

Organizational Development Manual
Armenia Social Protection Systems Strengthening Project
USAID SO 3.4
USAID Armenia 111-C-00-06-00067-00

AECOM International Development
July 2008



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This Manual is made possible with the support of the American People through the U.S. Agency for International Development (USAID). The contents are the sole responsibility of the authors and do not necessarily reflect the views of USAID or the U.S. Government

Introduction

Organizational development is a long-term process whose success depends on the implementation of a host of internal and external measures.

Internally, the process entails a paradigm shift in terms of reorienting all levels of personnel toward development goals; the creation of a Development Office; a high level of transparency, collaboration, flexibility, and creative thinking; well-informed planning and strategizing; the creation and maintenance of various databases; the maintenance of an organizational archive; and institution of self-monitoring and self-assessment mechanisms.

Externally, the process requires the implementation of highly-integrated public-relations (PR), fundraising, and advocacy plans.

The Basics

A Culture of Development

At the core of an institution's bid for organizational development rests an internal culture of unity in terms of awareness of clear development goals and dedication to their achievement. Without such awareness and dedication, organizational development is all but doomed to failure.

At the outset of an organizational-development process, the president, the development officer, and/or executives of the organization must formally present their vision for institutional growth to the entire staff, exchange ideas and opinions regarding best means and practices, confirm the commitment of all personnel to development goals, so as to be "on the same page," and proceed to determine specific procedures and develop various plans toward the accomplishment of the development vision. During this leg of the process, the president and/or executives of the organization must instill in the staff a sense of shared purpose and collective activism, encourage creative thinking and flexibility with regard to novel ways of doing things, and foster faith in the viability and fundamental necessity of the organization and its work.

Development Office

The creation of an in-house Development Office is the first practical step in formulating the specific policies, procedures, and plans of the organizational-development process, integrating organization-wide efforts toward development, and proceeding to implement a Development Plan.

The development officer must have requisite experience and skills in PR, grant-writing, fundraising, and advocacy. He or she must also have excellent management, communications,

and consensus-building skills, in order to effectively communicate with the organization's leadership and staff alike, and successfully steer the organization's development process.

Internal Cohesion

The ultimate success of any organizational-development process hinges on the internal harmony and cohesion of the organization's personnel.

While it is important to establish a clear hierarchy of functions and responsibilities for the smooth and effective management of the organization, it is crucial to foster mutual trust, a team spirit, open communication, and transparency, among the staff on the one hand, and between the staff and executive personnel on the other. To this end, staff members must be encouraged to feel free to express concerns or suggestions to executives. Leaders of the organization must at all times bear in mind that creative solutions are possible only in a pluralistic, nurturing, supportive work setting, and that disagreements on the part of the staff merit consideration before being dismissed as a challenge to the authority of the leadership.

Planning

Detailed planning for the future activities of the organization and organizational development in particular is crucial to securing the organization's continued viability and growth.

For the purposes of organizational development, planning essentially entails the preparation of a master Development Plan, which must include budgets and all the required components of development strategies and activities.

Self-assessment and monitoring

As there exists a necessary learning curve in all organizational-development efforts, any organization embarking on the process must, at the outset, institute a culture of self-assessment and self-monitoring, at both the staff and executive levels.

Training

Any organization that starts an organizational-development process must pay special attention to the qualification and continued skill-building of its staff, in order to optimally prepare it for the specific and general tasks required by the process.

The respective qualification and training needs of staff members can be determined by an outside expert. Based on his or her recommendations, the organization must take steps for the provision of adequate training to staff, particularly key personnel involved in development work.

Following initial trainings, the organization must take steps to provide continuing training and education to its staff, based on evolving needs.

Databases

Databases are among the “raw materials” of a successful organizational-development process.

In order to be effective in PR, fundraising, and advocacy, the organization must develop and maintain databases of:

- Media outlets (newspapers and magazines, radio, television, and Internet – local, international, and Diaspora).
- Fellow organizations.
- Donors (grass-roots donors, major philanthropists, family foundations, donor organizations).
- Government bodies (local and central).
- Local corporations, corporation executives, and business owners that have the potential of becoming actors in Corporate Social Responsibility (CSR) and community give-back.
- Advocacy groups and organizations whose work has a bearing on the activities and goals of the organization.

The organization must also create and maintain databases of:

- Organizational assets (properties, equipment, etc).
- Organizational personnel and volunteers.

Development Plan

A successful organizational-development process depends heavily on a Development Plan, which serves the process as a blueprint and a “manifesto” for growth.

A Development Plan, ideally encompassing five years, must include:

- A mission statement.
- A fundraising strategy.
- A PR strategy.
- A website-development strategy.
- Current budget.
- Graduated annual fundraising targets and equivalent budget projections.
- Targets in terms of personnel expansion, service expansion, property expansion, and other assets (equipment, cars, etc) expansion, if any.

The drafting and finalization of the Development Plan entails the active input and collaboration of the organization’s staff and leadership alike, and can benefit enormously from the guidance and collaboration of an outside expert. The collective nature of this work ensures that all members of the organization have a good understanding of the development process

and the particular tasks required of each individuals. In addition, the teamwork helps foster a sense that everyone has a stake in the success of the Development Plan.

I. PR

Maintaining good PR ensures that the organization enjoys continuous exposure among the news media (hence the public at large), government bodies, fellow organizations, advocacy groups, international agencies, foreign diplomatic corps, and existing and prospective donors. Such exposure facilitates the maintenance of public and government support of the organization, opens doors for partnerships, acts as a catalyst for advocacy and lobbying objectives, and is crucial for fundraising.

A. Promotional Material

PR activities across the board can benefit significantly from the availability of various promotional materials, which can be mailed, e-mailed, shown, or handed out as needed.

Promotional materials about the organization must include, at the minimum, a printed information packet containing:

- A letter from the organization president
- A mission statement.
- A description of activities/services.
- A list of accomplishments to date.
- Press clippings (if any).
- Success stories.
- A financial-contribution form for donors.

Promotional materials can also comprise PowerPoint files and short documentary clips highlighting the general work or success stories of the organization.

The organization can choose to produce longer documentary films about the organization. Such films can be screened at a variety of public events, including seminars, conferences, benefit concerts and exhibitions, etc.

Newsletters are another important promotional tool. Produced on a monthly or quarterly basis, newsletters can be posted online, on the organization's website, and/or printed for distribution. An effective newsletter is one which features lively graphics and an upbeat tone, and includes a letter from the organization president (or development officer), success stories, reprints of interviews, and a contribution form. In general, articles appearing in newsletters must touch equally on achievements and milestones on the one hand, and areas of need on the other.

B. News Media

The organization, through its Development Office (or Press Office, if any), must establish collaborative relationships with the editors/publishers of all major local and Diaspora news outlets. The organization must also establish relationships with local offices of international news outlets.

Press releases must be issued by the organization on a regular basis, ideally every month. Press releases can cover success stories and organizational news, or announce important organizational plans. Press releases should be brief, succinct, and include quotes from organization representatives or individuals involved in or connected to specific projects, milestones, or plans.

Through its relationships with news media, the organization must also encourage editors/publishers to conduct interviews with organization representatives, especially when a milestone has been achieved or is about to be achieved.

C. Fellow Organizations and Advocacy Groups

The organization must maintain relationships with select fellow organizations and advocacy organizations/groups which have converging interests and are involved in similar work. Such relationships are important for the development of partnerships and collaborative projects, and the securing of NGO-community support for advocacy or lobbying efforts.

Communications with fellow organizations and advocacy organizations/groups can range from the mailing (or e-mailing) of press releases and success stories to phone calls and meetings.

D. Government Bodies

The organization must pay special attention to initiating and maintaining excellent relationships with local as well as central authorities, particularly with leaders or agencies whose functions can have a direct bearing on the activities of the organization.

Local and central authorities can provide financial or in-kind support to the organization, help reform or enact regulations or laws pertaining to the organization's work, and help raise the organization's public profile.

Communications with local and central authorities can range from the mailing (or e-mailing) of press releases and success stories to phone calls and meetings.

E. Foreign Diplomatic Corps

Another key PR factor is the foreign diplomatic corps, which include embassies, foreign-aid agencies, and other entities with local offices. The organization must initiate and maintain

relationships with those foreign diplomatic corps which present opportunities for collaboration, partnerships, or funding, or which can help raise the organization's profile at the local or international level.

Communications with foreign diplomatic corps can range from the mailing (or e-mailing) of press releases and success stories to phone calls and meetings.

F. The Diaspora

While Diaspora communities will, in principle, be abreast of the organization's activities and plans through the news media, the organization must make a special effort to reach out to such communities. As a whole, the Russian-Armenian and worldwide Armenian diasporas wield enormous financial and political influence in terms of the ongoing development of Armenia, a fact that all Armenia-based NGOs must take into serious account.

Accordingly, the organization must explore opportunities to forge partnerships or launch collaborative projects with various Diaspora organizations or church communities. Even if partnerships or collaborative projects are not on the horizon, the organization will benefit by initiating and maintaining relationships with various Diaspora entities.

Communications with such entities can range from the mass mailing (or e-mailing) of press releases and success stories to phone calls and meetings with select community leaders.

G. Businesses

For sponsorship and fundraising purposes alike, the organization must vigorously pursue ongoing relationships with local businesses and corporations, as well as local chapters of international or Diaspora-based enterprises.

The organization must be extremely selective in choosing businesses with which to cultivate relationships, basing its solicitations on the relative probability of sponsorship or other assistance.

To this end, the organization must be well-informed about the products and services of a given enterprise and the relative willingness (perceived or documented) of its executive personnel to sponsor events or provide financial or in-kind support.

To maintain relationships with businesses and solicit them for sponsorships or financial assistance, the organization can approach them through letters, phone calls, and, ideally, meetings. (See "Corporate Social Responsibility" under "Fundraising" for a broader understanding of the role of corporations in the development of NGOs).

H. Public-event Planning

To secure additional conduits for public exposure and hence opportunities for public support in terms of fundraising, sponsorships, volunteer recruitment, and in-kind assistance, the organization should consider organizing and/or participating in a variety of events. These might include seminars, lectures, documentary screenings, festivals, fairs, expositions, and exhibitions.

To better prepare for such events, the organization might benefit by developing a six-month or one-year public-events plan.

I. Donor Cultivation

Donor cultivation is possibly the most labor-intensive and volatile aspect of the organizational-development process. As a rule, it takes a long time to cultivate and “win over” donors. Before they write a check, most donors, whether individual or institutional, must have developed trust in the organization, believe in its work and mandate, and have faith in its ability to implement projects and sustain its mission in the long term. To be in place, all these factors require vigorous and systematic cultivation on the part of the organization.

Based on the Development Plan, the organization’s Development Office, in conjunction with the president and with the input and collaboration of key personnel, must cultivate specific prospective donors and donor groups, employing specific strategies for each category.

A requisite to any donor-cultivation effort is a thorough knowledge of the background, track record, and support preferences or inclinations of individual donors, donor organizations, or communities being solicited. Since different donors and donor groups require different solicitation approaches, the Development Office must custom-tailor its donor-cultivation strategies for specific targets.

Thus, for instance, whereas solicitation for grass-roots support in the Diaspora might entail general letter campaigns, cultivating an individual philanthropist might require several steps including an introductory letter (accompanied by an information packet), a follow-up letter, a follow-up phone call (if possible), and a subsequent meeting (or several meetings) with the donor.

Neither should donor cultivation end when a donor makes a contribution or when it becomes apparent that a donor is not yet prepared to give financial support. Especially in the case of a donor who has come through, cultivation must continue after a contribution has been made. In such instances, the organization’s president or development officer must formally thank the donor for the support, and proceed to periodically inform the donor, through progress reports and other documents, of how the contributed funds are being used and what accomplishments they are making possible. Maintaining a relationship with the donor through letters, phone calls, and personal meetings ensures that the donor or donor organization is satisfied with their contribution, potentially paving the way for additional support by the donor down the line. The organization must also encourage donors to visit the organization premises and the sites

of its beneficiaries. Such visits help bolster donors' trust in the organization, give them an opportunity to experience first-hand the positive impact of their support, and increase the chances of additional support down the line.

Materials sent to existing or prospective donors as part of a donor-cultivation program can include general or custom-tailored solicitation letters, information packets, success stories, and progress reports (including PowerPoint files), depending on the particular phase of the donor-cultivation process and the preferences of the donors.

2. Fundraising

A central component of the organizational-development process, fundraising requires a high level of teamwork, a thoroughly professional approach, and a fair amount of creative thinking.

From the organization's point of view, laying the groundwork for fundraising entails having all the requisite human and technical resources in place: a dedicated Development Office, relevant databases, a thorough knowledge of prospective donors, good PR, relationships with key players (editors, journalists, elected officials, fellow organizations, etc), ability to write solicitation and cover letters, ability to write concept papers and grant proposals, etc.

Successful fundraising also requires a good grasp of the "public mood" (economic, cultural, political, and social trends) as well as constant screening of philanthropic patterns and trends (through the news media and donor websites). Being abreast of such patterns and trends helps the organization and the Development Office in particular to make well-informed decisions in terms of the timing, nature, and target of fundraising efforts. To this end, the Development Office, in conjunction with the organization's president and other personnel, must be in constant brainstorming/creative mode, seeking to come up with fresh, effective ways and means to raise funds.

A. Fundraising Plan

The organization's Development Plan must include a Fundraising Plan, which can encompass a time period ranging from one to two years.

The Fundraising Plan should articulate a fundraising strategy comprising:

- Fundraising goals (monetary amounts).
- General fundraising-source targets (communities, individual philanthropists, donor organizations, fellow organizations, government bodies, foreign governments, special public events).
- A solicitation and fundraising methodology for each category.
- A detailed description of how the raised funds will be used.

B. Individual donors

Based on the organization's list of prospective individual donors and its research regarding such donors' particular philanthropic track records and support preferences, the Development Office must choose a list (or various lists) of donors to target for fundraising solicitation.

Solicitation should start with a letter introducing the organization and the particular project or program for which funding is being sought, and making a strong case for supporting them. The letter can also be accompanied by an information packet about the organization and a concept paper for the project or program for which funds are being sought.

The next steps depend largely on the response of the donor. If he or she declines to support the organization, a follow-up letter should be issued to thank him or her for his or her time and leaving the door open for possible future support. If the donor shows interest in providing support, immediate steps should be taken to contact the donor (through a letter or phone call) to submit a full grant proposal (if required) or discuss the details of funding.

C. Grass-roots donors

Targeting specific communities or the public at large entails a general letter campaign. Bearing in mind that consumers today, particularly in the West, must deal with a barrage of junk mail every day, the solicitation letter must carry a highly engaging tone and narrative, and strive to make an immediate emotional impact on the reader. The letter can be accompanied by a visually captivating informative sheet on organization activities and projects as well as a contribution form.

Depending on the response (or non-response) of letter recipients, the letter campaign can be renewed periodically, with adjustments in the topic and/or language of the letter, as needed.

All respondents who make a donation must be duly acknowledged with a thank-you letter.

D. Corporate Social Responsibility

Historically, businesses and corporations have played a major role in supporting and empowering NGOs. Corporate dedication to public causes and community give-back is encapsulated in the concept of Corporate Social Responsibility (CSR).

In Armenia today, CSR is as yet in its infancy but already there are encouraging indications regarding its future growth.

Businesses and corporations can benefit NGOs through:

- Financial contributions.
- Financial support of specific projects or programs.
- In-kind donations.
- Sponsorships of public events.
- Sponsorships of publications.

Given their potential as a highly promising source of support, businesses and corporations must be vigorously cultivated by the organization. To this end, the Development Office and/or the organization's president must research local businesses and corporations to determine possible supporters, establish relationships with select company owners and/or executives, and arrange meetings with them to pitch specific projects/programs and request donations or sponsorships, always underscoring the bilateral benefits of CSR.

The Development Office must pay special attention to publicizing (through press releases, interviews, documentaries, notices on the organization's website) all instances of corporate support within the context of CSR.

E. Fellow Organizations

The organization must always explore opportunities for partnerships and/or co-funding with fellow organizations. Toward establishing partnerships and/or co-funding arrangements, the organization's president or the Development Office must take a more direct approach, by soliciting target fellow organizations through e-mail, phone calls, and meetings.

F. International Donor Organizations, Armenian Donor Organizations, and Family Foundations

As most international donor organizations, Armenian donor organizations, and family foundations have specific policies and rules in terms of the types of organizations and projects they support as well as funding scale and grant-proposal protocols including time frame and deadlines, the organization's Development Office must custom-tailor its solicitation of such funding sources.

While some organizations may choose to consider a solicitation letter outside their usual grant writing process, most organizations enforce strict solicitation (cover letter, grant application, concept paper, grant proposal, deadline) procedures.

G. Benefit Events

The organization must always explore opportunities for organizing and/or participating in public fundraising events. Such events may include cocktail or dinner receptions (which in turn may include auctions), exhibitions, concerts, fairs, expositions, and festivals.

When organizing exclusive events such as dinner receptions, the organization can benefit from corporate sponsorships, art or other auctions, and onsite individual donations.

When participating in events such as fairs and festivals, the organization can benefit from corporate sponsorships as well as by setting up booths or pavilions where event attendees can

be familiarized with the work of the organization (verbal presentations, printed information packets) and encouraged to support it.

In general, benefit events provide a broad range of fundraising opportunities and can go a long way in terms of raising public awareness of the organization's work and projects.

3. Website

A good website is a critically important asset for any organization, whether or not it is engaged specifically in an organizational-development process.

The following are the key qualities of an effective organizational website:

- Captivating graphics – including a color scheme and graphic elements that reflect and symbolize the organization's raison d'être, philosophy, activities, and projects. The visuals must also include a fair amount of photographs.
- Engaging language. In general, the tone must be upbeat and inspirational, even while discussing problems that the organization is addressing and its areas of need. As a rule, the language must be compelling and urgent enough to inspire the visitor to support the organization.
- Informative, interesting, succinct. In general, the text must tell a good story and provide sufficient information without being long-winded or overloaded with detail. Additionally, text can be peppered with quotes from donors, government ministers, media profiles, etc.

The following are the key components of an effective organizational website:

- Letter from the president.
- Mission statement.
- Organization history.
- Geography of organization activities, services, branches, centers, etc.
- Success stories; an archive of past success stories.
- Press releases; an archive of past press releases.
- Projects (current and future). Milestones. Awards (if any).
- Donor profiles (optional).
- Country profile (optional).
- Calendar of events.
- Links to relevant fellow organizations, government ministries, resource centers, online resources, donor organizations, etc;
- Volunteer recruitment page (optional).
- Feedback page.
- Contact page.
- Donation page – with information about nonprofit status and donation instructions.

4. Advocacy

To help facilitate the organization's activities, optimize its services to its beneficiaries, and in general help improve beneficiaries' lives, the organization must engage in advocacy and lobbying efforts, at both the public and government levels.

Advocacy can lead to legal reforms and/or the enactment of new laws and regulations, raise public awareness of societal issues, and in general contribute to the development of a socially-conscious, proactive civil society.

The organization can greatly benefit from the formulation of a short- or long-term Advocacy Plan, which can be part of the Development Plan.

Advocacy includes:

- Creating and maintaining relationships with relevant advocacy groups; developing collaborative relationships and/or partnerships with advocacy groups where interests converge.
- Creating and maintaining relationships, and closely working together with government bodies that can enact/reform rules, laws, or regulations affecting the activities of the organization.
- Lobbying the government on issues that have a direct or indirect bearing on the success of the organization.
- Publicizing advocacy/lobbying successes through press releases, interviews, etc.

5. Reports

For smooth transitions at various stages of the organizational-development process, to learn from past mistakes, to institute best practices based on experience and cumulative knowledge, and to constantly strive for improvement, the organization can greatly benefit from an internal culture of self-assessment and self-monitoring, at the staff and executive levels alike.

Self-assessment and self-monitoring can take the form of quarterly reports on achievements, shortfalls, problem areas, lessons learned, and next steps. Individual departments can write their own reports, and the president or the development officer can then write a summary and distribute it internally.

All such reports must be brief, succinct, and as objective as possible, to avoid the risk of unnecessary and time-consuming bureaucratization and to maintain the internal cohesion and harmony of the organization. After all, workers should concentrate on their actual work, not writing reports or worrying about possible consequences.

6. IT

Ideally, the organization should have an in-house IT person dedicated to maintaining the organization website, e-mail system, and other technology-related processes. If the organization is unable to engage the full-time services of an IT person, part-time or in-kind services should be sought.

7. Archiving

An organization's archive represents its history and includes a broad range of information that will help the staff and leadership steer the organization in the right direction.

At the outset of the organizational-development process, the organization must make sure to maintain a highly-organized archive that should include separate compartments for accounting, letters sent and received, minutes of meetings, press clippings, success stories, reports, radio and TV clips, and other documents.

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