep learning continuously
- to be aware of the staff's functions, keep good working relations with the staff, not to exceed the responsibilities of the volunteer's job description

VOLUNTEER'S QUESTIONNAIRE

Name _____

Surname _____

Address _____

Zip code _____

Phone: home _____ office _____

Age group: under 15 16-30 _____ 31-45 _____ 45-60 _____
over 61 _____

Student _____ Retired _____ Homemaker _____

Unemployed _____

Employed _____

Profession _____

Job or study _____

Educational background, experience _____

Foreign languages, special skills, music, arts, etc. _____

Hobbies, sports _____

Volunteer experience _____

Disabilities _____

Desired volunteer activities _____

Volunteer commitment: day _____ evening _____ weekends _____

I learnt about this volunteer program from _____

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A FEW THINGS YOU MIGHT WANT TO INCLUDE IN THE VOLUNTEERS' PERSONAL INFORMATION

- questionnaires
- copies of previous job descriptions
- copies of employee's performance reviews
- training and orientation courses
- emergency contact name(s)
- number of actual hours (it would probably be more advisable to monitor this in the general log)
- additional activities (e.g., attendance at planning meetings; organization of annual meetings)
- awards

A FEW QUALITIES, SKILLS AND EXPERIENCES USEFUL FOR THE VOLUNTEER-RECRUITING INTERVIEWERS

- knowledge of the organization and the volunteers' job
- free communication with people of different ages and cultural, educational and economic backgrounds
- the ability to accept the opinions of people of different social views, political or religious beliefs, and past experiences
- the ability to listen to the interviewee carefully and understand him/her
- the ability to understand another person's response, doubts, and unexpressed wishes
- the ability to focus on the subject of the talk and direct the conversation while maintaining friendly and sensitive attitude
- the ability to reveal strengths and potential opportunities
- volunteer experience

A FEW ITEMS THAT COULD BE INCLUDED IN THE ORIENTATION GUIDE

- the organization's goals
- a brief description of the key programs
- objectives and plans for the future
- liaison with other NGOs
- a list of paid staff members and their positions
- volunteer program goals
- organization of the volunteer programs
- schedule of training and performance appraisals
- basic rules and "do's and don't's"
- clues for the most common situations
- events in which a volunteer can participate, such as annual meetings
- a list of personal characteristics the organization expects the volunteer to have, such as responsibility, confidentiality, patience towards "difficult" consumers, etc.
- a list of supports that the organization will provide to the volunteer, such as performance reviews, references, help in difficult situations, training, etc.

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Evaluating Your Employee's Performance

An important part of the supervisory role is to assess employees' actual performance against established standards and expectations. Some companies have comprehensive standards and well-defined appraisal and assessment programs, while others use much simpler means such as a ranking plan. Nearly all companies, however, have some formal method of performance appraisal.

The main purpose of an appraisal system is to improve employee performance. A good program lets employees know what is expected of them in all aspects of their work and it tells them how they are doing. The assessment should tell them where they are doing well and where and how they should improve. It also offers the employee a chance to respond. A performance appraisal forces supervisors to get to know their subordinates individually and be aware of how they are doing.

Performance appraisals should also offer these benefits:

- They provide the supervisor and company with the information needed to decide on promotions.
- They help determine which employees are deserving of merit increases for their good work.
- They help identify special capabilities or talents of individuals that may be further utilized.
- They give the employee a chance to discuss his feelings about his job, his future, and problems, etc., privately with his supervisor and to learn his supervisor's thoughts on these matters.
- Generally, a good performance appraisal system helps improve employee attitudes and morale because it shows each employee that the supervisor is personally involved in his or her development.

Writing up the review

Many supervisors view the task of preparing reviews with resentment and cynicism. It produces a lot of paperwork for the personnel files and is a tedious undertaking. They see it as something to get done and out of the way. Unfortunately, they wind up with something that's not as valuable as it should be. Here are some suggestions to guide you that will help improve the quality and objectivity of your reviews:

- Review the employee's job description to refresh your memory as to her exact duties and responsibilities.
- Set aside specific and sufficient time for writing the review. Don't just "squeeze it in."
- Start each review from the time of the last review, as a clean slate, measuring development since then.
- Throughout the year, make notes on each employee that you can specifically refer to at review time.
- It may seem obvious, but always try to be fair and objective. Look beyond your feelings about the individual to their work and their results on the job.
- Look at the *whole* review period. Don't let a month of exceptional work near appraisal time influence your judgment about the past six months.
- Don't be too general. Bring in specifics. If she offered a suggestion to solve a problem, describe it, don't just note "She comes up with good suggestions."
- Think in terms of being constructive when writing up the review. Don't just set down a list of faults, but point out how

especially when criticism is involved. Many find discussing performance with a subordinate extremely stressful, but there are some things you can do to make it easier.

- Divide the conduct of the review into sections. Have an introductory time for getting comfortable, and creating a relaxed atmosphere. A few friendly comments or questions can help ease tension; perhaps even a cup of coffee will help. Then review the subordinate's overall performance, and make your comments on her strengths and deficiencies. Then let the subordinate react to what has been said about her performance. Finally, discuss suggestions for any changes or future improvements.

- Be prepared. Don't rely on general knowledge of your subordinate and his position. Review his records prior to the meeting, including attendance and production, and any other notes you've made during the review period.

- Discuss the job to make sure you and the employee see eye-to-eye on the exact nature of the duties and responsibilities.

- Ask her what she thinks are her strengths and weaknesses before you start listing them. It may be easier for her to cite them, than for you to have to criticize her.

- Listen to what he has to say.

- Recognize any progress he has made and offer an appropriate word of appreciation.

- Recognize her strengths and encourage her to develop her assets as well as overcoming deficiencies.

- Be prepared with suggestions or plans for improvement.

- Set aside plenty of time for the review, usually an hour as a minimum.

- When offering criticism, be sure to be able to back it up with examples. Be precise, so he can see exactly what you are referring to.
- Criticize performance, not the employee personally.
- When referring to errors in judgment, ask whether the employee considered alternatives and what they were.
- Use your own experience as illustration citing a mistake or two you've made and what you did about it.

As a supervisor, you must show some tact and sensitivity, but you're not helping the situation by sparing an employee's feelings. Most employees are aware of their shortcomings and pretty much know if they're doing their job satisfactorily. If you don't say anything about the below-standard performance, the employee may assume that you don't really care. You have, therefore, reinforced or heightened the employee's indifference and his performance may deteriorate even more.

The best way to avoid having to make significant criticism of an employee during a formal appraisal is to keep in contact at other times. Communicate your evaluations frequently, praise or criticism, on a more casual informal basis. Your comments should occur during or right after the situation you're commenting on. Then the facts are readily evident and the employee knows exactly what you are talking about.

The criticism is more helpful and usually easier for the employee to take. Keep in mind that the closer you are with your subordinates and the more you communicate with them regularly, the easier it becomes for you to criticize and praise, and for them to accept your judgments.

Nevertheless, some people, no matter what the circumstances, do not take criticism well. Appraisal interviews are not always going to run smoothly, especially if the employee is being told his performance is below standard. A supervisor must be prepared for this and anticipate an employee's reaction. Be ready to handle it, by being able to support your opinion about the employee's performance.

Watch the employee to see how what you're saying is being

received, and if he reacts emotionally, you might want to let him talk it out, or, if you see a major confrontation or problem, suggest you reconvene later after a "cool-down." (Watch this tactic. You might be inviting him to build up his resentment even further.)

Performance assessment is hard work and a serious investment of time and effort, but it can be one of a supervisor's most valuable tools. Done properly, it helps create a positive work environment and improve productivity in individuals and work groups.

When you have to fire

Firing an employee is the last resort to the employee's performance problems or the company's economic problems. But it is not a step to be taken without thorough consideration. You must carefully examine your company's policy and check with your professional personnel people in many cases. Current government regulations on human rights and equal opportunity place the burden on the employer to prove the legitimacy of the termination.

The employer must have accumulated a documented case of substandard performance of duties or other nontolerable actions. The employer also should have talked to the employee and given him or her a thorough chance to correct the situation and do the job. Following a reasonable probation period after notice, if there is no significant improvement, termination should follow, with sufficient documentation, of course. Putting up with employees who are not producing up to standards can be very frustrating to your other employees and cost you credibility with your better workers.

Company policy often will guide you as to what to do when you must fire. When you finally have come to the decision to act, move quickly and with consideration. Do what you can within policy to make it easier for the person being fired. It's a tough situation for everyone.

Appraisals help to achieve goals

Conducting employee reviews should tell managers more than whether or not to give employees a raise or whether to retain or terminate them. Reviews should lead to improved performance, better lines of communication, and more effective supervision.

The quality of supervision is a prime ingredient in determining a company's morale, productivity, and, ultimately, its success. The abilities of a top-notch manager go well beyond technical know-how on the job to encompass the people skills necessary to get subordinates working together effectively. Gaining the respect of the people who work for you is essential to your success.

7. a.

Employee Assistance Programs

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Presentations

**DEVELOPING AN EMPLOYEE ASSISTANCE PROGRAM APPROACH
IN RUSSIAN NGO'S: Becoming Part of the Solution**
Dori Dysland, Salus NGO Director of Training
World Learning Conference, October 1995

I. INTRODUCTION

- A. Be Part of the Solution to the Problem
- B. Our Attitudes Toward Drugs and Drinking

II. WHAT IS CHEMICAL DEPENDENCY?

- A. How Major Life Areas are Affected by Chemical Dependency
- B. Intervention vs. Enabling
- C. Signs of Chemical Dependency
- D. How an Alcoholic Employee Behaves

III. A PLAN FOR SUPERVISORS/NGO DIRECTORS

- A. Why Supervisors Procrastinate
- B. Assess Your Confrontational Characteristics
- C. Preparation and Planning
- D. Questions That Facilitate Discussion
- E. Pitfalls to Be Avoided

IV. DISCUSSION OF CULTURAL RELATIVITY OF EAP

- A. How Can We Use This Model to Strengthen our NGO's?
- B. Roleplays

V. WHERE DO WE GO FROM HERE?

- A. How to Get Help in Implementation
- B. Resource Materials

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HOW MAJOR LIFE AREAS ARE AFFECTED BY CHEMICAL DEPENDENCY

The following are only representative examples of the impact of chemical dependency on major life areas. Many more could be added.

| | |
|-------------------|---|
| HEALTH: | Chemically dependent people have a higher than normal rate of high blood pressure, malnutrition, cirrhosis of the liver, delerium tremens, deterioration of the brain cells, lethargy, depression, irritability and collapse of heart and other major organ systems. |
| SOCIAL: | Chemically dependent people associate with other users and often drop non-using friends. They can be a major cause of tension and embarrassment at social functions. |
| FINANCES: | Financial problems are an issue for the chemically dependent people because they spend more than they earn on their habit, and/or become sloppy about the way personal finances are handled. |
| RELATIONSHIPS: | Friends, families and co-workers all suffer at the hands of a chemically dependent person. Families are disrupted emotionally and economically. Employees resent chemically dependent co-workers who don't pull their own weight. Angry outbursts or unreasonable behavior by the troubled employee may also cause friction at the work site. |
| WORK PERFORMANCE: | The user's ability to perform may slip or become erratic. Attendance problems occur. Accidents are more frequent. Up to 40% of industrial fatalities, and 47% of industrial injuries can be traced to alcohol abuse or addiction. |
| LEGAL ISSUES: | The first arrest for Driving Under The Influence is a sign of a problem. Second and additional arrests are almost always a sure indicator the person is chemically dependent. Since possession and use of "street drugs" is illegal, drug addicted employees pose a legal problem for organizations. |

If an employee has problems in any of these major life areas, and drinking or drug use is involved, that person has a problem with chemicals. If the person continues to use, after suffering serious consequences in any of these major life areas, chemical dependency is likely.

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SIGNS OF CHEMICAL DEPENDENCY IN AN EMPLOYEE

It is important for supervisors to recognize the subtle signs that suggest possible patterns of chemical dependency. Individually, signs may seem harmless enough. Taken together they present a startling picture.

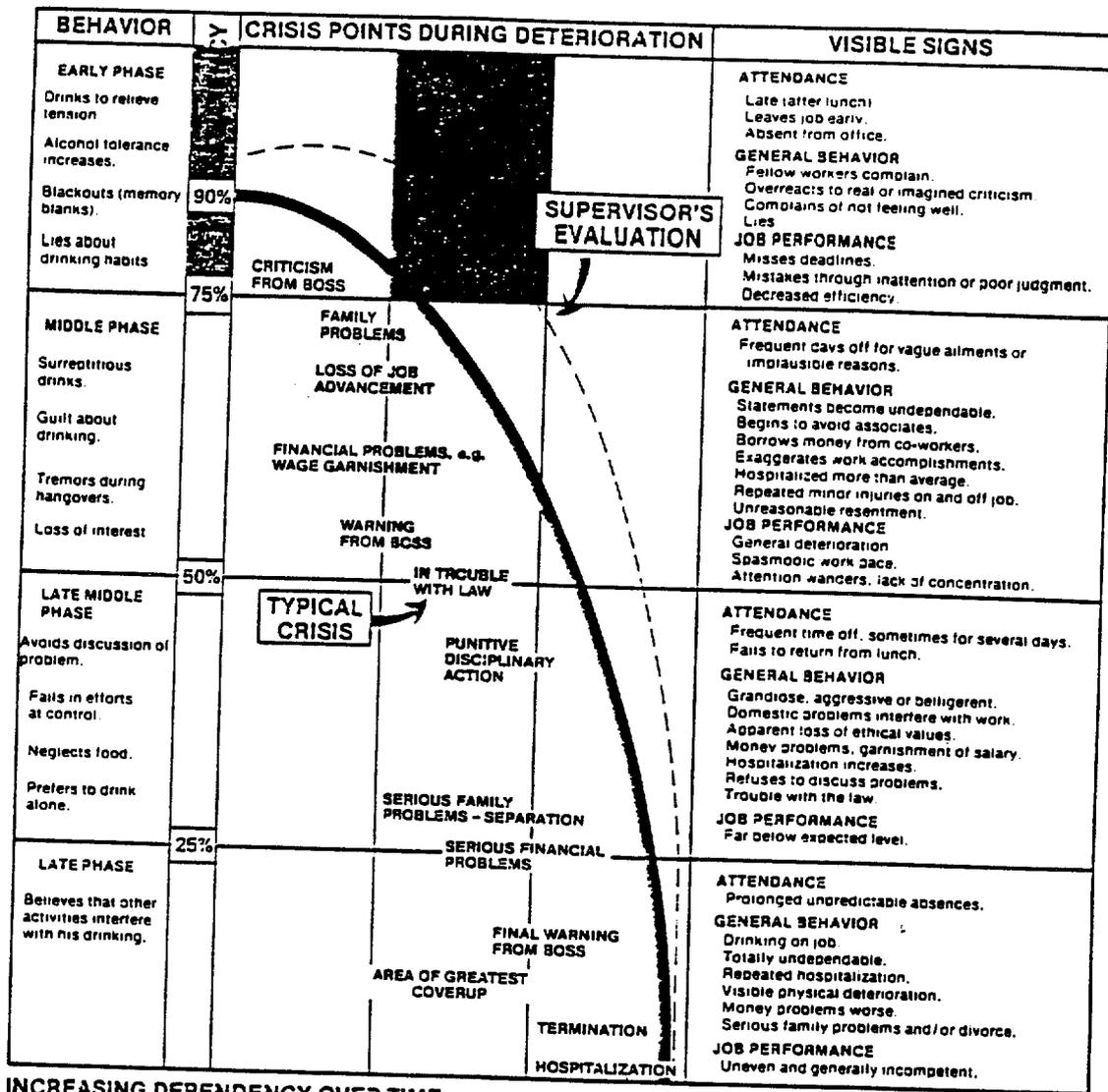
One pitfall a supervisor must avoid is to ignore some of the beginning indicators. By failing to document them, it is likely that supervisor will end up later with only vague recollections of when the problem began, and what was observed.

The following are important signs of chemical dependency. Place a check in front of those you are sure are *not* in evidence among your employees. Put an in front of those you have noticed, and may want to review more carefully.

- 1. Swings in an employee's pace of work, individual productivity, reliability and/or attendance. Peaks and valleys that progressively become more serious and closer together.
- 2. Deadlines that are missed; or an overall decrease in efficiency.
- 3. A gradual decline in work quality and/or quantity.
- 4. Unreasonable excuses for not getting the job done properly.
- 5. Attendance problems that begin on an infrequent basis and gradually get worse.
- 6. Tardiness. Lengthy lunches and/or frequent breaks through the day. Early departures from work.
- 7. Accidents causing minor injuries to self and others, and/or damage to equipment.
- 8. An increase in physical complaints and medical ailments that cause lost time.
- 9. Complaints from other workers, customers and/or the public about work output, quality, timeliness or attitude.
- 10. Emotional changes which produce tension, conflict and morale problems among co-workers.
- 11. Lack of attention to detail, and/or an inability to concentrate on the task at hand.
- 12. A promise to improve behavior (which may happen for awhile) but then gets worse.

DO YOU WATCH FOR THE SIGNS?

HOW AN ALCOHOLIC EMPLOYEE BEHAVES



INCREASING DEPENDENCY OVER TIME

Courtesy of CompCare Publications ©1982

Job Performance and Chemical Dependence

BEST AVAILABLE COPY

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WHY SUPERVISORS PROCRASTINATE

Some common reasons supervisors give for putting off one on one discussions of performance problems are listed below. Check those you plan to avoid in the future.

- I am too busy with more important things.
- I don't want to hurt the employee's feelings.
- I am afraid the employee will quit.
- I don't want to get involved in anyone else's personal problems.
- It's better to let sleeping dogs lie.
- Time will take care of the problem.
- I might do or say something my boss won't support.
- It won't do any good.
- I don't have enough authority.
- I can't stand to see anyone cry.
- He already has more problems than he can handle.
- I am afraid of her.
- I don't know what to do about a drug problem.
- I just can't communicate with young people.
- The old timers won't pay any attention to me.
- I'm afraid I'll lose the argument.
- Just give it some time. He/she will come around.
- A confrontation might have results that would make me look bad.

Anytime you feel inadequate to handle the problem at hand, consult your manager or others in your organization to get the help you need. Internal or external consultants are often available to assist you with employee drug and alcohol related problems.

CONFRONT PERFORMANCE PROBLEMS WITH CARING

The purpose of any confrontation is to establish reality with another individual who is presently operating with a different view. In the case of a supervisor and an employee, the purpose of a confrontation is to clarify the employee's performance. This is done by presenting facts which are so specific, and so direct, the employee clearly understands what is expected, and what steps must be taken to achieve satisfactory performance.

Often the employee is aware of the performance problems. Some will be anxious to resolve the differences. Others will attempt to justify their behavior. This makes the job of the supervisor more difficult.

In either case, a supervisor who confronts a performance problem and insists on improvement; but confronts with caring ("you are important and I want you to succeed"), will be more successful than one who uses the discussion to berate, order, demand or impose.

Assess your personal characteristics and how they might affect a performance improvement discussion using the rating scale on the next page.

ASSESS YOUR CONFRONTATION CHARACTERISTICS

The following personal characteristics support "caring" confrontation. This scale will help identify your strengths and determine areas where improvement is needed. Circle the number that best reflects where you fall on the scale. The higher the number, the more effective you are for that statement. When you have finished, total the numbers circled in the space provided.

| | | | | | |
|--|---|---|---|---|---|
| I make sure employees know what is expected of them on the job. | 5 | 4 | 3 | 2 | 1 |
| I follow up regularly to insure commitments, goals and standards are being met by everyone. | 5 | 4 | 3 | 2 | 1 |
| I do not hesitate to take corrective action when performance problems begin to develop. | 5 | 4 | 3 | 2 | 1 |
| I don't mind giving constructive criticism. | 5 | 4 | 3 | 2 | 1 |
| I give praise freely when it is earned. | 5 | 4 | 3 | 2 | 1 |
| I approach people in a way that makes them want to improve, rather than try to justify unacceptable behavior. | 5 | 4 | 3 | 2 | 1 |
| I encourage employees to diagnose their performance problems and recommend corrective action. | 5 | 4 | 3 | 2 | 1 |
| I can be firm and speak with authority, yet communicate sincere concern for the employee. | 5 | 4 | 3 | 2 | 1 |
| I get a commitment from employees to take corrective action once the problem has been diagnosed and possible solutions identified. | 5 | 4 | 3 | 2 | 1 |
| I monitor performance after an action plan has been established and praise accomplishments as they occur. | 5 | 4 | 3 | 2 | 1 |

TOTAL _____

A score between 40 and 50 indicates you should be very effective in dealing with performance problems. A score between 30 and 40 indicates significant strengths, but also some areas for improvement. Scores below 30 call for a serious effort to improve. Make a special effort to grow in any area where you scored 3 or less, regardless of your total score.

PREPARATION AND PLANNING

The following checklist will help you prepare to discuss a performance related problem. The process should evolve from normal observation and your measurement of day-to-day performance against the job goals and standards.

- _____ Observe and document job performance as measured against mutually understood expectations.
- _____ Review the employee's background including skills, work experience and training.
- _____ Identify the employee's performance strengths and weaknesses including such probable causes as lack of training, knowledge, experience, or application. Document with supporting examples.
- _____ Examine any of the visible signs of chemical dependency in the employee's work habits and document them in relation to their impact on job performance.
- _____ Review company policy covering employee development, termination, and handling special problems including chemical dependency. Clarify questions about process and authority for handling problems outside your sole discretion.
- _____ Give the employee advance notice of the discussion and its purpose to permit him/her to prepare.
- _____ Set aside a private place and an adequate block of uninterrupted time to permit a full and complete discussion.
- _____ Know which internal or external resources to call upon in the event that chemical dependency is the problem.
- _____ Include employee relations, union, medical or EAP personnel if you believe evidence of their support will facilitate the employee's acceptance of help.

QUESTIONS THAT FACILITATE THE DISCUSSION OF PERFORMANCE PROBLEMS

There are 3 types of questions that can be used to help the supervisor and employee better understand each other's point of view. Check those you would feel comfortable using.

1. OPEN QUESTIONS—Questions that cannot be answered with a yes or no. These questions require an opinion or expression of feelings. For example: "What is your opinion of . . . ?" "How do you feel about . . . ?"

The advantages of open questions include:

- A demonstration of your interest in the other person's point of view.
- A confirmation that you value the other person's ideas and feelings.
- A stimulation of thought about specific issues.
- A better understanding of the other person's needs.
- The encouragement of a dialogue.
- Possible new insights into a person and their view of issues and priorities.

2. **REFLECTIVE QUESTIONS**—A reflective question repeats a statement the other person has made in the form of a question. Good listening skills are required for reflective questioning to be successful. It is also important to select the most significant feeling or idea stated. For example:

Employee: "I have been doing some drugs on weekends with some friends. Maybe that's the problem."

Supervisor: "You think your weekend drug use may be interfering with your job?"

Reflective questions can be helpful because:

- Arguments can be avoided. You respond without accepting or rejecting what has been said.
- It confirms you understand what has been said. If you reflect incorrectly, the other party has an opportunity to correct you.
- The other person is encouraged to clarify or expand upon what has been said.
- The other person may recognize illogical statements they have made if they hear them back in a non-directive fashion.
- They create a dialogue conducive for agreement.
- They give you time to think before taking a position on an issue.

3. **DIRECTIVE QUESTIONS**—These are used to solicit information about a particular point or issue. Directive questions are usually reserved until after the other person has finished talking on the subject. Directive questions can then be used to sustain communication, or to obtain information or ideas. Here is an example.

Supervisor: "You have agreed that your personal problems are affecting your ability to do the job and have indicated a desire to get back to normal. Which of the alternatives we have discussed will you take, and when will you begin?"

Directive questions have these advantages:

- They provide pertinent information in the areas of greatest importance.
- They challenge the other person to explore ideas, defend statements, and contribute suggestions.
- They offer both parties specific facts on an issue.

Open, reflective and directive questions are all useful techniques to draw the employee into a thorough discussion of job performance and personal development.

BE SURE TO LISTEN!

PITFALLS TO AVOID

Factors that mislead or blind us when we are in the midst of solving a performance problem are pitfalls to avoid. A supervisor must be on guard against anything that distorts reality favorably or unfavorably. Some typical pitfalls are listed below. Check those you intend to avoid.

- Excusing or ignoring unacceptable performance.
- Failing to document substandard work.
- Covering up or doing an employee's work for him/her.
- Relying on impressions rather than facts.
- Making disciplinary threats you have no intention to carry out.
- Protecting employees from the consequences of their own job-related behavior.
- Accepting excuses that don't make sense.
- Accepting *all* personal hardship stories as fact.
- Protecting the employee while you counsel him/her.
- Engaging in "heart to heart" or "off the record" talks with employees who try to justify their behavior, and manipulate you.
- Thinking you can handle chemical dependency problems without help from the experts.
- Reacting to things that have nothing to do with performance such as: race, religion, education, family background, age and/or sex.
- Refusing to support chemically dependent employees who receive professional help because the problem is "their fault."
- Failing to recognize the impact chemical dependency has on others such as family members.

Engaging in the above behaviors delays or prevents timely corrective action.

MANAGEMENT BY OBJECTIVES: A PERSPECTIVE FOR NEW NGO MANAGERS**Scott Charlesworth**

Management by Objectives, commonly known as MBO, is a management system which has been on the American scene since the mid 1950's, introduced principally by Peter Drucker the well known authority on organizational management practices (1). Certainly since my earliest days working with non-profit organizations, starting in the 1970's, MBO or elements thereof have typically been implemented -- both in my work in the US and internationally. While MBO is not the only way to "conduct business", and variations do exist especially in regards to evaluating staff performance, if carried out faithfully this type of management does impart and reinforce the values of participation and feedback which are essential in human relations and human development work. Furthermore, in my opinion, by working in the field of human development organizations (e.g. community and human service organizations) have a responsibility to carry out this work in a participatory and developmental way. Effective MBO has these characteristics.

The purpose of this paper is to share some of my thoughts and interpretations of MBO and its appropriate use in the work of non-profit and non-governmental organizations (NGOs). While I am an MBO advocate, systems don't solve problems or create successes -- people do. But as useful management systems are developed and implemented by committed and thoughtful managers, I believe that all organizational stakeholders will benefit.

WHAT IS MBO?

In preparation for this topic I recently came across the following definition: "Management by Objectives is a system that features a periodic agreement between a superior (or supervisor) and a subordinate (a staff person being supervised) on the subordinates objectives for a particular period and a periodic review of how well the subordinate achieved those objectives" (2). In plain terms, MBO provides the opportunity for supervisors and staff to mutually agree on the staff person's job objectives for a period of time, and through concerted effort and ongoing feedback ensure the greatest opportunity to achieve the stated objectives. Furthermore, the review or job appraisal is a way to adjust or correct certain deficiencies, and to plan for both training needs and in the development of the future job objectives.

What the above definition does not elaborate on is the link between organizational priorities and objectives, and the specific job objectives of individual staff members. The following discussion will address this broader MBO issue.

IMPLEMENTATION OF MBO

In a current management text, I came across a discussion of "collaborative MBO" (3). The key message here is that throughout the MBO process, collaboration among various units or departments, supervisors and those whom they supervise, and among staff peers is essential if the maximum organizational benefit is to be realized. A look at the key stages of implementing MBO will shed further light on the elements of this system.

1.) Collaborative Organizational Diagnosis - First there needs to be a collaborative look at an organizations major problems and priorities, by a variety of persons in the organization, to develop a generally agreed upon prognosis of the organization.

2.) Information and Education - During this stage, various work groups are formed and specific information is discussed concerning the purposes and strategies of MBO. This is to ensure that there is broad understanding and consensus for the implementation of such a system.

*Scott Charlesworth,
Field Director, Moscow, World Learning Inc.*

3.) Analysis of Organizational Readiness - With the information derived from the first two steps, an organization is able to assess its ability to implement the system, the time table, the required staff orientation sessions, etc. These first three steps are the ground work needed before the development of organizational and individual objectives.

4.) Goal Setting - Organizational Level - At this point, a collaborative process is employed looking at the "big picture" - what the organization wishes to accomplish in the long and short-term. Longer term targets are generally classified as goals, while the more specific and shorter-term (generally within a 12 month period) projections are objectives.

In my own planning work, I look at two kinds of objectives: 1) program or output objectives and 2) management or process objectives. Examples of **program objectives** include:

- To involve 1000 youth in the city in drug prevention education programs by October 1, 1996
- To reach 400 less advantaged households by providing opportunities in a variety of counseling and prevention programs by December 1996
- To construct wheel chair access ramps for all city secondary schools by December 1996

Management or process objectives might include:

- Recruit 6 new board members and complete board orientation by July 1996
- Conduct an annual fundraising campaign raising a minimum of \$20,000 from local by September 1996

Another kind of management or process object, a "**value objective**", is difficult to quantify but nonetheless should be written as an organizational objective. These objectives are value statements which are essential to the well-being of an organization. One example might be:

- To develop an organizational code of ethics (or statement of principles) and ensure that all staff and volunteers exemplify the organization's principles of cooperation and honesty.

While more difficult to evaluate objectively, these value objectives should not be overlooked while striving to achieve other more quantifiable program and management objectives.

5) Goal Setting - Unit Level - In organizations with more than just a few people the work is often divided into different units or departments. Lets consider the earlier organizational objective of "reaching 400 less advantaged households by providing opportunities for a variety of counseling and prevention programs by December 1996". Given the scope of the work, an organization might create two divisions; a family counseling division and a youth services division. In this case, the family counseling division might establish an annual unit objective of: establish a peer counseling program involving a minimum of 400 heads of households by December 1996. The youth services division would then identify a series of programs for youth such as summer camps, youth employment training, sports programs, etc., listing the number of youth to be served as well as the related time frame.

6) Goal Setting - Individual Level - This is the point where supervisors and staff meet to establish how much, how well, by when, and by whom work will be accomplished. All the decisions from the previous stages, if done in a thorough a collaborative manner, will feed directly into individual work plans. The key benefit to collaboration is that staff will see

these objectives (organizational and individual) as their objectives, thus serving as further motivation to accomplish the work.

Returning to the previous example of the youth services division's objectives, individual job objectives might include:

- Involve 250 youth-at-risk , ages 8-14, in a summer camping program by August 15, 1996.
- Involve 150 low income high school students, throughout the school year, in small business training and provide them with apprenticeship opportunities with local businesses by December 1996.

Another factor, not previously mentioned, is the establishment of personal and professional goals and aspirations of the staff person, and to seek the commitment from both the staff person and the supervisor to make progress in this area. This commitment goes beyond the "bottom line" objectives of the organization, with a focus on the motivation and well-being of all those involved with the organization.

7) Performance Review - This is the formal process where supervisors and their staff review the progress being made in comparison with the established objectives. This is the time to make any changes to the plans, identify further training needs, and in general offer further clarification of expectations for both parties. It is important that attention also be given to the "values" objectives as well as the personal and professional goals established by the staff member, as stated above.

While the formal review process should take place at least twice a year, informal feedback is critical and ongoing communication among staff and supervisors is an important part of the process.

8) Re-diagnosis - At the completion of reviews throughout all levels of the organization, wage increases, promotions, and any disciplinary actions are instituted and the organization once again looks at the first step of the process; to diagnose problems and priorities for the next cycle. By following the same steps collaborative planning begins once again.

SOME CLARIFICATION OF TERMS

As one can see, there seems to be a striking similarity between MBO and strategic planning in some of the terminology and the process. This similarity is by design as MBO is a method of linking annual objectives to long-term goals (developed in a strategic planning process). While an organization's strategic plan looks 3-5 years into the future, MBO is key in the annual implementation phase which enables an organization to move toward its long-range goals.

While goals are long-term and less specific, objectives are more specific and have a time frame generally of one year or less. Job objectives, performance standards, job segments or targets are interchangeable terms which establish how much, how well and by whom the work will be achieved. Various examples of these have been stated above.

Job descriptions, however, describe what is to be done and outline various tasks or functions. Job descriptions should be used to organize and clarify the work of staff, but not as an evaluative tool. Its important to have a clear understanding of the difference between job objectives and job descriptions.

ADVANTAGES AND DISADVANTAGES OF MBO

It is my belief that when conducted in the proper manner and with a considerable level of commitment throughout the organization, there are numerous benefits to MBO.

- Evaluations are based on results and thus are more objective
- Staff have a clearer picture of what is expected of them
- As major participants in the process, individual staff members help determine the work to be done
- Builds stronger relationships among supervisors and staff
- Enhances staff motivation, staff responsibility and staff development
- Enables an organization to establish a more fair and objective salary administration system
- Is an integral part in strategic planning and organizational development

There are, however, potential problems in all management systems including MBO.

- When done properly, the process can be very time consuming - at all levels.
- Without proper care, it is possible that the setting of individual staff objectives may shift the focus from the big picture to individual results, thus reducing the spirit of team work.
- While quantitative objectives are what are sought, certain qualitative indicators (such as team work) must not be lost in the process.

PRINCIPLES FOR SUCCESS IN THE IMPLEMENTATION OF MBO

- Top management supports the process
- Mutual goal setting (by supervisor and staff) both quantitative and qualitative in nature
- Supervisors work to remove obstacles to staff performance and growth
- Success is recognized as it occurs, not just twice a year during the formal appraisal sessions
- Performance appraisals given periodically, both formal and informal
- Collaboration and team approach used in planning and problem solving
- Personal and professional goals and aspirations of staff are supported by management, as appropriate
- The environment within the organization (organizational culture) is supportive and developmental.

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Management By Objectives: practical approach

SUPERVISOR'S EVALUATION

| 1. <u>MAJOR DUTIES:</u> (From Job Description) Evaluate the employee and how well they have performed each duty by using the definitions of standards (attached) and placing a check mark in the appropriate column. | 5 | 4 | 3 | 2 | 1 |
|---|-------------|------------------|----------------|----------------|----------------|
| | Exceptional | Exceeds Standard | Meets Standard | Below Standard | Not Acceptable |
| 2. | | | | | |
| 4. | | | | | |

FACTOR RATINGS (The definition of each factor is the definition of standard performance)

| | | | | | |
|---|--|--|--|--|--|
| 6. <u>QUALITY OF WORK</u> - Work is neat, errors are rare, re work is seldom required. | | | | | |
| 7. <u>QUANTITY OF WORK</u> - Works at a steady pace, meets deadlines (for program staff, enrollment growth). | | | | | |
| 8. <u>WORK ATTITUDE/SELF- PRESENTATION</u> Cooperative, adaptable, positive contact with public, neat and pleasing image, responds positively to feedback from supervisor. | | | | | |
| 9. <u>JUDGMENT AND INITIATIVE</u> - Makes sound decisions and uses common sense; resourceful, requires little direct supervision. | | | | | |
| 10. <u>DEPENDABILITY</u> - Responsive to Association needs, available when needed, on the job every day on time. | | | | | |

TOTAL POINTS: _____

I agree/disagree with this review.

Supervisor's Signature _____ Date _____

Employee's Signature _____ Date _____

Branch Executive's Signature _____ Date _____

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Full Time Performance Appraisal

The purpose of the Performance Appraisal is to provide the employee with information on how he/she is performing his/her job. The appraisal process identifies areas of strength and improvement related to the job and encourages improvement in job performance and individual growth.

HOW TO COMPLETE THE EMPLOYEE'S SELF-EVALUATION

1. List your five (5) Major Duties (THESE FIVE DUTIES MUST BE AGREED UPON PRIOR TO COMPLETION OF THIS FORM) in the space provided on page 2 of the Part Time Performance Appraisal.
2. Rate yourself on these five (5) Major Duties Using the achievement values.
3. Complete the six (6) questions. If you need more space for comments, use the back of the form or attach a separate sheet of paper.

EMPLOYEE NAME: _____ BRANCH: _____

POSITION: _____ SUPERVISOR: _____

CURRENT: _____ MONTHS IN POSITION: _____

APPRAISAL INTERVIEW DATE: _____

The supervisor completes the next page of the form, which is then discussed at the appraisal interview. Both the employee and supervisor have the opportunity to give additional input before the form is submitted to Human Resources. The form then becomes part of the employee's file. Any additional comments or input should be written on page four of the form. Additional sheets may be attached if necessary.

EMPLOYEE'S SELF-EVALUATION

| MAJOR DUTIES: (From Job Description) Evaluate how well you have performed each duty by using the definitions of standards (attached) and placing a check mark in the appropriate column. | 5 Exceptional | 4 Exceeds Standard | 3 Meets Standard | 2 Below Standard | 1 Not Acceptable |
|--|------------------|-----------------------|---------------------|---------------------|---------------------|
| 1. | | | | | |
| 2. | | | | | |
| 3. | | | | | |
| 4. | | | | | |
| 5. | | | | | |

What special knowledge, skills and abilities are required by your job? _____

What special recognition have you received? _____

In what ways have you made a helpful contribution to your unit, department, or branch? _____

In what other ways could you make a helpful contribution? _____

In what ways has your supervisor been helpful to you? _____

In what ways could your supervisor be more helpful to you? _____

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ILLEGAL QUESTIONS

Related to Age

- . How old are you?
- . What is your date of birth?
- . How do you feel about working for a person younger than you?

Related to Sex/Marital Status

- . Are you married? single? divorced? separated? widowed?
- . What are your marriage plans?
- . What is your spouse's name? Where does he/she work?
- . (Asked of Women) Do you have any plans for raising a family? Have you made adequate arrangements for child care? How old are your children?
- . (Asked of Men) How do you feel about working for a woman?
- . What do you think of homosexuals or gay or lesbian individuals?

Related to _____

- . Are you of _____ heritage/race?
- . Do you feel that your race/color will be a problem in performing this job?
- . Did you ever receive public assistance?

- . What is your native tongue?
- . What kind of accent do you have?

Related to Religion/Creed

- . What is your religion?
- . What church do you attend?
- . Do you hold any religious beliefs that would prevent you from working on certain days of the week?

Related to Disability

- . Do you have any handicaps or disabilities? How severe?
- . Have you ever been treated for any of the following diseases...?
- . How did you come by this disability?
- . How long have you been in a wheelchair?

Related to the Military

- . What are your feelings about the draft? All volunteer service?
- . Are you required to attend reserve meetings?

Related to Emergency Contact

- . Who do we contact in case of an emergency or accident?
- . Can I have the name and number of a relative to contact should I need to call you?

Related to Criminal Record

- . Have you ever been arrested?

Related to Credit Information

- . Have you ever been refused credit?
- . Would you pass a credit check?

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SUGGESTED INTERVIEW QUESTIONS

- . How did you learn about this job vacancy?
- . What are some of the reasons why you would like to work in this position?
- . What are the strengths you would bring to this job? Both personal and work experience.
- . How do you handle yourself under stress or pressure?
- . In your past work experiences, what do you find that you enjoy? Most? Least?
- . What is the best way to supervise others? How about difficult people?
- . Do you consider yourself organized and/or well-disciplined? How could you improve?
- . What are some accomplishments of which you are particularly proud?
- . In your opinion, what are the most important qualities for this position? WHY?
- . What do you do when you are upset or angry about something? How do your actions differ when you are REALLY angry?
- . Do you consider yourself a good friend? How? Too many or too few?
- . Describe the best supervisor you ever had. Why did you like that?
- . Describe the worse supervisor or working condition you ever had. Why was that bad?
- . What do you think you can learn from doing this job?
- . Do people usually follow your suggestions?
- . Describe the ideal job you would like to have?
- . Besides being a "people person" and wanting to help others, what appeals to you about working in a non-profit or service related field?
- . Did you enjoy school? WHY?
- . What happened the last time you "lost your cool"? Looking back what would you have done differently?

- . What is it that motivates you?
- . How do you know when you have done a good job?
- . What kind of things frustrate you or "get you down"? What do you do about it?
- . If we talked with the people from your last job, what would they say about you? How would this differ from what your close friends would say?
- . Describe what you think this job does?
- . What would be the first things you would need to know on this new job?
- . What is the most difficult situation you had to handle?
- . Why do you want to work for the YMCA?
- . Describe your decision-making style? How does it vary with different situations? Do you involve others?
- . What are some ways you have used or would use that you consider successful in building a staff team effort or in getting others to work for you?
- . Describe your typical work week?
- . Describe your work habits. (Work pace -- fast, slow, moderate, variable)
- . How would you spend your first month on the job?
- . Why do you feel this position would be a good career move for you?
- . Do you wish to add any other information which you feel would be relevant to performing the duties of this job?

"DON'TS" DURING THE INTERVIEW SESSION

- . **As the interviewer, do not talk more than 20% of the time.**
- . **Do not intimidate the interviewee.**
- . **Do not tolerate interruptions during the interview.**
- . **Do not cut the interview short or spend less than 30 minutes minimum listening to the interviewee.**
- . **When taking interview notes, do not write subjective comments or personal opinions.**
- . **Do not fail to answer all the questions of the interviewee.**
- . **Do not "glamorize" or create a "halo effect" about the job, by giving inaccurate information.**
- . **Do not talk about yourself during the candidate's interview.**
- . **Do not get emotionally involved.**
- . **Do not make judgemental comments.**
- . **Do not accept all information as exact or verbatim.**
- . **Do not ask any questions that are not job related.**
- . **Do not ask any candidate who appears disabled any questions other than his/her ability to perform the job duties.**
- . **Never interrupt or contradict the interviewee or place him/her on the defensive.**
- . **Never describe the experience or qualities required and desired before the interview so that the interviewee designs his/her responses to conform to your needs.**
- . **Do not indicate by verbal or body language approval or disapproval of responses, thereby leading the candidate to the desired answers.**

- . **Never compare experiences, facts or comments from one candidate to another.**
- . **Never assume knowledge or experience, but question thoroughly.**
- . **Never ask questions related to marital status, religious preference, availability of child care, availability of transportation, sexual preference, national origin or ethnic background, conditions related to disabilities or physical impairments, credit history, or age (except in asking if eighteen or older in the case of child care positions).**
- . **Do not ignore your personal prejudices whatever they may be.**
- . **Do not forget the value of the question "Why?".**
- . **Do not make comments which lead the candidate to think that he/she will be the one offered the job.**

APPLICATION FOR EMPLOYMENT
(EQUAL OPPORTUNITY EMPLOYER)

PLEASE READ BEFORE COMPLETING THIS APPLICATION

This association does not discriminate in the recruitment, hiring, and conditions of employment on the basis of race, color, religion, national origin, sex, marital status, disability, age or veteran status. No question on this application is intended to secure information to be used in a discriminatory manner. Your completed application will be reviewed carefully; but its receipt does not imply that you will be employed. Employment consideration necessitates that you meet all minimum qualifications required for the position for which you are applying.

(ANSWER ALL QUESTIONS COMPLETELY.)

PERSONAL DATA

Name _____ Date _____

 Last First Middle

Address _____ Telephone: Home _____ / _____
 Street City Zip Business _____ / _____

Are you 18 years of age, or over? Yes No Are you a veteran? Yes No Dates of military service: _____

Are you authorized to work in the United States? Yes No

(If you are hired, you will be required to furnish proof of your employment eligibility.)

Other names used during prior employment _____

Maiden Name, Other Surnames, Etc.

GENERAL

Applying for position as _____ Acceptable Salary Range _____

Full-time Part-time Temporary

Notice Required _____

At which YMCA Branch _____ Date available _____

If applying for seasonal work, are you available to work during the school term? Yes No

Have you previously applied for employment for any YMCA? Yes No Worked for any YMCA? Yes No

If so, when? _____ Location _____

How were you referred to the YMCA?

Employee Advertisement School Drop in Agency Other

EMPLOYMENT

LIST ALL POSITIONS YOU HAVE HELD, BEGINNING WITH YOUR MOST RECENT. INCLUDE EMPLOYMENT AND VOLUNTEER WORK. ATTACH AN ADDITIONAL SHEET, IF NECESSARY.

Current, or last, employer _____ Employed from _____ to _____
Street address _____ Salary (monthly) at start _____ to _____
City _____ State _____ Zip _____ Telephone _____ / _____
Name and title of immediate supervisor _____ Your title _____

List major duties performed in this position:

Any supervisory experience? Yes No If yes, describe _____

Reason(s) for terminating, or considering a change _____

What did you like most about this job? _____

What did you like least about this job? _____

May we contact this employer while we are considering your application? Yes No

SUPPLEMENT TO APPLICATION **COMPLETE APPLYING TO WORK WITH CHILDREN**

Name _____ Date _____
Last First Middle

Why do you want to work with children?

How would you describe yourself?

On the next page list all other organizations or employers where you have had experience in caring for children

What other business or personal experiences or training have you had that may have prepared you for this position?

Describe non-employment activities you have been engaged in that might strengthen your application.

List any sports or hobbies in which you have participated (past and/or present):

APPLICATIONS / RESUMES REVIEW

The application is the first opportunity to eliminate candidates. If the minimum requirements on the job description are not met, do not consider the candidate, even if there are no other applicants.

Remember, you are not trying to "fill a vacancy." You are trying to find the most qualified applicant who's skills and talents match the job requirements and one who is well suited to the type of work described.

Suggest a candidate submit an application in addition to his/her resume. The application asks questions that a resume may not include.

In reviewing the applications and resumes, look for information revealed that may not be specifically asked, such as:

- . Look for any differences when comparing the application with the resume.
- . Be alert to previous residences and frequent moves.
- . Observe dates and types of employment. Note any time gaps or reasons for terminations.
- . Pay attention to extracurricular or volunteer experiences. Note whether applicant engages in activities with peers or solely with children.
- . Make sure the application is filled out completely. If information is missing, request it if the applicant has not been eliminated in the screening process.
- . Note whether the application is legible. If something is in question get clarification.
- . Determine if there is a progressive history of job titles, responsibility and salary.
- . Determine if supervisors' names are given.
- . Note whether the majority of references given are work-related or personal.

INITIAL CONTACT OF APPLICANTS

After you have reviewed applicants/resumes, eliminating those not meeting minimum job requirements, you review the notations you have made on the remaining applicants and select the candidates most qualifiable for the job.

Your next step is to narrow the number of applicants to those you will want to interview in person.

With a telephone call, you are to determine the following:

- . Verify that the applicant is still interested in the position.
- . Confirm that the applicant understands the type of work for which he/she is applying.
- . Verify the information given on the application/resumes by asking the applicant to briefly tell you what was written.
- . Clarify any facts that may have come in question.
- . Obtain additional references.
- . Answer any questions the applicant may have about the job, i.e., salary, hours, location, etc.
- . Request permission to contact current employer.
- . Determine the applicant's availability for a personal interview.

By spending a short time on the telephone, you may eliminate valuable time later in interviewing someone who may not be qualified or is not interested in the position or you may find reasonable facts to eliminate the candidate altogether.

INTERVIEWING SKILLS

The interview session is a period of discovery. Listen, don't talk. The rule of thumb is that the individual conducting the interview speaks no more than 20% of the time. That time frame includes the giving of information about the Association and the job vacancy.

The challenge is to discover facts which will predetermine the success or failure of the applicant in the performance of the job; in the environment; in the working conditions; in relating to the supervisor, to peers, to co-workers, to program participants and membership, and to volunteers.

How long should an interview last? As long as it takes to determine whether or not the person is QUALIFIABLE for the job and until all your questions have been answered in detail to your satisfaction.

Be friendly and put the interviewee at ease. If you can open the interview with some bit of neutral conversation, some item of interest, or some common ground learned from the application/resume, it will serve to relieve tensions.

Explain that you will be taking notes and why. Understand that any notes you take are subject to subpoena at a later date if there is a question as to the hiring of the most qualified candidate. Therefore, note facts only in order to refresh your memory of the interview. Subjective comments or personal opinions can put you in litigation.

Manage the interview. Establish an agenda or plan to acquire information and follow it. Tell the applicant that there will be an opportunity for him/her to ask questions at the conclusion of the interview session.

Ask the interviewee to tell you about him/herself and about his/her background. Listen with interest and remember not to make judgmental comments, either pro or con. Use empathy, not sympathy. Remember that this is information gathering and do not talk about yourself. Be as objective as possible. Do not become emotionally involved.

Understand that when a person is in a state of anxiety there can be a large difference between what a person says and what a person means. When a person is in a secure state, the difference is small. Understand also, that there may be significant and insignificant exaggerations or half-truths in order to place himself/herself in a more favorable position.

Annual Performance Rating

| Position Responsibilities and Standards of Performance | Priority | Rating—Annual | Describe Results/Achievements |
|--|----------|--|-------------------------------|
| | | <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unacceptable | |
| | | <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unacceptable | |
| | | <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unacceptable | |
| | | <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unacceptable | |
| | | <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unacceptable | |

Individual's Performance Trend

Assess the individual's performance since the last review and indicate what progress has taken place.

Performance Improvement Plan

List any areas in which the employee could improve performance and specific steps which will be taken to achieve the improvement.

Special Circumstances

If you are unable to conduct a performance review at this time, state the reasons why and describe the special circumstances that exist.

Employee Comments

I have been provided the opportunity to read this performance summary and offer the following comments.

Employee's Signature

Title

Date

Review

Supervisor's Signature

Title

Date

Performance Summary
(SAMPLE)

Name _____

Job Title _____

Department _____

Date of Mid-Year Review _____ Reviewer's Name _____

Date of Annual Review _____ Reviewer's Name _____

This performance summary focuses on key aspects of job performance and should be completed at least once a year. It permits the supervisor to assess an employee's performance and comment on overall levels of achievement in fulfilling the position's responsibilities. Recommendations for ways to improve performance and further develop abilities are also to be documented.

To maximize the effectiveness of this performance summary, the supervisor should carefully prepare this review and discuss it with the employee.

The employee is encouraged to make written comments on any aspect of the review. In all cases the employee should sign this form after reading it and discussing it with the supervisor.

The performance summary should be used for all personnel twice each year; for the mid-year assessment/coaching session and for the year-end annual performance evaluation.

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Sample of OBJECTIVES

Position Responsibilities and Standards of Performance

1. List the individual's key work objectives and/or primary position responsibilities using the job description as a guide. List also the standards of performance required.
2. Give a priority to each position responsibility, using this scale: **H** = High, **M** = Medium, **L** = Low. The employee should be made aware of these criteria prior to the measurement period.
3. Place a check in the box which indicates the degree of achievement for each responsibility.
4. Describe specific results/achievements in the appropriate column.

| Position Responsibilities and Standards of Performance | Priority | Rating—Mid-Year | MID YEAR Results/Comments Describe Results/Achievements |
|--|----------|---|--|
| Conduct 3 staff training events on methods of working with disabled children by December 31, 1995 | H | <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input checked="" type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unacceptable | at mid year, one training has been completed-- The second is planned for September and the third for October |
| Identify 2 members from the local administration to serve on the board of directors by October 1, 1996 | M | <input type="checkbox"/> Outstanding <input checked="" type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unacceptable | At mid year, 3 such persons have agreed to serve on the board, as well as 2 from local business |
| Enroll 50 children, ages 8-14, in summer camping programs by September 1, 1996 | H | <input type="checkbox"/> Outstanding <input checked="" type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unacceptable | At mid year, 40 children have participated so the new goal will be 75 children by September 1 |
| Raise \$1,000 for program activities by December 1996 from the local community | H | <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input checked="" type="checkbox"/> Below Expectations <input type="checkbox"/> Unacceptable | At mid year, no local funds have been raised. This will have to be a priority for the last 6 months of the year. The Board of Directors will need to participate more actively |
| Hire and train office secretary by April 1, 1996 | M | <input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input checked="" type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unacceptable | A secretary has been hired and trained in office administration |

PERFORMANCE APPRAISAL PROCESS

PURPOSE AND ASSUMPTIONS

Organizations work best when all workers know what their jobs are, what is acceptable performance and what is not. Individuals are entitled to know what is expected of them, how they are doing in relation to expectations, what they can do to excel, and what they must do to improve if that is required. Improved performance depends upon self-assessment as well as assessment by others. The expectations set forth in an appraisal form support and reflect the values and philosophy of the organization.

Individuals are entitled to know how they stand as they go along in their jobs, not just once a year. Feedback to employees is valued and expected at committed and effective organizations. Supervisors are required to meet with their employees at various times throughout the year, usually informally, to ensure that employees are completely aware of strengths and limitations in their performance. However, formal Performance Planning and Appraisal meetings are to be held at least once a year (twice a year is recommended) to take a look at the big picture and to make major plans.

It is assumed that this appraisal system will assist employees and their supervisors in doing a better job. Specifically, the performance statements contained in these forms (sample form included) have been designed so that each person can assess his/her own work against the criteria provided. Self-evaluation and personal goal setting is as important to successful performance as the feedback and appraisal provided by the supervisor. Therefore, it is intended that this be a joint effort with supervisor and employee working together to review progress and work toward improved performance and individual development. Although each individual will approach the ongoing process of self-evaluation in his/her own way, employees and supervisors are strongly encouraged to formalize this effort periodically by completing the forms for self-appraisal and by reviewing these results with supervisor during the Performance Planning and Appraisal meetings.

Consistent with the belief in the importance of ongoing feedback, this process should also include an opportunity for each person to provide his/her supervisor with constructive comments and suggestions. This is a tool which can lead to improved dialog and communication. To that end, each person is strongly encouraged to participate actively and positively in this part of the appraisal process.

FREQUENCY OF APPRAISALS

For newly hired employees and those who transfer to new positions, appraisals should be scheduled at the conclusion of 3, 6 and 12 months. For other employees two reviews should be scheduled, one at mid-year and one at the end of the year. The performance outcomes from the year end review should serve as a basis for annual pay increase for the following year.

SETTING PERFORMANCE OBJECTIVES AND THE REVIEW PROCESS

The review process consists of four major components: a) setting performance objectives b) mid-term review c) ongoing feedback/support d) final (or annual) review. For the process to be successful, both the supervisor and the staff being supervised need to value and consider the process as a priority for staff and organizational development. The intent is to promote professional development, increased performance effectiveness and enhanced job satisfaction.

a) Setting performance objectives

The first step is for the employee and his/her supervisor to mutually agree upon a series of performance objectives or standards which will serve as a measure of the employees work throughout the year. This should be completed no later than the end of the first month of the new year (or review period). Generally, the employee will, once the process is understood, develop a set of standards focusing on key areas of work and will share this with the supervisor. The agreed outcome from the discussion of both persons will result in the performance objectives for the employee during the year. It is essential that the supervisor respect the views of the employee in formulating the objectives, if not, the meeting will not yield MUTUAL agreement.

By definition, performance objectives (or standards) are specific assignments and/or tasks which contribute toward moving the organization (or department within the organization) toward achieving its planned priorities. When establishing these objectives, it is important that they are:

- clear, specific, measurable, and easily understood
- to be completed within a specific and agreed upon time period
- focus on specific results to be achieved
- realistic but challenging
- important/significant activities
- relevant to the organization, its divisions or departments

It should be stressed that performance objectives indicate important achievements to be accomplished during a given time period, and not be a general listing of the various activities as is often done job description formats. Furthermore, job objectives should also indicate the way things are to be done. Elements such as effective team work and cooperation, and consistent representation of the organization's values need to be a part of the performance objectives document.

b) Mid-term review

After approximately six months, the supervisor and staff need to conduct a mid-term review based on the written performance objectives. At this point, both can measure and determine progress being made as well as to identify shortcomings and steps needed to improve performance, as necessary. It is recommended that both the person being supervised and the supervisor first rate the employee's performance (based on the written objectives) individually. Then, during the meeting, they will share opinions in order to come out with a mutually agreed upon performance assessment.

It is important to note, however, that setting job objectives is often like developing an annual financial budget. Sometimes estimates made during the objective setting phase may not be realistic, or may have changed due to other factors. If this is so, the mid-term review is the time to make any necessary changes or adjustments in the performance objectives document (or agreement).

c) Ongoing feedback and support

Positive and effective supervision cannot be accomplished by only 3 meetings per year (the minimum required to complete the various aspects of the process). Therefore, the supportive and responsible supervisor will encourage frequent informal opportunities to both give and seek feedback from staff being supervised. The supervisor should also inquire how he/she is doing in supporting the professional growth needs of the person being supervised.

d) Final review

During the final month or two of the year, a final review needs to be conducted based on accomplishments throughout the year. If adjustments or plans for improvement were recommended during the time of the midterm review these changes should be reflected in the final review. As is the case of the midterm review, it is recommended that the person being supervised and the supervisor first rate performance individually. During the joint meeting they will then discuss and negotiate (if necessary) the ratings and this will result in a final version of the annual performance review. These outcomes will then be considered when the time comes for planning annual salary increases.

If there is disagreement in the rating of an employee's performance, then a grievance process should be instituted where the employee can list the specific areas of disagreement and why, and then management would be responsible for further examination with the aim of facilitating an eventual agreement among the parties.

CONCLUSION

In my view, the most successful managers place a high priority on the development of their human resources (staff and volunteers), and establish the kind of systems that foster motivation, commitment and skill building. If applied with the proper spirit, Management by Objectives can have a positive impact on the an organization's performance as well as on the people within the organization. But systems have their limitations, therefore it the responsibility of thoughtful managers to ensure that the values of the organization and the well-being of the individuals involved not be overlooked as daily struggles challenge organizational viability.

NOTE: On the following pages, additional information is provided on setting job objectives and performance appraisals (steps 6 and 7 of implementing MBO). Furthermore, there are samples of performance appraisal forms and job descriptions - drawn principally from my experience working with the YMCA of the USA and World Learning, Inc.

Research Notes:

- (1) Drucker, Peter, "Practice of Management", Harper & Row, New York, NY 1954.
- (2) French, Wendall L., "The Personnel Management Process - Human Resources Administration and development", Sixth Edition, Houghton Mifflin Co., 1987, pg 341.
- (3) Ibid, pg.344.

JOB DESCRIPTION

Position: FINANCE/ADMINISTRATION SUPERVISOR (FAS)
Reports to: Unit Administrator

Responsibilities (general): Will act as an accountant and administration head. In this capacity the general responsibilities are two-fold: 1) to handle all cash transactions, maintain financial records, prepare monthly computerized financial reports and proposal budgets for submission to Moscow head office; 2) to set-up and ensure appropriate and timely functioning of administrative structures (according to WL administration guidelines) as well as make suggestions and/or implement improved methods of administration. Additionally, the FAS will be responsible for ensuring that all staff under his/her authority are properly trained and work according to WL administration/financial principles.

Description of Responsibilities:

A. Finance

A1. Cash Control

The FAS assumes control of all cash and cash transactions: receipts, disbursements, cash management and ensures the timely payment of all contractual obligations.

FAS will, in consultation with the Unit Administrator (UA), propose monthly budgets for Moscow head office approval. FAS will then make timely call forwards and organize for reception of cash in such a way that there will be no disruptions with normal cash disbursement functions.

FAS will verify all advances, expense vouchers and obtain approval from the UA prior to making any payment. FAS must ensure that the expenses are justified on a timely basis and they fall within the legitimate categories of expenditure. It is FAS' responsibility to ensure that all WL's accounting/financial procedures are adhered to for all transactions.

A2. Finance Documents and Report Management

FAS assumes control and is responsible for all finance documents, vouchers and receipts. He/she is also to make daily entries in the computerized ledger sheets. FAS will prepare a weekly (Fridays) Cash Recap for physical verification and approval of the UA. FAS will prepare a monthly Cash Recap and all relevant ledger sheets and supporting documents for physical verification and approval of the UA, prior to submission to HQ.

FAS is responsible for having available copies of all financial reports and up-to-date back-ups of all computerized financial documents.

As and when required, FAS will make visits to the head office in Moscow for collecting cash, submitting reports and at the behest of the Financial Controller (or other) for training. FAS will be available for instant audit to both the UA and the Finance Department of Moscow head office. His/her procedures and accounts may be reviewed and/or modified by WL or other audit staff.

B. Administrative Responsibilities

General: The FAS position exists to supervise the daily running of the administration unit. FAS is required to handle non-recurring as well as routine tasks. S/he will guide his/her staff in their efforts to complete their assignments in an expeditious manner

B1. Implementing and Improving WL administrative systems

FAS in his/her administrative capacities ensures the placement, implementation and improvement of WL administrative systems including all filing, translation, document preparation procedures (note: modifications in administrative procedures need to be discussed prior to application with the UA). FAS also assumes responsibility for encouraging a regular relationship between the sub-offices and head office, colleagues and counterparts. FAS ensures the continual updating of all personnel records and files as regards to contracts, leave entitlements, evaluations, promotions and salary specifics. FAS will keep the UA informed concerning all personnel matters.

B2. Personnel Management

FAS assumes the role of "manager" and thus is to allocate administrative responsibilities accordingly. Nevertheless, FAS is responsible for all administration and finance needs and thus, must keep him/herself informed of all matters and whereabouts of admin. information.

B3. Inventory

FAS ensures an inventory control system is in place and continuously updated. FAS supervises the disbursement of all items. FAS also ensures that all "unassigned" office equipment and supplies are kept safely and appropriately.

B3. Sourcing / Purchasing

FAS is responsible for organizing all project-specific purchases: obtaining quotes from various suppliers and consulting with the UA prior to purchase. FAS is to use the "procurement request form" for items needed to obtain from HQ and to ensure that the request is made sufficiently in advance of incoming personnel. FAS is to be cost conscious, seek the lowest prices for the highest quality items, report loss, diversion, theft or offers to misuse WL assets.

B4. Lease / Rental Contracts

FAS (or his/her assistant) will assist the UA in lease/rental negotiations. He/she will maintain original copies of all contracts (facilities, equipment and personnel) on file and forward copies to HQ. A computer listing of contracts is to be kept up-dated at all times. FAS is also responsible for ensuring prompt payment of rent to contractors, apartment owners, etc.

B5. Vehicle Management

FAS is responsible for communicating all vehicle needs to the Dispatcher and arranging for logistical demands for WL staff, with prior approval from the UA.

B6. General duties

The finance/administration supervisor assists the UA with all other aspects of sub-office administration and management in accordance with WL's established policies and procedures.

FAS is to supervise his/her administrative staff, including such tasks as locating apartments, making hotel reservations, obtaining plane/train tickets.

C. Translation / Interpretation

FAS assumes the role of "interpreter" for the UA or other WL staff when requested.

D. Special note

FAS will advance WL's interests by constantly seeking to upgrade the professional quality of the Administration and Finance Units. FAS' main objectives are to serve professionally and timely the needs of WL projects. FAS must expect that his/her performance will be measured in part against responsibilities set in this Job Description. However, the employee may be called upon to perform other tasks that are consistent with his/her level of responsibility, and that the UA deems necessary to fulfill WL's objectives.

World Learning - Moscow
JOB DESCRIPTION - Assistant Program Officer

Position: Program Associate - Training

Reports to: Field Director

Commitment: Full time

General Functions: The principal responsibilities of the Program Associate - Training is to schedule and direct all logistical activities in the promotion and implementation of World Learning's Institutional Strengthening Training Program, and to assist in the development of training and public education resource materials. While reporting directly to the World Learning Field Director, the Program Associate will work in close collaboration with the Program Officer - Training and the Program Officer - Information. The successful candidate will be highly organized and able to follow-up on numerous and diverse tasks at a given time. Furthermore, the Program Associate must demonstrate personal initiative, the ability to work in a team approach, a keen interest in World Learning's work in the development of non-governmental organizations (NGOs), and a clear understanding and commitment to the World Learning principles.

Specific Tasks

1. Provide principal leadership in the organization and follow-up of all logistical matters related to the implementation of World Learning's Institutional Strengthening Training Program (including identification and contracting of training sites, promotion and information sharing with potential participants, assisting in the scheduling and maintaining contact with workshop trainers, securing translators, etc.);
2. Maintain contact with World Learning Subgrantees in order to develop a current list of training activities being conducted by these organizations, and facilitating World Learning's appropriate participation;
3. Maintain updated general information list of all World Learning Subgrantees;
4. Develop and maintain training files which document current information on workshop trainers, participants, results of evaluations, and program content matters;
5. Provide on-site support at World Learning's training workshops and conference, as requested;
6. Collect and develop Russian language training materials;
7. Assist the Program Officer - Information in the area of public education and media relations activities; maintain list of media contacts; maintain publications file on the activities of World Learning Subgrantees; assist in the organization of press conferences; and assist in the facilitation of information flow;

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8. Work closely with the Field Director and all Program Officers to ensure an integrated team effort in all areas of the World Learning's work; and

9. Additional duties as assigned by the World Learning Field Director.

Requirements: High level of organization and initiative. Ability to function well as a member of a team. Written and spoken English and Russian. Computer skills. Previous experience in events planning and training strongly preferred. Information management experience a plus. Basic knowledge of the work of non-governmental organizations in Russia and the former Soviet Republics.

Performance Indicators:

1. Successful implementation of 20 - 25 training workshops in five regions (Moscow, St. Petersburg, Ekaterinburg, Ukraine, and Georgia) involving 400-500 participants;
2. Enhanced involvement and support by World Learning for individual Subgrantee training events;
3. Presence of current and comprehensive training materials for regular use by World Learning Subgrantees; and
4. An enhanced public image of World Learning through assisting in the public education and media relations activities.

World Learning - Moscow
JOB DESCRIPTION - Secretary

Position: Secretary
Reports to: Office Manager
Commitment: Full time

General Functions: The office secretary is responsible for establishing and maintaining administrative functions of the office. In so doing, the position will report directly to the Office Manager but will work to assist the entire team effort including providing support to the World Learning Field Director and the 3 Program Officers. The successful candidate will demonstrate personal initiative, a keen interest in the work of World Learning, and a clear understanding and commitment to the World Learning principles.

Specific Tasks:

1. Establish and maintain office filing system;
2. Answer telephone;
3. Greet visitors;
4. Word process and copy documents in English and Russian;
5. Ensure maintenance of office equipment;
6. Send and receive electronic mail and faxes;
7. Circulate correspondence within office;
8. Make travel arrangements for staff;
9. Report supply shortages and needs;
10. Supervise cleaning staff; and
11. Additional duties as assigned by World Learning staff.

Requirements: High level of organization and initiative. Ability to function well as a member of a team. Computer skills. Written and spoken English and Russian. Previous secretarial experience.

Performance indicators:

1. Smoothly functioning office;
2. Organized filing system; and
3. Positive working relationships with colleagues and clients.

DEVELOPMENT OF PERSONNEL POLICIES

To ensure clear understanding among management and staff and to guarantee the basic rights of all employees, it is critical that an organization develop a comprehensive personnel policy. In addition to all key elements related to employment and organizational principles, the personnel policy needs to be guided by the host country labor code, customary practices within the local context and, in the case of organizations with regional/international affiliates, should be consistent with any relevant existing policies.

While there is no standard format for personnel policies of local non-governmental organizations (NGOs), the following suggestions may serve as a guide in the policy development process:

1. Presentation of organizational principles and values
2. Basic code of ethics and expectations for employees and volunteers
3. Employment principles which outline the process or "way of working" among colleagues
4. Policies and procedures related to employment and compensation
 - Hiring and contracting
 - Length of employment/probationary period
 - Hours for full and part-time employees
 - Job descriptions, job objectives, job evaluations
 - Professional training and development
 - Vacation time, holidays, sick leave, etc.
 - Termination of employment
 - Health benefits, insurance, and retirement benefits or issues
5. Policies related to the recruitment, training and conduct of volunteers
6. Protections against discrimination in the workplace (e.g. sexual harassment, gender and ethnic discrimination, etc.)
7. Employment grievance policy (an established process for resolving disputes among staff and management, as well as actions to be taken in the case of legal and rights violations)
8. Travel policy
9. Rights and responsibilities when using organizational resources (e.g. communications equipment, expense accounts, etc.)
10. Issues related to hospitality allowances for staff, club or associations memberships, etc.

JOB DESCRIPTION

The first step in recruiting an individual to fill a job vacancy is to review the job description or to write a comprehensive job description if the position is new. Your objective is to make the best match of applicants with job requirements.

The job description is to state specifically:

- . the minimum level of experience, skills and education required to satisfactorily perform the duties of the job;
- . all duties involved in performing the job, describing what must be done to maintain an acceptable/standard level of performance;
- . the minimum physical requirements related to all job duties, described in detail;
- . the scope of supervision involved (i.e., program areas, equipment, facilities, amount of budget accountability, and number of program participants, volunteers, and staff, etc.);
- . the position to which this job reports and is supervised by; and,
- . the latitude for decision making;

The job description must have been evaluated to position it within the hierarchy of your organization. This process produces a salary range assigned to that specific job which is equitable within the Association.

A starting salary below the mid point of the salary range is determined based upon equitably with others starting and positioned in similar jobs and upon the job market requirements. An entry level wage is established for those who will require total training for the position.

JOB VACANCY ANNOUNCEMENT

The next step is to consider the best resources for soliciting job applicants. Your current staff, volunteers, membership and program participants are very often your best resources.

Prepare a job vacancy announcement that includes:

- . a brief description of the job and its minimum requirements;
- . the starting salary range plus the new-entry level salary;
- . the location of the job, especially if it is different from the branch;
- . a contact name and telephone number for obtaining additional information;
- . how to apply, giving name and address of person receiving the application or resume; and
- . date the position will start and deadline for applying;

Circulate the job vacancy announcement so that it reaches as many potential markets as possible.

SUGGESTED RESOURCES FOR RECRUITING

- Current staff, volunteers, membership and program participants
- Applicants file, previously submitted for similar positions
- Professional employment agencies
- Internship or work study programs
- Employment classified adds in newspapers
- Word of mouth (i.e., mention your job vacancies wherever you go and to whomever you speak)

IMPORTANT "DON'TS" IN RECRUITING

- . Never keep the job vacancy a selective secret, always announce the vacancy.
- . Never refuse to accept an application or resume for a specific job vacancy unless it is submitted after the stated deadline.
- . Never eliminate applicants because they are "Over Qualified".
- . Never eliminate applicants based upon sight, personal prejudices, and/or assumption that they cannot perform the job duties.
- . Never place applicants in consideration for a job when they do not meet minimum requirements listed for the job.
- . Never limit your announcements to homogeneous groups, neglecting resources from other age, sex, economic, cultural or ethnic groupings.
- . Never disclose the reasoning why some applicants are selected and others are not. State only that the selection process seeks the most qualified candidates.

[Sample Personnel Policy]

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| Section 2 | Involuntary |

Adapted from Association of Professional Directors of YMCAs "Model Personnel Policy and Employee Benefits Guide for YMCAs 1995".

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CAREER DEVELOPMENT - INDIVIDUAL'S POINT OF VIEW

Who am I? -----> Where do I want to go?-----> How do I get there?

self assessment/profile

the ideal career

seek information/
develop an action plan

in your worklife what have you done
what skills do you have
what are your values
what are your interests

where are you
what does your workspace look like
what are you wearing
what are your activities/contributions
what kind of people do you work with
what is the main purpose of your job
what is the best part of your job

understand the culture of
advancement within your
career
write letters
build a network of
references
perfect interviewing skills

Recruitment & Selection

Goal:

To place the best equipped candidate into a position where he/she can be successful tomorrow and in the future.

Orientation

Goal:

To familiarize all new employees with the mission, goals, programs and operating policies/procedures of the YMCA.

Perpetual In-Service Training

Goal:

To increase the productivity of all team members.

Performance Measurement & Appraisal

Goal:

To provide each team member with sound coaching for improved performance and the YMCA with a basis for salary increments.

Job Enrichment

Goal:

To challenge staff to learn and grow through new assignments and greater responsibilities.

Recognition & Compensation

Goal:

To retain high quality staff at all levels of the organization.

WHAT WE WANT TO ACCOMPLISH TODAY:

1. What can I change in my work environment to help me get more things done in a more efficient, less draining way?
2. How can I change my perspective or attitude on the way I look at things that will help me tune into the best use of my time?
3. What can I do to save time? What are the specific action steps that I can take right now?

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World Learning Materials

Fact Sheet



- School for International Training
- Citizens Exchange and Language Programs
- Projects in International Development and Training
- The U.S. Experiment in International

WORLD LEARNING INC.

Founded in 1932 as

The U.S. Experiment in

International Living

HISTORY World Learning Inc. was founded in 1932 as The Experiment in International Living, a pioneer in people-to-people exchange. It is one of the oldest private, nonprofit, international educational services organizations in the world, and the oldest institution of its kind in the United States. For more than sixty years, it has sustained its founding concept -- **learning the culture and language of another country by living as a member of one of its families** -- while it has also pioneered new initiatives in response to a changing world.

MISSION The scope and diversity of World Learning's programs have grown well beyond the institution's original homestay exchanges, but its mission remains intact: **to enable participants to develop the knowledge, skills, and attitudes needed to contribute effectively to international understanding and global development.**

SCOPE Today, World Learning's broad range of international expertise is represented by its three operating divisions: its accredited college, the School for International Training; its traditional Citizen Exchange and Language Programs; and its private, voluntary organization activities operated by Projects in International Development and Training. World Learning currently administers more than 260 programs in nearly seventy countries, providing direct program services to more than 54,000 participants and indirectly benefiting more than 500,000 other people.

World Learning's School for International Training was established in 1964 as a direct outgrowth of the institution's role in providing the original language training and teaching materials for the U.S. Peace Corps. Today, the School offers a bachelor's degree program in international studies, master's degree programs in inter cultural management and the teaching of languages, and college semester abroad programs in more than thirty countries.

Citizen Exchange and Language Programs is World Learning's cornerstone division, operating the institution's Summer Abroad program which was pioneered in 1932. For more than sixty years, World Learning has been dedicated to a simple approach known as the homestay, the best cross-cultural learning laboratory. Families and individuals of all ages from all over the globe participate in World Learning's various exchange and language programs.

Building on its pioneering efforts in international educational exchange and training, World Learning applied its expertise to institutions and individuals working in development. Through the Projects in International Development and Training division established in 1977, World Learning has become a prominent private voluntary organization (PVO) dedicated to furthering world peace through economic and social development initiatives.

World Learning is one of more than twenty-five member organization of the worldwide Federation of National Representations of The Experiment in International Living, which was incorporated in Switzerland in 1954. The Federation has held consultative status with the United Nations Educational, Scientific, and Cultural Organization since 1958, with the United Nations Economic and Social Council since 1978, and with the Council of Europe since 1981. The Federation is composed of member organizations that are privately run, nonprofit, nonpolitical, and nondenominational.

STAFF

World Learning employs more than 1,200 staff, of which about fifty percent are dispersed among its headquarters in Brattleboro, Vermont, and its U.S. offices in Washington, D.C.; Belmont, California; Greenwich, Connecticut; Jacksonville, Florida; and Boston, Massachusetts; and about fifty percent are dispersed among field offices around the world.

SCHOOL FOR INTERNATIONAL TRAINING

- *Master of Arts in Teaching Languages* - A program that prepares language teachers committed to professional development and service in their field. Participants concentrate in French, Spanish, or English to Speakers of Other Languages.
- *Master's Program in Intercultural Management* - A graduate program that provides competency-based, professional-level training for intercultural managers. Participants concentrate in Sustainable Development, International Education, or Training and Human Resource Development.
- *Bachelor's Program in World Issues* - A two-year, upper-division bachelor's program offering a degree in international studies. Participants concentrate in at least one of these studies: Peace, Social and Economic Development, Environment.
- *College Semester Abroad* - Over forty-five programs in more than thirty countries in every part of the world for college and university students.

CITIZEN EXCHANGE AND LANGUAGE PROGRAMS

- *Summer Abroad* - Programs for high school students that offer homestays, travel, language training, ecological adventure, and community service in Africa, Asia, Australia, the Caribbean, Europe, and Latin America.
- *Elderhostel™* - International homestay and education programs for participants aged 60 years and older, offered in cooperation with Elderhostel, Inc.
- *Homestay/USA* - A homestay program that welcomes international participants, aged 13 to over 80, into U.S. homes for several days, weeks, months.
- *International High School Program/Congress-Bundestag Youth Exchange Program* - Full scholarship programs funded by the U.S. and German governments in which high school students from around the world stay with host families and attend school in the USA, while U.S. students do the same in Germany.
- *AuPair/Homestay USA* - A yearlong cultural exchange program that offers a practical solution to child care for U.S. families and a cost-effective way to work and study in the United States for European *au pairs*.
- *AuPair/Homestay Abroad* - A cultural exchange program in which U.S. *au pairs* live with host families in several European countries, while providing child care and studying for up to one year.
- *International Students of English* - An intensive English language training program for college-age and older students, featuring small, four-week classes on U.S. campuses.
- *Corporate Language Programs* - Intensive language and cross-cultural training programs tailored to the global marketplace.
- *Youth Adventure Camp* - An ideal blend of language training, recreation, and cultural discovery for 11- to 15-year-old students from around the world.

PROJECTS IN INTERNATIONAL DEVELOPMENT AND TRAINING

- *Development Management* - Projects that support local public and private institutions to promote social and economic change through on-the-job training and formal training-of-trainer' workshops.
- *Human Resource Development* - Projects that help to increase the capabilities of individuals to secure employment, play dynamic roles in their chosen fields, and contribute to the communities in which they live.
- *Development Training* - Courses that enable mid- and senior-level professionals to develop knowledge and skills that are immediately useful in their work at home.

It is the policy of World Learning Inc. to provide, in an affirmative way, equal employment and educational opportunities for all persons regardless of race, color, religion, gender, sexual orientation, national or ethnic origin, age, or disability.

Fact Sheet



World Learning Inc

- SUBGRANT MANAGEMENT
- MONITORING AND EVALUATION
- INFORMATION SHARING

ALLOCATING PVO/NIS PROJECT FUNDS

In May 1992, the U.S. Agency for International Development (AID) selected World Learning to manage the Private and Voluntary Organizations Initiatives to the New Independent States of the former Soviet Union (PVO/NIS) project.

The PVO/NIS Project is mandated to fulfill three functions. The first is to award subgrants to US nonprofit organizations, focusing on NIS NGO development accompanied by respective service delivery. The second is the monitoring and evaluation of subgrantees. The third mandate of the PVO/NIS Project is to provide "lessons learned" to AID and the broader PVO community on collaborative US PVO/NIS NGO work in the NIS.

FUNDS GRANTED BY SOLICITATIONS

The first round of competitive solicitations under the Project was held in June 1992. Invitations for Applications (IFAs) were sent to over 300 US nonprofit organizations. Over 60 nonprofits answered the call and submitted proposals. The main focus of this round of solicitations dealt with humanitarian aid and health care delivery in order to strengthen the social safety net -- a general void since the breakup of the USSR. Total funding for the first round amounted to \$3,550,000 awarded to 8 organizations.

In October 1992, a second smaller solicitation was held, focusing on the impediments to voluntarism. Developing legislation and NGO advocacy were the main criteria sought. Under this solicitation, \$483,350 was awarded to 3 organizations.

In January 1993, a third solicitation was held with two due dates, in January and March. This effort focused on NGO institutional development as an aid to civil society building and ensuring the survival of NGOs and their service delivery. Sixteen (16) organizations received funding totalling \$6,670,500.

In February 1994, a fourth solicitation, which originated at the AID-Moscow office, was held. This solicitation, which was for Russia only, emphasized support to Russian non-governmental organizations to improve administrative, management, and communications capabilities. Funding totalling \$2,000,000 was awarded to 7 organizations.

A fifth solicitation, originated at the AID-Moscow office with a proposal submission deadline of July 14, 1994, distributed funding to US PVOs and their local Russian partners working together on projects that promote the development of NGOs involved in health care in Russia.

Grants were recently selected and range from \$375,000 to \$750,000, from a total funding of \$6.5 million.

FUNDS ALLOCATED TO GEOGRAPHIC REGIONS

To date, most of the funds have been awarded to US nonprofit organizations working in Russia. However, groups working in other countries of the NIS, or in more than one NIS country, have also received support.

Following is a breakdown of funding to the NIS regions.

| | |
|--|--------------|
| Russia | \$15,836,350 |
| Western NIS (Moldova, Belarus, Ukraine) | \$ 2,055,000 |
| Central Asia (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan) | \$ 1,137,500 |
| Caucasus (Armenia, Azerbaijan, Georgia) | \$ 175,000 |
| TOTAL | \$19,203,850 |

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WORLD LEARNING

PVO/NIS OFFICE - MOSCOW

Moscow Field Director - Scott Charlesworth

Scott Charlesworth joined World Learning at the beginning of March, 1995, after leaving his position of Associate Director of the International division of the YMCA of the USA. Most recently, Scott managed the YMCA's international development grants, including the World Learning-funded program to assist emerging local YMCAs in Russia, Belarus, Georgia, Armenia and Ukraine. Based overseas for more than six years, he served as Country Director of Covenant House, Panama, working with street children in Panama City, and was the founder/director of the YMCA in Belize. He trained NGO youth leaders in Papua New Guinea and was Peace Corps volunteer in Honduras. Mr. Charlesworth has a BA in Economics from Rollins College and a Masters degree in Public Management from Carnegie Mellon University.

Project Officer (Health) - Donna Barry

Donna Barry joined the PVO/NIS Project in December, 1994 and spent the first month in Washington as the Project's Health Officer. In February Donna moved to Moscow, where she will take on the position of Project Officer, monitoring a number of the Project grants. Donna formerly worked as a Program Officer for Family Health International for the former Soviet Union, organizing, implementing, and evaluating reproductive health related projects. Proficient in written and spoken Russian, Donna lived and worked in Russia and the FSU for three years. In the fall of 1993, she organized and coordinated a training of trainers workshop on reproductive health for physicians in the Central Asian Republics. She has Master's degrees in Public Health and International Affairs from Columbia University.

Project Officer (Operations Management) - Alexander Borovikh

Alexander joined World Learning in 1993. He deals with the overall functioning of the PVO/NIS office in Moscow, and is responsible for logistics for World Learning's conferences and workshops. He reports on financial aspects of the Moscow office, provides information on World Learning's activities in the NIS, and participates in designing articles for the newsletter, as well as maintains and develops the database. Alexander graduated from Moscow Linguistic University and for several years worked as an interpreter in different institutions in Russia and abroad. Recently Alexander received his degree from Moscow State University Law Department.

Program Associate (Training/Information) - Tatiana Galkina

Tatiana joined World Learning (Moscow Office) in June 1995 as a Program Associate. Her responsibilities are organising and coordinating World Learning's training program and assisting in information collection and dissemination. Tatiana formerly worked at the Carnegie Endowment for International Peace/CEIP (Moscow Center) as a Project Coordinator - a joint CEIP and IREX project. Her focus at Carnegie was publishing a guide of Russian research organizations (Institutional Map) working in the international relations and foreign affairs fields. The Guide was published both in Moscow and Washington DC in Russian and English (February-March, 1995). Tatiana has previous experience at the Canadian Embassy maintaining and developing immigration data base files within the Immigration Section. For two years Tatiana was a freelance correspondent at INTERFAX News Agency. Tatiana is finishing her degree at Moscow State University's History Department in Cultural Ethnography.

Project Officer (Information) - Ekaterina Greshnova

Ekaterina joined PVO/NIS Moscow staff in January, 1994. She handles publication issues, collects and coordinates project information, maintains the database, and establishes contacts with mass media and NGOs. In addition Ekaterina coordinates designing and publishing the Moscow Newsletter, "INFOHELP". Ekaterina graduated from Moscow State Institute of International Relations and undertook postgraduate

course work at the Institute of African Studies of the Academy of Sciences. For seven years she worked as a journalist and participated in setting up the first Russian independent news agency "Interfax". Ekaterina has been involved in Russian-American humanitarian projects as a program coordinator for the Citizens Democracy Corps.

Project Officer (Training) - Jeff Jacobs

Jeff joined the PVO/NIS Moscow staff with his experience working for CARE as a sub-office administrator in Alma-Ata, Kazakhstan, Baku, Azerbaijan, Ekaterinburg, Russia, and a project assistant in Togo. Jeff graduated from World Learning's School for International Training and participated in a homestay program in France with The U.S. Experiment in International Living. Moreover, Jeff worked in the Ivory Coast as a program manager in charge of developing rural, micro enterprises and also was an assistant at the African-American Institute in New York.



WORLD LEARNING

PVO/NIS PROJECT OFFICE (WASHINGTON)

Director - Tom Kelly

Tom directs the NIS Initiative for World Learning and is the liaison with many PVO network organizations in the U.S. and abroad. Contact him for information regarding Private Voluntary Organizations' work in the NIS, or any other Initiative-related project. Project Officer for ACTS International, Aga Khan Foundation U.S.A. (AKF U.S.A.), Agudath Israel of America, America's Development Foundation (ADF), Counterpart, Foundation for Social Innovations U.S.A. (FSI USA), Global Jewish Assistance and Relief Network (GJARN), ISAR (formerly Institute for Soviet-American Relations), International Orthodox Christian Charities (IOCC), International Research and Exchanges Board (IREX), Network of East-West Women (NEWW), Rodale Institute, and United Way International (UWI).

Senior Program and Information Officer - Margot Mininni

Margot is the NIS country expert for the Washington office and acts as a resource for Russia, Ukraine, and other areas. Margot gives information on all funded projects, works closely with their U.S. and NIS counterparts, and coordinates both the publication of the quarterly newsletter and upcoming workshops, conferences, and training on all PVO/NIS activities. Those with suggestions or questions about the topics or ideas of either the newsletter or meeting events are welcome to contact Margot. In addition, she acts as a resource for potential funding sources for NIS projects. Project Officer for Access Exchange International (AEI), The Center for Development and Population Activities (CEDPA), Lutheran Hospital - La Crosse, National Association of Social Workers (NASW), Opportunity International (1), San Francisco State University Foundation/Wheeled Mobility Center (SFSUF/WMC) (1), United Ukrainian American Relief Committee, Inc. (UUARC), and the World Institute on Disability (WID) (1 and 2).

Project Finance Officer - John Owens

John is a specialist in subcontract management and the financial fine points of general grants-making. In addition he is well-versed in the accounting requirements of A.I.D for subgrantees. He works closely with all PVO/NIS subgrantees in monitoring financial reports.

Health Program Officer - Erika Elvander

Erika is responsible for overseeing the newest health subgrantees. Her background is family planning and reproductive health, having worked for some years for the local Planned Parenthood. She has also been involved in research at Emory University (where she finished her course work for an MPH). She recently oversaw a survey of attitudes and behavior towards HIV/AIDS for Population Services International in Ethiopia. She has lived in Asia and has studied Chinese and Russian. While all the health subgrantees (new and old) are under Erika's purview, Erika is the program officer in particular for AIDS Infoshare Russia, Feed the Children, Fountain House Inc., International Rescue Committee (IRC), Magee Womancare International, Population Services International (PSI), San Francisco State University/Wheeled Mobility Center (SFSUF/WMC) (2), and World Vision Relief and Development (WVRD) (2).

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Project Officer / Program Associate - Patricia Donnelly

Patricia is well-versed in the overall functioning of the PVO/NIS Office, handles logistics and programming for many conferences and workshops, and coordinates travel clearances for all projects. In addition, she handles design input for brochures and pamphlets and serves as the Assistant Editor of the quarterly newsletter, Initiatives. Patricia Donnelly is Project Officer for the American Red Cross (ARC), The Center for Attitudinal Healing, Elwyn Inc., Goodwill Industries International, Operation Smile International, Planned Parenthood of Northern New England (PPNNE), and Project Harmony.

Program Associate - Kathy Kalinowski

Kathy is editor of the quarterly newsletter Initiatives and assists with other publications. She develops and maintains the database and mailing lists, responds to inquiries for information about the PVO/NIS Project, and coordinates e-mail communication. Kathy Kalinowski is Project Officer for Christian Children's Fund (CCF), Opportunity International (Grant 2), Pacific Institute for Research and Evaluation (PIRE), Salvation Army World Service Office (SAWSO), World Vision Relief & Development (WVRD) (Grant 1), and YMCA of the USA.

Project Assistant - Scott Altmann

Scott works in a number of capacities to provide general support to the office. His work includes filing, answering phones, sending cables and faxes, procuring supplies, database entry, and promoting overall efficiency in the office. In addition Scott frequently writes letters, edits documents, works on the newsletter, and occasionally works on subgrant travel procedures. Scott is Project Officer for Aid to Artisans and the Central European Center for Health and the Environment (CECHE).

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WORLD LEARNING MOSCOW

1. STATEMENT OF PRINCIPLES

World Learning Moscow seeks to be a dynamic force in the development of the NGO community in the former Soviet Union. In so doing, World Learning's principle priority is providing quality service, in the form of training, technical assistance, and information dissemination to the 46 Subgrantee organizations involved in the PVO/NIS Project. This function of support extends to all 46 subgrantees regardless of their current grant status, albeit active or closed.

In further support of the development of the Subgrantee organizations, World Learning Moscow endeavors to promote and advocate for the strengthening of the broader NGO community in the republics in which it operates. This effort is enhanced through forming appropriate linkages and coalitions with other concerned organizations, implementing public education campaigns on areas of common concern to organizations and communities, and by taking leadership in identifying and addressing important and often complex issues which have significant impact on the prospects for successful NGO development.

In carrying out its mandate, World Learning Moscow recognizes that its greatest resource, first and foremost, is its thoughtful, committed, capable, and unified professional staff. This supportive relationship, characterized by its integrated and mutually respectful operational style, is furthermore extended outward to join in cooperation with other key participants in the NGO development process including World Learning Washington, the Subgrantee organizations (PVOs/NGOs), and other organizations and individuals working on behalf of the emerging NGO sector.

While the historic developments leading to the formation of what has come to be known as the New Independent States (NIS) and the subsequent inflow of international organizations and resources can have an intoxicating effect on those involved, World Learning Moscow recognizes that the only true measure of its success is the growth of healthy programs and organizations capable of meeting community needs on an ongoing basis. As such, it is substantive action rather than rhetoric that counts, and as World Learning Moscow conducts its daily affairs it strives to put these principles into practice and never lose sight of the well being of the Subgrantee organizations and the people they serve.

2. PROGRAM PRIORITIES

- I. Project Monitoring and Technical Assistance to World Learning Subgrantees;
- II. Organizational Development Training, specifically in the areas of human resource development, financial management, strategic planning, public education through the media, and the external environment;
- III. Public Education and NGO Advocacy.

"Non-profit organizations exist to bring about change in individuals and in society..."

Peter F. Drucker



World Learning Inc.
Founded in 1932 as
The U.S. Experiment
in International Living

PVO/NIS SUBGRANTEE PROJECTS

WORLD LEARNING PVO/NIS PROJECT

In May of 1992, World Learning, Inc. was selected by the Agency for International Development (AID) to manage a US government program of assistance to private social service organizations in the former Soviet Union. The program is divided into three phases:

- 1) the awarding of grants to US non-profit organizations to work in partnership with non-governmental organizations in the former Soviet Union in order to strengthen the management and effectiveness of the local organizations;*
- 2) the monitoring and review of all the projects funded, including training workshops and conferences to share information. World Learning will cooperate with all interested organizations in the training aspects of this phase, regardless of whether they have received a grant in the initial phase or not;*
- 3) the organization and publication of information on lessons learned from the program, which can help to provide guidelines for the establishment of a strong non-governmental sector in the former Soviet Union.*

**ACCESS EXCHANGE
INTERNATIONAL**

112 San Pablo Avenue

San Francisco, CA 94127

415-661-6355

415-661-1543 (FAX)

**MOSCOW CHARITY
HOUSE**

Russia, Moscow

Contacts:

Thomas Rickert,
Executive Director

Galina Bodrenkova, President;
Valeria Svyatkina,
Program Coordinator

Received a grant of:

\$265,000

Geographic focus:

RUSSIA: Moscow

Dates of project:

8.93 - 8.95

To develop outside access for low-income, disabled persons and the frail elderly in Moscow. This program will encompass a transportation support network including alternative systems in the form of special vehicles, vans and drivers. Service itself will be door-to-door and will create a para transit system using volunteers, through its partner organization, The Moscow Charity House, and other social service organizations. Technical assistance and equipment will be provided as organizations learn strategy planning and infrastructure support-building with a goal of building a long-term, sustainable system.

**A CALL TO SERVE
INTERNATIONAL
(ACTS)**

895 Kifer Road
P.O. Box 60788
Sunnyvale, CA 94088-0788
(408) 245-4905
(408) 245-4907 (fax)

Contacts:

Anthony De Palma
Vice President of Operations

Trish Blair
Program Officer

**A CALL TO SERVE GEORGIA
(ACTS-GEORGIA)**

Georgia, Tbilisi 380002
Asatiani St., 7, State Med.
Tbilisi University
(8832) 96-9074
(8832) 39-3776 (tel/fax)
e-mail: actsg@actsg.ge

Gia Tomadze
Executive Director, ACTS Georgia
Gia Tsilosani
President

Received a grant of
Geographic Focus:
Dates of project:

\$175,000
Georgia
12.93 - 6.95

To provide technical assistance and training to their affiliate organization in Georgia leading to self-sufficiency and creating an indigenous cadre of management expertise. The program will forge a partnership in administering ACTS' humanitarian aid program which, in turn, will transfer the technical skills, operating principles and strategies of a self-sufficient NGO to other local NGOs serving at-risk populations in Georgia.

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**AGA KHAN FOUNDATION
USA**

1901 L Street, N.W .
Suite 700
Washington, D.C. 20036
(202) 293-2537
(202) 785-1752 (fax)
e-mail: 71075.1561
@compulserve.com

**PAMIR RELIEF AND
DEVELOPMENT PROGRAM**

Russia, Moscow 117192,
Mosfilmovskaya ul., 11, apt. 1
(095) 146-9524

Tadzhikistan, 736000
Gorno-Badakhshansky region
Khorog
(377910) 27-19

Contacts:

Iqbal Noor Ali
Chief Executive Officer
Patricia Scheid
Program Officer

Jury Khubonshoyev
Executive Director (Moscow)
Mahmadamin Mahmadinov
President (Khorog)

Received a grant of
Geographic Focus:
Dates of project:

\$600,000
Tadzhikistan
10.94 - 9.96

To develop local institutions which can identify local development needs and plan and implement programs. The program will establish community based organizations, train these organizations in participatory methodologies, initiate community dialogues to identify productive activities, provide grants to start these activities and, through the monitoring of these activities provide the local NGOs the means for adapting strategies to fit local situations. Potential productive activities include reactivating and operating of a hydro-electric power station, provision of agricultural inputs for land privatization, and improvement of coal mining efficiency as an income generation activity.

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AGUDATH ISRAEL

84 William Street
New York, NY 10038
(212) 797-9000/212-686-1222
(212) 269-2843 (fax)

Operation Open Curtain

230 Fifth Avenue, Suite 1814
New York, NY 10001
(212) 686-1222
(212) 696-0073 (fax)

Contacts:

Joshua Mehlman
Director

Rabbi Shmuel Bloom,
Executive Vice-President,
Agudath Israel

Received a grant of
Geographic Focus:

Dates of project:

**AGUDATH ISRAEL
OF MOSCOW**

Russia, Moscow
Pervaya Brestskaya ul., 60
(095) 250-9216 (fax)
(095) 250-9202

Alexander Rabinovich
Chairman
(095) 201-2231
Iskhak Guberman
Training Associate

Ukraine, Kiev
(044) 416 2442
416 4056

Jacob Bleich

\$ 575,000
Russia, Ukraine,
Byelarus, Georgia, Moldova
9.93 - 9.95

To expand its social services programs in the NIS by strengthening their local affiliate through technical assistance and training in administration, enterprise development, income generation and job training. The program will build on Agudath Israel's existing humanitarian aid activities and develop a number of micro enterprises which will provide employment and income generation opportunities immediately and long term funding for a wide range of social service activities.

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AID TO ARTISANS

**CREATIVITY ASSOCIATION
RUSSIAN ASSOCIATION OF WOMEN
BUSINESS OWNERS
ALLIANCE OF AMERICAN
AND RUSSIAN WOMEN**

14 Brick Walk Lane
Farmington, CT 06032
(203) 677-1649
(203) 676-2170 (fax)

Russia, Moscow 129626
Alleaya Zhemchugovoi, 1
build. 1, apt. 61
tel/fax: (095) 370-5237
e-mail: lena@aarw.ms.su

Contacts:

Claire Brett Smith
President
Robert Knopper
Project Coordinator
Docey Lewis
Design Specialist

Elena Alyoshina
Program Director

Received a grant of
Geographic Focus:
Dates of project:

\$555,000
Russia
9.93 - 9.95

To develop artisans' products, train them to develop and master business skills to market those products and create a business network for artisans. Working with its Russian partner non-governmental organizations Creativity, The Russian Association of Women Business Owners and The Alliance of American/Russian Women, Aid to Artisans' project will concentrate on training and supporting the disadvantaged in Russia, particularly women, and will work to develop employment opportunities for them as well as income generating programs that will focus on training, logistics support, price setting and materials cost controls.

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AIDS INFOSHARE RUSSIA

666 5th Ave., Ste. 572
New York, NY 10103

Moscow Office

Russia, Moscow 105037
P.O. Box 51
5 Chingarsy bulvar, apt.50
(095) 110-2460 (Moscow-TEL/FAX)
(095) 383-7553(tel/fax)
e-mail:julie@glas.apc.org

AESOP CENTER

Russia, Moscow 12552
P.O. Box 51
87 Rublyevskoye Shosse, k.2
(095) 141-8315(phone/fax)
e-mail: aesop@glas.apc.org

Contacts:

Julie Stachowiak, President
Lena Pyerishkina, program director

Kevin Gardner, Chairman

Received a grant of:
Geographic focus:
Dates of project:

\$223,000
RUSSIA
10.94 - 9.96

To establish and operate SPIDNET, the first HIV/AIDS information network in Russia. The main components of the project are an electronic mail network, database, library, and bulletin devoted to HIV/AIDS issues in the former Soviet Union. The primary goal is to promote communications and generate information resources of civic groups and individuals, especially those located outside of Moscow, focusing on the prevention, treatment, and research of HIV/AIDS and other sexually transmitted diseases (STD). SPIDNET is designed to facilitate the free flow of information within Russia and between Russia and the international community, creating a forum for dialogue and "hands-on" access to materials, articles, and videos produced abroad without barriers of language or distance.

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**AMERICAN RED CROSS
(ARC)**

**RED CROSS AND RED CRESCENT
SOCIETIES OF CENTRAL ASIA**

*National Headquarters
18th and D St. NW
Washington, DC. 20006
(202) 639-3226, -3098
(202) 347-4486 (fax)
e-mail: bakert@arc.org*

*Kazakhstan, 480100 Almaty
ul. Kunaeva, 86
(3272) 618-063, 542-742
(3272) 541-535 (fax)
e-mail:ifrckz.ala@glas.apc.org*

Contacts:

Tom Baker
Project Manager

David Eby
Development Delegate

*Received a grant of
Geographic Focus:
Dates of project:*

*\$500,000
The Central Asian Republics
10.92 - 6.95*

To develop the capacities of local Red Cross & Red Crescent Societies in the Central Asian Republics to develop voluntarism and foster non-governmental services that benefit the local populations. Through a series of training programs and management exchanges, the American Red Cross, along with various National Societies of the International Federation of Red Cross and Red Crescent Societies, hopes to ensure indigenous replication and foster regional self-sufficiency, independence, and long-term sustainability. In addition, the introduction of financial management, fund-raising training and information dissemination programs will contribute to the financial sustainability of other development programs.

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**CENTER FOR ATTITUDINAL
HEALING (CAH)**

33 Buchanan Street
Sausalito, CA 94965
(415) 331-6161
(415) 331-4545 (fax)
e-mail: catheal@holonet.net

Contacts:

Donald Goewey
Executive Director
Carolyn Smith
Project Director

**"KRUG" CENTER FOR
PSYCHOLOGICAL SUPPORT**

Russia, Moscow 123371
Box 17 for T. Ignashova
(095) 324-4278,
(095) 208-5191 (fax)
e-mail: cab@glas.apc.org

Tatyana Ignashova
Executive Director

Received a grant of
Geographic Focus:
Dates of project:

\$200,000
Russia
9.93 - 9.95

To offer training to hospitals and voluntary organizations in the NIS to develop the skills to provide emotional support services to people with chronic and life-threatening illnesses and disabilities, and to their family members as well. This intensive training program, which is called the Russia Project, will create a network of hospitals and organizations throughout the NIS that provide support services to their community. It will also coordinate communication among the emerging network of social services providers in the NIS. The Project will provide technical and program assistance to the Center of Love and Support (a new NGO in Moscow) which will then serve as a model for other agencies.

208

**CENTRAL EUROPEAN CENTER
FOR HEALTH AND
ENVIRONMENT(CECHE)**

2112 F Street, NW, Suite 703

Washington, DC 20037
(202) 331-3330

(202) 775-9385 (FAX)

Mauerstrasse 93
1-117 Berlin Germany
(49-30) 308-534-40
(49-30) 308-534-43 (FAX)

Contacts:

Sushma Palmer
Chairman (Berlin)

Anil Mahyera
Senior Program Consultant
(CECHE)

John Modzelewski
Program Officer (Berlin)

Received a grant of
Geographic focus:

**RUSSIA: Moscow, Rostov-on-Don, Nizhniy
Novgorod, Vladivostok,**

Dates of project:

**HEALTH AND
ENVIRONMENT
FOUNDATION (HEF);
ASSOCIATION OF
PHYSICIANS OF DON
(APD)**

CECHE c/o Health &
Environment
Pokrovka 22, Korp. 1
Russia, Moscow 121 069 (or
is it 101000)

(7095) 206-0941 (FAX)
e-mail:ceche@glas.apc.org

Irina Demina Vice President,
(HEF);

Elizabeth Coll, Program
Officer, (CECHE);
(095)917-5889(tel)
(095)230-2635(fax)

Igor Simakov,
President (ADP)
(863 42) 3-1822(tel/fax)
(863 42) 6-1708(h)
\$400,000

Tomsk, St. Petersburg

10.94 - 9.96

To foster the development of a network of Russian NGOs to address public health policy, service delivery, information, and communication. Each of the Russian NGO partners is partnered with a US PVO to focus on specific health care programs such as a media campaign on alcohol abuse, food safety policies, and the integration of disabled children into their communities. In a broader context, the program establishes a Nucleus Network of Russian health care NGOs to spread information among a variety of health care NGOs via e-mail to more effectively advocate for improvements in public health.

**CENTER FOR DEVELOPMENT
AND POPULATION ACTIVITIES
(CEDPA)**

1717 Massachusetts Ave.,NW, #200
Washington, DC 20036
(202) 667-1142
(202) 338-4496 (fax)
e-mail:cedpa_lh@cerf.net

Contacts:

Adrienne Allison
Vice President

**INTERNATIONAL WOMEN'S
CENTER**

Russia, Moscow 125124
Tretya ul.Yamskogo Polya,14/16
room 20
(095) 257-0436
(095) 257-0436 (fax)

Aleksandra Momdjan
Director
Natalia Grigoryeva
Deputy Director
(095) 235-8113(h)

Received a grant of
Geographic Focus:
Dates of project:

\$215,000
Russia (Moscow)
8.93 - 8.95

To develop a model women's reproductive health clinic in Moscow. Working with the International Women's Center, CEDPA will train women as managers and providers of health services to other women. They will also focus on resource development for non-profits and institution building through programs in volunteer recruitment and non-profit management and organizational behavior for women hospital workers and staff.

**CHRISTIAN CHILDREN'S
FUND**

2821 Emerywood Parkway
(PO Box 26227)
Richmond, VA 23261
(804) 756-2700

(804) 756-2718 (fax)

CCF Offices in Geneva:

P.O. Box 2100
route de Ferney 150
1211 Geneva 2, Switzerland
(022) 791-6462
(022) 791-0361 (fax)

Contacts:

Dr. Margaret McCullough
President (VA)
Ghassan Rubeiz
Program Manager (Geneva)
Michelle Poulton
Director (Geneva)

**THE BYELARUSIAN CHILDREN'S
FUND**

Byelarus, Minsk 220029
Prospekt F. Staryny, 31

(0172) 36-62-67 (phone/fax)
(0172) 36-66-74

Vladimir Lipsky
President
Nina Bilik
Program Coordinator
e-mail:nina@ccfmsq.minsk.by

Received a grant of
Geographic Focus:
Dates of project:

\$575,000
Byelarus
9.93 -12.95

To enhance treatment and healthcare delivery systems in Belarus. Working to alleviate the continuing deleterious effects on the health of the people of Belarus in the aftermath of Chernobyl, the project will focus primarily on the children of Belarus in rural areas where health care facilities are less accessible or unavailable. The program provides financial support for the procurement of medical supplies and equipment. Technical assistance and training aimed at strengthening BCF NGO institutional capability over the longer term, will be implemented on an on-going basis.

211

COUNTERPART

910 17th Street, NW
Suite 220

Washington, DC 20006
(202) 296-9676
(202) 296-9679
e-mail: cpfsp@igc.apc.org

Contacts:

Stan Hosie
Executive Director
Karen Sherman
Project Manager

RUSSIAN CARE

Russia, Moscow 121019
ul. Vozdvizhenka, 9,
room 50-51
(095) 290-07-03 (fax)
(095) 290-07-61

e-mail: counterpart@glas.apc.org

Andrey Stepanov
Director
Irina Kozireva
Chairman of the Board
Rebecca Bryan
Country Director

Received a grant of
Geographic Focus:
Dates of project:

\$ 625,000
Russia
8.93 - 8.95

To support and enhance the development of a sustainable, self-help oriented private network of social services for the children and families of demobilized and dislocated military servicemen. While administering to the urgent needs of the newly demobilized Russian military the project will simultaneously strengthen the capacity of the NIS partner organization Rossiskaya Zabota. This group will receive experience through hands-on practical collaboration on real-world challenges and through technical assistance in network building and coordination.

ELWYN, INC

111 Elwyn Road
Elwyn, PA 19063-4699
(610) 891-2519, 891-2043
(610) 891-2458 (fax)
e-mail: center@fupi.nikolaev.ua

**FUND OF UKRAINE
FOR THE PROTECTION
OF INVALIDS**

Ukraine, 327001 Mykolayiv
vul. Rozu Louksebourg, 46
pidyzyd 2
(0512) 35-1414 (tel/fax)

Development Center
(0512) 259-300
e-mail: center@fupi.nikolaev.ua

Contacts:

Maureen Hugel
Project Officer

Galyna Tazaratcheva
Director
Jenelle Allen
Elwin Representative

Received a grant of
Geographic Focus:
Dates of project:

\$570,000
Ukraine (Nikolayiv)
9.93 - 9.95

To provide a plan of action for early intervention for children with disabilities in Ukraine. Working in southern Ukraine through a local NGO, Fund of Ukraine, Elwyn will train and educate children who might otherwise be needlessly institutionalized. The project will raise consciousness about the resources offered by this group and will focus on training to tap into these under-utilized resources for work and independent living and will save the state and local municipalities costs normally spent on children too casually institutionalized.

**FEED THE CHILDREN, LARRY
JONES INTERNATIONAL
MINISTRIES, INC.**

PO Box 36
Oklahoma City, Oklahoma 73101

(405) 942-0228
(405) 945-4168(fax)

Moscow office:
Ul. Goncharova, 17-A
Alan Romen
(095) 287-0177(h.tel/fax)

Contacts:
Lou Ziskind
Assistant Director
Grokhol'sky per., 13,
3rd floor, suite 302
(095) 280-1648(tel)
FTC/Moscow
17-A Goncharova Str.

Moscow, Russia
(095) 287-0177
Alan Romen
Project Director
(095) 956-0597(tel/fax)
(095)280-1648
Georgy Belozyrov
NIS/PVO Project Manager

Received a grant of
Geographic Focus:
Dates of project:

**SVERDLOVSK
OBLAST
CHARITABLE
FOUNDATION "HEALTHY
FAMILY"**

Russia, Ekaterinburg, 620149
Regional Children's Hospital
No1
ul. S. Derubina, 32
(3432) 55-1546(Tel/fax)

e-mail: olga@saic.e-burg.su

Dr. Alexey Kulikov
President
(Ekaterinburg)

Lily Bouldoukian
MCH Outreach
phone/fax: (3432) 60-9082

\$600,000
Russia
10.94 - 9.96

To improve the health of women and children in Ekaterinburg and neighboring communities through development of a local NGO to support maternal/child health care and of a perinatal intensive care center in cooperation with Regional Children's Hospital No. 1 and the regional ministries of health. The program enables staff of Our Future to receive training in project management, fundraising, and communications to support the Regional Children's Hospital where nurses and doctors are to receive additional training in Maternal/Child Health management and preventative and curative services. Emphasis is on outreach to pregnant women and women of child-bearing age in the surrounding regions for early medical care. An advisory council of regional medical professionals

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and NGO leaders is established to advocate for health care policies and offer guidance to the project.

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FOUNTAIN HOUSE, INC.

425 West 47th Street
New York, NY 10036
(212) 582-0340
(212) 397-1649 (FAX)

Contacts:

Rudyard N. Prost
Director of Education

**HUMAN SOUL
CHARITABLE
FOUNDATION**

Russia, Moscow 111394
ul. Martenovskaya, 30
(095) 301-7204
(095) 301-1810 (FAX)

Igor Donenko
President
(095) 306-20-82
Olga Zayarnaya
Program Manager

Received grant of:
Geographic focus:
Dates of project:

\$400,000
Russia
10.94 - 9.96

To replicate the "clubhouse" model of care and treatment for mentally ill in several cities throughout Russia. Already a strong and successful NGO with a clubhouse in Moscow, Human Soul plans to bring new skills to mental health professionals to provide a community-based, self-governing restorative environment for mentally ill people - a "clubhouse." In addition to providing rehabilitation programs for the mentally ill themselves, the network of centers is designed to lessen the burden on families caring for mentally ill relatives and at the same time heighten public awareness about mental illness.

2/16

**GLOBAL JEWISH
ASSISTANCE RELIEF
NETWORK
(GJARN)**

730 E. Parkway
Brooklyn, NY 11213
(718) 774-6497
(718) 774-6891 (fax)

e-mail: gjarn@igc.apc.org

**UKRAINIAN AFFILIATES
OF GJARN**

Ukraine
320101 Dnepropetrovsk
ul. Sverdlova,6, kv. 313,315
(0562) 422-051, 450-253(h),
784-266, 457-239(fax)

e-mail: gold@gjarn.dnepropetrovsk.ua

Ukraine, Kharkov
c/o Regional Red Cross Committee
Novgorodskaya ul.,4
(0572) 40-9583(tel/fax)
e-mail: bomar@gjarn.kharkov.ua

Contacts:

Rabbi Eliezer Avtzon
Executive Director

Dan Berkove
Misha Goldenberg
Representative(Dnepr.)
Grigory Krainovitch
Representative (Kharkov)

Received a grant of:
Geographic Focus:
Dates of project:

\$ 400,000
Ukraine
8.92 - 12.94

To provide humanitarian assistance to needy people in a number of communities in Ukraine through supporting the activities and strengthening the management capabilities of GJARN affiliates in Ukraine and of other NGOs in the service areas. Project components include management training (including training in processing, distribution and accountability for donated material), material assistance logistics, outreach service development to the elderly and disabled and conducting group feeding operations.

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**GOODWILL INDUSTRIES
OF AMERICA**

LOCAL GOODWILLS

9200 Wisconsin Ave.
Bethesda, MD 20814-3896
(301) 530-6500
(301) 530-1516 (fax)
e-mail: mjordan@clark.net

Russia, Moscow 103051
Sredny Karetny per., 6/9,36
(095) 299-0917 (Karpenkova)
(095) 238-3969(fax)

Russia, St.-Petersburg
(812) 314-4775)tel/fax)

Russia, Rybinsk
(085) 552-3863 (Graphenkov)
(085) 552-4007 (fax)

Contacts:

Elizabeth Scott
Director, International Affairs
Melissa Jordan
Grant Manager

Vera Karpenkova (Moscow)
Elena Chumak(St.Petersburg)
Vyacheslav Grafenkov(Rybinsk)

Received a grant of
Geographic Focus:

\$250,000
**Russia (Moscow, St.-Peterburg,
Rybinsk)**

Dates of project:

6.93 - 6.95

Working in St. Petersburg, Rybinsk and Moscow to establish self-sustaining donated goods retail facilities through which vocational rehabilitation programs will be carried out. With already three stores established in Rybinsk, Goodwill plans to include employment and training in management of retail facilities. Profits will be returned to employees and to nonprofit institutions. This model will be further refined in Moscow and St. Petersburg as well.

7/18

**INTERNATIONAL
ORTHODOX
CHRISTIAN CHARITIES
(IOCC)**

711 W. 40th St.
Suite 356
Baltimore, MD 21211
(410) 243-9820
(410) 243-9824 (fax)
e-mail: iocc@igc.apc.org

Contacts:

Alexander Rondos
Executive Director
C.W.T. Hagelman III
Director, International Programs

Received a grant of
Geographic Focus:
Dates of project:

**RUSSIAN
ORTHODOX CHURCH**

Russia, Moscow 113191
Danilovskiy val 13/1
(095) 331-2222, 331-2288
(095) 955-6789 (phone)
(095) 952-8059 (fax)
e-mail: ioccmoscow@glas.apc.org

Peter Mikuliak
Representative
Alexey Trubetskoi
Tony Randel
Representative(temporary)
\$400,000
Russia
8.92 - 3.95

To provide material and technical assistance to emerging networks of private voluntary social service organizations, both secular and affiliated with the Orthodox Church, in Moscow and St. Petersburg, with the aim of eventually expanding into other Russian cities. The goal of the project is to expand significantly the access of vulnerable groups (infants, orphans, the elderly, pensioners, the handicapped, the sick and unemployed) to voluntary social and economic services. IOCC's primary partner is the Russian Orthodox Church. IOCC plans to provide training in organization and relief distribution, and funds to help indigenous organizations expand and develop their own projects.

**INTERNATIONAL RESCUE
COMMITTEE**

122 42nd Street
New York, NY 10168-1298

(212) 551-3000
(212) 551-3185 (FAX)

Contacts:

Randy Martin, Regional
Director for Asia and Europe;
Heidi Wagner, Program Officer

Received a grant of:
Geographic focus:
Dates of project:

**COMPASSION
CENTER**

Russia, Moscow
Komsomolskiy prosp., 9 Apt
45

(095)245-2209 (PHONE/FAX)
(095) 923-4778 (FAX)

Aleksey Korotaev, Executive
Director

\$400,000
Russia
10.94 - 9.96

To expand a program providing medical services to former prisoners of conscience and their immediate families in the Moscow area both at home and in an inpatient unit within a suburban Moscow hospital. A portion of the grant supports training in effective management of the two-year old NGO program with an eye toward its sustainability. Medical supplies and equipment are provided, as is medical education, primarily in psychiatric care, for specialists caring for these elderly survivors of torture and repression.

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**INTERNATIONAL RESEARCH
& EXCHANGES BOARD (IREX)**

1616 H Street, N.W.
Washington, D.C. 20006
(202) 628-8188
(202) 628-8189 (
e-mail: tonyb@igc.apc.org
irex@gwuvvm.gwu.edu

**CENTER FOR CURATIVE
PEDAGOGICS**

Russia, Moscow 117311
ul. Stroiteley, 17-B
(095) 131-0683
e-mail: ccp@glas.apc.org

IREX Moscow Office
Russia, Moscow 121069
8 Khlebnyi Pereulok
(095)290-6233, 290-5878
(7095)202-4449 (fax)
e-mail: fick@glas.apc.org
irexmos@glas.apc.org

Contacts:
Tony Byrne
Program Officer

Roman Dimenstein
Director
Bill Fick
IREX Program Officer
Irina Kazakova
Project Coordinator

Received a grant of:
Geographic focus:
Dates of project:

\$300,000
Russia
7.94 - 3.96

To create a computer communications network among non-governmental organizations (NGOs) which work in children's health care and disabilities rehabilitation throughout Russia. Project will provide equipment, training, and computer network access in a structured program to promote creation and exchange of materials necessary for the development of the everyday work and management potential of Russian NGOs. In addition to the electronic network, the project will form network discussion groups; publish a monthly newsletter to share ideas and information; convene seminars for training and networking; and make Western resources on disabilities and NGO management more readily accessible to Russian NGOs by placing information and materials on-line.

ISAR
(formerly Institute on
Soviet-American
Relations)

1601 Connecticut Ave. NW
Suite 301
Washington, DC. 20009
(202) 387-3034
(202) 667-3291
isarmos@glas.apc.org

SOCIO-ECOLOGICAL UNION
(SEU)

Russia, Moscow
Bogoayavlenski per., 3, build. 3
phone/fax: (095) 921-7161
e-mail: soceco@glas.apc.org

Kazakhstan, Almaty 480098
ul. Furmanova, 91-97, # 21
(3272) 33-78-62
e-mail: isarata@glas.apc.org

Contacts:

Eliza Klose
Executive Director

Lyubov Rubinchik, Director,
Center for Coordination and
Information (CCI)
(095) 304-2579

Mary Carpenter
Coordinator of E-mail Project
(095) 251-7617

Michael Clayton, ISAR Georgia
e-mail: isargeo@glas.apc.org

Amy MacVey

Received a grant of:
Geographic Focus:

\$200,000
Throughout the NIS, but
main target is Russia

Dates of project:

8.92 - 2.96

To improve communications and coordination between environmental NGO groups in the NIS. ISAR proposes to work with the Socio-Ecological Union (SEU), the largest network of environmental NGOs in the former USSR. ISAR has funds from AID to establish the SEU's Center for Coordination and Information in order to enhance communication and coordination between environmental NGO groups in the NIS. This two-year project consists of three parts: 1) direct support for the Center and its new environmental news agency; 2) extension of the environmental electronic mail network to 20 more groups (10 each year); and 3) assistance for the "green" newspapers in Nizhny Novgorod and Krasnoyarsk.

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LUTHERAN HOSPITAL-LA CROSSE

1910 South Avenue
La Crosse, WI 54601
(608) 785-0530
(608) 785-2181 (FAX)
e-mail: 71075.1173@compuserve.com

Contacts:

Sandra J. McCormick
Project Director
Barbara Pretasky
Administrative Coordinator

DUBNA EDUCATIONAL CENTER

Russia, Dubna 141980
ul. Universtetskaya, 19
(8 221) 4-56-98 (phone/fax)

Vladimir Tsaptsyn
Administrative Director
Madina Bikboulatova
Administrative Coordinator
phone(h): (8 221)4-9520
e-mail: madina@main1.
jinr.dubna.su
Tamara Zhitnikova
Clinical Coordinator
phone/fax(o): (8 221)4-5698

Received a grant of:
Geographic Focus:
Dates of project:

\$500,000
Russia
10.94 - 9.96

To create the "Dubna model" for rural alcohol treatment in Dubna and three nearby towns with an emphasis on alcoholism as a health problem and the need for a continuum of anti-alcohol services. The program provides training to counselors, and expands the availability of AA, Alanon, Alateen, 12-step programs, and in-patient treatment facilities in cooperation with local government and medical institutions. The Dubna Education Center is developing two programs: school-based teenage alcohol prevention and treatment for women alcoholics.

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**MAGEE WOMANCARE
INTERNATIONAL**

*Magee-Women's Hospital
300 Halket Street*

*Pittsburgh, PA 15213
(412) 641-1189
(412) 641-4949 (FAX)*

*e-mail:moskva70@glas.
apc.org*

Contacts:

Tanya Kotys
Program Coordinator

*Received a grant of
Geographic focus:
Dates of project:*

**WOMAN & FAMILY
EDUCATIONAL CENTER**

*Russia, Moscow
Savior's Hospital for Peace &
Charity
Federativniy Prospekt, 17
(095) 301-1502
(095) 918-4331(tel/fax)*

Anna Anokhina
Administrative Coordinator
Rachel Mays,
Melissa Zahniser
Field Representatives
Ludmila Zatsepina
*Deputy Program
Administrator*

*\$540,000
Russia
10.94 - 9.96*

To establish "Rural Outreach to Russia," a program to train health professionals from numerous regions of Russia and to build a network of independent women's health centers. The focus is on consumer education, and trainees will receive posters, demonstration models, family planning displays, TV/VCR, a computer, and a education center policy and procedure manual. The Moscow-based Woman and Family Education Center is a both a model and a classroom for development of similar women's health education centers throughout Russia.

226

**NATIONAL ASSOCIATION OF
SOCIAL WORKERS (NASW)**

750 First Street, NE, Suite 700
Washington, DC 20002-4241
(202) 408-8600
(202)336-8310 (fax)

Contacts:

Eileen McGowan Kelly
Director, Peace and
International Affairs

**ASSOCIATION OF SOCIAL
PEDAGOGUES AND SOCIAL
WORKERS**

Russia, Moscow 119906
ul. Podgorskaya, 8
(095) 248-5496(fax), 247-1598
(095) 246-5799

Dr. Valentina Bocharova
President
Tanya Zimakova
Program Coordinator(NASW)
e-mail: zimakova@glas.apc.org

Received a grant of
Geographic focus:
Dates of project:

\$400,000
Russia
7.94 - 3.96

To establish new, expanded, and more effective networks of indigenous non-governmental organizations (NGOs) working in the social service sector; to develop a stronger, more effective professional organization of social workers in Russia; to improve institutional and managerial capabilities among targeted regional NGOs; and to improve communications and information sharing. Through communications and information systems, national and regional action planning workshops, management training, and networking opportunities, the project aims to improve social services in targeted communities and to help mitigate human suffering in communities served by the project, which include Tuva, Yakutia, Mary El, Taymyr, Komi, and Stavropol.

225

**NETWORK OF EAST-WEST
WOMEN**

1601 Connecticut Avenue, NW
Suite 300
Washington, DC 20009
(202) 265-3585
(202)667-3291 (fax)
e-mail: newww@igc.apc.org

Contacts:

Shana Penn
Executive Director
Victoria Vrana
Assistant Coordinator

Received a grant of
Geographic focus:
Dates of project:

**MOSCOW CENTER FOR
GENDER STUDIES**

Russia, Moscow 117218
Ul. Krasikova, 27

(095) 332-4532(tel/fax)
(095) 395-50-05(fax)

Elena Kochkina
Director
Galina Venediktova
e-mail Project Coordinator
Olga Lipovskaya
Project Coordinator (St.Petersburg)
(812) 528-92-93

\$144,000
Russia
5.94 - 3.96

To develop an electronic communication network linking women and women's non-governmental organizations (NGOs); to establish and perpetuate a legal collaborative organization to address law and public policy issues concerning women and their role in democratization; and to train Russian women as self-defense trainers to foster the empowerment of women.

226

**OPERATION SMILE
INTERNATIONAL**

717 Boush Street
Norfolk, VA 23510
(804) 625-0375
(804) 626-0368(fax)

Contacts:

Judy F. Ford
Director Of Development

**OPERATION SMILE
RUSSIA**

Russia, St. Petersburg
ul. Belinskogo, 13
(812) 279-8101 (tel/fax)
e-mail: tom@white-
wind.spb.su

Tom Farrell
(812) 1446787

Russia, Moscow
ul. Dinamovskaya, 9/2, #51
(095) 276-7034 (tel/fax)
Jennifer Kaplan
Project Manager
e-mail: smile@glas.apc.org

Received a grant of
Geographic focus:

Regions
Dates of project:

\$600,000
RUSSIA: Karelia and Volga
10.94 - 9.96

To enhance the capacity of Russia's health care system to provide facial reconstructive surgery to children. Operation Smile will teach a team of personnel in specialized surgical procedures, while at the same time promote a spirit of volunteerism among medical personnel. Training for NGO staff is designed to build leadership and develop fundraising capabilities. Children in Moscow, St. Petersburg, and the Volga region who have not had access to such procedures due to its availability or their limited finances are to undergo surgery using equipment supplied by this program.

227

**OPPORTUNITY
INTERNATIONAL**

(first grant) Street Address:
360 W. Butterfield Road, Suite 225
Elmhurst, IL 60126
(708) 279-9300
(708) 279-3107 (fax)

Mailing Address:
P.O. Box 3695
Oak Brook, IL 60522
e-mail: oppint@attmail.com

Contacts:
Dennis Ripley
Executive Vice President
Ken Koskela
Program Assistant

Received a grant of
Geographic Focus:
Dates of project:

**NIZHNY NOVGOROD CHARITABLE
FUND SERAFIMA**

Russia, Nizhny Novgorod
Bolshaya Pokrovskaya ul., 25, apt. 14
O.I. Country Office
(8312) 337-227 fax/phone

Russia, Nizhny Novgorod,
ul. Minina, 6
O.I.N.N.
(8312) 603-005
(8312) 369-943

Larisa Tzezan
Executive Director
Stacie Schrader
O.I. Country Coordinator
(8312) 337-227
(8312) 340-504 (fax)
Sergey Yefrenenko
O.I.N.N.

\$550,000
Russia (Nizhny Novgorod)
10.94 - 9.96

Development of an activity already begun with the Nizhny Novgorod Charitable Fund to provide small business loans, training, and hands-on consultation to pensioners and women-heads-of-households to start their own small enterprises. Once established in Nizhny Novgorod, the program plans to expand to Vladimir.

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OPPORTUNITY INTERNATIONAL

"VOZMOZHNOST"

*P.O. Box 3695
Oak Brook, IL 60522
(708) 279-9300
(708) 279-3107 (fax)*

*25 Bolshaya Pokrovskaya Ul., Suite 14
Nizhny Novgorod 603008, Russia
(8312) 33-7227 (phone/fax)*

Contacts:

Rodger Voorhies
*Project Manager,
Eastern Europe*

Stacie Shraeder
Country Director
Vera Chadaeva
Executive Director

*Received a grant of
Geographic focus:
Dates of project:*

*\$288,000
Russia (Nizhny Novgorod)
6.94 - 3.96*

To equip emerging indigenous non-governmental organizations (NGOs) that assist small entrepreneurs in the Nizhny Novgorod Oblast by developing a self-sustaining microenterprise development (MED) training center and creating an alliance of local NGOs, managed by Vozmozhnost. To strengthen the capacities of local NGOs to facilitate job creation through small business development activities, including not-for-profit management training, technical assistance and training to NGOs to train loan officers, assistance in business plan development, seminars and other networking opportunities, and consultations on funding sources.

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**PASIFIC INSTITUTE FOR
RESEARCH AND EVALUATION
(PIRE)**

172 Lancaster Road
Walnut Creek, CA 94595
(510) 946-9238 OR; 938-7754;
(510) 946-1522 (fax)
e-mail: salus@well.sf.ca.us

**SALUS INTERNATIONAL
HEALTH INSTITUTE**

Russia, Moscow
ul. Dmitriya Ulyanova, 37, k.3
(095) 956-9092 (tel/fax)
e-mail: dyslandsalus@glas.apc.org;
apc.org;
salus@glas.apc.org;

Contacts:

Mary Kay Wright
Project Director

Olga Petroukhina
Administrative Director
Dori Dysland
Director Of Training

Received a grant of:
Geographic focus:
Dates of project:

\$650,000
Russia
10.94 - 9.96

To expand alcohol treatment capabilities through training of chemical dependency professionals, a drug and alcohol abuse prevention campaign for teenagers, a media campaign, and dissemination of alcoholism statistics and information. The program brings together numerous US and Russian chemical dependency NGOs to utilize their expertise and provide them with additional training, resources, and information. Alcohol addiction treatment facilities and an e-mail bulletin board are important components of this project.

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**PLANNED PARENTHOOD
OF NORTHERN
NEW ENGLAND**

51 Talcott Road,
Williston, VT 05495-8116
(802) 878-7232
(802)878-8001 (fax)
e-mail: eppnn@vbi.champlain.edu

**CENTER FOR THE
FORMATION OF SEXUAL
CULTURE**

Russia, Yaroslavl 150044
ul. Pionerskaya, 19
(0852) 55-6691
e-mail: root@cfsc.yaroslavl.su

Contacts:

Ellen Dorsch
Director, International Projects
Ann Buxbaum
Management Sciences for Health
Jen Peterson
Administrative Coordinator
Received a grant of:
Geographic Focus:
Dates of project:

Aleksandr Shmaglit
Director
Valentina Shelkova
Deputy Director

\$215,000
Russia (Yaroslavl)
9.93 - 9.95

PPNNE in collaboration with their U.S. partner Management Sciences for Health (MSH) will help the Center for the Formation of Sexual Culture (CFSC), Yaroslavl', increase their visibility in their community and expand the number of youth and families that they serve. PPNNE will develop staff skills in the areas of management, education/counseling and marketing/revenue generation. At the end of two years the "TEEN TEAM" (a peer counseling group) will have the skills to continue their work, under the supervision of the CFSC staff. In addition the organization will be a resource to similar groups who are addressing the serious problems of high abortion rates, lack of sexuality information, AIDS and STDs, and teen pregnancy.

231

**POPULATION SERVICES
INTERNATIONAL**

1120 19th Street, NW, Suite 600
Washington DC 20036
(202) 785-0072
(202) 785-0120
e-mail: psiwash@glas.apc.org

Contacts:
Scott Billy
Alex Brown

Received a grant of:
Geographic focus:
Dates of project:

**ASSOCIATION OF
OBSTETRICIANS
AND GYNECOLOGISTS**

Russia, Ekaterinburg 620149
Regional Children's Hospital N1
(3432) 44-2770
e-mail: psieburg@glas.apc.org

Svetlana Shumkova
Executive Director
(3432) 56-2801(h)
Elizabeth Gardiner, Program
Officer/PSI
temporary: (3432) 55-2210

\$750,000
Russia
10.94 - 9.96

To increase the use of contraceptives in the Sverdlovsk region through a social marketing campaign. The project is designed to determine contraceptive needs and attitudes toward their usage in order to develop and disseminate an effective popular message about contraceptives. The Sverdlovsk-based NGO partner will cooperate with private sector enterprises to to develop, market and maintain a sufficient supply of contraceptives. Local medical professionals are to be trained in contraceptive counseling and procedures for a client base primarily of women bringing their children to the pediatrician.

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PROJECT HARMONY

6 Irasville Common
Waitsfield, VT 05673
(802) 496-4545
(802) 496-4548
e-mail: pharmony@igc.apc.org

**PALACE OF YOUTH AND
CREATIVITY**

8 Ul. Krasnaya, Petrozavodsk
Karelia 185000, Russia
(81400) 74-135, 76-230,
75-649
e-mail: phstp@sovam.com

Project Harmony Moscow Office
119021 Russia, Moscow
Vtoraya Frunzenskaya, Dom 7, kv. 9
(095) 242-4820 (phone/fax)

Contacts:

Charles D. Hosford
Co-Director
Barbara Miller
Co-Director
Melissa Carr
Program Coordinator

Galina Razbivnaya
Director
Susan Matson
Project Harmony NIS Director
James Metz
Program Assistant

Received a grant of:
Geographic focus:
Dates of project:

\$245,000
Russia (Karelia)
6.94 - 3.96

To establish a permanent resource and training center and to organize an educational and training program in Petrozavodsk which will serve the needs of disabled children's organizations located throughout Karelia. As Project Harmony joins forces with its local partner, the Children's Palace for Youth and Creativity in Petrozavodsk, as well as with other organizations to be involved in the Partnership Initiative with Karelian Disabled Children's Organizations, it will establish an effective NGO communication network for the purpose of exchange of information, sharing services, and developing professional contacts among local, regional, national and international organizations.

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RODALE INSTITUTE

611 Siegfriedale Road
Kutztown, PA 19530
(215) 683-1400
(215) 683-8548 (fax)
e-mail: jonathon_landeck.inbox
@parti.inforum.org

**THE FOUNDATION FOR
AGRARIAN DEVELOPMENT
RESEARCH (FADR)**

Russia, Moscow 117261
Leninsky Prospekt, 85
(095) 134-3364
(095) 318-8352 (fax)
e-mail: fadr.inbox
@parti.inforum.org

Contacts:

Dr. Jonathon Landeck
International Projects Team Leader

Dr. Alexander Makeev
General Director
Dmitry Durmanov
Yevgeny Yakushev

Received a grant of
Geographic focus:

\$400,000
**Russia (Orel, Novosibirsk,
Lower Volga, Tver)**

Dates of project:

6.94 - 3.96

To develop a communications network for policy issues, while strengthening the leadership capacities and the ability of its partner organization, The Foundation for Agrarian Development Research (FADR). In partnership with other NGOs, the FADR will collaborate to publish local newsletters, convene regional workshops to design community development projects, and organize a national-level information network, as well as national symposia and an international electronic conferencing system. The FADR Networking Support Project will improve NGO's capability to use information exchanges to establish community-based partnerships for projects that address local and regional development issues and national policy initiatives derived from local and regional experiences.

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**SALVATION ARMY
WORLD SERVICE OFFICE
(SAWSO)**

615 Slater Lane
(PO Box 269)
Alexandria, VA 22313
(703) 684-5528
(703) 684-5536 (fax)

Contacts:

Dean B. Seiler
Executive Director
Rosemary Regis
Program Consultant

Received a grant of:
Geographic Focus:
Dates of project:

**SALVATION ARMY
OF RUSSIA
MOSCOW CHARITY HOUSE**

Salvation Army, Russia
Russia, Moscow
Slavyanskaya pl., 4, room 338
(095) 220-9676
(095) 924-9169 (fax)
(095) 151-8785 (phone/fax)

Senior Citizen's Center,
Moscow, Shmitovskiy Proezd, 41
(095) 259-5654

Sandra Foster
Salvation Army
Galina Bodrenkova
Valeria Svyatkina
Moscow Charity House

\$500,000
Russia (Moscow)
9.93 - 9.95

To assist Russia in developing a network of services for the elderly. Through the establishment of a model multipurpose senior citizen center supported by satellite centers in Moscow, The Salvation Army center will offer socialization, counseling, information and referral, health education and preventative services, volunteer, and income generating opportunities. The center will also organize its volunteers who will provide social services to frail, elderly, and needy families. The center to be established in Moscow will serve as a model for other centers throughout Russia, Ukraine, and Georgia, and will develop a Salvation Army corps in these areas while establishing a system of services for the elderly.

235

**UNITED UKRAINIAN
AMERICAN RELIEF
COMMITTEE**

1319 W. Lindley Avenue
Philadelphia, PA 19141
(215) 455-3774
(215) 455-0540 (fax)

Contacts:

Alexander Bilyk
President

Received a grant of:
Geographic Focus:
Dates of project:

**LVIV UNITED REGIONAL
TRADE UNION COUNCIL**

Ukraine, Lviv 290008
Prospekt Shevchenka, 7
(0322) 72-6787, 72-8976
(0322) 72-9300(fax)

Rostislav Veretka
Director

\$275,000
Ukraine (Lviv)
9.93 - 9.95

To offer educational and vocational services training to disadvantaged, abandoned and disabled children living in youth homes in Ukraine. Working with the local NGO Ukrainian Educational and Cultural Center based in Lviv, the UUARC will also provide technical assistance training for income generation to support and maintain these youth homes.

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**WHEELED MOBILITY CENTER
SAN FRANCISCO
CLUB
STATE UNIVERSITY
FOUNDATION**

1930 Parker St.
Berkeley, CA 94704
(510) 548-3652 (phone/fax)
e-mail: krizack@sfsuvax1.sfsu.edu

Contacts:

Marc Krizack
Project Manager

**NOVOSIBIRSK REGIONAL
SPORTS "INVALIDS"**

1st grant
Russia, Novosibirsk 630031
ul. Frunze, 15
(3832) 24-0349, 24-3801(fax)
(3832) 24-0355
e-mail: wmc@sfsu.nsk.su

konstantin.kovalev@finist.nsk.su
Vladimir Krivenkov
President
Elizabeth Schuster
Regional Coordinator
Larisa Tokareva
Program Coordinator

Received a grant of:
Geographic Focus:
Dates of project:

\$525,000
Russia (Novosibirsk)
5.93 - 5.95

SFSUF/WMC will receive funding to work with the Novosibirsk Regional Sports "Invalids" Club (NRSIC) to establish a series of privately owned wheelchair building enterprises capitalized through NRSIC loans to the owners. Once established, the project hopes to see an outgrowth of specialty parts manufacturing companies and repair shops that will provide vocational training and job placement for the disabled.

**WHEELED MOBILITY CENTER(WMC)
SAN-FRANCISCO STATE UNIVERSITY
FOUNDATION(SFSUF)**

1930 Parker Street,
Berkeley, CA 94704
(510) 548-3652(tel/fax)
e-mail:krizack@susuvax 1.sfsu.edu

Contacts:
Mark Krizack
Project Director

Received a grant of:
Geographic focus:
Dates of project:

**FINIST DISABLED
SPORTS CLUB**

2nd grant
Russia, Novosibirsk,
630031, ul. Frunze, 15
(3832) 24-0349;
240-355; 243-801(fx)
e-mail:wmc@sfsu.nsk.su
konstantin.kovalev@finist.nsk.su

Vladimir Krivenkov
President
Elizabeth Schuster
Regional Coordinator

\$450,000
Russia
10.94 - 9.96

To open the Disabled Community Health Clinic in Novosibirsk to provide clinical services and counseling for people with disabilities. The clinic is to offer peer counseling by and for people with disabilities, as well as diagnosis, prevention, and treatment for health problems afflicting wheelchair riders. Other components of the program include reproductive health care for people with disabilities and communication and dissemination of medical information amongst the Russian and US disability community via e-mail.

238

**WORLD INSTITUTE
ON DISABILITY
(WID)**

510 16th St.
Oakland, CA 94612
(510) 763-4100
(510) 763-4109 (fax):

Contacts:

Bruce Curtis
Program Manager
Suzanne Reier
Project Director

**ALL-RUSSIAN SOCIETY
FOR THE DISABLED**

1st grant
Russia, Moscow 121165
Kutuzovskiy prospekt, 30/32
(095) 241-2286, 241-1880
(095) 241-7825, 241-6955
(095) 241-2280, 241-8180 (fax)

Aleksandr Lomakin
Chairman
Tamara Zolotseva
Deputy Chairman

WID/Moscow
Denise Rosa
(095) 253-7453
e-mail: mscwid@glas.apc.org

Received a grant of:
Geographic Focus:
Dates of project:

\$450,000
Russia
9.92 - 12.94

To develop the network and community base throughout Russia of the All-Russian Society of the Disabled (ARSD) and to strengthen the overall institutional capability of the ARSD by providing management and advocacy training of the emerging disabled leaders so that advocacy can be translated into policy and policies into action. This action will encompass assessing and meeting the needs of the disability organizations. It will identify services currently available to the disabled and suggest how to improve and overcome obstacles to those services. A key element of the proposal will be to identify potential international working groups and funding sources to strengthen training, leadership, advocacy and eventually, the services themselves.

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**WORLD INSTITUTE
ON DISABILITY
(WID)**

510 16th St.
Oakland, CA 94612
(510) 763-4100
(510) 763-4109 (fax):

e-mail: mariaoginski@delphi.com

Contacts:

Bruce Curtis
Program Manager
Suzanne Reier
Project Director

**ALL-RUSSIAN SOCIETY
FOR THE DISABLED**

2nd grant

Russia, Moscow 121165
Kutuzovskiy prospekt, 30/32
(095) 241-2286, 241-1880
(095) 241-7825, 241-6955
(095) 241-2280, 241-8180 (fax)

Aleksandr Lomakin
Chairman
Tamara Zolotseva
Deputy Chairman

WID/Moscow

Denise Rosa
(095) 253-7453
e-mail: mscwid@glas.apc.org

Received a grant of:
Geographic focus:
Dates of project:

\$360,000
Russia
10.94 - 9.96

To improve the business and communication capabilities of the for-profit businesses linked to the All-Russian Society for Disabled (ARSD). Training seminars are planned in business plan development and establishment of a cadre of business advisors in five regions of Russia. Communications between and among disabled-owned and staffed businesses with ARSD's central and regional offices are established through meetings, e-mail, and a business newsletter. The All-Russian Societies for the Blind and Deaf and their associate for-profit institutions are additional beneficiaries of this training and communications program.

**WORLD VISION
RELIEF & DEVELOPMENT
(WVRD)**

World Vision International
10-11 Mariahilser Street,
1070 Wien Austria
43-15261-333-51
43-15261-333-689 (fax)

220 I Street, NW, Suite 270
Washington DC 20003
(202) 547-3743
(202) 547-4834(fax)

Contacts:

Lisa J. Jackinsky
International Program Officer
ME/EE/NIS
Ann Claxton

Regional Director,
International Programs(DC)

World Vision/Moscow/Russia
Ul. Panfilova, 18a
(095) 244-0232(temporary)

Jos Vanhee/Tigran Yepoyan
(095) 158-7055
e-mail:moscow@wvrussia.msk.su
World Vision/Ekaterinburg
e-mail:rupen@rupdas.e-burg.su;
nadp@wvrus.e-burg.su
(3432) 23-20 46

Rupen Das
Project Manager
Irena Boskar
Nancy Unger

Received a grant of:
Geographic Focus
Dates of project:

**CHITA NURSING
ASSOCIATION**

Russia, Chita
Health Administration
Directorate
ul. Bogomiakova, 23
(30222) 613-46, 632-50(fax)

**EKATERINBURG PUBLIC
NURSING ASSOCIATION**
Russia, Ekaterinburg

(3432) 23-2046(tel/fax)

Valentina Vishnyakova,
President(Chita)
Valentina Kharina,
Director of Nursing College
(Ekaterinburg)
Nadezhda Gesudinova
President(Ekaterinburg)

\$750,000
Russia
10.94 - 9.96

To foster the development of nursing associations in Russia, leading to the development of a baseline survey of maternal/child health and of a Reproductive Health Center. The project is based in Ekaterinburg and Chita, where training in NGO management and in practical application of nursing standards is offered to the nursing associations.

Area hospitals serve as clinical demonstration sites, and equipment and supplies are provided to these facilities.

YMCA OF THE USA

YMCA AFFILIATES IN CIS

2200 Prospect Avenue
Cleveland, OH 44115
(216) 344-0095
(216) 344-3949 (fax)

Russia, Moscow 127276
ul. Acad.Koroleva,11, kv. 35
(095) 219-2067 (phone/fax)
(095) 205-4252

101 N. Wacker Dr.
Chicago, IL 60606-7386
(312) 269-0570
(312) 269-0517,
800-872-9622 (S.Evans)
(312) 977-9063 (fax)

Russia, Moscow
(09222) 30897

Contacts:

Donald Robinson
Project Director
Sam Evans
International Division
Director, Chicago

Joe Wootten
President, Moscow YMCA office
Anastasiya Tsiganova
Communication Director

Received a grant of:
Geographic Focus:

\$650,000
**Russia, Byelarus, Georgia,
Ukraine**

Dates of project:

8.92 - 6.95

To develop the capacities of local YMCAs the YMCA of the USA will work with it's International Office for Europe and the European Alliance of the YMCAs. Under this project, new indigenous groups will be partnered with strong YMCAs in the U.S. to assist in volunteer leadership development, program design and implementation. The project will strengthen and extend current efforts and existing associations to address immediate community needs. In addition, it will establish replicable leadership and administration models that the YMCAs of the NIS can use for their future expansion and development.

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IMPEDIMENTS TO VOLUNTARISM PROJECTS

**AMERICA'S DEVELOPMENT
FOUNDATION**

101 North Union Street
Suite 200
Alexandria, VA 22314
(703) 836-2717
(703) 836-3379 (fax)
e-mail: adf@igc.apc.org

Contacts:
Michael D. Miller
President

INTERLEGAL

Russia, 117331 Moscow
ul. Marii Ulianovoy, 16/1
(095) 138-4408
(095) 138-5686, 138-5916 (fax)
e-mail: nina@assist.msk.su
interlegal@glas.apc.org

Nina Belyaeva
President

Received a grant of:
Geographic Focus:

\$150,000
**Russia, Ukraine, Kazakhstan
and Uzbekistan**

Dates of project:

12.92 - 6.94

To research and disseminate information on the voluntary sectors in Russia, Ukraine, Kazakhstan and Uzbekistan including production of reports describing government policy toward the voluntary sector and the administrative and legal framework within which they must operate. Also, other activities include research and educational programs to build public understanding and support for the independent sector; legal consulting services to voluntary organizations to facilitate their registration and organizational development; technical assistance to voluntary organizations in the development of public policy and advocacy; and organization of a clearinghouse information network to encourage collaborative relationships among voluntary organizations at the local, national and international level.

**FOUNDATION FOR
SOCIAL INNOVATIONS
(FSI) USA**

777 United Nations Plaza
6th Floor
New York, NY 10017
(212) 697-6222
(212) 692-9748 (fax)
e-mail: fsiusa@igc

Contacts:

Leeda Marting
CEO
Nellie Gregorian
Vice President

**FOUNDATION FOR
SOCIAL INNOVATIONS
MOSCOW**

Russia
101000 Moscow
Novaya ploschad', 3/4
(095) 925-4345
(095) 921-0077
(095) 928-6211 (fax)
e-mail: fsimosc@glas.apc.org

Gennadiy Alferenko
President
Yelena Sedikova
Program Manager

Received a grant of:
Geographic Focus:
dates of project:

\$150,000
Russia, Kazakhstan
4.93 - 4.95

To carry out a model trainers of trainers (TOT) program for NGO staff. It will be focused primarily on fundraising, proposal writing and other appropriate topics relative to enhancing the long-term financial sustainability of NGOs. The activity will also expand FSI's research on local attitudes towards charitable organizations in the NIS.

244

**UNITED WAY INTERNATIONAL -
USA**

701 North Fairfax Street
Alexandria, VA 22314
(703) 519-0092
(703) 519-0097 (fax)

Contacts:

Russy D. Sumariwalla
President & CEO

Gary D. Thorud
Vice President,
Affiliates Programs & Support

Shanon Duling
Assistant Director,
Administration & Affiliate Support

**UNITED WAY INTERNATIONAL
MOSCOW**

Russia, Moscow
Ul. Gilyarovskogo, 5
(095) 208-8514(tel)
(095) 956-8114(fax)
e-mail: uwi@igc.org

Nancy Galloway
Director

Received a grant of:
Geographic Focus:

\$183,350
**Russia, Ukraine
and Byelarus**

Dates of project:

1.93 - 9.94

To compile and distribute through its local partners' informational directories about NGOs in Russia. It also plans to publish booklets on topics of interest to NGOs and directed to their questions. In addition to the information dissemination activities, UWI plans to run training programs through a new Moscow Volunteer Center. The Center is intended to be a multi-faceted facility where new/expanding NGOs can get information and training on such topics as volunteer recruitment, organizational structures for non-profits, board selection and other general administrative and management information. UWI's intention is that this volunteer center will eventually form a model for the establishment of similar centers in other republics.

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