

CHURCHES AND ORGANISATION DEVELOPMENT IN AFRICA

DIRECTIONS AND DILEMMAS FOR NORTHERN NGOs

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INTRAC

The International NGO Training and Research Centre was set up in 1991 to provide specially designed training, consultancy and research services to organisations involved in international relief and development. INTRAC's goal is to improve NGO performance by exploring NGO policy issues and by strengthening NGO management and organisational effectiveness.

CORAT Africa

The Christian Organisations Research and Advisory Trust was initiated in 1975 to enable churches and church-related organisations to improve their management capability. Based in Nairobi, Kenya, it offers training, consultancy and research services throughout Africa. CORAT was started in recognition of the critical need for better management in Christian organisations that is seasoned by Scriptures, African cultural insights and the best in management practice.

Bilance

A Catholic-related NGO from the Netherlands which has had close contact with both these organisations over the years. Bilance has recently very generously supported a linkage programme between CORAT and INTRAC whereby both organisations can cross-fertilise experience and learning so that they can provide even more effective services to their clients. This paper is a product of this linkage.

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INTRODUCTION

Background

Churches have played a major role in the implementation of relief and development work in Africa over the last three decades. They have received considerable financial support for this work from church-related development and mission agencies in Europe and North America. Yet many of the problems of poverty remain seemingly intractable. There are concerns that the church development programmes have not been achieving their objectives for impact. To some extent, it has become apparent that the internal organisation and management weaknesses of church and development structures have contributed to these performance shortfalls. As a result, ‘capacity-building’ programmes have become very fashionable over the last five years. Church-related development agencies in Europe are increasingly interested in whether Organisation Development (OD) can have any impact on strengthening the capacity of churches to carry out effective development work. Through their engagement with such processes, staff of some agencies are being faced with difficult questions and dilemmas, for example:

‘How do we let organisational change go at its own pace while we have to provide evidence of concrete results?’

‘How do we deal with a situation where other donors of the same partner or even our own staff have conflicting understandings of capacity-building?’

‘If OD is about looking at the “whole picture”, how can we justify looking at the wider church when we are only about development?’

Aim of Paper

The aim of this paper is to deepen the understanding of staff from European Church-related development NGOs (especially CIDSE and APRODEV members)¹ of the emerging practice of OD with traditional church ‘partners’ and so challenge them to improve their support of such interventions and also consciously grapple with some of the difficult questions and dilemmas that still remain.

Structure

Section 1 highlights the role of churches in development work within the aid system and some of the key trends and changes that have affected them. Section 2 considers several of the common organisational issues faced by churches in implementing development work drawing on practical examples from the authors’ experience. Section 3 focuses on two practical case studies of Organisation Development interventions to illustrate some of the ingredients involved in any OD process, in relation to church organisations. Section 4 then draws out key learnings about good practice when taking an OD approach, as a basis for the identification of ‘10 OD commandments’ for Northern NGOs working with churches in Section 5. Section 6 concludes with some of the outstanding strategic questions and dilemmas facing Northern agencies when looking at OD and the church’s role in development which still need further exploration and debate.

¹ These are the donor umbrella bodies for European Catholic and Protestant development agencies respectively.

Case Studies

The main findings of this paper are based on an analysis of two case studies of Organisation Development interventions with the development departments of two dioceses in Africa, which CORAT has led (and in which INTRAC has had some involvement). This is reinforced by practical examples from the authors' own experience of working in and with churches involved in development. It is important that learnings are based on thorough reflection on actual experience, rather than simply theoretical concepts. The case studies and examples are drawn from a variety of geographical contexts within Africa, with a focus on the 'institutional'² churches (see definitions below). For the purposes of client confidentiality, factual details about context and people have been disguised or removed.

Definitions of Terms

The Church

The authors recognise that the church in Africa cannot be treated as a homogenous entity, given the diverse histories and theological perspectives reflected there. However, given that the case studies and practical examples indicated in this paper come from 'institutional' churches with an Episcopal church structure,³ then references to the church will be made with this context in mind. Despite this, the authors believe that there are some organisational features of the church in Africa which offer sufficient commonalities to allow some observations to be made which can apply to a variety of denominations and models of church.

Development Departments

Given that the main point of interface with the church for Northern agencies is through their development departments at diocesan or national level, then the focus of the paper will be at this level. However, the authors recognise that a diocesan unit or a national body is the sum of its parts i.e. the church at local level from which it gains its legitimacy, and therefore, the local church cannot be ignored. There are also African Church-related NGOs (perhaps started by or affiliated to the church, yet completely separate entities), but the focus of this paper is not on them, but on Church-based development departments. It should be recognised that some churches may have well-established development departments with programmes and funding, whilst others are at a 'pre-development department' stage, where co-ordination or promotion of development activities may be attached to the job description of an already overworked church worker or priest, in a organisational set-up with very limited resources. Whilst recognising that the latter is the reality of some churches, this paper will concentrate on churches with already established development departments. It is hoped that some of the lessons learnt from these, could also be applied by churches considering the setting up of their own.

Partners

² Sometimes referred to as 'main-line' or 'historic' churches.

³ Where the geographical area served by a local church is called a parish, with a priest or equivalent 'in charge'. A number of parishes make up a diocese, with a Bishop at its head. The cases and examples used within this paper derive largely from the Anglican and Catholic church.

We use the terms ‘partner’ and ‘counterpart’ to describe the ‘recipient’ church-based organisation in the South. We use it, not because of their accuracy in describing the relationship between the organisations in the North and the South, but because they are terms, which are still most frequently used by Northern church-related NGOs.

Organisation Development (OD)

This is a term that has come to have many meanings. Our approach to OD will be explored in Section 3, but in short, it involves a mixture of explicit processes and methods to enable an organisation to assess and understand itself, in relation to its external and internal environment. It is about enabling an organisation to agree ways forward, in a way that improves performance. It is also about developing a continuing capacity and culture for managing change and learning from practice. Given that the nature of organisational change is often long term and can include challenging and letting go of certain behaviour and practices, then an objective external facilitator is often involved.

Northern Church-related Development Agencies

The term refers to European or North American NGOs with church connections involved in development, but may not be a formal part of the church structure (e.g. APRODEV and CIDSE members are not necessarily part of the churches with which they are related).

Limitations

This paper is subject to a number of obvious limitations. In terms of methodology only two case studies have been used specifically, although practical examples are also given from the authors’ own experience of working in and with churches. The cases used are still in progress; therefore it has not been possible to carry out a thorough analysis of the ultimate impact of these interventions on the grass-roots communities which these organisations serve. This can be seen as a limitation as any organisation involved in development does not exist for its own sake. The success of an OD intervention needs to be judged ultimately on the impact the organisation has on those whom it serves.

Who the church serves also depends on different theological positions around models of church, for example, for some it will be for its membership; for others, it will be for all those who live within the area that it serves, be they church members or not. It is beyond the scope and intention of this paper to analyse and articulate the different theological/historical perspectives and models of church and their resulting implications on the development work of churches, rather the authors have chosen to focus on the key learnings from the experience of the cases that are relevant for this paper. However, they also recognise the critical role these factors can play in shaping the response of the church and the need, therefore, to understand them.

There is little context provided about the case studies used in order to protect the identity of the organisations and the individuals involved. Given that the understanding of the context-geographical, political, cultural and organisational- is a critical component of any OD process, this could be seen as a major limitation. However, confidentiality of the client is also a concern for any OD consultant. Although the organisations involved were consulted and were

pleased to be included, it was deemed important to disguise them as much as possible since some of the interventions were still in progress.

1. WHY ORGANISATION DEVELOPMENT?

In order to understand why OD may have a role in strengthening churches involved in development it is important to understand some of the changes and issues that affect them.

The Central Role of Churches in Development Work

Over the years, churches in Africa have played a major role in the implementation of development and relief work with communities. In terms of development, the churches have many potential strengths that can be drawn on, including:

- being a rooted and legitimate part of civil society as they have a voluntary membership from the local population;
- in many cases, an autonomy from government;
- a long and established history in development work and will probably exist for many years to come;
- having become largely indigenous, despite many of their missionary roots;
- a strong value base of concern for poor and marginalised groups which is supported by their biblical mission and which inspires commitment from clergy, church members and development staff;
- a culture of giving in money, kind, skills and time and an ability to mobilise local resources and often a pool of voluntary lay professional expertise that they can draw from;
- regular meetings of membership often with its own physical meeting place;
- a strong network of women's groups (given that the majority of congregations are made up of women) which can be an important catalyst for change in church and community life, despite the male domination of the formal decision-making mechanisms;
- a broad village-based presence even in hostile or remote rural areas where many other NGOs are unable to operate;
- being part of a wider institutional structure with extensive external linkages and opportunities to meet at international level,⁴ reinforced by the image of the 'Body of Christ' which transcends national and other boundaries, all of which can be drawn on when needed, in terms of solidarity and support.

Churches have a long history in promoting non-state development in many countries and are often key actors in the development of a healthy, just civil society. Indeed, some would argue that they are one of the few remaining institutions with a motivated grass-roots structure that can perform this role.

The Realities of the Aid System

As a result of these advantages, church-based development organisations in the South have received significant outside funding, which has stimulated an increase in the size, number and scope of church-based development and relief work in the South. This funding support and subsequent growth can be largely attributed to the establishment of many church-related development agencies in Europe and North America during the 1960s and 1970s.

⁴ For example, the Lambeth conference in the Anglican Communion or the World Council of Churches.

These agencies have been able to access funds, both from the general public (and congregations) and increasingly from official sources such as governments and multilateral donors (such as the European Union). They have been anxious to support and fund church-related development programmes in the South. The evolution of church-based development work received a massive boost from these agencies, but also meant that they have become very dependent on outside resources.

In turn, the growth of these European and North American church-related development agencies has been fuelled by increased government channelling of aid resources through NGOs. Agencies which previously received funding primarily through donations from the general public have had their budgets expanded considerably by official funding from governments and multilateral donors.

This financial dependence of church-based development agencies in the South on Northern church-related NGOs has lasting implications and ramifications for their work as they are very vulnerable to changes in the external funding environment. This dependency can also stifle their potential to explore opportunities for enhancing local fund-raising efforts.

Recent Changes in the External Environment

Working in such an open-aid system, whereby a change in one part is automatically transferred to another, means that organisations have to adapt rapidly to changes in the external environment. To a large degree the need for organisational change within church-based development organisations in the South is a result of having to adapt to recent changes in the external environment. *How* they adapt and respond to these challenges is very much up to their internal environment.

The last few years have witnessed a considerable demise of the role of the state, due partly to structural adjustment policies in providing essential services in the South. This has put increased pressure on the church, alongside NGOs, to fill this gap. In some countries churches are being asked to re-assume control of the education and health services which they relinquished to the government only a few years ago. This pressure will continue as the trend of direct funding increases where Northern governments fund organisations in the South directly, including churches, to provide development services. All these external factors have created their own organisational and operational challenges for churches involved in development and for those Northern agencies that support them.

The increased proportion of funding from official sources has meant that recent changes in the political economy of aid have had a greater impact on church-based development in the South. Such changes include the world-wide recession, changing domestic and international priorities of Northern governments and changes in churches in the North which have affected the volume and nature of aid given to these Northern agencies. This, in turn, has affected the aid available to disburse to 'partner' churches. Changes in government priorities and funding trends have led to greater demands for impact and accountability from the back donors⁵ of many of these agencies which are passed on to Northern NGOs and in turn passed on to Southern churches.

⁵ Back donors are invariably official aid agencies often from the host government of the Northern NGO concerned, e.g. SIDA (Sweden), DANIDA (Denmark), DFID (UK).

Changes in the Church

The church in development as well as being part of the aid system is also affected by changes in the church system. Up until the 1960s and 1970s the missionary system predominated,⁶ by which Northern churches would raise money to 'send out' missionaries to the 'mission field' either individually or through missionary agencies/orders.

Currently, many church congregations in Europe are declining, while those in the South are increasing with the majority of all Christians now in the South. Indeed, some churches in the South are now sending their own missionaries to Europe. Alongside this, there has also been a rise in the number of African 'instituted' churches,⁷ de-linked from the historical roots of the more 'institutional' churches.

Many churches and agencies in the North have, in addition, changed their thinking about 'mission' - seeing it as a common enterprise of human transformation rooted in partnership across national and confessional/denominational boundaries. This has led to a re-orientation of funding, programmes and personnel towards much greater mutuality, solidarity, inter-change and inter-dependence. In the institutional churches, the Christian mission is seen as increasingly being 'from everywhere to everywhere' rather than 'from West to the rest'. Nonetheless, the baggage of the colonial-mediated missionary system can still hold back the realisation of this new approach in practice.

In turn, the weakening position and influence of the church in society, declining church membership and the increasing secularisation in Europe has weakened the church roots of many European church-related agencies and their ability, at times, to relate to and build on that common identity and constituency. Declining church membership and increasing domestic burdens are also competing with the level of giving to those agencies that rely on the public. At the same time, although the church is expanding in the South, the power imbalance in relation to development work remains the same; Northern agencies still control key financial resources. As in nearly all development funding, the donor/recipient or even parent/child dimension from the past still manifests itself.

Questions of Developmental Impact of Churches

The recent emphasis on ensuring that development aid provides value for money and concrete results has led to increasing concern that the potential opportunities for church-based organisations to have a development impact are not being realised. Many churches do not seem able to translate their comparative advantages in development into measurable impact. In the harsher and more competitive aid world, 'good intentions' alone are no longer sufficient (if they ever were).

⁶ It should also be recognised that the role of churches in Africa goes back several centuries before the arrival of missionaries from Europe. For further reading on church history and theology in Africa, see Hastings (1994). There is also a research project currently being carried out by the University of Edinburgh theology and development department on 'African Theology'.

⁷ These are churches that have no missionary roots from outside Africa but have been started or 'instituted' from within the Continent.

The growing recognition that many of the limitations in programme impact have their roots in the internal organisational weaknesses of churches and their development departments has led many to advocate the need for organisational change and specifically OD programmes for churches. This goes alongside the recognition of the limitations of the project mentality in recent development thinking and practice and the need to take a more holistic approach to organisations, if programme performance is to improve. **This is one of the main assertions of this paper.**

‘Flavour of the Month’ or Biblical Precedent?

Consequently, in recent years, many Northern agencies have turned their attention towards trying to strengthen the capacity of churches to carry out development work. Such a shift is mirrored by their secular counterparts. OD seems to be very much in fashion as the latest trend in development. Yet it is worth noting its biblical precedent - when Moses was leading the Israelites to the Promised Land, Jethro (perhaps the first OD consultant) came to him with some very sound organisational advice, *‘Listen, Moses. You have too many people reporting to you. We’re never going to get to the promised land if you do not delegate some power’* (paraphrased by Bridges 1995:39).

Many of the principles of OD can also be drawn from the Bible. For example, the image of the Body of Christ can also be used to illustrate the systems approach underpinning much of OD thinking, where the inter-relatedness of organisations internally and in relation to the wider environment will mean that where there is change or pain in one part it will affect the rest (1 Corinthians 12 v.12-31).

Many staff of Northern agencies appear, however, to have differing levels of understanding about OD itself and the distinctive internal and external factors that affect churches involved in development. Consequently, a variety of approaches are used, some of which are in danger of undermining the churches' strengths and may even disable churches in carrying out their role in development and civil society. To support OD in such a way that ‘partners’ are indeed strengthened requires that Northern agencies deepen their understanding of the emerging practice of OD with traditional church ‘partners’ and consciously struggle with the difficult questions that still remain. The first step in this is to better understand the common organisational issues faced by many churches.

2. COMMON ORGANISATIONAL ISSUES FACED BY CHURCHES

Although it has been stated that the lessons of this paper may well transcend denominational differences this does not mean that churches are homogeneous organisational entities. In order to support their organisational change processes more effectively, we must seek to understand their unique historical experience, their socio-economic and political context, their particular theological perspective and what organisational implications (in terms of culture, structure and so on) this has for the churches' development work.

It is not the purpose of this paper to present an analysis of these factors in terms of denominational differences within the African context. That would be a very complex task and the required (probably over-) generalisations would only serve to distract from the main messages of this paper. Important sources of information would include the Kairos Document and African theologians and scholars, such as Bakare (1997), Gifford (1995, 1998), Hastings (1994) who are listed in the bibliography. Suffice to say here that church-related development NGOs in Europe seeking to support their church partners better must attempt to understand these issues from the perspective of each individual partner. Otherwise their interventions may well be superficial and ineffective and possibly harmful.

One of the case studies to be examined in Section 3 (Yano Diocese) illustrates some of the common organisational issues faced by churches.

Such issues described here are common to many other (though certainly not all) church development work.

The Initial Diagnosis of Yano revealed

At development department level:

- the vision statement for the department was extremely broad and no clear distinction was made between the vision and the mission (or core purpose) of the department (mission);
- stated strategies were also not apparent;
- from the wide variety of activities taking place, it seemed that there were a number of different development approaches being followed;
- the Christian identity of the development department was not clear. There were not obvious links with its Christian values or the role of the church in development;
- there were structural tensions between the development department and the church. Although attempts had been made to link the development department into the church structure, its rapid growth and level of activity were in danger of distancing it from the very body that gave it legitimacy. The imbalance of resources led to envy and resentment among some clergy;
- a growth in programmes and project activities with scant attention paid to how such programmes might be sustained in the long term;
- complacency arising from the successes of the 1970s and 1980s, meant that there was a general feeling of 'things will continue as they were' - using the same methods, expanding programmes with an increased budget met by our 'friends in the North';
- there were few mechanisms/opportunities in place to reflect and learn from practice and the changing external realities. The development department appeared to be locked into a culture, structure and methodology plus a level of activity based on external funding that would be very hard to change;
- much of the above was compounded by little governance structure, as the Board met infrequently; and
- concerns about limited impact on the lives of rural communities by the actual programmes themselves.

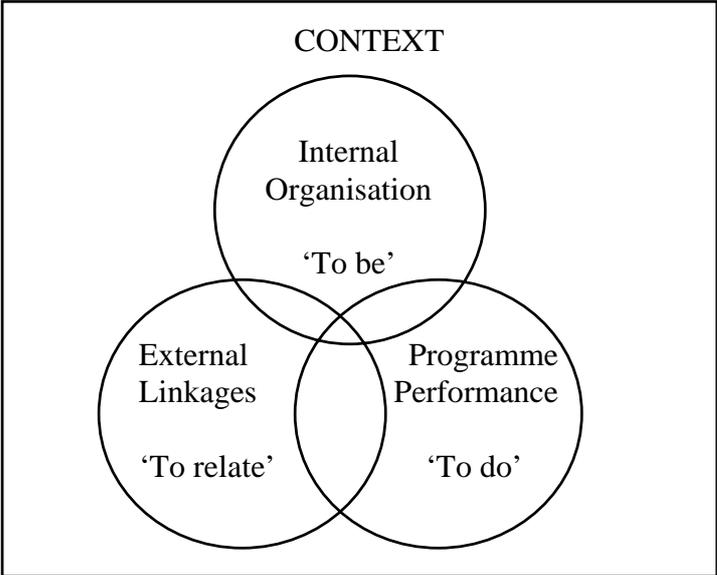
At diocesan level:

- the development office had grown up in parallel with the church from parish to diocesan level and had outgrown it in terms of resources, leading to envy and resentment among some clergy; and
- the diocese did not appear to have a clear shared vision or mission or any explicit statement as to where development 'fitted' into the mission of the church.

The three-circles model (Fig. 1) is one way of looking at organisations. The ‘to do’ circle relates to the programme performance of the organisation, its impact and effectiveness; its basis for existence. The ‘to relate’ circle concerns the nature of the organisation’s external linkages with community leaders, with other NGOs, churches, donors, government and so on. The ‘to be’ circle includes the internal working of an organisation which will be looked at further in the ‘onion-skin’ model (Fig. 2). The circles are interlocked to illustrate that a change or a problem in one circle will be affected or influenced by the other, therefore emphasising the importance of looking at an organisation as a whole, rather than piece-meal. The model also illustrates the importance of understanding the surrounding socio-political-cultural context, which any organisation is influenced by and can have impact on.

An Organisational Framework

Fig. 1



Focusing on the ‘to be’ circle, it is possible to examine organisations a bit deeper using the image of the ‘onion-skin’. (Fig. 2).

Fig.2

The outside layer of the ‘onion-skin’ represents the physical and financial resources which an organisation needs- money, buildings, vehicles, equipment. Inside that layer are the human skills and competencies required to implement the activities. Inside that the structures and

systems (such as monitoring and evaluation systems, personnel systems, financial management systems) needed to make an organisation work. Inside that the vision, purpose and strategy of the organisation- what it wants to achieve and how. At the very heart (or soul) of an organisation lies its core: its identity, values, beliefs, culture, theory of development and understanding of the world i.e. its 'world-view'. Although not specified in the model, leadership could be seen as running throughout. In turn, the lines of each circle should not be seen as rigid. Ideally, there should be a flow and a 'fit' from the core outwards, for example, having structures and procedures which reflect and support vision and strategy.

In relation to organisation development and capacity-building, the outer parts of the 'onion-skin' are elements of capacity that can be easily assessed and quantified. Those elements towards the core are to a large extent intangible, observable only through the effects they have, both internally and in its programmes and external relationships, as indicated in the three-circles model. By their very nature, they are often more deep rooted, complex and more difficult to understand but without 'health' in these areas, there is little point in only addressing issues in the outer layers. For example, training of staff will be limited, if they are not clear about the purpose of their organisation or role or they are unable to apply their skills due to autocratic leadership or a culture that is closed to learning. While short-term measures or interventions may be needed in the outer layers, it is the heart and soul of an organisation which by and large determines capacity in the long term. It should also be added that while organisations may share similar features, each organisation is nevertheless unique, both in itself and in terms of its stage of development and context (CDRA 1997/8). What may be appropriate for one organisation, may not be appropriate for another - each organisation needs to be "read" in its own right. Similarly change processes in organisations cannot be predetermined or predicted; they are complex and unpredictable, as the case studies in the next chapter illustrate. Using both these models, the following observations can be made about those organisational factors that influence the role and practice of the church in development.

Internal Organisation 'To Be'

Identity, Values and Mission

The identity of the 'institutional' churches in Africa is invariably coloured by their history and the theological tradition of their 'mother' churches, which may not 'fit' with the present context and the development challenges facing them. Linked to this, the 'mission' of the church is subject to a wide variety of theological and personal interpretations- is it only about 'saving souls' or reaching out to the whole person (integral/holistic development), or promoting the values of the Kingdom of God, such as love, peace and justice here on earth or a mixture of all of these? In spite of the varying interpretations that are known to exist, it is common to observe that many churches draw their mandate from the following:

The spirit of the Lord is upon me, because he has chosen me to bring good news to the poor. He has sent me to proclaim liberty to the captives and recovery of sight to the blind; to set free the oppressed and announce that the time has come when the Lord will save his people. Luke 4: 18-19

Although there may be a range of understanding and interpretation amongst church membership, the stance of clergy including the Bishop with their power and influence will

greatly shape the identity of the church, its 'world-view' and its subsequent approach to development.

Despite the importance of values and beliefs in churches, such values are often not explicit in terms of how they affect development, and if they are explicit they are often communicated in a language that many find difficult to understand, inside and outside the church. Consequently, its development work is carried out without much anchorage or clear identity in relation to the church of which it is a part and there is a danger that the development department is seen as just another service deliverer. While many churches do not consider themselves as an ordinary NGO, they are not always very clear at stating what makes them distinctive.

The influence of dualism (the separation between the material and the spiritual or the church and 'the world') has tended to undermine any attempts to gain greater clarity and has contributed to some of the split-identity problems. A dualistic view of the world can be traced back to the early history of the church at large and has now been compounded by the approach of the aid community. Northern church-related NGOs have accessed official funding for development work by their partners in the South with the promise to their back donors that no money would go to 'spiritual' work. This has led to some Northern agencies encouraging the establishment of development departments in order to keep the development work separate from other parts of the church's work. The focus for development then becomes a central development office implementing and co-ordinating programmes and projects from the centre rather than the local church actively promoting and supporting development initiatives.

The wider church or diocese then becomes the 'host' for development, rather than being directly engaged with it. More recently, there is a trend within some African countries for donors to encourage separate organisations altogether. Although recognising some of the difficulties of working through church structures, some would argue that this approach is separating the church from the very strengths that give it an advantage in development, as well as distorting a holistic and integral spirituality often promoted by many churches. Given the large amounts of funding available for development, this inevitably leads to a funding imbalance and a 'skewing' of the church illustrated most commonly by the large divide between the 'professional' paid development staff (with their 4-wheel drive vehicles) and the practically voluntary pastoral workers (on foot). Others would argue that it is because of this imbalance and the effects this has on the church, that it is better for the development department to split. "Better for whom?" is still a debatable point.

Culture, Power and Leadership

Staying within the heart of the onion and closely linked to identity is the culture of the church. This relates to some of the underlying assumptions to what drives behaviour and 'the way things are done around here'. It says a lot about what and who the church gives value and authority to and how it organises itself. It can greatly influence its approach to development and how it is seen by the wider community.

The institutional churches consider themselves as part of a wider body. In many ways this is a strength, though it can also often make them very cumbersome, bureaucratic and unwieldy to work with. In terms of human and institutional development processes which demand time-scales of 15-30 years, the church offers a perspective of continuity beyond many others. However, this can also mean a rigidity and slowness to change. With the increasing democratisation of many of the institutions in Africa some churches are becoming more adaptive to the changing environment -though their long histories still tend to give rise to inherent resistance. People have had time to build up vested interests and inflexible opinions.

The church's history may also mean that some (lay and clergy) hang on to a tradition that is inappropriate to the local context and concerns that affect people in daily life. This can be reflected in the style of worship in particular. A certain dress code or the use of hymn-books and 'the written Word' can also lead to groups feeling excluded who may not have received formal education or are from a different social/ethnic background. This can lead to the church being seen as part of the local elite or irrelevant to the local culture for those in the wider community, which can directly impact on its role in development.

Most churches are characterised by hierarchical structures 'which do not lend themselves to participatory methods or approaches (even if priests would wish for a different role)' (Goold 1994:23). At times this may clash with participatory development processes promoted by the development department. For example in one diocese in West Africa where such processes were used by the development department, both within the church and wider community, some clergy were supportive while 'some expressed their unease by distancing themselves or by trying to steer the programme into church fund-raising' (Goold 1994:23). In other cases, the increasing awareness of and questioning by lay people through such programmes has actually led to their closure, as they have been seen as too great a threat to the church and political hierarchy.

Hierarchical power and (spiritual) authority tend to be invested in church leaders, i.e. Bishops, clergy and pastors (most of whom are men). This can lead to a culture of passivity within the congregations and clericalism in attitudes towards the involvement of lay people in decision-making, theological reflection and worship and the role of women, in particular. This may well have implications for how the church operates, how it is seen in the wider community and its subsequent approach to development. Many churches struggle to make links between how they operate internally, the concerns that affect people in their everyday lives and their role in the wider community.

Understanding of Development and Strategy

Flowing from issues of identity, culture and purpose is the lack of strategy often found within churches in relating to the needs of poor people i.e. being clear about what it will and will not do and instead trying to be 'all things to all people'. Although there is a general recognition of

the need to be 'on the side of the poor'; how this is interpreted in action is again dependent on the theology and model of development from which the church operates. For example, the term 'poverty' can be interpreted as spiritual poverty as well as material poverty. Few churches have a clear conceptual framework for development that is explicitly used when making strategic choices about what approach or actions to take in relation to development. One Archbishop recently raised the following question at a CORAT development consultation, *'How come that the block grants we received over the years did not build us up and make us sustainable? We gave posho mills ... what have we received in return? ... more requests. Something must be wrong with our concept of development.'*

The church's strength is in its foundation- the people themselves. The local church is made up of members of the local community, and therefore has direct access to and understanding of community concerns. It is surely this strength that must be built upon rather than simply duplicating the technocratic development model being undertaken by so many others (Fowler 1984). However, 'the community' is not homogeneous and a congregation may be heavily composed of certain groups, such as the local elite, which may eschew any development efforts in their favour, whilst ignoring the needs and concerns of more marginalised groups (Goold 1994).

Some would argue that the church's development stance and activity has been insufficiently founded on an analysis of the causes of underdevelopment and its differential impact on the various sections of society; 'the poor', the landless, women and children, farmers, entrepreneurs, artisans, etc. Such an analysis is needed, for its outcome is relevant to how church development is undertaken and for whom. Likewise, churches do not tend to have the tools or expertise to critically analyse the external environment and the changes that may affect them. Although there may be some progressive thinking at national level or pockets of good practice at local level, given the structure of many churches and the vast areas they often cover, along with a somewhat insular culture, it is difficult to learn from these examples or to access the relevant information to inform strategic choices that need to be made.

The development strategy of many churches has tended to focus much more on providing services to 'the poor', essentially providing relief on a temporary basis for vulnerable groups in order to protect their welfare. Although often necessary in the short term this relief strategy only serves to alleviate the symptoms of their problems rather than addressing the root causes and offer more sustainable solutions. In the circumstances, the beneficiaries become more inclined towards dependence on the giver, which can be interpreted by some as a means to increasing membership and loyalty to their denomination.

The tendency to give handouts and respond to any need that is presented to them is also

exacerbated by the difficulties churches have in saying ‘no’. This can manifest itself in some of the difficulties it may have in enforcing difficult decisions in programmes and staffing in the light of a changed environment or in accommodating internal conflict. This relates to a deeper organisational culture informed by a theology that emphasises a charitable view of ‘giving to the poor’, the conventional view of the ‘Good Samaritan’ and self-sacrifice. The fact that more material aspects of development are only a part of the overall work of the church has strategic implications when dealing with issues of how to prioritise resource allocation.

However, it is also worth noting that programmes such as DELTA (Development Education Leadership Training for Action), based on the manuals *Training for Transformation*⁸ and the writings of Paulo Freire, have had considerable influence in many parts of Africa in moving churches away from the relief/welfare model and encouraging groups from within the church to be more active and engaged in the wider community, and more recently to look at national policy and issues at a macro level.

Structure and Governance

The structure of development work within churches may not support the creation of a coherent strategy or even the mission of the development department. For example, while ‘integral development’ may be sought, the reality of the way work is structured may be a series of departments based around sector programmes, which become ‘mini-empires’ in their own right. We have already outlined the structural implications (in some cases separating the development work of the church into a separate organisation altogether) arising from the influential dualistic approach. In addition, many local development initiatives can come from individual priests/missionaries (or staff) who may relate more closely to their own orders, missions or interests than to the diocesan development department. This raises real issues about accountability and the role of leadership in terms of the development work.

Dualism has often meant structural separation within churches between the development department and the pastoral/mission department, as well as in roles. This can be reinforced further by the creation of a justice or advocacy department which then structurally de-links development from justice issues (although in certain political contexts there may good reason for this⁹). At the local level, parallel structures can also form alongside the parish structures, e.g. parish development committees which may promote development but do not take the local church along with it, which may lead to issues of sustainability in the long term.

In addition, the poor governance structure of a development department can cause problems. It can often be:

- dominated by staff and therefore the agenda is largely set by them, de-linking it from the church;
- dominated by clergy who may not have the necessary understanding of development or who may skew the development work to the needs of the church or their preferred area;
- unwieldy and ineffective and, therefore, be bypassed in order to get the work done;

⁸ *Training for Transformation*, A. Hope and S. Timmel (1984, 1995) is in three volumes and is used by churches and other groups throughout Africa as part of DELTA programmes. The most recently revised edition places greater emphasis on macro issues.

⁹ For example, some justice and peace departments of the Catholic church are set up separately from the development departments to ensure funding for development is not threatened by oppressive governments.

- non-existent with management and governance decisions under the direct control of the Bishop; and
- marginalised with no recognised power and authority within the church structure and become merely a rubber-stamping body.

Staffing and Skills

Moving to the outer rings of the onion-skin and often a problem presenting for many churches is the issue of staffing, where there is often a lack of required skills and experience to do the work effectively. Both case studies reveal how development co-ordinators were appointed without any relevant development experience. Other considerations such as religious affiliation, salary scales, availability and even regional background may be more influential. In some churches, priests may be given responsibility for development programmes on top of existing duties but with little understanding or concept of how they should be managed or of development itself. In fact, there may even be a perception amongst some church leadership that appointing clergy will be cheaper and more trustworthy than lay people in such a position. The leadership of the development department, such as the development co-ordinator and chair of the board, are often overloaded with other church responsibilities.

In order to cater for development, the church has had to employ many new types of worker. This may create its own pressures on the traditional authority patterns of the church. For instance, how does the parish priest or minister relate to the development worker? With whom does a church development worker have a contract of employment; who does selection and how?

Relatively low salaries, due to limited resources (as well as not to offend clergy), make ‘most pastures greener’ and staff turnover can become an issue particularly for the more dynamic staff. Poaching by other NGOs or transfer to the security of tenure provided by teaching in schools is commonplace. In the meantime, Christian goodwill and loyalty of staff members can be taken advantage of within the church culture of service with poor staff conditions and long hours.

Courses do exist specifically designed for diocesan development officers, for example the six-week course run by CORAT. Developing the capacity of a development practitioner,¹⁰ however, also needs ongoing support, mentoring and sharing with peers. These areas are often not given priority due to the demands of the many roles that development officers are expected to play within a church context.

In terms of skills, some would argue that the church’s own forte is in the human rather than the technical domain. This should be where the church should expand and strengthen its development skills, rather than engaging in big technical projects or income-generating schemes. The clergy, who are often seen as community leaders, have a key role themselves in being catalysts for change. However, their training does not always equip them for that role, focusing more on their ‘church’ rather than their ‘community’ function, let alone an integration of the two. In turn, much lay training is just at an individual level or for the maintenance of the church rather than community-building/development, although there are some notable exceptions.¹¹ Many competent lay people often feel de-skilled or under-valued

¹⁰ For further reading on the ‘art’ of being a development practitioner, see Kaplan (1996).

¹¹ For example, the aforementioned DELTA programme, and a recent training programme soon to be piloted by TEAR Fund, called ‘The Transforming Church’.

by the culture of the church. The quiet, caring work of lay people in their everyday lives or the difficult decisions they may be making in their work that can affect many others are not always supported, acknowledged or built on by the church.

Development officers, in turn, may need to play a more proactive role in working with local churches and other diocesan departments and institutions (e.g. theological colleges) to address such issues. This will demand an understanding of how the church operates and skills in change management, capacity-building and theological reflection at a variety of levels; areas that are not automatically associated with the role of a development officer.

Funding

The funding of most of the development work of churches is from outside sources. Many churches at diocesan level give limited physical and financial contributions to the development department, indicating that it may not be seen as a priority, as compared to other areas of diocesan expense, although the limited resource base of member churches generally should be acknowledged.

Outside funding has also contributed to the removal of responsibility from the churches for giving themselves to development efforts, at diocesan and local level. As one church elder commented to CORAT, *'We initially donated our cattle to raise funds to build churches, but when they gave us the impression they did not need us, then we retreated.'*

Activities can expand in proportion to donors' willingness to give, rather than out of the commitment and capacity of the church to development. Over-reliance on outside funds can actually stunt or undermine the church's ability to tap its own and alternative sources of funding. Indeed, calls for local contribution and self-reliance may wear thin when a department is almost 100% dependent on external funds. The culture of tithing and local fund-raising initiatives, which is the strength of the church, can be undermined by increasing dependency on funds from outside.

Missionary priests and missionaries may use their outside contacts to bring in money to fund their own projects without any accountability to the diocesan structures. The approach and model of development used may be inconsistent and indeed contradict the approach of the development department. As the funding is often linked to priest or missionary, once they go or move on the project goes with them, to the detriment of other possible sustainable activities in the area.

Many churches were also not set up for the complexities of managing large amounts of funds from overseas. They do not have the capacity or competence to manage the varied systems required of them by their Northern partners and their respective back donors. This may lead to the 'adoption' of a system that does not 'fit' with the rest of the organisation and/or recurring problems and difficulties with finance and reporting procedures.

Programme Performance ‘To Do’

Whilst recognising the importance of the internal organisation, churches do not exist for their own sake. They are to do something (although exactly what will depend on the church’s understanding of its purpose). Using the 3 circles model in Figure 1, it is clear that the actual development work of the church is invariably affected by some of the internal organisational factors outlined above. These manifest themselves in a variety of ways and will ultimately have an influence on the effectiveness and impact of the development programmes of the church.

Who Benefits?

The heated debate about who should be the beneficiaries of the church development programmes- church members and others- means that in this capacity the church is both operating as an NGO (meeting the needs of others) and a community-based organisation (meeting the needs of its members).¹² Whether they focus on members or on the wider community or whether they try and marry the two somewhere in-between can mean that considerable organisational dilemmas will arise. One such dilemma is the tension between maintaining a congregation’s cohesion and motivation whilst ensuring those in the wider community benefit from and participate in their efforts. Issues around ownership and identity inevitably arise, for if the church is committed to principles of participation and community engagement, then decision-making bodies of development initiatives will need to include a representative group from the community, not just the church.

Many would argue that the structures, skills and activities which have led to such effective community organisation do not necessarily lend themselves to the incorporation of material development activities which churches often seek to engage in, especially when the method of funding is on a per-project basis.

Monitoring and Evaluation

The monitoring and evaluation systems of programmes are often not apparent or used, except by the bequest of donors, as with other church programmes. This would also include any system for gauging outreach/cost per capita for services. Participatory research methods and setting up a participatory evaluation would be a natural outworking of some of the participatory populist approaches used by development programmes of churches but are not always evident in practice, except through the encouragement of more progressive donors.

Income-generating Activities

Church income-generating activities often get muddled up with development activities, consuming and diverting a disproportionate amount of time and energy from core development activities and can affect community participation and benefit. Commercial activities under the auspices of the development department are often handled with insufficient expertise and can seriously discredit them and the church. In turn, this can be exacerbated by their donors not having much understanding of what is involved at the beginning of such

¹² This is linked to different understandings of church- for example, in the Anglican/Catholic tradition the church is seen to serve the geographical area in which it is placed (the parish), whereas for others they will draw members from different locations and the emphasis will be more on those members as a ‘gathered’ church.

activities. A move towards income-generating activities can also be seen as a knee-jerk but understandable reaction to the threat of withdrawal of funds from donors and the need for sustainability.

Project Mentality, Capacity-Building and Influence at Macro-level

The activities of the development department tend to stay at micro-level within a project mentality (often encouraged by the practices of donors). Project funding can be inflexible and produces uncertainties, as well as leading to delays in implementation. It also creates an illusion that development happens within a project cycle, whereas the life of communities operates and is affected beyond the boundaries of a project. Many of the activities of a development department and local church tend to stay at the micro-level, with little emphasis on influencing policy issues or using/challenging structures at regional/national level. Influencing policy issues or challenging government at regional and national level appears to have been largely conceded to the broader bodies such as the Council of Churches, the Bishops National Conference, and the Justice and Peace Departments of denominational national secretariats which tend to take a reactive rather than proactive role. National bodies such as these are increasingly moving from their traditional implementing role to a facilitation role, without a necessarily clear understanding of the structural and cultural implications this may have in practice. In turn, there may be equivalent implications for diocesan development offices that move into more of a facilitating and capacity-building role with the local church and community, as one of the case studies will illustrate.

At the diocesan level, a commitment to justice within the mission statement of a diocese, can merely become another programme (e.g. civic education), project or department (for example, in the Catholic church there are justice and peace departments), rather than an integral part. As civic education and advocacy issues receive increasing attention from Northern NGOs, there is a danger of skewing the church in one direction whilst ignoring deeper organisational issues.¹³

Churches do not always use broader mechanisms effectively, such as the Council of Churches, their wider bodies or the media, to influence governments or lobby for change. This can be indicative of the poor decision-making processes of churches at different levels, as well as the often parochial mentality that pervades many churches at local level. The isolationist tendency of some churches also limits their networking and links with other civil society actors, and therefore limits its impact at macro-level. The important role of the church in civil society and its potentially powerful influence is insufficiently documented or monitored,¹⁴ where the degree of its influence is very much dependent on the nature of its external relationships.

External Relations ‘To Relate’

Looking at the final circle in the three circle model, churches external linkages may extend to other churches within their own denomination, to ecumenical bodies, to their Northern partners, to community leaders, as well as potentially to other NGOs, government and so on.

¹³ For example, the authors are aware of a Council of Churches which had a civic education department that received massive funding from eager donors in the early 1990s, while at the same time the actual organisation itself was on its knees.

¹⁴ INTRAC is presently engaged in a study exploring the role of churches in advocacy in Africa, commissioned by DanChurchaid and Norwegian Churchaid (see Ajula and Gibbs (1998), ‘Role of Churches in Advocacy in Africa’, INTRAC).

Churches at the local level have sometimes been competitive between denominations and isolationist from the NGO sector which has militated against co-operation, learning and advocacy. At the national level, there may be ecumenical ventures and collaboration through the Council of Churches but at the local level, co-operation may be more limited. One possible explanation may be that it reveals pervasive underlying assumptions that development is a legitimate means of widening or holding on to their respective 'patch'. Certain denominations can also be identified with certain ethnic groups and the underlying tensions that may exist between them.¹⁵ Prejudice or clashes with other faiths (for example, Moslem and Christian) can also undermine development efforts, although there are examples in certain parts of Africa of Moslems and Christians collaborating together as part of wider community initiatives (Goold 1994).

There is a view held by some churches that their development department is not an NGO but a Christian organisation (although it can be an NGO when it suits). This can undermine the credibility of the church's development work in the eyes of some NGOs and government. Combined with the difficulty in sometimes trying to be all things to all people, it can also duplicate and undermine other NGOs' efforts (though recently there have been encouraging signs of greater co-operation).

Although being rooted as part of the community is a comparative advantage to other NGOs, this may also be a disadvantage as it may be more subject to local pressures. For example, if members of the elite in a community are members of the church and are big supporters financially, they may well have 'a vested interest in the maintenance of the status quo' (Goold 1994). This may seriously compromise the autonomy and integrity of the church, especially when there are issues of injustice in the very same community.

The independent standing of the church in relation to the government can be seriously undermined if the Bishop and other church leaders are openly or implicitly in support of the ruling party or 'sit on the fence' especially when violation of peoples' rights takes place or when they are co-opted into the government itself. Churches are recognised as having their own legitimate place in African society and its development, but as Kinyanjui (1982) states, 'they have to decide who they wish to serve and how'. In one of the case studies, one scenario is explored where the development office agrees on an empowerment and justice focus for its work but is unsure whether the Bishop would provide the necessary protection/support needed if this stance was challenged by the political authorities.

The churches' extensive linkages to other countries and that it is part of a global network of churches (e.g. the Anglican Communion, the World Council of Churches) does allow it room to co-operate and manoeuvre which would perhaps not be tolerated of other organisations. It provides opportunities for networking and lesson learning, linked to the organic nature of the 'Body of Christ'. It also enhances the possibility of maintaining autonomy and can be drawn on when seeking to expose human rights abuse in their own countries, lobbying governments in the North, as well as encouraging world-wide prayer, which in itself can be a 'tool' for change.¹⁶

¹⁵ For example, the Anglican church in Sierra Leone due to its history was traditionally associated with the Krio, the educated elite within the country.

¹⁶ General guidelines for "healthy" churches involved in development can be found in Appendix A.

3. THE PRACTICE OF OD WITH CHURCHES

This section provides the main focus for this paper by concentrating on the discipline of Organisation Development and its practice by taking the reader through two case studies of OD intervention with churches involved in development. An exploration and analysis of these cases will then follow in Section 4.

Organisation Development has recently burst onto the NGO landscape as part of the general interest in capacity-building of NGOs. As a discipline, it originated in the USA in the 1960s but its roots can be traced back as far as the 1930s.¹⁷ OD as a term is generally very widely and loosely used. There is no one definition which all adhere to. In the NGO world, as well as academic literature OD often describes an intervention which might be more accurately called OD consultancy as consultancy is the prime intervention to be used. People tend to use these words synonymously, which can create confusion. In this paper we will be referring to OD in terms of OD consultancies, whilst recognising that such interventions are designed to support the ongoing development of organisations themselves and the carrying out of their mission, rather than be an end in themselves. There are other 'organisational' interventions, which in and of themselves would not fit our descriptions of OD, for example, management skills training, or advice on finance systems. We believe there are important capacity-building interventions, which might be part of an OD process (if they were identified by the organisation through their own assessment as being critical), but if used in isolation they would not constitute our definition of OD.¹⁸

Expanding on the short explanation in the introduction, the authors view that any OD intervention should have significant traces of the following ten important ingredients (adapted from James 1998):

- The goal of OD is not just that an organisation can deal with its current problems today, but that it can be strengthened to address its problems in the future, developing the continuing capacity to manage change and learn from its own practice.
- OD sees organisations as whole systems of interrelated components, and therefore the importance of understanding the 'whole picture' of the organisation in its environment.
- OD encompasses a process of collaborative assessment and analysis of the key issues by the key stakeholders, where there is ownership of the issues identified and the process used by all concerned.
- OD stresses senior management commitment and support to the whole process.
- OD uses an appropriate mix of interventions and processes for the unique needs of that organisation, often with the use of a skilled, external facilitator.
- OD looks at the cultural and political dimensions of organisations and change, not just the technical.
- OD is about conscious not accidental change.
- OD focuses on people, women and men, not just physical resources.
- OD is long term, not one-off or quick fix.
- OD focuses on enabling the organisation to become more effective in carrying out its mission through the development of an appropriate and effective organisational practice and culture.

¹⁷ For further reading on the history of OD, see Weisbord, (1987), Harrison (1995).

¹⁸ For further exploration of some of these issues, see James (1998: ch. 1).

Some of the principles of OD can also be linked to illustrations from the Bible, as indicated earlier.

Case Studies

The following case studies of Yano and Sende dioceses¹⁹ show examples of two intensive and long-term consultancies, which contain most, if not all, of the ingredients of OD. Both in Yano and Sende, the interventions dealt with core issues of the organisation's identity, helping them to clarify their vision, values, mission, strategy and to develop an appropriate organisational practice and culture. Both interventions arose out of concerns about performance and sustainability. With the Diocese of Yano these were highlighted by an evaluation which recommended in-depth restructuring. With the Diocese of Sende, the concerns arose from a number of evaluations and rejected donor proposals.

The initial point of entry for both dioceses was the development office. However, the main difference between them is that the primary focus of the Yano consultancy study remained with the development office whereas in the Sende case study, the focus shifted to the wider diocese.

The following is a description of the process used in both cases.

Case Study 1

¹⁹ Both dioceses have given permission for their cases to be used. However, contextual details have been changed or withheld to protect the confidentiality of the client.

Diocese of Yano: Managing Changes in the Development Department

The Diocese of Yano is situated in a semi-tropical region within West Africa. Its development department has been in existence for over twenty years with a strong focus on 'people-centred development'. In the 1970s and 1980s it grew rapidly to about twelve sector-based programmes fuelled by the funding support of more than willing donors. By the end of the 1980s, it employed over thirty-five people. The Board was largely made up of staff and a couple of priests. The department's work was seen as very successful and many researchers and visitors came to admire its work.

Donors Change their Tune

Towards the end of the 1980s, Northern NGOs were under increasing pressure from their back donors to show impact and effectiveness. The main donor expressed concerns about the impact of the development programme and this was confirmed by a major participatory evaluation that took place. One of the recommendations was for the development department to re-orientate itself through restructuring. The African consultancy organisation involved in the evaluation was asked by the diocese to continue working with them to carry out this recommendation, encouraged by the main donor. At this stage, no formalised Terms of Reference were drawn up and the diocese requested that the donor paid the consultants directly.

Identifying the Issues

From initial meetings with key stakeholders plus a consultation workshop with heads of department, a number of issues were identified (see Section 2). Unfortunately, the development co-ordinator was unable to attend most of this consultation meeting because he was chairing a disciplinary committee for the local theological college. The Bishop, although supportive of the process, was also tied up with preparations of a visit by a senior government representative to the area.

From the initial diagnosis, the consultants realised that just restructuring as indicated in the evaluation, would not be enough. They saw that in-depth and far-reaching change was needed, if the development department was to be healthy for the future. They identified a variety of areas that needed to be addressed. The external realities needed to be faced which included changes in the donor world. The vision and core purpose of the department needed to be revisited in light of these, as well as an examination of values, development and faith. Priorities and strategies needed to be set that were consistent with all these and the findings of the evaluation in relation to impact on communities. An accompanying structure would be required that 'fitted'; this would also need to include a strengthened Board. The change had to be managed in a way that was consistent with the values of the department and the culture and politics of the diocese. The process itself would need to strengthen the capacity of the development department to manage change and learn from its practice and develop a culture that encouraged this; something which was presently lacking.

The main donor was also watching this whole process very carefully and with an eye to signs of serious change. The consultants were aware of the danger of a donor-driven agenda and were worried that the impetus for change from the development department would be linked more to concerns about the funding situation than their impact on communities. At the same time, the relationship with the donor could not be ignored; indeed, this needed to change too. The relationship with and implications for the wider diocese also had to be taken into consideration. The consultants decided to focus on the development department as a point of entry as it had almost become a mini-organisation itself, while recognising that it was part of a wider, even world-wide organisation. They recognised that this was inevitably going to pervade any change process and would have to be taken on board.

Stakeholder Consultations

Where to start? Two wider consultation workshops took place bringing together staff and representatives from parish development committees, parish councils, clergy, community groups and the chair of the Development Board. Only a relatively small percentage was women (while most of the development activities were carried out by women). Considerably more clergy were invited, than those that actually came. In total, over fifty participants took part in both consultations.

Warning Signs

There was a gap of three months between the first and second stakeholder consultation. In the interim, a financial crisis was suspected. One of the programmes had mistakenly overspent on material equipment, leaving insufficient resources to pay for salaries until the end of the year. The main donor was unwilling to release further funds, rather wanting the development department to sort it out for itself. At the same time, one or two of the smaller donors were not renewing grants or approving new ones, partly due to changing donor priorities. Consequently, some programmes had to wind down. Financial information was hard to obtain due to problems with a new accounting package, recently introduced by the main donor. The consultants also offered back-up support in sorting out the financial system/reporting while the finance person got to grips with the new software.

Some of the warning signs were becoming a reality- the challenge was how to honour and build on the good work done so far, in an atmosphere of increasing anxiety amongst staff. There was now a greater sense of urgency. The Development Co-ordinator, the Bishop and the working group from the previous consultation agreed that the process should continue and the second consultation duly took place.

Achievements of Consultation Workshops:

The consultants used a variety of methods and processes, which led to the following:

- A revision and agreement on a new vision and mission statement based on a review of the past, a rigorous analysis of the present socio-political-economic context in the country, as well as external (including donor) trends. As a result greater emphasis was given to an empowerment approach and human rights and justice issues.
- Identification and agreement on core values underpinning work linked to their understanding of development and the Christian faith.
- Greater leadership within the process from the Development Co-ordinator.
- A greater sense of urgency by those taking part.
- Identification of main strengths and weaknesses of development department by key stakeholders (including the main donor who was asked to communicate by fax). These concurred with many of the issues identified in the initial diagnosis.
- Increased transparency by programme staff with other stakeholders about sources and level of funding to different programmes.
- Recognition that some programmes did not fit with the new mission statement and approach and that it would be more painful to stay the same than to change.
- Identification of some possible options/strategic choices for the future.
- Agreement on terms of reference for a task force to take this process forward. These were subsequently ratified by the Bishop.

Weaknesses/Constraints in the Process

Although he intended to come to the whole process, the Bishop only made it for the final day of the first consultation (due to preparations for a visit by a senior Church leader) and sent his representative to the second. Meanwhile, the chair of the development Board was only able to come intermittently to the first consultation due to other commitments. In fact, this frustrated some participants so much that they refused to continue until he returned because they saw the issues as so important. He was present throughout for the second one.

A small minority of largely programme staff at the first consultation perceived this process as a donor-driven agenda; one evaluation likened the consultant who shared information on donor trends as a 'bringer of doom'. This led to some resistance that had to be carefully handled and was a turning point in the move away from the 'old ways' of doing things.

There was insufficient time to look at the relationship of the development department to the wider diocese and the representation of clergy and sisters, as well as lay women was limited.

The Task Force

The terms of reference for the Task Force as agreed at the second consultation and ratified by the Bishop included:

- formulating a future strategy for the development office based on the external realities and mission statement;
- deciding on the necessary internal changes needed; and
- managing that change process, including the setting up of an appropriate Board structure.

The Task Force requested the support of the consultants in carrying out this task. Terms of reference and a contract between the consultants and the Task Force were worked out and agreed. The development department sought assurance from the main donor that they were to 'walk alongside' the diocese by providing the necessary funding as part of their budget to pay for the next phase of this process. This then meant that the development department was able to pay the consultants direct from their budget.

The Task Force was comprised of those who had been largely part of the previous consultations to ensure continuity. It was chaired by the chair of the old Board, representing the Bishop. Membership consisted of a clergy representative, a community representative, a staff representative and the Development Co-ordinator. All were men except for the staff representative. The consultants raised the issue of gender representation with the Task Force, given that most of the development activities were carried out by women. After a few meetings, two more women were invited to join the Task Force; the team leader of the previous evaluation and a legal advisor from a Council of Churches which had gone through its own organisational change.

What Happened

The Task Force took a long time to get started and looked to the consultants and the external resource people for support and guidance. The financial situation dominated the initial meetings and got in the way of moving forward. Little progress seemed to be made in-between meetings, with the chair and Development Co-ordinator being caught up in the day-to-day demands of their respective jobs. The Task Force began to flounder, lacking direction and the consultants had to take action to review the situation

with the chair of the Task Force and the Development Co-ordinator. This was an important meeting, as from that point the Task Force began to take a more proactive role (see Section 4)

Achievements:

Over the next six months, the Task Force met ten times and achieved the following:

- Strategic options were assessed and a new strategy formulated, moving from a programmatic approach to a thematic one, focusing on capacity-building, advocacy and information-sharing/networking with animators at parish level, working with the local church and community, supported by a small team of advisers at the centre around the thematic areas.
- A skeletal structure was worked out in line with the new strategy including the role/responsibilities of staff and skills and abilities needed. With the greater emphasis on the local level, de-centralising resources away from the centre, there were big implications for existing staff levels, skills and ways of working.
- A greater grip on the financial situation with support from the consultants on the financial systems.
- Two consultations took place with staff about the proposed strategy and structure by the Task Force.
- Meetings between themselves and the Task Force who contributed their own ideas to the proposed strategy.
- Donors were informed of the proposed strategy with requests for feedback.
- Open discussions took place with the main donor. They affirmed their support for the change process but also revealed that their priorities were changing and that funding could not be guaranteed for the future. Other sources would need to be found.
- The Task Force grew into its role, taking and sharing responsibility for the process. The chair became more proactive and engaged. The Development Co-ordinator acknowledged that this sort of approach should have been built into the workings of the department a long time ago and that it needed to be part of any future department and Board.

Consultation with Clergy

One of the most encouraging signs was the way that the Task Force with its chair took up the challenge of consulting the clergy on the proposed strategy and structure of the development department. An intensive series of consultations took place over a period of one month involving all the priests, sisters and brothers. The Bishop headed up the process and the Task Force facilitated it with the consultants acting as observers. It is clear that for many of them this was the first time they had been consulted about the development department, since its birth.

Managing the Changes

As the whole process became increasingly drawn out, so the level of anxiety amongst staff and rumours of redundancies increased, leading to a drop in morale and a running down of some activities. The Task Force had meetings with staff but they were few and far between. Meanwhile some level of activity still had to continue, while the changes were being agreed upon, for example, the lack of rain led to drought, failed harvests and food shortages. Consequently, the Development Co-ordinator became heavily involved in relief co-ordination and distribution locally. At the same time, the computer software was still proving problematic in producing the right financial information for the donor and a recent audit was returned requesting it to be re-done. Given the focus at parish level, a lot of consultation at that level needed to occur to ensure ownership. The re-structuring began to take place with posts created at parish level and staff being invited to re-apply. Some left, while others took up new roles. The donor appeared anxious for the new strategy to be implemented, as they were not willing to support the change process indefinitely, while at the same time, they were embarking on a process of organisational change themselves.

Yano is still on the Journey

'In the past we waited for development to come from the central office. Today we have discovered that there is a lot we can do for ourselves. Of course we still expect the central team to come, but only to guide us and build our capacity to learn and act from the opportunities around us.'

The restructuring is over, some staff have left, others have been deployed and new ones have joined. There is now a new Board in place, with some of the original Task Force remaining as members. The central team is settling down to real work. There is enthusiasm from some of the pilot parishes, where new community groups have been formed and are getting actively engaged in doing things for themselves.

The role of the central team is essentially that of guiding the process of engaging local communities in addressing the issues that affect them. So far, local advocacy groups are being developed; linkages with other local actors are being worked on with assistance and support from the central office team. Some of the existing programmes are still continuing but with a greater emphasis on how to promote empowerment with a view to enabling communities to address the root causes of their problems.

Case Study 2

Diocese of Sende: Shifting from the Development Office to the Wider Diocese

The Diocese of Sende has been in existence since 1959. Presently, it has forty-four priests and 220 churches/mission stations. It covers some 45,000 km square of semi-arid land in Southern Africa, which is largely inhabited by pastoralists. The present Bishop has been there since its inception but will be retiring in the near future. From the beginning, the diocese adopted a decentralised approach towards development with a large community development project in one part of the diocese and a diocesan development education programme based in a parish. Both were only loosely attached to the development office (DO) of the diocese. Other sector programmes (e.g. health) emerged as departments as funding allowed, with the development office playing a co-ordination role. Meanwhile, priests (largely foreigners) accessed funds from external sources for their own individual parish development projects. The development department is made up of a Development Co-ordinator and two assistant co-ordinators.

The Trigger and False Start

Development initiatives fluctuated over the years and there was a high turnover of staff in the development office. After an evaluation of the Development Education Programme, this programme finally split off from the diocese in the early 1990s. There then followed a whole series of evaluations, which raised questions about the role, direction and sustainability of the development co-ordination office. With the impending departure of the Bishop, funding looking more precarious and the loss of implementation role for the DO, a crisis was brewing. One major donor (75%) suggested that the diocese undertake a feasibility study for future work and suggested a firm, which had been started primarily by some university lecturers in their spare time. This consultancy proved disastrous. The final report appeared to have little relevance to the church or its context and many in the diocese, particularly the priests, considered it an imposition from the donor. The diocese 'swept the report under the carpet'. At the same time, this situation forced them to think about the purpose of such a consultancy and whether they wanted one at all. The main donor realised that their choice of consultants had been a mistake. They encouraged the Bishop to approach a local consultancy organisation, which had a track record in working with churches in development. There was already an existing relationship through some previous work they had carried out for the diocese.

The Initial Diagnosis:

The Bishop approached the consultants and initial meetings then followed with the consultants and the Bishop, the development office and others in the diocese to establish trust and rapport and highlight key issues, which included the following:

- The development officer had neither a background nor experience in development, but was the only person the Bishop found who was willing to work in this area.
- There was pressure from the donor to produce a clear mission- priorities, plan and budget- but the development office did not know how to go about it.
- The development office of the diocese was very dependent on the goodwill of priests if it wanted to work in parishes. Many priests saw the development office as marginal and only there to access funds for their projects.
- The missionary priests were still influential. Accountability was first to their order/congregation/own donors rather than to the diocese, therefore an overall approach to development would be hard to implement.
- With the departure of the DEP programme the development office was largely a co-ordinator of projects and programmes without any clarity of its own role and identity.
- Given the weakness of the development office, the wider diocese could not be ignored in any change process.

With the above points in mind, the consultants initially worked with the staff of the development office. One of the assistant co-ordinators was very competent and was seen to be a possible successor to the incumbent Development Co-ordinator. Unfortunately he soon left for 'greener pastures'.

From Change within the Development Office to the Diocese as a Whole

The consultants saw the need to broaden the initial diagnosis and encouraged the Bishop to bring together a small consultation group, representing different parts and sections of the diocese. This included a historical review of the diocese identifying significant changes and events up to the present day, stakeholder analysis, an assessment of the culture and life stage of the diocese and the development office and an analysis of the strengths and constraints of the development office. From this analysis, part of the initial diagnosis was confirmed, particularly the lack of clarity about the role, identity and conceptual/theological basis of the development office. Likewise, when the analysis went deeper the same was said of the wider diocese. Those involved, therefore, felt that there needed to be a shared common vision, mission and priorities identified for the wider diocese and then from there, it would be possible to look at how the development office fitted into that, if at all. It was also recognised that some of the problems in the diocese, for example the relationship between clergy and lay people and the lack of relevance of the church, felt by some, to the context and culture were all impacting on the work of the development office. The separation between the pastoral and developmental work of the church was seen to be artificial and potentially damaging.

A possible window of opportunity to move this process to a diocesan level was the Diocesan Pastoral Council (DPC) meeting which brought together lay representatives from parishes, clergy and women's and youth groups in the diocese, once a year. At this meeting, the Bishop chaired a debate which led to an agreement by the Council to continue with a process of forming a shared vision for the diocese, starting with consultations at parish/group level and then another meeting at diocesan level to discuss a common vision/mission for the diocese. A representative planning team, with the DPC lay chair as chairperson, was given a mandate to plan this process with the support of the consultants who sat in as observers at this meeting. A gradual shift began to take place, moving this from a development office initiative into a diocesan one.

Contracting

The Development Co-ordinator was part of the planning team in his role as secretary to the Diocesan Pastoral Council. With the endorsement of the planning team, he wrote a proposal to the main donor to pay for this capacity-building process. This was also an opportunity for the consultants to agree on clear TOR and a contract with the diocese. The main donor expected that within the year the development office should present a vision, a concrete programme with measurable objectives, activities, structure, organisation and number and quality of staff needed for a 3-4 year period. Although initially perturbed by this demand, the planning team challenged this time-scale as unfeasible.

The Process Used- Questionnaire

Given the size of the diocese, but to ensure that the process was as participatory as possible, a simple questionnaire relating to past changes and dreams for the future were sent to all parishes for congregations to discuss, with an invitation for representatives to join the diocesan level consultation.

Vision and Mission Workshop

Over fifty people took part from nearly every parish. The majority were lay people and male. Only a few priests' representatives came. The Bishop was unable to attend as he was on leave. This consultation gave particular emphasis to the changes occurring externally and internally to the diocese, with an in-depth social analysis of the country and the church's role. Perceptions of how different groups of people viewed the church were shared openly, particularly by one ethnic group that felt the church devalued their culture. This was explored through the use of drama, pictures and focus groups and led to much

animated debate and strong feelings. The Bible, the social teachings of the church, the Bishop's pastoral letters and recent debates from the African Synod were also drawn upon. From this, participants were encouraged to dream of a future vision for the diocese and how the diocese would contribute towards this (its mission). Discussions and debates went on late into the night. Those who resisted at the beginning, particularly one or two influential priests, began to change their approach and engage actively with the process.

After four days, the entire group agreed upon a draft vision and mission statement with a sense of ownership and satisfaction with the hard work done. Ideas were also put forward for ways of ensuring this vision and mission was shared and owned throughout the diocese. Concerns were raised about the small number of priests having gone through this experience and their possible resistance later. The planning team was given the mandate to continue the process.

Donor Demands

In the meantime, the main donor requested that a detailed programme for the following year be submitted in the next two months by the DO together with a consolidated budget for all the departments. The development office, backed up by the planning team, felt this was premature given where they were in the process. During a visit by the main donor, open and frank discussions took place with the Bishop about changes occurring in the donor world and the need for change. They also expressed their specific concerns about the competence of the Development Co-ordinator, saying that 'without skilled people we will not be attracted to fund you in the future'. These suggestions were resisted by the Bishop who believed that the donor was dictating what should emerge from this process rather than letting it evolve and be managed from within. The donor, in turn, felt that the Bishop did not fully appreciate the urgency and need for change.

Bringing the Priests on Board

The central role of priests at parish level meant that they had to be brought on board. To overcome any resistance, the Bishop invited all priests to arrive the day prior to their annual meeting to give some time to the vision process.

After considerable discussions most supported the draft vision and mission statements, though some challenged them, as they were not 'theological' enough, having been done largely by lay people. Those priests who had been involved in the diocesan consultation spoke up and played an active role in winning some of their fellow priests round. The consultants' understanding of the church set-up also helped in this respect. There was a general agreement that a parallel diocesan-wide process considering African Synod debates on inculturation and justice and peace needed to be integrated into the OD process, as a basis of a diocesan plan. They also agreed that there had to be further discussion at parish level.

Since then there has been a consolidation of these suggestions. The planning teams for both processes have merged and begun to work on a statement of core values as well as strategies, including the role of development in taking forward the vision and mission as part of an overall diocesan plan. The vision and mission proposal has now been embraced and endorsed at a recent DPC meeting.

This process is ongoing after a year and may continue for another year or so. As well as working with the diocese on strategy setting and structure flowing from the visioning process, the consultants are also providing intensive support to the development office in developing their own direction and priorities/ways of working and policies in relation to the wider process.

Preliminary Assessment of the Impact in Sende:

While the process is still mid-way and the translation of verbal commitments into practice will take time, the client identified significant changes which had taken place already in terms of:

Wider Church Diocese

A clearer and shared identity: *'We have managed to come up with clear diocesan vision and mission and by 'harmonising the African Synod debates with the OD process' they have overcome dualism to some degree and separation of spiritual and secular.*

'the values statement doesn't just affect development but influences the wider work of the church'

'the development office has now been integrated with the rest of the organisation with greater consultation, joint planning and team work'

The process is also contributing to the 'indigenisation of the church'. The vision and direction of African lay people and priests has been endorsed by the church. In this way the process is having a much wider impact on the church as a whole.

Development Office

The DO has also progressed in its:

Identity: *'we now know what we are doing, why and what we are going to do'*

Strategy: *'helped with a better focus for development activities'*

Systems: *'we are in the process of standardising our financial systems and manual'*

Programming: *'Our expectation of the process was to find out if our work was the priority of the people but the priests were in the way. Now we are sure the demands come from the people.'*

According to church members, these changes have had a direct impact on beneficiaries.

There has been a change in attitude with people taking responsibility for their own development: *'taking initiative themselves and no longer waiting for handouts'*.

Lay people

More broadly the process has had an impact on the wider work of the church with arguably the most significant achievements being that *'for the first time the laity have had a chance of discussing the role of the church and its work amongst them, whereas in the past, we grew up believing that all decisions should be made by priests'*. Given the integral part that lay people have in the development work of the local church, this is bound to have a positive impact.

The Whole or just a Part?

The Yano case study illustrates a process used with a large development department of a diocese. For a significant part of the process the church does not feature in a dominant way, which is indicative of a development department which has almost become a mini-organisation in itself. Considerable work had to be done internally before relating to the wider organisation, particularly the priests. As the new role, strategy and structure emerge, so there will be a need to involve the rest of the organisation, particularly the clergy, to a much greater extent given the focus on animators working at parish level.

In the meantime, the Sende case study deals with a similar process but on a different scale and with a greater emphasis on the wider diocese. This is because the development department is much smaller, less influential and the development work is largely carried out at parish level, with or without the development department's support. The development office was an entry point for a broader intervention, which had more support from the Bishop. While the Yano consultancy started with the development department and is only now beginning to relate it to the wider diocese, the Sende case took a much broader and more ambitious focus from the start. Consequently, though riskier, this approach has the potential to have a wider impact on the diocese and the work of the church as a whole, including its development role.

4. LEARNINGS ABOUT GOOD PRACTICE IN OD WHEN WORKING WITH CHURCH ORGANISATIONS

This section draws out from the cases studies some of major learnings for good practice in Organisation Development when working with churches involved in development.

A Sense of Urgency, Vision and Ownership of the Need to Change

Research on organisation development with NGOs has shown that 'the prime factor determining the success or otherwise of an OD intervention was that the NGO itself owned the change process' (James 1998). For any organisation (including churches) to go through the

effort and dislocation of change they must believe in the importance of this change and that the status quo can no longer be accepted, as well as have a vision of what the organisation could look like, once the change has taken place (Kotter 1995). To overcome the inherent resistance to change it must be clear that there is a sense of urgency and that not changing would be even more perilous and threatening. Recent literature on Future Search and Appreciative Enquiry methodologies also emphasise the need for finding the energy and potential for change within the organisation and areas of common ground (see Postma (1998), Kelleher and McLaren (1995) Weisbord and Janoff (1995)).

The Yano case study demonstrates how the lack of ownership and sense of urgency initially obstructed the change process.

The Urgency in Yano:

With the Diocese of Yano, the sense of urgency to change did not appear to be present among many of the department heads or even the Bishop, despite the findings of the evaluation and the changing external realities. Only the new Development Co-ordinator seemed to recognise the urgency, but being new did not want to rock the boat and needed time to get on board.

At the first stakeholder consultation, the consultants used a series of ‘what if’ scenarios to facilitate the organisation’s understanding of the urgency of the need to change. Such scenarios included:

‘What if’ the main donor pulled out tomorrow?

‘What if’ the government became increasingly antagonistic to organisations promoting empowerment, justice and rights?

‘What if’ the present Bishop left and a new one came promoting a relief/welfare model of development?

‘What if’ other agencies/churches move in/carry out the same work in the areas that you are operating in?

In fact, a few months later, the development department found itself in a financial crisis due to serious cash flow problems and the donors were unwilling to bail them out. Emergency meetings took place to look at short-term ways of addressing this situation, while at the same time the necessary urgency and impetus for change was created.

Although with the Sende case authentic ownership may not have existed initially, the false start and resulting decision to restart the process meant that the diocese had to make a clear choice to take the OD process forward. Their subsequent ownership of the OD process by the Diocese of Sende can be seen through the considerable investment of time which was put into the process, particularly by lay people.

While there certainly does need to be internal pressures to change, the cases show also the importance of external factors in catalysing the change process. With Sende and Yano concerns over performance arising out of a donor’s evaluation, threatened to disrupt the funding pipeline, along with the financial crisis in Yano. Other research by CORAT has revealed that, ‘policy-makers are commonly unresponsive to calls for change until the purse holder raises a red flag’ (Oladipo 1998). The threat of donor withdrawal was the match which lit the kindling of internal pressures for change. However, in other cases, ‘the match’ could be

a change in leadership or a rapid expansion in demand for services and consequent growth (or lack of).

Leadership Commitment

The level of ownership of a change programme is closely correlated with the nature of leadership support. While some change initiatives might emanate from staff, unless the leadership supports these change efforts or comes to support them, they are doomed to fail. Leadership acquiescence is not enough; they must be part of the driving force behind this change.

The church cases reveal ambiguous and changing leadership support for the changes, which has hampered their success. With the Sende case, some said that '*all along the bishop was championing the process*', others felt that this was not the case originally, but it was the process itself that brought his commitment. The Bishop being on leave during the crucial vision-building workshop could be seen as a mixed blessing; some felt that this signalled a lack of commitment to those who took part, while others felt that his and other priests' absence gave lay people the freedom to participate more fully. With Yano the lack of leadership energy in the process was more obvious. From hardly appearing at the first stakeholder consultation, it was noticeable how much more seriously the Bishop and the chair of the Board took the second stakeholder consultation after the seriousness of the financial situation became apparent in the interim. Lay people also showed some leadership and strength at the first meeting by refusing to continue until the Bishop's representative turned up. This may well have had some influence too.

Commitment and Involvement of Key Stakeholders to Process and Outcomes

As well as the leadership there is a need to have the commitment of the key stakeholders to the change process, particularly those who will be responsible for implementing the changes of direction with the communities. Initially these must be identified and their involvement assured. This should ensure greater commitment to the outcomes, for example to stand alongside and support a more radical mission statement/approach if this is what is decided upon from such a process or any re-structuring that may be needed as a result. This was certainly the case in Yano, when more emphasis was given to empowerment and justice issues. Both cases revealed that though change was being sought in the development department, it was essential that the priests were brought on board to support the process. With the Diocese of Sende this was a central part of the intervention strategy, involving priests at the initial diagnosis stage, the vision-building workshop and as change agents with their fellow priests at the priests' consultation.

In addition any group or body (be it Board or Task Force) carrying forward the change process internally needs to have a mandate from those already involved and the authority from the Bishop to make decisions. If they do not have the political power to facilitate change, they will soon become marginalised and frustrated. This group must also have the expertise and competence to carry out their responsibilities which commonly include: facilitating the process of taking and implementing decisions during the intervention; keeping the process active; 'selling' the process internally; and supporting the leader on logistics (Oladipo 1998). The members of this group need to be the 'vision carriers' and 'champion' the process through, even when things become difficult as they inevitably will. This task force may need

to be challenged and strengthened during the intervention process, as was the case with Sende and Yano.

The Yano Task Force:

The Task Force began to flounder, lacking direction. Members struggled with the necessary development thinking needed in re-formulating a new strategy. The consultants did not want to ‘take over’, as there had to be ownership of the process and outcomes, at the same time they were concerned that momentum was being lost.

Finally, after three months the consultants decided to call a separate meeting at their offices with the chair and the Development Co-ordinator to clarify the assumptions and expectations of both sides. The consultants were prepared to withdraw if there was no evidence that the Task Force was to take a more proactive role. The chair and Development Co-ordinator made it clear that they wanted a ‘home-grown’ process and they were prepared to play their part in that. From this meeting the chair began to become more engaged. Although the Task Force still struggled at times, the responsibility appeared to be shared more within the group and some progress was being made between meetings.

Over the following six months, the Task Force met ten times.

Their growth in competence and confidence in managing the change and their recognition that such processes should be built into their way of working in the future is a key part of any capacity-building process.

Address Key Issues

One of the common factors, which emerged from these cases- as being critical in their effectiveness, was that they dealt with core issues. The identity and role of the church in development was a key aspect to most of the cases. Vision, values, mission and strategy as well as structural and cultural implications were addressed, rather than merely identifying the capacity-building needs as simply re-structuring, a lack of staff training or changing the development officer. As indicated in the ‘onion-skin’ model (Fig. 2) organisational change programmes must often go beneath the surface of an organisation’s needs to deal with questions at the core. For churches involved in development, this may include questions such as, *what makes a church organisation involved in development distinctive as a Christian organisation as compared to other NGOs? What is the role of the church in this particular socio-political context? What aspects of church culture help or hinder its role in development and how can these be addressed?* Responses to these questions can be improved by exploring and making explicit underlying values and assumptions, understanding the context and theological reflection.

The cases illustrate the importance of revisiting, formulating and agreeing the vision, mission statement and underpinning values with key stakeholders in order to form a key reference point for strategy setting and direction at various points in the change process. Alongside this, there were also pressing issues that needed to be attended to and technical support and advice was offered, for example, with the financial systems.

As a general rule there needs to be clarity or consensus around the fundamental purpose and direction of the organisation before one deals with issues of organisational structure or procedures. Alongside this, the Sende case ‘surfaced’ issues relating to the church culture, for

example the relationship between clergy and lay, leadership and decision-making, style of worship and the exclusion of certain groups. It was possible to do this due to the diocesan focus and the recognition that these factors impacted on the life and work of the church including its development work. The Yano case, however, only related to them in terms of the change process itself and when it became clear that the development work would take place at parish level, where the local church would inevitably have a greater role to play.

Understand the Whole Organisation

As indicated in the ‘three-circles’ model (Fig. 1), a meaningful organisational change programme needs to recognise the integrated nature of an organisation and how a change in one element will have repercussions in other parts of the organisation. The Sende case and the Yano case offer two contrasting strategies for fostering organisational change in the development work of churches. The Yano case concentrated initially on the development department alone and then began to broaden the implications to the whole diocese. The Sende case started out with a broader focus on the whole diocese looking at the work of the development department in that context.

An appreciation of the whole organisational context does not mean the development department alone should not be the focus for the intervention, but there is a need to have a deep understanding of the whole picture of the diocese, its environment and how it works, in order to see where the development department fits. There is an inextricable link between the wider organisation of the church, including the local church level and its development work. For example, a lack of vision and direction in the development department can be linked to a lack of vision and direction at local church and diocesan level, as was the case in Sende Diocese. Likewise, the nature of the church itself can help or hinder the effectiveness of the development work and any change process, for example, given the role and authority of clergy, they remain vital for implementation of any change programme. Therefore, the development department cannot be treated in isolation from the wider church.

Build on the Existing and Potential Strengths of the Church

The potential strengths of the church should be used as a positive force for change. The existing structures and mechanisms for decision-making within churches (e.g. parish, deanery, synodical, diocesan structures), the social teachings of the church (as in the Catholic church) and the Bible, the large lay membership of local churches and the sense of being inter-connected and part of something bigger as ‘the Body of Christ’ can all be important tools or mechanisms for change. In the Sende case, the meeting of the Diocesan Pastoral Council was a golden opportunity to float the idea of a vision-building workshop, when representatives from all the parishes were present, which then gave a broad-based mandate for the process to continue. Likewise, the discussions around the African Synod were also used as an opportunity. Overcoming potential blocks involves a delicate balance between working with and yet also confronting and challenging. For example, it is essential to involve clergy in any change process as they are often the ones to implement (or not) any new changes and they are the main gatekeepers to a parish structure. Yet it is important also to not let them dominate the agenda. This may also involve challenging overt clericalism or providing a safe environment or mechanisms for others to challenge, particularly if the church culture discourages this. If this is not done, then the potential strengths risk being ignored or even undermined, while the

potential blocks become impossible obstacles. It was opportune that there was a large presence of lay people and only a few priests at the vision workshop, as this gave lay people the freedom to open up. However, it was important that there were some priests there as they became important ‘champions’ amongst their fellow clergy at a later stage.

The initial point of entry of an OD intervention can influence how a process is perceived. In Sende, as the initial contact was with the development office during the earlier stages of the process, several saw this as a development department ‘affair’. It was only by working with diocesan structures and having the lay chair of the DPC, rather than the development officer, as chair of the planning group, that the perception shifted to this being seen as a diocesan initiative.

Skilled, Independent Consultants

It is essential for OD consultants working with churches to have a clear understanding (or desire to quickly learn) about the unique cultures and issues which churches experience. One Northern NGO donor concluded that some OD work they had supported in Ghana, ‘*did not lead to clear results ... because the local consultants had a limited understanding of church development structures. The intervention was not well adapted to the particular church context*’ (James 1998). This does not mean in any way that OD interventions should only be done by church-based groups or by Christians, but that consultants must have, or quickly develop, a keen understanding of the particular organisational context, culture, dynamics and structures if they are to have a meaningful impact.

In contrast, the local consultants in the Sende case brought this church understanding and empathy.

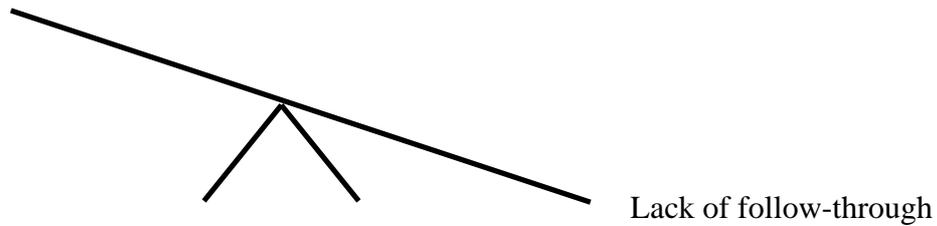
The Sende Consultants:

The skills and attitudes of the consultants were lauded stating that ‘*the way they are performing is so beautiful*’. These consultants were seen to be much better than others, and ‘*we were surprised by their approach as they made us think for ourselves*’. As well as having the experience and the skills, they understood the organisation and the local context- ‘*they speak the language of the people, not just the development office*’ - and their understanding of how the church worked was noted and valued. There was, however, a fear that the consultants had too much other work and were not able to give enough time to the process.

The issue about how much time should be given by consultants to follow through any change programme is a thorny and contested issue. On the one hand, a lack of follow-through means that the internal momentum for change may not be sustained and people will revert to old ways. On the other hand, good consultants are very aware of the dangers of creating dependency and therefore strive to ensure that the clients are equipped to take responsibility for their own development.

In both cases, this was a balancing act for the consultants involved, where different stages in the process demanded different styles and roles.

Dependence



Find an Appropriate Mix of Approaches and Tools Relevant to the Context and Organisation

Assessment and change interventions should involve a variety of tools and processes appropriate to the culture, history, church tradition, context, size and age of the church organisation. It is important to understand the stage of development that the church is at in its own history and to be able to ‘read’ the unique needs it faces at this particular point in time. A blueprint approach should be discouraged.

The denominational and historical backgrounds of different churches and subsequent leadership style, structure, culture and attitudes may greatly influence any change process for good or for ill. These issues need to be understood and acknowledged by those who seek to strengthen church-related development programmes; donors and consultants alike.

Integrate Gender and Diversity

Issues around gender arose in both cases, in the Yano case study it was apparent in the make-up of the stakeholder consultation groups and also the composition of the Task Force. In the Sende case study it was evident again in vision workshops. When raised as an issue in Sende by the consultants, the donor and the female Assistant Development Co-ordinator, it was treated as the ‘Beijing factor’²⁰ by the Bishop and some priests and laymen in a somewhat condescending or patronising way. These attitudes and the lack of women representatives illustrate broader attitudes about gender within the church, even though women carry out the bulk of church and development work. In Yano, the consultants also raised it as an issue in terms of the make-up of the Task Force, which provided an opportunity for women with considerable experience and ‘weight’ to be invited.

In recent years, the debate has shifted from an exclusive focus on gender to a broader focus on diversity, which considers other aspects such as disability, age, race, ethnicity and so on, as well as gender. In the Sende case study, this was particularly an issue amongst one ethnic group that felt marginalised, as well as some concerns raised that the Development Co-ordinator came from another dominant ethnic group which may get in the way of his development work and how he is perceived. As well as gender, OD should embrace these wider issues, which interestingly appear to be more culturally appealing to some church organisations in the South than what some see as the ‘European’ agenda of gender. Some would argue that potentially conflictive issues such as gender can be better approached by using Biblical examples rather than donor conditionalities. For example, the values of justice, ‘Good news for all’ and that ‘all are equal in the eyes of God’ can be used to emphasise the

²⁰ The 1994 UN Conference on Women was held in Beijing to which many churches in Africa sent representatives.

theme of inclusiveness, suggesting that gender and diversity cannot be foreign to the church after all.

Change has a Cultural, Political, Personal, Spiritual and Technical Dimension

Organisational change is not just a technical exercise. There are several dimensions: cultural, political, and personal and within a church context, possibly spiritual too. If it is just treated as a technical exercise whilst ignoring the rest, it is unlikely to have much lasting impact. It involves people- their feelings, their values and beliefs- as well as the cultural and political realities of any organisation.

According to INFO-LINE, ‘a change process which does not take into account the cultural roots of an organisation will often leave people without a usable past and seriously diminish their sense of competence and faith in the organisation’s ability to change effectively’ (1993). For example, in one diocese in which CORAT has worked, a dominant expatriate culture had been nurtured and developed and this blocked opportunities for change in the development department. It was not until the expatriate priest left that the diocese was able to move forward. As indicated above in the Sende case study, issues of culture were one of the very issues to be addressed by the Diocese in terms of stereotypes and discrimination experienced by some from different ethnic groups. Drama was used as a way to express this. OD interventions can benefit from the use of ‘local metaphors or symbols, which may include appropriate language, folklore, ideology, or in the case of a religious organisation, a theological basis’ (Kisare 1996). Many examples of change can also be drawn from the Bible, for example the Exodus story which illustrates the importance of leaving behind and ‘dying to’ the old ways before being able to realise the vision of inhabiting a ‘land of milk and honey’. For Christians (and other faiths) the spiritual dimension of change is also an important area to consider, for instance, examples of change can be drawn from the Bible and personal testimonies where God initiates and empowers change in individuals, organisations and nations.

Change Takes Time!

One of the powerful messages from all cases is that change takes time. Unless we understand the history and complexity of the church (described in a previous section) we will be surprised by how long change takes. Some clergy or lay people may have been part of the church for over 50 years. Fifty years gives someone a great deal of time to build up considerable resistance to change as well as power to obstruct any proposed change. Both the Sende and Yano processes have continued over a period of two years. The length of time involved in such processes has significant implications for Northern agencies and the nature of their support. Some of these implications will be explored in the next section.

5. 'TEN OD COMMANDMENTS' FOR NORTHERN NGOS WORKING WITH CHURCHES

The following provides some guidelines for staff of Northern NGOs who are seeking to apply some of the learnings from OD to their work and practice with church partners. They are by no means limited to 'ten'!

I. Be Clear as to 'Who is the Client?'

It is essential that all parties clearly recognise who is the client in the change process. Just as consultants have to determine clearly 'who is the client', so too do donors. There is a temptation for Northern NGOs to direct and control the process and consider themselves, not the partner, as the consultant's client. However, unlike other types of consultancies, 'honest' and effective OD work cannot be done 'to' partners by consultants hired on behalf of their donors. The primary client has to be the organisation that is going through the OD process itself if there is to be any ownership of the process and its outcomes. The test of who is the client, is to ask, 'who hires and who fires the consultant?' as well as 'who does the consultant report to?' Responding to these questions, can be a challenge to the traditional ways of working of some Northern NGO staff but have to be asked early on in any potential OD process. The issue is complicated further within the church as it is often unclear as to whether the development office is the client or the diocese itself. Although the point of entry and initial focus of an OD intervention may be the development office it is still important to remember that it is still part of the wider diocese and, therefore, needs to have its ownership. An OD approach is holistic by nature and may well have implications for the whole organisation. In principle, the diocese should be seen as the client, as was the case in Sende. In practice, this may not be so clear, as the Yano case proved. Therefore, there is a need to build in a regular review as part of any change process, as the boundaries of the client system may change over time.

II. Be Super Aware of your Role and Manage the Boundaries

The potential triangular relationship between the client, the consultant and the donor needs to be carefully managed by all parties. If not, boundaries can blur and consultants can become associated with a hidden agenda or be seen as agents of the donors. The partner needs to be encouraged to take the driving seat as client, liaising with the donor and the consultant, and may need support in taking up that role from donor and consultant alike. The donor can help create the conditions for this in a variety of ways. For example, resisting the temptation of seeking information from and making arrangements with the consultant, accepting the confidentiality of the relationship between the consultant and client by not demanding internal reports of the process (unless agreed by the client).

The issue of contracting and payment is also important to clarify. The donor may well be the sponsor of an OD intervention but the request for any such external financing should come from the partner. Payment or request for payment of the consultant should come from the client, even if via the donor to the consultant. Many of these areas can be clarified at the contracting stage between the client and consultant. This stage is also an opportunity for the donor to be consulted where mutual expectations can be expressed and worked through between all parties concerned, as part of the Terms of Reference. Moreover, building in periodic reviews can be a mechanism to check these expectations out, and can also serve to reduce any anxieties or concerns that the donor may have which can often be the cause of

over-interference later. If they are also a funder of the organisation, as a key stakeholder, the Northern NGO will invariably have some involvement in the process, but not as the client. Ultimately, the contract lies with the partner as client which, as indicated above, includes the hiring (and if necessary, firing) of the consultant and the reporting to by the consultant. In the Sende case, this was worked out as part of the proposal to be presented to the donor to fund such a process. In the Yano case, the consultants involved in the evaluation were asked to continue with the change process but no new contracting took place. This might explain some of the concerns about them being linked to a donor agenda later on in the process.

The success of OD consultancies is very dependent on the consultants playing the appropriate roles at the appropriate times. Consultants need to play roles which are effective and accepted by the client. For many churches, OD interventions are initially perceived as another series of interventions by experts and yet OD interventions are often more 'process' consultancies. As Schein advises, 'if we are to be influential and genuinely helpful, we must learn how and when to be in the role of expert advice giver and when to be in the role of facilitator and catalyst' (Schein 1987:19). The reality in many donor-funded interventions is that donors confuse these roles due to a lack of understanding of OD and often add a further complication by asking the consultant to report back to them on the client organisation, as already indicated. This undermines the neutrality of the consultant and may well serve to derail the OD intervention. Although the consultant will need to hold and manage the boundaries of their role, this can be greatly helped by the donor being sensitive and responsive to some of the areas suggested above.

Despite the sensitivities of organisational change processes many donors still recommend or worse simply employ their own consultants to implement the change, oblivious of the controlling messages this sends and the undermining tensions it creates from the start. It is highly likely that Northern NGOs would be unhappy if their main donors, such as DANIDA, DGIS or DFID decided to take their organisation through an OD process, but somehow this connection is not always made. As one African NGO commented: 'it is an outrageous step beyond critical boundaries, you cannot wear two hats as it causes role confusion. Stay away and do what you do best.' If there are other programme funding-related issues between the donor and the client which need to be addressed, then this is for a different purpose and different consultants should be used (and these may be more donor-related). It is important to create a separate space for organisations to change.

III. Catalyse with Care

The Sende case showed that donors can have a catalytic role in putting an organisational change process on the agenda as *'the idea originated from the donor, but then was taken up by the diocese'*. The various stakeholders in Sende were clear that *'we wouldn't even have started without the assistance of the donor'*.

If the donor does play a role in initiating the change process, it can have deep implications on how organisational change is carried out and whether ownership is really with the client or mere acquiescence. Given their control of key resources, donors run the risk of being perceived as imposing or pressurising change. This can lead to a donor-driven rather than an organisational-driven change process. There is a danger that it then becomes a one-off exercise to deal with a crisis and not a process that becomes an in-built part of organisational life. What appears to a European desk officer as an innocent suggestion can be taken as a donor directive by a church partner due to the power dynamics involved. The challenge is to

trigger a process and then stand back and let the process move on its own. If handled well, the catalytic role can also lead to a positive shift in the relationship between church organisation and its Northern partner.

IV. Read the Situation Well and Signpost Appropriately

The process of organisational change and development almost always benefits from the use of external, skilled, experienced consultants who can provide objectivity and balance without being linked to a funding agenda. The need to be able to signpost effectively is demonstrated in the Sende case both negatively and later positively when the donor recommended the much lauded local consultants.

Northern NGO staff need to recognise the potential far-reaching effect that well-intentioned but inappropriate guidance can have on the state of the organisation and on future interventions and relationships. In order to effectively signpost, Northern NGOs' staff need to be able to 'read' the situation well, in terms of:

- the stage in the organisation's development and its unique needs at this time;
- the organisational culture, its performance and wider context/environment;
- the type of support that may be appropriate including funding;
- the availability and quality of capacity-building providers locally;
- whether the pre-conditions are there for change (e.g. senior management commitment, agreement and ownership of the issues, a readiness to change); and
- the presence of other Northern NGOs relating to the same organisation.

It is important to note that every organisation is unique and will have certain needs that relate to their particular stage in their development and context. OD consultancy may not always be the most appropriate intervention and cannot be treated as a panacea for all problems in an organisation. Northern NGO staff must be aware of the range of possible interventions available that may fit particular needs, which may include core funding and beware of a blueprint approach, even with OD.

V. Strengthen Local OD Providers

Given that effective OD work often involves long-term accompaniment work with an understanding of the changing context, Northern NGOs must think strategically about supporting the development of local OD capacity, particularly where none exists. This can include core funding of or strengthening existing NGO support organisations that provide OD consultancy services (e.g. Bilance), developing individual OD consultants (e.g. EZE/GTZ OD consultancy formation programme) or creating a capacity-building unit (e.g. Concern Universal/INTRAC in Malawi). There are dangers of Northern NGOs creating something foreign and unsustainable, but if the local pre-conditions are right and local ownership and governance exist, then there can be real opportunities for Northern NGO involvement. In turn, those who are involved in supporting such initiatives, must have an understanding of OD and the sort of competencies and qualities needed for such work and how they might be developed. For example, OD practitioners need good judgement around organisational and social issues, an ability to analyse complex organisational and social pictures, an ability to work in teams, sensitivity to issues of power, a high degree of self-knowledge and openness and, ideally, deep

personal experience of the work areas and issues involved²¹. Development of this sort of capacity and competence cannot take place just through a couple of training courses; it needs ongoing accompaniment, mentoring and peer support. Invariably, the formation work that is needed to develop such competencies is therefore, long term, intensive and expensive.²² Along with this, an appreciation of church culture will also be an important aspect for local OD consultant capacity when working with church-related organisations. One way that some donors (for example, Bilance) are supporting NGO Support Organisations is by providing funds to help pay for much of the essential pre-entry work that needs to take place in OD processes before a contract is drawn up; time which is often unpaid. It has also made it possible to provide consultancy services to some smaller organisations at a reduced fee, although there is a need to be sensitive to the effects this subsidisation may have on the local consultancy market.

VI. Let the Process Take Its Own Course and See the Process Through

There is a very real danger with most change programmes that the donor will try and force the pace as they are under pressure from their own donors to show concrete results. As Robert Chambers pointed out ‘the harvesting cycles of donors and of Third World farmers are fundamentally different’ (quoted in Morgan and Qualman 1996:14).

Donor Directives in Sende:

In the Sende case, the donor lost its way a bit mid-way and tried to push the process too much demanding that a detailed programme for the following year be submitted in the next two months by the Development Office together with a consolidated budget. The donor was trying to tie the process to artificial deadlines in Europe, which were *‘not compatible with the participative process we wanted and the size of the diocese and poor communications in the diocese and the fact that we were involved in a lot of other pastoral work’*.

An OD approach fundamentally challenges the concept of the ‘development project’ which is generally short term, time-bound and reductionist, alongside the restrictive funding practices of donors that go with it. Development, be it of organisations or communities, has no end and does not begin when outside agencies decide to intervene; it has already begun. Organisation development interventions, therefore, often involve long-term intermittent support, which can be costly in time and money. It is not a quick fix, particularly with organisations like the church. This has implications for the nature and length of donor support. If the donor supports an OD process, it should be prepared to see it through and not bail out halfway leaving the ‘partner’ stranded. In Sende, the same donor who was tempted to be too directive, on the other hand showed great commitment and persistence in funding a process which has already taken two years. Obviously it is not possible for a donor to guarantee support for the final outcome of a change process, but once they have helped set a process in motion donors should be aware of their responsibilities to see it through. This may prove difficult for a donor who is supportive of an OD process but does not see any significant changes in the quality of programmes put forward by the organisation for funding approval. Changes are not always immediate and outcomes cannot always be determined but this can be difficult when trying to

²¹ A competency checklist for OD consultants developed and used by CORAT and INTRAC can be found in Appendix B.

²² The CDRA formation programme for OD consultants is for about a two-year period, likewise the support that INTRAC has been providing to the formation of OD consultants in Malawi.

convince a funding committee within one's own organisation. All the more reason, therefore, to build in regular periods of review and reflection and to ensure that the pre-conditions are in order in the first place. As CDRA, a South African OD consultancy organisation, put it, 'All that we can do is facilitate processes which are already in motion. Where they are not in motion, it would be best - and honest - to refrain' (1997/8).

VII. Place the Development Work within the Context of the Whole Church

An Organisation Development approach encourages a holistic perspective and a reading of the whole picture, which may well mean relating to/addressing wider issues related to the church, particularly if this is getting in the way of its development role. However, many Northern NGOs will argue that this does not fit their mandate, reinforced by a suspicion that this will somehow be supporting the 'mission' part of the church. But if a Northern NGO wants to work through the church to promote development and civil society, then it needs to look at the whole organisation not just a part of it. It cannot have it both ways. Unless the wider church is considered, present initiatives may well remain short term, ineffective, unsustainable and easily undermined. This does not necessarily mean having to fund other parts of the church but it may mean having to support OD initiatives that address deeper organisational ills which are impacting on the effectiveness of the development work. For example, a lack of clear vision and strategy or contradictory approaches to development within the development department may be linked to a lack of vision within the wider diocese and a limited ownership of its development work, as was the case in Sende. If the intervention had stayed at the level of the development office and not broadened out to the wider diocese, then the impact of the intervention would probably have been superficial and limited. In certain cases, the church leadership may assume that the focus on development means that it has nothing to do with them and therefore do not get involved in the process. There are cases where the development department has naturally played a catalyst role from within for the wider diocese and these initiatives should be encouraged. For example, in Sierra Leone a diocesan development programme began with workshops at parish level focusing on community development and the role of the church, but it soon became clear that alongside this work needed to be done at a diocesan level too, if parish/community level work was to be truly integrated and the diocese itself strengthened. Workshops for the vision and direction of the diocese took place for clergy, women and lay people in general as a result.²³

If Northern agencies were to apply these OD principles to the local church level, which arguably gives the wider diocese and the development department its legitimacy, then it may need to look at ways of encouraging processes that enable the *local* church to reflect on itself and its role in the community. This may include understanding development, improving ways of working internally, in terms of decision-making, leadership, relevance of worship and so on, articulating vision and values and how these are expressed in action, building on their existing strengths. Much can be learnt from the Basic Christian community models from Latin America and Africa in this respect and there are one or two examples of agencies that are supporting the development of resources for churches to engage in such work.²⁴ The shift of focus of the Yano development department from the centre to working at parish level and the feedback from lay people in the Sende case about their sense of greater involvement in the

²³ For further reading on this process, see Goold (1994).

²⁴ For example, TEAR Fund UK have supported the development of a training manual called 'The Transforming Church' which originated from practice in South Africa and uses many of the concepts of the Training for Transformation/DELTA programme but starting more with the church.

activities of the church at diocesan and local level are all evidence of a movement in this direction.

Given the above, staff of Northern NGOs could justify such an approach to their back donors (and own organisations) on the basis that this will ultimately develop the capacity of the church and, in turn, its development work. The funding of any follow-up that relates to aspects of church life which could not be justified to back donors, could be a signpost to mission agencies, which suggests greater collaboration with these agencies around such initiatives in the first place (see 'commandment' VIII). This issue of funding and some of its implications is explored in the final section.

At a broader level, Northern NGOs need to have greater awareness about the effect that their funding has on the development of the wider church. Again, this asks for intelligent reading of the 'whole' picture, which demands skill and sensitivity. It also demands a degree of humility when they get it wrong, as was expressed by the donor in the Sende case in its poor choice of consultants. A lack of awareness of their own power as donors and having only a partial understanding of the church can be dangerous, skewing the church in a certain direction which may not be sustainable and may even be harmful to the nature of the church. The above suggests that many Northern NGO staff also need to have a greater understanding of the church context, as well as a more rigorous understanding of OD and capacity-building. Many misunderstandings and mis-diagnoses / recommendations are made due to the limited understanding of the church culture and its organisational complexities. Some Northern NGOs could argue that this is due partly to a limited opportunity and mandate to discuss the internal workings and policies of church partners beyond their development activities, while others would also see it linked to the fact that some staff of Northern NGOs have little personal or professional experience of working within the church or OD. Maybe it is a mixture of both. The latter could be addressed as part of staff induction, recruitment, training, support and exposure.

VIII. Co-ordinate with Other Agencies and within Your Own

Another important role for Northern NGOs in supporting OD effectively is to ensure that there is co-operation amongst themselves. An OD process can very easily be undermined by another donor who does not share the same understanding of capacity-building or their role in the process. Different donor policies and approaches may well confuse the process. For example, in the Yano process another donor offered to prop up a programme, which was to be closed down as a result of reassessment of priorities. This sent out confusing messages and false hopes to those concerned. At the same time, the partner, too, must have the courage to say 'no' to another donor who conflicts or undermines the OD process and to manage the donor relations it has. In the Yano case, the partner did take the initiative of regularly updating their donors and seeking feedback on the progress they had made. Donors, in turn, should respond and encourage wherever possible- even if they are not funding the process- as this can be quite a vulnerable time for the partner.

Moreover, Northern NGOs should talk to one another. For example, one European NGO sees their important role in an OD process as encouraging '*parallel dialogue with other stakeholders (such as World Council of Churches) and ensuring co-operation amongst Aprove members, particularly Nordics*' (James 1998). Meetings of regional CIDSE groups are also important opportunities for partners to inform and to explore together examples of OD processes and the donor role. There are now several examples of Northern agencies meeting

to explore and deepen their learning about different approaches to organisational strengthening.²⁵ Similarly, greater efforts could be made to dialogue and co-operate with traditional mission agencies, sharing mutual learning from often long-established relationships with churches, experience of how the church and development processes work. Although suspicions may need to be overcome, in times of limited resources and for the sake of effective interventions, greater collaboration and synergy between donors and mission agencies could benefit all concerned.

Likewise, there needs to be consistency and co-operation within the donor itself. For example, if one part of the donor organisation is supportive of a longer-term process, while another part is making shorter-term demands, this can send confusing and conflicting messages to the partner. This often manifests itself in conflicting approaches between programme/policy departments, fund-raising and financial accountability departments, as was the case in Sende. There, the desk officer was receiving pressure for proposals to be produced for the finance and grant-making committee leading to demands with unrealistic time-scales for the partner. The donor has to satisfy and manage a range of stakeholders internally and externally which is not an easy task; and the 'fall-out' is often experienced by the partner.

IX. Make the Relationship Part of the Process

In the Sende case it was stated that the '*OD process should not be done isolated from the donor*' and would have benefited from understanding better their constraints. Donors are part of an aid system which includes a number of interrelated but autonomous organisations. Donors have the tendency to compartmentalise OD and limit it to the Southern partner without recognising the important role that the donors themselves play in the 'open' aid delivery system.

For a more effective performance of a Southern 'partner' changes may be required in its relationship with and the behaviour of donors. Donors can ask consultants to 'fix' a partner's relationship with its own beneficiaries, when in fact the problem lies with the donor's relationship with the partner. One APRODEV member for example, when discussing how to engage in OD with partners rapidly concluded that its own capacity weaknesses had to be recognised and admitted to first, as did their historical role in shaping partners' own capacity (James 1998).

Northern NGOs must be prepared for a change in the relationship between church partners and Northern NGOs as they grow stronger. To what extent are Northern NGOs really open to change, and learning from their church partners? The building of capacity must be marked by shifts in the partner relationship and so exclusion of the partnership itself from the OD process may be extremely narrow and limiting. As one Southern NGO notes 'the resources which support the activities of development practitioners come from the powerful and are seldom if ever consciously given with the intention of setting processes in motion that will significantly redress the power differentials against the interests of the donor' (CDRA 1996/7:18). The consultants did their best in both cases to encourage the client to take a more proactive role with the donors, which in itself was challenging behavioural norms that were deeply

²⁵ For example, the BOND (UK NGO Umbrella group) organisational strengthening group made up of UK NGOs; an action learning programme for Northern agencies based in Kenya through Action Aid; organisational strengthening workshops and follow-up for Swedish church-related agencies organised through Swedish Mission Council; in-house training in Balance in the Netherlands on lesson-learning from OD consultancies they have supported.

ingrained. There was a noticeable shift during the process, even though this was not explicitly stated as part of the TOR. It is worth noting that some Northern agencies are considering carrying out their own organisation assessment, alongside that of a partner church, the results of which will be mutually shared.²⁶ How this will be done, for what purpose and on whose terms are questions that are still being debated by those concerned.

In turn, it must also be recognised that Northern NGOs have their own back donors as part of the ‘aid chain’ and the nature of this relationship and accountability pressures have a knock-on effect on a Northern NGO’s relationship with its partners. Northern NGOs, too, may need to lobby and influence their own back donors if they want a healthy relationship with their partners. In practical terms, this may include challenging practices that undermine partnerships and OD processes, for example the short-term project cycle mentality with its focus on linear thinking and inputs and outputs, as well as seeking support for their own OD.

X. Remove Your Own Plank- Apply OD to Yourself

If Northern NGOs believe in the effectiveness of OD for ‘partners’, they should practice it in their own organisations, not merely encourage others to use it. If they are really serious about the OD of their partners they would seek to take the plank out of their own eye first or, put another way, ‘how can we teach others to fish, if we do not know how to fish ourselves?’ (CDRA 1994/5). There is something very disturbing and inconsistent if organisations only advocate a particular approach with those over whom they have power, without applying it to themselves.

Some of the major questions facing many Northern church-related NGOs are linked to identity. The Northern NGO sector in general is undergoing a major identity crisis at present. Funding has slowed and reversed in some cases and redundancies are becoming commonplace. The role and performance of Northern NGOs is being challenged by official donors and by some Southern NGO partners, particularly as direct funding from official agencies increases. Several church-related agencies are responding by decentralising, setting up offices in the South when latterly they worked through and with traditional church partners from a distance. How they do this needs to be thought through carefully, in terms of how it is perceived by the partner agency. Also, issues of their own governance and accountability must be addressed, where some decisions are devolved locally while others remain at headquarters.²⁷ Alongside this, Northern agencies are additionally having to manage often conflicting demands from their individual supporters’ base, members and Board. There are also initiatives from some agencies to encourage OD processes with a community perspective for their own church members and supporters in the North.²⁸

Many Northern church-related NGOs are responding to this changing context by undergoing their own organisational changes, some of which are long and painful and involve much time, energy and resources. Reflecting on this experience when suggesting similar type processes with their partners may enable staff of these agencies to be more sensitive to the implications of what they are saying. If Northern church-related NGOs do apply OD to themselves and are more able to manage their own change and learn from their practice *they* will not only have

²⁶ For example, Swedish Mission Council is liaising with member churches on such processes

²⁷ For further reading on issues and challenges around decentralisation, see Fowler (ed. Gibbs.), forthcoming INTRAC Occasional Paper, No. 19.

²⁸ For example, TEAR Fund’s UK Action programme which encourages self-assessment and community involvement by UK churches.

greater credibility in suggesting it to their partners in the South, but can also put it on the agenda of their own back donors.

6. OUTSTANDING STRATEGIC QUESTIONS AND DILEMMAS FACING NORTHERN NGOS

Northern NGO staff reading this may well recognise the desirability of following such good practice guidelines and yet know that in their day-to-day jobs such decisions are not always so easy. Northern NGO roles in development cannot be reduced to trite recommendations. Inherent dilemmas and questions always remain. The paradoxes and tensions must be recognised and lived with and even loved (!). These questions must not be avoided, ignored or even answered too easily as so much poor practice arises from our own Western inability to tolerate and live with questions, and so in our frustration we impose superficial answers using our power of money. Some of the common dilemmas facing Northern church-related NGOs are outlined below, though this list is far from exhaustive and will, hopefully, give rise to further and better questions.

Some of these questions arise from the inherent tensions for Northern NGOs in being intermediaries between donors in the North and partners in the South and East. For example,

- *How do we let organisational change go at its own pace while we have to provide evidence of concrete results?*
- *How do we stand back and not be the client and at the same time be accountable for the use of funds?*
- *How do we ensure that the short-term reporting demands do not get in the way of long-term OD processes*
- *How do we marry the tension between an OD process that we find promising and a programme that is presented for funding by the same partner that is below the minimum quality standards for funding?*

Other questions relate to the nature and process of OD, such as:

- *How much time and money should partners spend on their own organisation development instead of actually working on community development?*
- *How can my organisation enter into the OD process of a partner when my desk is such a small part of the whole?*
- *How do we support the outcomes of an OD process if they come up with different priorities to our own?*
- *How do we invest the necessary time and effort in supporting these processes better when we are already trying to lower staff costs and overheads in general?*
- *How do we signpost effectively when there are no ‘good’ local OD providers?*
- *How do we deal with a situation where other donors supporting the same partner have different policies and perspectives on OD and capacity-building?*

Other questions or issues surround the choice of roles open to church-related Northern NGOs.

- *How do we play a funding role and a capacity-building role at the same time?*

Traditionally Northern NGOs have been primarily channels of funds for Southern ‘partners’. For a number of different reasons, such as threats to this role from the direct funding of partners by official agencies (and consequent questions from these official agencies about ‘what value do you add?’) as well as staff desires to be more than just ‘development bankers’, many Northern NGOs have been led to diversify their developmental roles, particularly into supporting and implementing capacity-building.

The cases show how difficult and confusing it is to play different roles simultaneously. On the one hand the Northern NGO is a donor, threatening to cut off funding, on the other it is a capacity-builder offering to support potential solutions. Invariably boundaries get blurred and

the capacity-building initiatives can be seen as donor-driven leading to little ownership from the partner.

It may be more effective to concentrate on one role and perform it effectively. Currently many Northern NGOs are undervaluing the donor role and yet the importance of developmental funding should not be downplayed. Funding in itself should be seen as capacity-building and when given 'developmentally' may play a more important role than some other conventional capacity-building initiatives promoted by Northern agencies, such as training. Developmental funding requires the ability to be able to read the unique needs of the partner at the particular stage of development in its context, which may be very different from that of the Northern agency. For those churches that are relatively young and/or working in difficult or remote circumstances, their funding needs may be very different from those with more established development departments working within relatively stable environments. In turn, some dioceses are so large and communication so difficult that a Bishop or development officer may be able to contact the UK or Holland more easily than to send a message to one of the outlying mission stations! Sharing the power of information technology may be just as or more important for the workings of the church and the co-ordination of its development work, than support in writing and funding project proposals. This has implications for funding practice and how these agencies collaborate with other mission agencies who may already be providing such support.

We have seen that change requires dissatisfaction with the status quo and invariably funding, or the lack of it, can trigger the 'wake-up' call as it did in Yano. Withholding or reducing funding can be a powerful tool but has to be very carefully judged, as mis-funding or lack of it can also disable or paralyse the organisation at a time when it is most needed. Indeed, core funding may well be the most appropriate form of capacity-building for some organisations at their particular stage in their development, at other times, it may be funding other capacity-building interventions or encouraging other types/sources of funding. To play a donor role effectively and developmentally requires immense understanding and sensitivity. It demands the ability to accurately diagnose funding needs and the ability and flexibility to respond to them appropriately. It places the donor in an incredibly powerful position and requires immense self-knowledge as an organisation to ensure that it is acting in the best interests of its partner, not out of its own organisational needs, demands and frustrations.

Other questions arise from the particular issues of working with churches in development.

- *Can we separate the development work of the church from the pastoral work?*

Much of the money flowing into church-related NGOs in Europe comes with the conditionality that it is not used for spiritual or proselytising work. The acceptance of such money sows the seeds of the problems of dualism described earlier. The demarcation between the secular and the spiritual appears to be largely imposed from outside (akin to the way colonial boundaries were imposed in the past). By not appreciating such dilemmas and recognising Northern NGO roles in creating false dichotomies and tensions, the problems fester unattended.

Creative ways of dealing with 'partners' rather than just one department of a partner need to be explored. For example, this may mean increasing contacts with traditional church constituencies in Europe or perhaps working in co-operation with 'Mission Agencies'. As well as supporting OD processes at diocesan level, similarly it may mean also encouraging such

processes by the diocese at local church level. As we saw in the case of Sende and the example from Sierra Leone, the development office can play a critical role in promoting such processes. This turns on its head many of the present approaches to church-related development. It suggests that rather than just funding and supporting sector-development programmes and projects through the development department at the centre, there needs to be a whole reorientation of approach to encouraging and supporting the church to reflect and act within a community context at local level. In many ways, the Yano case study illustrates the movement of a development department to such a model. As indicated earlier, this will also demand different skills and competencies of development officers, so that they are better able to strengthen the capacity of the churches to engage in development and demonstrate internally the values they seek to promote.

Taking such a stance could be met with much reluctance by many Northern agencies as it would mean a move away from the traditional development department model to a more holistic one, that challenges their whole approach to disbursement of funds, partnership, ways of relating and, arguably, their very role and existence. How ready Northern church-related NGOs are to do this will depend to some extent on their answer to the subsequent question.

- *What makes us distinctive as Church-related development agencies?*

The challenge of direct funding and the move away from traditional church partners by some agencies is raising questions about what makes church-related NGOs distinctive from any other NGOs, particularly when many share similar values that are influenced by Christianity but are now part of a largely secular society. Is it just their target ‘partners’ (or historical constituencies) which defines their identity? Some staff would argue that to have greater impact, they need to work with other civil society actors. In a recent INTRAC study of Northern church-related NGOs, a large number of staff spoke about the importance of supporting a broader range of organisations rather than simply focusing on ‘natural’ partners:

The way in which the churches are structured in Zimbabwe puts us under great pressure, we would have to work in a corridor (in a very narrow and limiting way) if we work only with the churches.²⁹

At the same time, others argue that if NNGOs move away from traditional church partners, they are not building on their potential strengths which offers a tremendous added value. Indeed, some agencies are acknowledging the importance of the role of the church in development and civil society by funding research on the role of the church in advocacy work,³⁰ as well as exploring ways of strengthening the role of the local church in development.³¹

As indicated earlier, another related dilemma, is that by engaging with the local community in development, issues around ownership and identity inevitably arise. If the church is committed to principles of participation and community engagement, then decision-making bodies of development initiatives will need to include a representative group from the community, not just the church.

²⁹ Respondent on interview survey from INTRAC’s study of the role of churches in Advocacy in Africa, see n. 13.

³⁰ See n. 14.

³¹ See n. 24, n. 28.

The response of some Northern agencies to de-centralise also raises questions of identity. Some church partners have appreciated the closer contact with their Northern partners while others have seen it as questioning their competence and role. For example, as one General Secretary of an African Council of Churches remarked when one of their donors set up a local office, *'we are obviously not doing our job well enough, if you need to set up an office next to us'*.

Another important potential strength to consider is the role that some of Northern agencies' church constituencies can play in education and advocacy work in the North, for example the Jubilee 2000 campaign which brought together many churches to lobby against the issue of world debt. Indeed, this is increasingly the request coming from Southern church partners about the role they would like their Northern partners to play and the nature of this relationship gives Northern partners the mandate to do so.³² This is another potential argument for sticking with church partners.

Linked to this, when Northern agencies can harness their theological tradition and relationships in a way that speaks to those outside the church, then they can have considerable impact. The role of theology in the lives of these agencies and their capacity for theological reflection through and with their church partners, and work amongst poor and marginalised groups is, therefore, critical. According to Riddell (1993), recent theological approaches of church-related agencies in Europe 'can best be described as eclectic; incorporating elements from a wide cross-section of different sources as well as from very different approaches to theology'. Whilst 'such a wide trawl of theological methods and approaches enriches the theological perspective of the agencies, it has its drawbacks', for example by diluting the thrust of what is said, weakening the potential use that the agencies might make of theology in their work and putting agencies in a weaker position when confronted by other donors/agencies as to why they do what they do and what they stand for, in a language that they and others understand. As Riddell argues, 'If theology were to take on a more active role in the agencies ... then the potential at least would exist for theology to assist the agencies better to answer the perennial questions of what they should be/do and where their priorities lie ... it would (also) help them to clarify their role and identity as Christian agencies- regardless of whether it led the agencies to work in areas any different from other Northern and secular agencies' (Ibid.:31).

However, theology is still predominantly seen by most staff members as something to be done 'out there' resulting in a lack of integration into the overall decision-making and policy/advocacy-orientated reflection within agencies and missed opportunities to learn from the theological reflection of Southern churches/Christian communities and partners. This can be due to the fact that, an increasingly large proportion of staff of church-related NGOs in Europe do not share the faith of their organisation, where equal opportunity recruitment procedures often require at most a 'sympathy' with Christianity or a willingness to work alongside. It may also be due to others not wishing to engage in theological discussions because of their belief that theology has little substance to add to the work being done or they feel that they do not have the confidence to engage in such debates (often reinforced by the (mistaken) belief that only theologians can reflect theologically). Again, links with other mission agencies may be an important consideration here.

Along with this, the source of funding is increasingly secular, a large proportion of partners are still church-based (though this is changing) and the staff are caught somewhere in the

³² Danchurchaid/Norwegian Churchaid round table 1997.

middle. The last two decades seems to have witnessed a ‘secularisation’ of these organisations, leaving them with an uncertain identity which has considerable ramifications such as an ambivalence about working through churches (even a withdrawal) and the loss of supporters to more overtly Christian agencies.

Northern church-related NGOs are facing their own issues of identity, which must be clarified for their own strategic benefit. Otherwise they will be left in an ambiguous and uncertain position which will be demotivating for staff, opaque to donors and misleading to ‘partners’. If they do wish to continue to work through churches in the South (and in the context of having to prove comparative advantage it may well be in their interest to sustain and value their long-term relationships with church partners- the strengths of which were outlined in Section 1), they then need to clarify their identity and utilise the rich potential which Christianity could bring to their work (Riddell 1993) and the opportunities for theological reflection with and learning from partners. They need also to implement the principles of effective Northern NGO support for OD, acknowledge the centrality and role of the local church in development work and be prepared to grapple with the uncomfortable strategic dilemmas and questions which will always remain.

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Appendix A

Guidelines for 'Healthy' Churches Involved in Development

INTERNAL

<i>a) Identity, vision, mission, values, strategy</i>
The development department has a clear shared vision and mission which is part of and 'fits' with a wider vision of the church. If there is no such wider vision, then the development department encourages/challenges the diocese to have one.
The vision and mission of the development department is based on a serious analysis of the development problems facing people of that area, the external realities and a conceptual and theological understanding of development.
The vision and mission are underpinned by clearly stated values that come from an exploration of the Christian faith, the social teachings of the church and the church's role in development and justice. They inspire and are consistent with the vision and mission and model of development chosen.
If integral development is sought, then this is reflected in the approach to development, theology, strategy and structure of the development department (and the wider church). This approach to development and faith also forms part of clergy and lay training and formation.
There is a clear strategy that fits with the mission statement, external realities (including donor trends) and strengths and weaknesses of the department. This strategy is regularly reviewed by stakeholders. This may involve the use of skilled, external consultants/facilitators hired by the development department.
The strategy makes it clear what the development department will and will not do.
The vision, mission and values are formed by representatives of those who are involved in or affected by the work of the development department (stakeholders). They need to be expressed and shared in the local language in a form that all understand.
<i>b) Structure and governance</i>
There is an effective governance structure (e.g. Board) that has sufficient responsibility and authority to make decisions about strategic direction and policy. The role and responsibilities of this body are clearly spelt out, as are the criteria for membership. The criteria for membership are based on the Board's task. They represent a balance between representation and expertise.

<i>c) Management and leadership</i>
The development co-ordinator and the chair of the Board have the will and skill to lead and manage the development department through times of change. They are actively supported by senior church leaders who are aware and actively engaged in the issues at hand and will provide the necessary leadership without undermining their role, for example, the Bishop can be represented in the governance structure but should not be involved in management decisions. Authority is delegated responsibly.
The development co-ordinator has space and time to reflect and provide strategic direction to the development work and the management of staff. (S)he is relieved of duties that do not fit with the job's core purpose, for example, sitting on other church committees which are not related to or do not strengthen the development department. Likewise, if the chair of the Board structure is part of the church structure they would be relieved of other commitments, so as to give the necessary time to this role.
<i>d) Funding</i>
The development department has a clear financial strategy which 'fits' with a wider diocesan financial strategy. The diocese or wider church demonstrates its commitment to its development work by budgeting in its own financial contribution to the work of the development department.
There is a clear regularly reviewed contract between donor(s) and the development department and the church including mutual expectations of partnership.
The development department has a wide financial resource base including locally generated funds and local contributions from development initiatives
<i>e) Staffing</i>
Staff display an appropriate balance between skill and experience in development work and commitment to the purpose and underlying values of the development department and the church.
There is a clearly stated HRD policy, that retains staff while encouraging newcomers.

PROGRAMMES

<i>a) Building on natural strengths</i>
Development interventions make use of the church's structures, local presence and commitment as a point of entry but do not stop there. They endeavour to include those from other faiths/denominations and secular groups.
<i>b) Role of clergy</i>
The clergy are consulted and involved in their capacity as local leaders and inevitable gatekeepers to work in the parish. This may take the form of involvement in local development committees which would be made up of those involved in or affected by development activities with an understanding and commitment to development at the local level. Any development work/projects initiated by the priest which involve funding from outside will need to fit with the development vision and values of the wider diocese and be under the auspices of the development department to ensure consistency and accountability. Programme activities may include awareness-raising for clergy about their potential role in the development process and how development relates to their role as priests.
<i>c) Programme fit</i>
There needs to be a 'fit' between programmes, the needs of the target group and the mission and strategy of the development department. Programmes need to be regularly reviewed in light of this. Activities that fall outside the purpose of the development department are signposted to other agencies/services where possible.
<i>d) Development and commercial activities</i>
Commercial activities are 'ring-fenced', that is they are located outside church administration and managed as separate entities.
<i>e) Development and the church</i>
Involvement in development issues is seen as a natural and integral expression of faith rather than as a means of expanding the church.
<i>f) Church and justice</i>
Church leadership is willing to stand by and speak up for the work of the development office involved in challenging injustices. Senior church leaders disengage themselves from any kind of collusion with those who perpetuate injustice and rights abuse.
<i>g) Practising what you preach</i>
There is a conscious effort by the development office to promote the values of its work within the church in the form of representative church bodies, participatory decision-making structures, vision-building, attitudes towards development, relationships between clergy and lay people, ensuring inclusiveness in worship and so on.
<i>h) Focus at local level</i>
The work of the development office is as de-centralised as far as possible, with responsibility and authority carried out

as near to the grass roots as possible.
<i>i) Effectiveness and impact</i>
The Board ensures regular monitoring and evaluation of work at a local level. There is a system in place for gathering views of the target group and those affected by the work of the development programme. This may also include a system for gauging outreach/cost per capita for services. There are mechanisms in place to ensure issues of policy importance and justice are fed into regional/national bodies, e.g. Council of Churches, Catholic secretariats, synodical structures, NGO networks, local government, etc.

EXTERNAL RELATIONS

<i>a) With government</i>
The development office needs Board and church support of active links and mechanisms to relate to local, regional and national government, challenging where necessary.
<i>b) Other NGOs and churches</i>
The development department is an active member of local NGO/church networks and seeks to minimise development/church rivalry by collaborating on joint pieces of work. It needs to share information through regular meetings at a regional level, or signposting activities/groups to others where appropriate. Poaching of staff is minimised by open advertising for any post and the use of contracts.
<i>c) With community leaders/groups and other actors in civil society</i>
The development work of the church encourages healthy links with community leaders but again not being overly associated in case of being compromised. Links with other community groups/ human rights organisations are actively sought.
<i>d) Relationship with donors</i>
i) Mutual expectations are expressed from the outset and the ‘partners’ have their own criteria about the Northern partners they want and the value base from which they are working.
ii) These mutual expectations take the form of a contract between the development office, through its Board, the diocese through the Bishop and the donor.
iii) regular review of the partnership is built in from the outset.

Appendix B

CORAT-INTRAC

COMPETENCY CHECKLIST FOR CONSULTANTS INVOLVED IN ORGANISATION DEVELOPMENT AND CHANGE

This checklist can be used for peer and self-assessment. It can also be used for personal reflection in identifying development needs. Underlying assumptions behind the approach to Organisation Development and Change Consultancy used in this checklist are:

- **Commitment to change in self/others/organisations**
- **Commitment to learning in self/others/organisations**
- **Commitment to process**

This checklist has been adapted for those working within a development setting. Like any tool, it will need to be revised and adapted to fit with different and changing contexts.

x	-	insufficient experience to assess competence
1	-	not presently competent but has potential
2	-	competent but some room for improvement
3	-	adequately competent at present
4	-	highly competent.

	Self	Peer 1	Peer 2
◆ PERSONAL MANAGEMENT/AWARENESS			
1. Able to manage boundary between personal issues and work	-----	-----	-----
2. Awareness of own value and able to express them clearly without imposing	-----	-----	-----
3. Able to live with uncertainty and incompleteness	-----	-----	-----
4. High degree of self-knowledge	-----	-----	-----
5. Able to work under pressure and to deadlines	-----	-----	-----
6. Able to ask for help and be open to new ideas	-----	-----	-----

7.	Able to manage time well and prioritise	-----	-----	-----
8.	Not threatened by conflict or challenge	-----	-----	-----
◆ CROSS-CULTURAL AWARENESS/DIVERSITY				
1.	Ability to question and challenge racist/sexist/tribalist behaviour and language appropriately (in self and others)	-----	-----	-----
2.	Willingness to understand, respect and challenge (cross) cultural norms, as well as use local cultural symbols/stories	-----	-----	-----
3.	Able to demonstrate an understanding of gender and diversity in an organisational setting/consultancy	-----	-----	-----
◆ INTER-PERSONAL/COMMUNICATION SKILLS				
1.	Able to admit and learn from mistakes	-----	-----	-----
2.	Able to work constructively with conflict	-----	-----	-----
3.	Able to develop rapport and trust with client	-----	-----	-----
4.	Letting others talk before interjecting in	-----	-----	-----
5.	Being clear and concise	-----	-----	-----
6.	Listening actively to others	-----	-----	-----
7.	Comfortable with authority figures	-----	-----	-----
8.	Able to exchange feedback constructively	-----	-----	-----
9.	Able to be assertive/challenge, when appropriate	-----	-----	-----
10.	Able to empathise and see the world through the client's eyes	-----	-----	-----
11.	Knowledge of conflict resolution processes and ability to use them	-----	-----	-----
◆ FACILITATION/ENABLING SKILLS				
1.	Able to build an atmosphere of openness, trust and learning	-----	-----	-----
2.	Able to draw others out and build their strengths and resources	-----	-----	-----
3.	Able to pick up non-verbal signals	-----	-----	-----
4.	Ability to motivate and energise others	-----	-----	-----
5.	Comfortable with facilitating large and small groups	-----	-----	-----
◆ FACILITATING CHANGE				
1.	Able to tolerate ambiguity without rushing to simplistic interpretations	-----	-----	-----
2.	Able to maintain long-term and wide perspective	-----	-----	-----
3.	Has an understanding of how and why individuals and organisations change and how they avoid change	-----	-----	-----
4.	Has an understanding of power and how it can be used and abused	-----	-----	-----
5.	Awareness of own power/influence in change process	-----	-----	-----
6.	Able to draw from and use a variety of tools for managing change	-----	-----	-----
7.	Understanding of the wider environment/changing context and how it impacts on the client	-----	-----	-----
8.	Ability to act as "reflective practitioner"	-----	-----	-----
9.	Recognition of the client as change agent	-----	-----	-----
10.	Recognition of the pre-conditions needed for change	-----	-----	-----
◆ KNOWLEDGE AND EXPERIENCE				
1.	Understanding of organisations and how they develop	-----	-----	-----
2.	Knowledge of different approaches to development, social theory, political economy	-----	-----	-----
3.	Knowledge of current management ideas and practices, including programme management	-----	-----	-----
4.	Knowledge of changing trends and issues in development sector and organisation development	-----	-----	-----
5.	Understanding of group process	-----	-----	-----
6.	Understanding of historical and cultural context of client organisation	-----	-----	-----

7. Ability to draw from this knowledge and use it sensitively/appropriately	-----	-----	-----
8. Ability to draw on personal experience of work areas and issues	-----	-----	-----
◆ CONTRACTING			
1. Being clear about who the primary client is	-----	-----	-----
2. Talking about money and fees without embarrassment	-----	-----	-----
3. Saying “no” without guilt or fear - knowing limitations	-----	-----	-----
4. Able to clarify mutually realistic expectations, assumptions, roles and responsibilities	-----	-----	-----
5. Able to manage often conflicting expectations between client and funder (if different)	-----	-----	-----
6. Able to renegotiate terms of work if necessary	-----	-----	-----
7. Able to assess workload involved realistically, including preparation time	-----	-----	-----
8. Able to start with where the client is at	-----	-----	-----
9. Presenting preferred working methods clearly	-----	-----	-----
10. Ability to communicate significant change in contract to client/funder with conviction and integrity	-----	-----	-----
11. Ensuring there is senior management commitment	-----	-----	-----
◆ TEAM-WORKING			
1. Ability to choose a team with right mix of skills/experience/ personality/gender/racial/tribal background	-----	-----	-----
2. Clarify aims, roles and ways of working at the outset	-----	-----	-----
3. Ability to work with people you do not particularly like(client/ peer)	-----	-----	-----
4. Ability to create creative climate for team maturity	-----	-----	-----
5. Able to identify and respond to the task, maintenance and individual needs of a team or group	-----	-----	-----
◆ DATA COLLECTION			
1. Able to choose appropriate data collection methods	-----	-----	-----
2. Able to ask relevant and searching questions	-----	-----	-----
3. Able to encourage client ownership of data	-----	-----	-----
4. Sensitivity to the confidential nature of data in possession	-----	-----	-----
5. Ensuring key stakeholders participate	-----	-----	-----
◆ SENSING AND DIAGNOSING			
1. Able to draw out underlying tensions/concerns/assumptions	-----	-----	-----
2. Able to draw from a variety of models/frameworks of organisations and change and analytical tools and be able to create own	-----	-----	-----
3. Ability to see problems and opinions in perspective in terms of client’s current capability	-----	-----	-----
4. Helping clients to discover and analyse their own issues	-----	-----	-----
6. Being able to identify the focal issue (rather than just staying with presenting problems)	-----	-----	-----
7. Summarising discussions accurately and drawing out essence	-----	-----	-----
8. Ability to sense where client is at start of consultancy especially in relation to important stakeholders	-----	-----	-----
9. Ability to ask open questions which lead to further explanation	-----	-----	-----
10. Gutsiness to “speak the unspeakable”	-----	-----	-----
◆ INTERVENING/IMPLEMENTATION			
1. Choosing appropriate intervention style (not just relying on packaged or favourite interventions) in relation to timing and situation	-----	-----	-----
2. Able to re-design and change plans on the spot	-----	-----	-----
3. Able to help clients generate their own solutions	-----	-----	-----
4. Able to critically evaluate and offer alternative possibilities/ options	-----	-----	-----

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|----|--|-------|-------|-------|
| 5. | Able to encourage widespread participation in design and implementation of change and ownership of outcomes | ----- | ----- | ----- |
| 6. | Courage to discontinue assignment if no prospect for implementing change | ----- | ----- | ----- |
| 7. | Able to find right balance between detachment and involvement | ----- | ----- | ----- |
| 8. | Able to strengthen the capacity of internal change agents and wider organisation to manage change and learn from practice during the consultancy | ----- | ----- | ----- |

◆ **EVALUATION AND CLOSURE**

- | | | | | |
|----|--|-------|-------|-------|
| 1. | Feeling comfortable with clients reviewing work | ----- | ----- | ----- |
| 2. | Devising appropriate methods for feedback and evaluation, both informally and formally | ----- | ----- | ----- |
| 3. | Taking accurate notes and writing up | ----- | ----- | ----- |
| 4. | Letting go when task is finished - disengaging well (including defining unfinished business) | ----- | ----- | ----- |
| 5. | Acknowledging and learning from failure and celebrating success | ----- | ----- | ----- |
| 6. | Arranging next steps and follow-up | ----- | ----- | ----- |
| 7. | Ensuring review of learning from each assignment | ----- | ----- | ----- |
| 8. | Knowing when to exit and how | ----- | ----- | ----- |

Adapted and developed from: Consultation Skills Manual (MATC) and Philips and Shaw (1989), A Consultancy Approach for Trainers (Gower), with further revision at CDRA OD Event 1995 by E. Goold (INTRAC) with W. Temu (CORAT)