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Mentoring Leaders of HIV/AIDS Community- Based Organisations

Reflecting on
The Barnabas Trust's
approach in South Africa

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Introduction

Foolishly, we often try to strengthen community-based organisations (CBOs) as if they were identical to formal organisations. We ignore the very differences that make CBOs potentially the most effective agents of development change. Consequently we find our capacity building at best ineffective and at worst destructive.

Leadership is particularly important in small, informal organisations such as CBOs, being both their major strength and often their critical weakness. This Note describes an innovative mentoring approach to leadership development that concurrently builds the capacity of the CBO as an organisation. This approach is being pioneered by the Barnabas Trust in South Africa which works alongside 53 HIV and AIDS-related CBOs.

CBO Leaders

CBOs in South Africa have great potential to catalyse change because they are initiated by motivated, dynamic people; people who notice their neighbour's closed door, cold fire and hungry children. They know the names and stories of the people affected and the names of their family members. They see the suffering around them and they care deeply about it. This compassion inspires founders to

respond. Their main qualifications are simply that they live in the communities where the problems exist and they care enough to do something about it.

While some founders have professional skills (retired nurses, teachers or social workers), most leaders are not highly educated or articulate people with experience in the NGO sector. They have never done community development work before, and they have no past experience or relevant training to help them. They are predominantly 'ordinary' people, often women, who expect to live their whole lives in the same community. But they are highly motivated and willing to work hard to ease the suffering that they see around them every day.

This lack of experience in the leadership of organisations, however, can make CBOs highly vulnerable and fragile entities. Without support, many leaders burn out. In the face of a bottomless pit of need, the work grows and grows. As the work expands more management is needed. But few CBO leaders have management experience, nor are they particularly interested by organisational administration. They want to change the world, not to make notes or write reports about it. They rarely have a background in book-keeping and financial management.

As a result, simple problems can go unresolved, paralysing the work. Internal conflicts arise when everyone is under stress and emotional pressure. Sometimes money disappears or runs out, because of poor planning and inadequate financial systems.

Other community members can become jealous and start malicious rumours. Valuable volunteers get frustrated and stop work because their needs are not being met or they are tempted away by a better offer elsewhere.

Capacity Building Experiences

Many donors and government institutions acknowledge the value and potential role of a strong CBO sector and have expressed a commitment to support CBOs working in the field of HIV and AIDS. However, CBOs' lack of capacity, poor infrastructure, lack of access to technology and lack of confidence when presenting their work has made the vast majority of them invisible to donors. This has also kept them outside the broader NGO networks. Where efforts have been made to reach out to CBOs directly, the sector has become a graveyard for conventional funding and capacity building programmes. Resources are often wasted, sometimes misused and training frequently never applied or implemented.

Time and again expensive skills development initiatives have yielded no obvious lasting results and well-intentioned assistance has been given in a way that poisons the relationships and kills the volunteer spirit in these organisations. Too much money has been given with too little preparation, support, accountability and understanding of the unique pressures on the CBO leaders.

The pollution of resources

The way in which resources are channelled into a mentored CBO needs to be very carefully handled. Time and again we have seen how too much money introduced too soon can act like a poison on the organisation. Suspicion and resentment explode, relationships fall apart and more often than not, groups collapse as a result.

The result is that CBOs are now extremely vulnerable and difficult to sustain in South Africa and the sector is starved of the inputs needed to function effectively.

CBO Capacity Building Challenges

CBOs are unique entities, very different from NGOs. To develop structures and functions to the point where they can work effectively and sustainably they need something more than just training, money and appropriate materials. They need a supportive human relationship in the context of their own community, with someone who knows them and can help them to use what they have learned and develop accountable ways of working.

AIDS-related CBOs have a complex task. To deliver quality services to their HIV infected and affected 'clients' it is vital that they are able to run accountably and efficiently with basic systems and structures in place. At the same time they also need to be rooted in the affected communities, capable of anticipating, adapting and responding to the rapidly and continuously changing situation – while sustaining themselves and maintaining a strong grasp of their own vision for their community and the work they are doing. They need to be

adept at learning and capable of thriving in a changing and interdependent world. In a rapidly shifting context, CBOs face severe challenges in prioritising their strategy. A group may begin with home-based care and possibly treatment support and adherence work. But they soon start helping clients with advice because in their day-to-day contact, the volunteers see that the clients are having difficulty accessing grants and getting their identity documents in order. Then the CBO leadership and volunteers move into child care, in response to the needs of the orphaned and vulnerable children (OVC) they are seeing every day in their work with clients. And because the HIV+ clients, OVC and the volunteers are struggling to survive, food gardens and income generating activities soon become part of the group's activities.

The Barnabas Trust's Approach to Mentoring CBOs

The Barnabas Trust was established as an independent trust in South Africa in 2001 at the instigation of the National Department of Health as part of their Mentoring for Change project. Founded specifically to mentor CBOs and faith-based organisations (FBOs), the Barnabas Trust is currently working alongside 53 CBOs and FBOs working in the field of HIV and AIDS in the Eastern Cape Province.

CBOs are selected for mentoring using the main criteria that:

- They have a clear vision
- They have already been operating in the community for six months
- They are accepted by the community
- The majority of the group's volunteers and leadership live in or near the target community
- They show a willingness to learn and a desire to be mentored (not just the desire for funding)
- They have not received significant funding for their work in the past

The mentoring process supports leaders in a balanced, systematic way in the context of their organisation's unpredictable day-to-day life. Skills, communication, co-operation and organisational structures are built up gradually using information specifically developed for the CBO sector. As the organisational capacity of the mentored CBO grows, so does the funding it receives. The group starts with a small monthly allowance which they must administer themselves before they move on to larger grants in the second year, which they must apply for and report on.

The Barnabas Trust CBO capacity building model¹ combines mentoring, training and limited financial support:

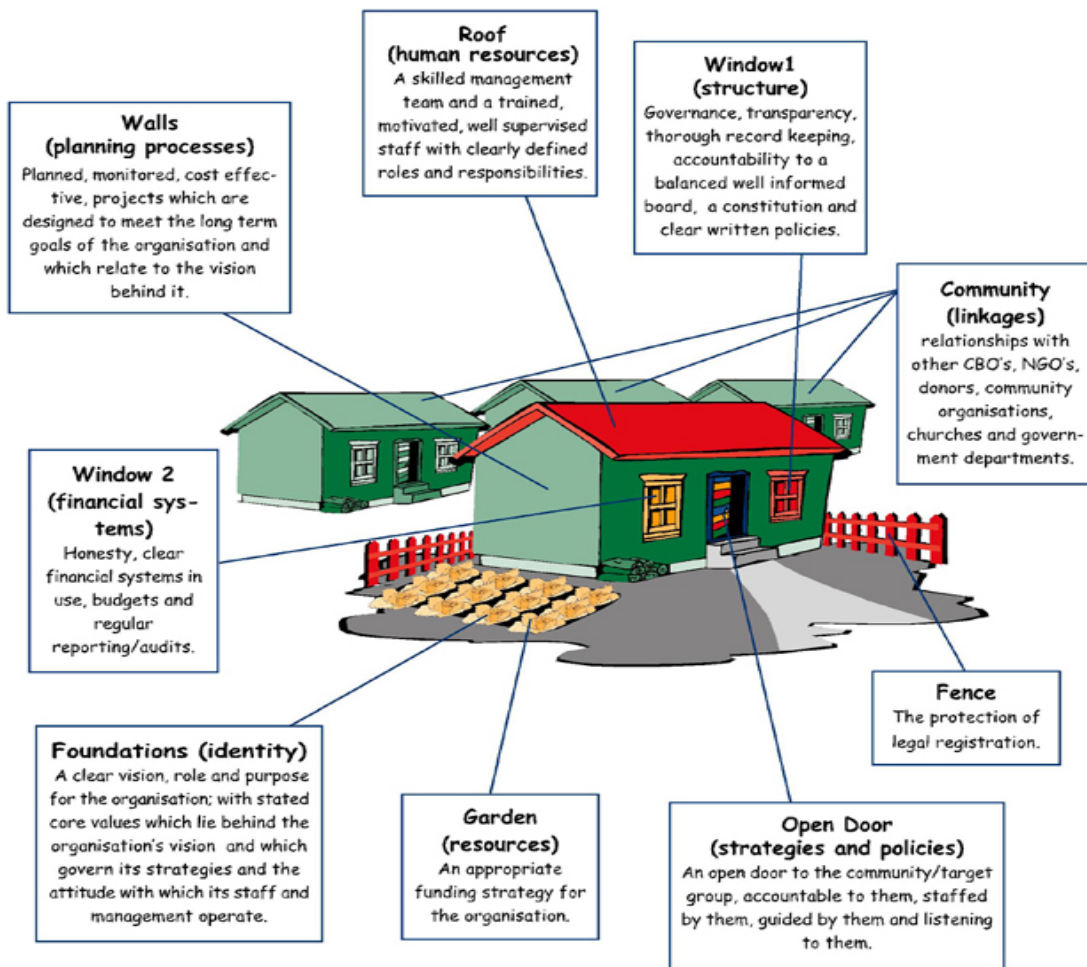
Mentoring - A two-year relationship with a trained and experienced 'mentor' who will visit the leadership of the organisation on a weekly or bi-monthly basis. They provide technical support and assistance with the establishment of action learning processes as an integral part of the life of each organisation. The mentor also gives encouragement and practical support to the group leaders as they start to use and share the skills and insights from the training process and as they build up the structures and systems of the organisation.

¹ Symes, C. (2005) Mentoring Community Based Organisations – a companion to the New Tool Box. Mentoring Resource Network and SA National Department of Health.

Training - A clear and comprehensive basic training of two three-day modules six months apart. This involves four or five people in the organisation's leadership. The initial emphasis is on developing a culture of reflection, learning and planning alongside their action.

Financial support - A modest regular 'allowance' to the CBO, which is initially given monthly and then, as their bookkeeping and budgeting competence improves, in the form of lump sums. The only financial rules are that the group should budget, track and report on the money they receive.

The Content of the Mentoring Process



Although every CBO is different, there are a number of basic necessary elements. These elements are illustrated in the House Model above. Each part of the house corresponds to a key area of the life and work of a CBO. During the Barnabas Trust training and mentoring programme, the CBOs go through a

process of looking systematically at the different parts of their life and work. They use a combination of appreciative enquiry and participatory situational analysis exercises to answer the questions:

- ‘where are we?’
- ‘where do we want to be?’
- ‘what is preventing us from getting there?’

Once the strategic and specific goals are established, indicators are identified, based on the group’s hopes and fears associated with each goal. CBO progress is monitored against these and the benchmark provided by the CBO House Model.

The Barnabas Trust also uses a timeline which lists key benchmarks, as a guide for the work with each CBO on their mentoring programme. Every group starts at a different point and progresses at a different rate. But, after approximately a year to 18 months of mentoring the mentored CBOs would be expected to have progressed to a new level where the following has happened:

Indicators of Progress

- The leadership struggles associated with bringing resources into an organisation should be settled
- The group should have stabilised, grown and formalised into a registered entity
- They should be able to monitor their own progress towards their goals and to resolve problems as they occur
- They should have a bookkeeping system working smoothly, resulting in balanced books at the end of every month and passed audits at the end of every year
- The leadership team/governance structures should be stable and working together as a team
- The activities and decisions of the organisation should be planned and recorded
- They should have access to ongoing funding through a relationships with appropriate donors who will pay them on time

Mentoring is a long, patient process in which CBOs and their leadership teams are given a safe place to try and to fail, to evaluate their failures, to learn from them and to try again in the context of a supportive relationship with another more mature organisation which is represented by an individual mentor.

Because it often takes longer than 18 months to achieve these goals, mentored CBOs still have occasional access to their mentor after the end of the formal mentoring process. In our experience, however, the leaders of CBOs are strong, competent people with a passion

for what they are doing and a desire to be independent. So as long as the foundations have been established effectively during the mentoring process, such follow-up is only asked for when it is really needed.

One of the most important things about mentoring is that it is temporary. One day, the leadership of the CBO must feel that they no longer need their mentor. So the entire process, including every decision taken, needs to be handled in a way that gradually builds the group’s confidence and sense of empowerment.

Sheltered finance

Giving the groups a 'sheltered' opportunity to work with lump sums is also important. Very often, when the groups receive their first lump sum – a payment intended to cover three months of activities – they run out of money after the first two months. If this happens, the mentor can face the implications of running out of resources during the third month with them and help them to take steps to ensure that it doesn't happen again; a practical lesson they never forget.

Key Principles of The Barnabas Trust's Mentoring Practice

1. There is a link between emotion and motivation to act. If we want to bring change, we need to break through apathy and powerlessness by using emotions and motivations. The mentor is available to help people deal with issues they feel strongly about or things they urgently have to do, as they arise in their own situation. For example, the group members learn to write a budget based on the plans they have already made the month before they receive their first payment. And they learn to keep the books using their own figures, bank statements, cheque books and receipts, so they can track their own expenditure against their own budget.

2. Discussion is vital. Everyone living in a small community is an expert on their own situation. The outsider may be able to give valuable information on what has been done elsewhere, but insights from the local people are most needed in the problem analysis and the search for solutions. Only when people are part of the discussion and the plan is a product of their own critical judgment, will things change in the web of history, relationships and motivations that exist

in any community. The mentor therefore encourages participation and as much democracy as possible in organisational structures. The mentors also ensure that key players are involved in building the vision and making important strategic decisions and plans.

3. People are motivated by their own search for solutions. People remember and commit to things they discovered themselves. It is far more effective to get a group fully involved discussing (even arguing about) a problem first, than it is to come with a ready-made analysis and solution. The mentored group's responses to ready-made solutions are usually polite, quiet, uninterested or intimidated. The challenge becomes persuading them to 'buy in' to the plan – a potentially fruitless and endless struggle.

Consequently mentors do not give answers, but instead they present key issues and problems to the group using creative, interactive techniques. Once the group are engaging with the problem, mentors help them to search for solutions and strategies themselves. The resulting plan may be rough around the edges, but it is likely to work better because the group understand how the solutions relate to the problem. They also know it is their own plan and are committed to making it work. Later on, the mentor also ensures that learning occurs through the group's own regular analysis of events and problems during the implementation of the plan.

4. Ambition, motivation and purpose grows as people achieve their goals. People need to see that their own analysis was correct, that their ideas work and their own efforts are making a difference in their community. The most effective way to achieve this is to use a learning cycle of identifying needs, solving problems, taking decisions, laying out plans, implementing plans and

looking in detail at the process, the outcomes and the changing context to identify new needs, solve new problems and make new plans.

Too often, CBO plans and decisions are never implemented. Mentors make sure that the group works towards clear, simple relevant goals that they have set for themselves. Each group is also helped to get into a disciplined rhythm of thinking, planning, working and analysing their work to celebrate success and understand failures, then plan again...

5. People learn most from mistakes and conflicts. Mistakes and conflicts are a valuable part of mentoring, like windows into what is really going on in the organisation. Frequently, issues that need to be dealt with only come to light when there is a conflict or crisis. At such times there is also plenty of motivation to change and openness to new ideas, because emotions and energies are high. It is clear to everyone that this is an issue that needs to be faced and resolved. Learning from mistakes is a very effective way of learning. People are likely to remember a lesson learned from a corrected mistake. Admitting an error, allowing the group to explore it, to give feedback and to draw recommendations from it, is a powerful tool for building trust and respect. The mentors must expect plenty of mistakes and plenty of conflict. They also need to be able to stand back from the group enough to be able to identify the root causes of the conflict and what needs to happen in the group to address the issues that the conflict is raising.

Looking for conflict

If a group is too 'quiet' about three months into the mentoring process we start to worry and look carefully at the leadership to see what the matter is. Why? Because there will inevitably be a storm of some kind as they adapt structurally and psychologically to the new dreams, ideas, resources and opportunities that come with the programme. If the group are too 'quiet', it usually means they are being *kept* quiet.

Valuable lessons can come from conflict. For example, we noticed recently that one of the previously harmonious groups we work with was now having real problems with conflict and quarrels and accusations among the volunteers. On the surface it looked as if the group was falling apart. But when we looked at the situation carefully, we realised that the group were not coping as well with the emotional stress of losing clients as they had been previously, and the result was this new pattern of angry behaviour between the members of the group, and especially between the volunteers and the leadership.

When we asked why there was such a sudden change, we discovered that a local pastor who played a quiet but key role in the emotional 'maintenance' of the group had moved on to another post. The group no longer had a safe, understanding outlet for their feelings and were taking them out on each other.

6. People must be helped to fulfil their own dreams and potential. The vision belongs to the CBO and not to the mentor. The vision was with the CBO before the mentor arrived, and it should still be fully theirs after the mentoring process is over.

Sometimes in a mentoring situation, the mentor develops their own picture of what a group could become. In such situations, the mentor is tempted to encourage them along that path, without realising that they may have a different dream and emphasis of their own which is being pushed aside.

Mentoring manipulation?

When a mentor puts too many of their own suggestions forward a subtle power shift takes place. The group starts to rely more and more on the mentor for ideas and direction and the enthusiasm slowly drains out of them. Eventually, a crisis inevitably comes when the mentor begins to complain that the group have no initiative or commitment and the group members become divided and resentful, behaving as if they are working for the mentor, not for themselves and their own community.

The Roles of a Mentor

Mentors need to be patient, with proven character and a willingness to be flexible and hard working. Experience working within an NGO, CBO or FBO is extremely useful.

Once selected, the mentors are trained in the Barnabas Trust method and materials; their role; the differences between training and mentoring; and the empowering principles outlined below. In addition, they are quickly introduced to direct work with groups, but accompanied by an experienced mentor.

The role of a mentor fits into three broad categories:

1. A supportive relationship with the leaders and volunteers.
2. Involvement in the day to day life of the group.
3. Access to networks, technical information and advice.

1) A supportive relationship with the leaders and volunteers means:

- Listening to the group and allowing them to express their feelings and frustrations.
- Affirming them and building their confidence.
- Encouraging them and giving feedback.
- Helping them to understand the causes of conflict and to resolve it.
- Promoting positive values, a culture of mutual respect and good conduct in the group.
- Appropriate spiritual support (depending on the group).

2. Involvement in the day to day life of the group means:

- Regularly meeting them where they are.
- Helping them use what they have learned regularly in the life of the group.
- Making sure the group listen to each other, communicate and encourage participation in their planning and decision making.
- Enabling change and problem solving.
- Holding them accountable for their own decisions and plans and reporting on progress every month.
- Making sure they learn from mistakes and use the lessons in their new plans.

3. *Access to networks, technical information and advice means:*

- Providing information when it is needed.
- Helping them to understand and use information.
- Working through material in the New Tool Box.
- Using networks to get information, training and resources that the group want/need.
- Initially acting as an advocate for the group.
- Then enabling the group to network and speak out for themselves.

What We Have Learnt About Mentoring

The Barnabas Trust has worked with 12 mentors since its inception. We have learnt that the mentor needs to be someone that the group will respect and listen to. There is no point choosing a young, inexperienced mentor who, for cultural reasons, will not be respected or heard by the group. There are enough barriers to the progress of the organisation without introducing a new one in the form of an unsuitable mentor. In rural areas especially, the mentor should also speak the same language as the people he or she is mentoring.

No single mentor has it all. Some are good with people, but struggle to get the job done. Others are so task-oriented that they forget about the relationships and leave the group behind. Others are so soft-hearted that the group exploits them and takes them for granted. Still others fail to treat the group members with the respect they deserve. At the Barnabas Trust we have found it helpful to send mentors with different strengths out together in teams to tackle different situations that come up in the CBOs.

Often, when mentors see a colleague handle a situation well, they pick up skills and attitudes that help them to do a better, more balanced job in future.

Mentoring CBOs is a stressful job. A mentor needs to be someone who is able to stay calm in a crisis and think strategically ahead for the good of the CBO, while keeping the issues facing the mentoring organisation they represent in mind as well.

The Humility of a Good Mentor

At times the mentor may have to apologise to a group for an error or for some aspect of their behaviour. Some years back I remember having a mentor come to me complaining about the fact that the group were useless and never did anything for themselves. When we met with the group however, it became clear that they were deeply resentful of the mentor, because they felt that he was dominating the group. To help both sides, I asked the group to act out the river crossing, a drama which illustrates dependency, and we went through the questions with the mentor and the group together. The result was a heartfelt apology to the group from the mentor for his superior attitude, and an apology back from the group for their lack of communication and resentment. I won't pretend that things were ever perfect after that, but from that time on the group became far more empowered and independent, and the mentor was extra careful to affirm the group and to resist the temptation to do things for them instead of with them. And today the group are still very strong.

A group might be going along beautifully one day, and the next time the mentor visits maybe a key person has decided that she is leaving, or maybe some money has disappeared and they

are in deep crisis. Experience is more valuable than anything else in such situations, and the mentor will do a far better job if they have opportunities to discuss issues and the best way forward with other people involved in similar work. At the Barnabas Trust, the mentors meet regularly to review the progress of each group together. Where there is a major crisis or conflict they listen and help each other and may even visit a group together to introduce a mediator from outside the situation.

We have learnt that in handling conflict mentors should:

- Ensure that everyone understands the roles and responsibilities of leadership.
- Encourage the group to make the management representative avoid divisions between the ‘educated’ management and the ‘less educated’ volunteers.
- Encourage the group to share the leadership tasks and avoid all the work being done by one person.
- Make sure that the whole leadership is involved in discussions and important decision making.
- In a conflict situation, be careful to listen to everybody, stay impartial and avoid taking sides.

The more mentoring people do the better at it they become. Once mentors have worked with several CBOs, they start to see patterns emerging, and can usually anticipate what is likely to happen next and prepare for it.

Mentoring is definitely a job for emotionally stable people. They must be able to keep their own self-esteem separate from the progress of the CBOs they are working with – that is of course unless the failure of the group actually turns out to be the mentor’s fault! When things go well, they need to be able to give credit to the group, and

when things go badly, they need to be able to think about the situation and what to do next realistically without taking the failure to heart.

Conclusion

This Note has outlined one particular approach to mentoring that combines both leadership development and organisation development for CBOs. This combination ensures that change is both personal and also applied to a very practical and meaningful organisational context. The rootedness of the mentoring process in practical things that matter to the leaders is a key secret of its success.

One indicator of success is replication. In the Eastern Cape, the Provincial Department of Health funded four NGO service providers to mentor 72 CBOs using the Barnabas Trust approach and materials during 2004/5. Nationwide in South Africa, the national Mentoring Resource Network (MRN) has adopted the Barnabas Trust approach to mentoring CBOs and FBOs working in the field of HIV and AIDS. Nationwide, with funding from the National Department of Health and the Government of the Netherlands, Barnabas Trust training teams have worked systematically with the 10 other MRN members around South Africa throughout 2004, to help them to use the New Tool Box materials and the Barnabas Trust mentoring system in their own provinces.