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FRANK JULIE



A guide for today's leaders and managers on how to build sustainable organizations for permanent social change.

To test the degree of a potential treatment's effectiveness, researchers conducted a survey, where health care providers were asked to report on the use of a novel treatment, a novel device, therapy, or other form of intervention in a community laboratory setting, as well as the number of patients who had received the treatment in the prior two months. The question on a scale of 1 (not used) to 5 (used in more than 100 cases) was how often each of these practices were used. The study was a change that had been made in the sample to have more patients receiving treatment and more use shown. The results indicate that the frequency of use for a novel treatment is higher

THE ART OF LEADERSHIP AND MANAGEMENT ON THE GROUND

“To meet the demands of a successful transformation in any organization, community or society, every leader must be prepared to undergo an internal transformation, a painful process cleansing a leader from the contamination of an unconscious, unthinking, gender-, race-, and rank blind society. Like steel forged in the white heat burning the impurities, so a leader is moulded on the anvil of those invisible social forces that must lead to change - human change, a change that must lead those at the margins to have more access to resources and power over choices. The leader of today must be prepared to sit in the fire of transformation without getting burned!” ***Frank Julie***

THE ART OF LEADERSHIP AND MANAGEMENT ON THE GROUND

**If you have come here to help me,
You are wasting your time.
If you have come here because your liberation is
bound up with mine,
Then lets work together.
(Aboriginal prisoner: Lilla Watson)**

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My family, especially my mother, Dorothy and my late father, Cecil, who allowed me to pursue my passion and life purpose from an early age and who provided me with the support to do so. My two sisters, Lana and Freda who always remind me of my true potential whenever I forget. My other sisters Olive, Margaret, Gwendoline and brothers Peter, George and Cecil who worked so tirelessly to feed me whilst I was pursuing my great passion.

The late I.B. Tabata¹ who taught me the discipline and humility of leadership, Jonas Bosch² who taught me the importance of continuous learning, Frank Anthony³ who taught me about the determination to overcome despite all odds and Stephen Corry⁴ who taught me the courage of leadership. Jan Webster for introducing me to process work and the works of Arnold Mindell.

All my ex-colleagues and comrades in the Resource Action Group (RAG) and Youth Development Network (YDN), board members and beneficiaries who allowed me into their lives and where I was given the opportunity and privilege to learn, try, test, implement and develop many of the ideas contained in this book. Special thanks go to Professors' Flip Strydom and the late Johan Combrink, Aleem Abrahams and Johan Bowers, very dedicated board members during my time as executive director at RAG and who were all a great support.

Special thanks also to Janny Poley, ex-secretary to the Dutch Ambassador in South Africa, Zini Godden, ex-project officer at the Royal Netherlands Embassy (RNE) and Nico Keijzer previously at the Catholic Organization for Relief and Development Aid (CORDAID) based in the Netherlands who taught me so much about effective donor practice. Thanks also to James Taylor for his valuable time sharing his ideas with me for an interview published in this book. Also to my clients, past and present, who taught me not to forget my roots and who were always around to keep the flame burning and who, unbeknown to many of them, inspired the writing of this book.

Fellow conspirators and comrades in the various political, civic⁵, youth and student movements in South- and Southern Africa where I cut my teeth in organization and community mobilisation over the past 26 years. To all of you: This is also your book and a celebration of our partnership and the path we have traversed during good and bad times.

Frank Julie
Cape Town, March 2006

¹ I.B. Tabata was the President of the Non-European Unity Movement (NEUM), later renamed the Unity Movement of South Africa (UMSA) and African People's Democratic Union of Southern Africa (APDUSA). He was the first South African to be banned under the Communism Act in the 1950's. I was privileged to live with this intellectual giant in Zimbabwe, one of the first Cuban trained guerrillas in South Africa and a veteran of the Bay of Pigs, when the Americans invaded Cuba. Amongst other books, he is the author of *The Awakening of a People*, *Imperialist Conspiracy in Africa*, *Apartheid*, *Cosmetics Exposed* and *Education for Barbarism*. He was also a founding member of the Workers Party of South Africa formed in the early 1930's.

² Jonas Bosch was a member of the Non-European Unity Movement (NEUM) and later the New Unity Movement (NUM). He was also a member of the Teachers League of South (TLSA) and banned from teaching in the 1960's due to his opposition to the introduction of Bantu Education. He was also an active trade unionist, instrumental in cleaning up sweat heart trade unions, facing constant detention and house arrest.

³ Frank Anthony was a member of the APDUSA and spent seven years on Robben Island in the 1970's for recruiting cadres for the armed struggle against the apartheid regime. He is the author of "The Journey".

⁴ Stephen Corry is a friend, comrade and business partner. As a trained special forces soldier in the New Zealand Army, he also fought in the war in Vietnam. Disillusioned, he later travelled to Europe and the Soviet Union where he later joined up with South African liberation fighters in Moscow. He joined the underground movement in 1982 when he moved to South Africa. He is currently the executive director of 17 Shaft Conference and Education Centre in Johannesburg.

⁵ My baptism of fire in organization was in the Bishop Lavis Action Committee based in Bishop Lavis on the Cape Flats.

Dedication:

***For my son Kyle and all the leaders in organizations on the ground
working with the marginalised, the unsung heroes of yesterday,
today and tomorrow who are providing hope to the hopeless!
Remember, I see you!***

***“The world of yesterday has sunk into oblivion, the world of today is
struggling to maintain itself, and the world of tomorrow is struggling
to be born.”⁶***

Knowledge is Power but Consciousness is Light!⁷

⁶ Quoted from a paper on the International Situation delivered by I.B. Tabata in 1989 in Zimbabwe

⁷ Ali Sariat, a Iranian philosopher

About the author:

Frank Julie is an organizational development practitioner, activist, consultant, advisor, strategist, facilitator and author. His journey in the development sector started in the late 1970's as a volunteer, organizer and programs manager. In the early 1990's he launched the Resource Action Group (RAG), a youth development agency focusing on building capacity amongst young marginalized youth to access sustainable livelihoods. He was the executive director for 10 years.

Frank acts as strategic advisor for many non-profit organizations. He is a founding trustee of the Youth Development Network (YDN), a consortium of 6 youth development agencies where he served for 5 years (www.ydn.org.za). He is also the co-founder and chairperson of People First Foundation, a group of highly experienced development practitioners sharing their skills and experiences with survivalist and marginalized community based organizations (www.peoplefirstfoundation.weebly.com).

Frank is the author of ***The Roots of the NGO Crisis in South Africa – A look beyond the surface***. He regularly contributes articles on development to various magazines, journals and websites around the world. Some of the articles include ***“18 Ideas to Avoid a Funding Crisis”***, ***“23 Sins of Management”***, ***13 Less Known Habits of Highly Effective Leaders”***, ***“Effective People Development in a Non-Profit Organization”*** and many more.

Frank studied social science at the University of the Western Cape (UWC) in the early 1980's, and adult education and learning at the University of Cape Town in the early 1990's culminating in the completion of a Masters of Philosophy in Adult Education. His thesis focused on the ***NGO Crisis, Leadership Discontinuity and Learning over 3 Historical Periods in South Africa*** where he explored the evolution of the NGO sector and how different modes of learning impacted on leadership continuity over a period of about 40 years.

He also studied the *practice of development* at the Community Development Resource Association (CDRA) and *fundraising and development* at the Centre for Development and Population Activities (CEDPA) based in Washington DC. Frank traveled extensively in different parts of the world to study development models on the ground over a period of 20 years.

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FOREWORD BY DR LINDA COOPER

Leaders, managers and adult educators in Africa and countries of the South often face difficulties in finding education materials that are both educationally sound as well as appropriate to our context.

This book, compiled by Frank Julie, will be an extremely valuable resource to those in non-profit organisations (NPO's) who are wanting to develop their leadership potential and skills as well as those working in the field of training in organisation and leadership development.

The book combines a thoughtful, critical understanding of the theory and politics of leadership development with practical resources for effective skills development.

In addition, it is grounded in the history of organisation-building in the context of the developing world, and combines the collective wisdom of generations of organisation-builders with a sensitive understanding of the challenges of building new layers of leadership who will be able to take their organisations effectively into the future.

The book is written in an engaging and challenging style. It encourages its readers to rethink their assumptions and develop a critical 'gaze' not only on their organisations and social context, but also on themselves, and its holistic approach emphasises not only the politics of the organisation, but also the politics of 'self'.

Adult education staff at the University of Cape Town has enjoyed a long and fruitful relationship with Frank Julie, and we are very gratified to see him making this important contribution to the development of leadership in organisations.

Dr Linda Cooper
Senior Lecturer: Adult Education
Centre for Higher Education Development
University of Cape Town and
Board Chairperson of the International
Labour Research and Information Group (ILRIG)
April 2006

SOME THOUGHTS AND ACCOMPANYING QUESTIONS BY JAMES TAYLOR:

Frank, my overriding response to your book is that it is a remarkable reflection of your journey as a conscious thinking, learning practitioner. It is rare to find experienced and rooted “grassroots” type practitioners who take up the challenge to capture and share their experience through writing. This book reflects an enormous array of learning, insights, models, practices, and tips that you have managed to collect and collate from your own practical experience and commitment to ongoing learning.

Throughout the book there is a sense that you are “struggling” with how leadership can contribute towards bringing new organisational forms into being. There is always the hint that leadership needs to be understood and practiced differently in organisations that have social transformation as their ultimate purpose. This sense of disquiet with existing practices links your book to many others who are seeking the new.

Emerging from the periphery of society there is a new way of understanding the interdependent nature of the world that sees human systems as but a part of it. This world view is deeply questioning many of the dominant organising principles and structures that have been so successful in bringing human society to where it is today. Despite all our remarkable achievements of the past, the ongoing nature of development is now again demanding that humankind face the challenge of reviewing and transforming the relationships that give form to society as we know it. This is the ultimate challenge facing those committed to the practice of development, and of the role of leadership within it.

Put into this context your book reflects the fact that we are all struggling to build a clear picture of the role of leadership in transformed organisations, and what their role is in facilitating this transformation. As is reflected in your book we are all still limited by the power of existing forms and practices of leadership that cause us to slip back into old known forms. In this unclear emergent phase we must not look for quick answers but be led by good questions. I share a few questions that might be helpful in our search for new forms:

- How should those in leadership positions fulfil their function in ways that reinforce an understanding of leadership as an organisational function contributed to by all and not some heroic person and position?
- How can we elevate followership practice to the same status as leadership, recognising that good leadership really is totally dependent on the quality of the practice of followers?
- How will leadership need to change to create organisations that do not extract power, wealth and value from the periphery in order to concentrate them at the “top”?
- How should leadership be executed to counter the belief that everything of value resides at the top and everyone should aspire to be there?
- How can leadership add value to that (and to those) residing at the periphery?
- What would leadership look like that is based on the understanding that the creativity that leads to transformation emerges from the chaos that exists at the periphery of living systems, and not from the fragile order and need for control that exists at the centre (or the “top”)?

James Taylor
Executive Director
Community Development Resource
Association (CDRA)
April 2006

Comments from other leaders around the world:

Frank Julie asks, "So how do you approach your shadow? Don't fight it. Make it your friend, your ally. Be aware of it. Embrace it and integrate it. When you push it away then you live in denial. Then it will haunt you, control and ultimately destroy you!" Ghosts and shadows permeate this gift. Frank gives honour to I. B. Tabata. It is a great innovation and intervention to bring Tabata to the discussion of the local and the community, of the non-profit and the other micros and networks working through social change towards real democracy and justice, hopefully in our lifetimes. Our leaders: The question is not who are the leaders, the question Frank asks is ... who are we who make 'them' ours? Thank you, Frank, for the gift of critical discomfort. I hope it passes from hand to hand, like a hot potato, and when it cools, we'll eat together. **Professor Daniel Moshenberg, Director, Women's Studies Program, George Washington University, Washington, DC, USA**

Nelson Mandela said: "Our deepest fear is not that we are inadequate; our deepest fear is that we are powerful beyond measure. It is our light not our darkness that most frightens us. We ask ourselves who am I to be brilliant, gorgeous, talented and fabulous? Actually who are you not to be? ... As we let our own light shine we unconsciously give other people permission to do the same. As we are liberated from our own fear, our presence automatically liberates others." Frank, this quote captures the ethos and spirit of your book. The book is very well done, very helpful and constructive. Keep it up!!! **(Tiruwork Tizazu, Head, Women's Affairs Department, Ministry of Finance and Economic Development, Addis Ababa, Ethiopia)**

"I think it's great! Thought provoking and very thorough. I especially liked parts 1, 2 and 3. You have given an amazing amount of information, theory and practical application on leadership in these sections. A great resource for all leaders, managers and facilitators. This is and will be a good contribution to NGO leadership..." **(Professor Tony Saddington, Steering Committee member of the International Consortium on Experiential Learning – ICEL)**

Frank, your book on Leadership astounds me; it is brutally honest and direct, to the "T" as some would say. Through this book you not only speak to me, but also with me, through me. I could not stop nodding my head as I identified with its contents. Congratulations Frank, a good job done damn thoroughly well! This will not only give that almighty attitudes of some corporates a run for their money but also assist CBO's, NPO's and NGO's who think they are not worthy to jack themselves up and get into the mentality of proficiency." **(Daphne Jansen, Executive Director, Mitchell's Plain Network Opposing Women Abuse, Cape Town)**

First of all let me congratulate you for the intensive exercise you have carried out for this book and for your efforts for publication. I have gone through the contents and it is really interesting. It's a splendid attempt and more useful for upcoming researchers and leaders in all areas. **(Dr. P Ramesh, M.A., Ph.D., University of Gokhale, Deccan Gymkhana, India)**

"Nelson Mandela once said: 'By working together we can build the South Africa of our dreams'. Frank Julie puts this into practice, he is a regular networker who believes that sharing information and resources will benefit us all. The book commends itself through its profoundness. It touches on all the major subjects that NGO's need to know about, from capacity building to accountability, from fundraising to governance, from transparency to leadership, from management to communication." **(Martje Boerma – Executive Director: South African Foundation, The Netherlands)**

"My colleagues and I have been astounded at the insight shown throughout this incredibly useful book. I would recommend any organization to peruse this tool within all sectors of their

organization to gain a holistic understanding of how the world works." **(Carolyn Flinn – Fundraiser: DP Marais/Santa Centre, Bellville, South Africa)**

"I would like to congratulate you for a good job you did. ...I tell you the book is so wonderful, you have sited real experiences and what is happening in our working environment. I like the language which is very simple to understand for any target audience. ... you didn't talk only about South Africa's experience. So keep it up my brother! I always dream to be an expert in this area of "management and leadership" like you, but I believe one day YES!!! Why not!!!!"

(Isabella Neeso, Programme Assistant, Pahffinder International, Tanzania)

"I have enjoyed the book. What I noticed is that the book is a healer. Once you read it you feel better. It gives strength and power to those who feel hopeless, confused and powerless because of the ups and downs in their organizations. It makes you awake, tells you the real truth that can be followed if your ambition is to build your organization and yourself. This book is not only focused on developing the organization, but it builds up individuals... This book is quite interesting and attractive and each page is impressing and you feel like reading it all the time. Frank, I must tell you: This is superb!" **(Mavis Ndusulwana: Executive Director – Umanyano Lomama, Khayelithsa, South Africa)**

"...the book is very good and educative. It is clear that it is written from a background of vast experience. You touch on a number of things that a lot of books do not touch on, mainly because you address a lot of issues based on what you have learnt when you worked in NGOs. Of all the things, I liked the chapter on Self-Management and Self- Development. Guess what, I have put up a sustainability plan for my organization and I used ideas I got from your book and workshop. As for the issue of Spiritual Resources, believe it or not, I had not heard about it before! It was such a discovery! **(Lorato Moalusi, Senior Programmes Manager – Sakufiwa: Gaborone, Botswana)**

"I was so stressed up this morning and happen to have decided to open your book. It eased up my tension. I was stressed up because I was busy thinking of the storming stage YONECO was going through; people becoming individualistic etc. But then your introduction on "*The Art of Leadership and Management on the Ground*": "If no one is pissed-off with you then you are dead but just haven't figured it out yet!" These Frank were very encouraging words and I know I am pissed not because I am doing something wrong, but because it is a cause. Keep up writing such good stories. This motivated us." **(MacBain Mkandawire – Director: YONECO, Lilongwe, Malawi)**

This book is the answer to every manager's nightmare of how to cope with the ever increasing demands of his work, and yet at the same time wade through the sea of literature that is supposed to help him do it. Frank's book is a concise, focused resource work. It shouts "Experience" from every page. It should be every manager's handbook, as indispensable as his cell phone!" **(Warner Stewart, Public Relations – Christel House, Cape Town, South Africa)**

"... Congratulations on putting this much needed tool together. It is generally a really comprehensive piece of work that is a must read for everyone since we are all managers and leaders even at home!" **(Debbie Kaddu-Serwadda: East African Regional Representative of ASHOKA – Kampala, Uganda)**

The book is refreshing, insightful and to the point. I am privileged to have had Frank Julie as a leader and mentor. **(Rusana Philander ex- Rag volunteer, board member and journalist)**

INTRODUCTION:

Sawubona! I see you! Thank you for joining me and taking the risk on this journey of discovery on leadership and management. You should know that you are brave and good and that you have the potential to become an even greater leader and manager. Otherwise, why read this book at all? Those who think they are good do not waste their time reading books. They think that they know everything, so why bother? It is those like us who accept how little we know (and that we will never know enough) that seeks to know more and more. For development has no end. In a rapidly changing world the knowledge of today becomes obsolete tomorrow. What works today may not work tomorrow. What is relevant today can become irrelevant tomorrow. Today's high standards are tomorrow's mediocrity.

The mere fact that you are reading this book means you are doing something right or wants to know what the right thing to do is. It means you are open to learning, an important quality of authentic leadership. This book will aim to build your awareness on the things you are already doing right and further guide you how to do the right things right.

Did you know that directors and managers are paid to be uncomfortable? This is what Peter Drucker said many years ago: "As a manager you are paid to be uncomfortable. If you are comfortable, it is a sure sign you are doing something wrong!" Tom Peters said: "If no one is pissed off with you then you are dead but just haven't figured it out yet!"⁸

This book will examine and explore the source of this discomfort. In a world of transition, confusion and chaos, especially in countries of the South, the tasks of leadership and management are becoming more and more taxing. In fact, to lead and to manage is more than just a task. It is a calling. It is a mission! Are you up to the challenge?

Remember, in a rapidly changing world, the practice of leadership is becoming more and more vital to the future sustainability of human society. It is a platitude to say that an organization rise or fall on leadership. Change the leader and you can change the organization. This same platitude holds true for our human society.

It is my firm belief that the new leadership to manage our changing world will largely emerge in the countries of the South, in particular on the African continent. Just like Africa was the cradle of

⁸ *Mail and Guardian*, 22 - 28 October, 2004, p. 3

humanity, I believe it will also become the cradle of the new forms of human relationships necessary for our future existence and survival. These relationships are now being forged everyday in the laboratory of human struggle.

There is a common misconception that the new society we strive towards will emerge on some magical day. This is dangerous thinking and an unconscious abdication of responsibility of leadership. The fact is that the new society we want to see is being created before our very eyes every single day. It is primarily created in the myriad of organizations in which we find ourselves. At home, in our schools, community groups, non-government organizations, organs of state, businesses, etc. Each organization, a place where groups of people come together consciously to achieve common objectives to build a better life, is in actual fact a reflection of the society we want to create. In this society we are all responsible, we all contribute and frankly, nobody is neutral. For you either build this society up or you break it down, whether you do it consciously or not. You either co-create it or you co-destruct. You either help to integrate it (bring the various parts of society together) or you promote separation and hence fragmentation and destruction.

This book is a small attempt to guide those who have assumed positions of organisational leadership to understand and manage the demands placed upon them, to understand the seriousness of the tasks that face them. It examines the requirements of leading from within (yourself) and without (others).

I argue strongly that being effective in your personal life does not necessarily become a passport to assume leadership over others. It is however, a necessary requirement. On the other hand though, a lack of effectiveness in your personal life can *never* qualify you for effective organizational leadership. For you first need to travel within before you can travel without.

This book is not written to provide you with the final answers to the practice of leadership and management in a non-profit organization. It would have been foolish and unrealistic of me to attempt this. This book is aimed at providing you with a **foundation** to begin to understand the practice of leadership and management in a non-profit organization. It is like any driver of a car who will tell you that it was only after they passed out for their driver's licence that they only started to really learn the rules of the road. Studying the rules of the road in the comfort of your

home and later passing your learner's test is fine. But it is not enough. It is only all part of the process.

So, regard this book as a learner's guide to provide you with a foundation of understanding about leadership and management in a NPO before you seriously sit behind the wheel of your organization to drive it into the future. And make sure that after you have studied this book that you find yourself a mentor, a guide or a coach to help you on your journey to lead and to manage. That is, of course, if you don't have one already.

The tragedy in the countries of Africa and in the South in general is that there are so many passionate and enthusiastic leaders who want to make a difference in their communities. In my experience I have seen many women for example who have been abused or witnessed abuse and who decided to start organizations to fight against this. However, many of them lack the skills and competencies to sustain these organizations. The result is that the organizations become rife with internal conflict and personality clashes, which are signs that the leadership is unable to manage complex organizational processes. Our countries in Africa have become graveyards to such organizations with so many good intentions but without the capacity to convert them into concrete results.

As I said, this book is not aimed to provide any final answers. In this world of complexity there can never be final answers to anything. There can only be many ways of looking at things. And this is what I have tried to do, looking at certain leadership practices differently. You may agree with some of the ideas and differ with others based on your own experiences. That is fine. Take from this book what can work for you and discard the rest. In a process of continuous co-creation final answers can only amount to utopia, to the **only** right way of seeing the new world that is unfolding. And utopia always leads to fundamentalism, a form of absolutism that **swears allegiance to only one truth**. The violence perpetrated on millions of innocent people all over the world today is a direct result of such warped thinking and organizational practice.

This book amounts to the totality of my own experiences in many organizations over the past 26 years. It includes the readings I have done and discussions with many people, most of them great leaders in their own right. And they came from all walks of life. I will always remain indebted to all of them for my learning and mentoring.

Although everybody who is in leadership can benefit from this book, it is really aimed at the more aspirant leader or the one who just tasted the realities of leadership. People who work with NPO's like those in government and the corporate sector will also benefit as they will learn to appreciate the dynamics and complexities confronting non-profit organizations.

The *first part* deals with defining the practice of leadership and management and what it involves. *Part two* deal with the environment within which leaders and managers operate internally and externally. It is here where I try to show the source of the discomfort of leaders and managers. *Parts three and four* deal with the practical skills and responsibilities you need to develop as a leader if you wish to run an effective and efficient organization. *Part five* deal with you as a leader and your personal development. I regard this as the most crucial chapter because this is where I believe authentic leadership is built. I have included some inspiring poems and slogans throughout the book to stimulate your thinking around yourself and the practice of leadership. Each chapter also ends with an exercise. The purpose of the exercises is to allow you to reflect on the content of each chapter and relate it to your work in your organization. I hope that in this way you will be able to check for yourself the strengths and weaknesses in your own organization and evaluate your own practice of leadership.

If my research has been correct, then according to my knowledge, this is ***the first book in the world*** that covers comprehensively some of the most important knowledge, skills and understanding that leaders and managers should have when leading a non-profit organization. Ironically, it was a book that I searched for in vain when I started out on my own journey of leadership more than 26 years ago. All the books that I am aware of dealing with the subject of leadership and management in non-profit organizations only cover a certain aspect. This is why I committed myself to write this one and share it with you. (See list of books in the bibliography) The one that is the closest to dealing with the subject matter comprehensively, is "Managing the Non-Profit Organization" by Peter F. Drucker and one that I highly recommend.

I have also included a list of useful books at the end for you to follow up if you need to read and study more about the practice of leadership and management. In writing this book I came across many useful articles and manuals dealing with the subject of leadership and management. The authors of some of these are unknown and wherever I quoted from them I noted this. I have also noted that on some instances ideas from these articles or manuals come from other books that crossed my desk but where the original author was not acknowledged. I have tried to note this as well.

Readers will note that I have tried strenuously to keep this book free from intellectual jargon and as simple as possible. This was deliberate. This book is aimed at ordinary people doing extraordinary things to better the lives of others on the ground. I trust that these people will find this book useful as a resource in their daily struggles to sustain their organizations.

I have been very much aware of other books with no or little gender sensitivity and that constantly refer to “he” as if “she” does not exist as leader and manager. I have tried to avoid this by using “he” and “she” or “her” and “him” interchangeably. This is to allow for an easier reading of the text. If I have used the one more than the other, then this was not deliberate.

I will not be honest if I also confess that I also decided to write this book because of the ease with which non-profit organizations are destroyed after struggling for years to be built up from scratch. I had a similar experience and you will find numerous references to this. Although this is changing, NPO's in the African context have long been known for being the repository of individuals who dropped out at university, found the private sector too harsh for their liking, got retrenched in the public sector or struggled to get into government for a plum job. Certain dubious leaders therefore see NPO's as stepping stones into these spheres and some even start their own NPO's as a means of job creation. In pursuing their own personal agendas they wreak havoc with the organization to the point where they also destroy themselves. Hopefully this book will help to uncover such individuals and protect our organizations on the ground.

A final note: Some people may be pissed off and even angry with some of the ideas that I have penned in this book. But that is their problem and not mine. I have long ago learnt that when I meet a new client/partner and they don't feel uncomfortable when I leave after my work is done, then I don't actually deserve to be paid. Why is this so? Because I believe consultants are paid to say the things you don't want to hear! If we keep telling you what you want to hear then you will never learn to think and think critically. Margaret Wheatley said something to the effect that we need to learn **to disturb one another**. This is another purpose of this book. To disturb, make you think, question, criticise, debate, enquire, etc. All over the world (and in South Africa as well) there is an ominous trend that tries to kill dissent, opposing views, intellectual debate. In short, it tries to kill a plurality of ideas. This is very dangerous and this book also aims to counter this trend. It will not make me very popular of course. But I have also learnt a long time ago it is better to be honest with myself than to strive for cheap popularity.

As you travel this road of exploration with me in this book, remember the following quotation from the “I Ching”. Remember it especially when you are faced with difficult decisions or choices.

“To become a centre of influence holding people together is a grave matter and fraught with great responsibility. It requires greatness of spirit, consistency and strength. Therefore let him who wishes to gather others about him ask himself whether he is equal to the undertaking...”⁹

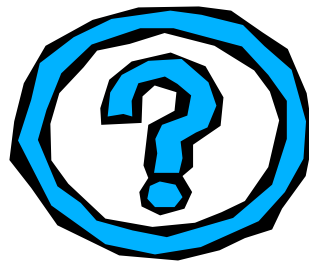
⁹ Kaplan, Allan (1998) *Leadership and Management*, p. 1

WHAT THIS BOOK WANTS TO ACHIEVE:

By the end of this journey, you should be able to:

- *Understand the context within which leaders and managers operate*
- *Appreciate the challenges that face leaders and managers on a daily basis*
- *Realise that leadership and management is more than just having the right skills and techniques to do a particular job. It is a calling. It calls for a holistic and integrated approach to the task.*
- *Understand the essential differences between leadership and management tasks*
- *Understand the different levels of leadership and implications for organizational practice*
- *Plan, organise and delegate work activities to ensure the best possible achievement of objectives linked to vision and mission*
- *Know how to create a positive working environment by using various management tools such as problem solving, effective decision making communication, listening skills, conflict transformation, team building and meeting management*
- *Learn the important practical responsibilities of resource mobilisation to achieve strategic objectives*
- *Learn how to work with your governing board as a resource and not as a necessary evil*
- *Learn to take relationship responsibility amongst your client base to promote long term organizational sustainability*
- *Learn how to take ownership over your own development and develop your life plan*

CHAPTER ONE



UNDERSTANDING WHAT LEADERSHIP AND MANAGEMENT IS

“Integrity means living it *myself* before leading others!” (John Maxwell)

Leadership and management in the non-profit organization

Chapter 1. The context: Understanding what leadership and management is

A: The struggle of leadership and management

Many definitions have been postulated for what leadership is. For example, John Maxwell tells us that “Leadership is influence. That’s it! Nothing more and nothing less! He who thinketh He leadeth and hath no one following him/her is only taking a walk.”¹⁰ I don’t think this definition adequately explains what leadership is. In any case, we all exercise influence over others whether consciously or unconsciously a point that Maxwell himself acknowledged at a later stage. This is how he put it: “Did you know that each of us influences at least ten thousand other people during our lifetime? So the question is not *whether* you will influence someone, but *how* you will use your influence (his emphasis).”¹¹

In *The Servant as Leader*, Robert Greenleaf defines effective leadership as people who serve others and while they serve, “Do those being served grow as persons: do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants? *And* what is the effect on the least privileged in society; will she or he benefit, or at least, not be further deprived?” He then continues: “I would now add one further stipulation: “No one will knowingly be hurt by the action, *directly or indirectly*.” (his emphasis)¹²

In *The Leadership Challenge*, James Kouzes and Barry Posner quotes Vance Packard as stating that, “Leadership appears to be the art of getting others to want to do something that you are convinced should be done.” They identify five leadership practices common to successful leaders namely: “**Challenging the Process** (referring to leaders as pioneers, willing to step out into the unknown. They are people who are willing to take risks...) **Inspiring a Shared Vision** (Every organization, every social movement begins with a dream. The dream or vision is the force that invents the future. Leaders inspire a shared vision. They breathe life into what are the hopes and dreams of others and enable them to see the exciting possibilities that the future holds.) **Enabling others to act** (Exemplary leaders enlist the support and assistance of all those who must make the project work. They encourage collaboration, build teams, and empower others.) **Modelling the way** (Leaders must also have detailed plans. They must steer projects along the course,

¹⁰ John Maxwell (1993) *Developing the Leader in You*, p. 27

¹¹ John Maxwell ((2002) *Leadership 101*, p. 9 (in the introduction)

¹² Robert Greenleaf (1998) *The Power of Servant Leadership*, p. 43

measure performance, raise funds, and take corrective action.) **Encouraging the heart** (People do not start their work each day with a desire to lose. It is part of the leader's job to show them that they can win.)¹³

According to Max Du Pree "The first responsibility of a leader is to **define reality**. The last is to **say thank you**. In between the two, the leader must become a **servant and a debtor**." Quoting a friend, he states: "Leaders don't inflict pain; they **bear pain**." He continued: "The signs of outstanding leadership appear primarily among the followers." ... Leaders should leave behind them **assets and a legacy**. ...Leaders need to be concerned with the **institutional value system** which, after all, leads to the **principles and standards** that guide practices of the people in the institution. ...Leaders are also responsible for **future leadership**. They need to identify, develop, and nurture future leaders. Leaders are responsible for such things as a **sense of quality** in the institution..." Effective leaders encourage **contrary opinions**, an important source of vitality. ...Leaders owe a certain **maturity**. Maturity as expressed in a sense of self-worth, a sense of belonging, a sense of expectancy, a sense of responsibility, a sense of accountability, and a sense of equality." ...Leaders owe the corporation **rationality**. Rationality gives reason and mutual understanding to programs and to relationships. It gives visible order. ...Leaders owe people **space**, space in the sense of freedom. Freedom in the sense of enabling our **gifts** to be exercised. We need to give each other the space to grow, to be ourselves, to exercise our diversity. We need to give each other space so that we may both give and receive such beautiful things as ideas, openness, dignity, joy, healing, and inclusion." ...Leaders are obligated to provide and **maintain momentum**. Momentum comes from a **clear vision** of what the corporation ought to be, from a well-thought-out strategy to achieve that vision, and from carefully conceived and communicated directions and plans which enable everyone to participate and be publicly accountable in achieving those plans."¹⁴

The Berkhana Institute led by Meg Wheatley and Bob Stilger defines a leader as "...**anyone who wants to help, who is willing to step forward to make a difference in the world**." (my emphasis). According to them the world is blessed with an abundance of these leaders.¹⁵

For me **leadership is struggle**, a **struggle for life**! It is a struggle that manifest itself both in a **personal context** (in your own life) and in the **organizational context** (within an organization). It is important to differentiate between personal leadership and organizational leadership. In the first

¹³ James M. Kouzes and Barry Z. Posner (1987) *The Leadership Challenge*, pp. 8 – 13

¹⁴ Max Du Pree (1989) *The Art of Leadership*, pp. 9-15

¹⁵ Meg Wheatley and Bob Stilger, *Berkhana Institute*, e-mail circular, 15 December 2005, p.1

case, you have no choice but to lead yourself in your own life. The quality of training you received from your parents will contribute greatly to your ability or inability to lead your own life. Your life is your biggest project and you are always in charge. Failure to exercise leadership in your project of life will result in you having to face the consequences. If you are married or live with others dependent on you, they will all suffer the consequences. In this case, you have no choice.

But in organizational leadership ***you have a choice***. This is the defining difference between personal and organizational leadership. If your actions as a leader lead to the destruction of the organization, then you have the moral duty and responsibility to decide if you are fit or unfit to provide leadership. ***You have to make a choice***. You cannot wait for others to act against you, to force you to jump ship. Trying to find excuses or blaming others is one of the worst crimes by someone who professes to be a leader.

Authentic leadership is born through struggle both within (your inner struggle) and without (your external environment). I remember this story by Robert Fuller that best describes for me the struggle of leadership:

A group of farmers used to travel weekly to the town market to deliver their potatoes. Before embarking on this weekly journey, they used to arrange the potatoes in an order from big to small. This practice took them considerable time and energy. But there was another farmer who did not follow this ritual. Instead of arranging the potatoes from big to small, he used a different method. Travelling to the market, he took a rocky road full of bumps and potholes. When he arrived at the town market the big potatoes were all lying on top and the smaller ones at the bottom.

What is the moral of the story? Leadership is born out of struggle. The big ones always rise to the top through obstacles, through struggle. The key to authentic leadership for me is captured in this story. There can be no life except through struggle and the essence of true leadership is to face this struggle. Any attempt to take short cuts and avoid this struggle can only lead to misleading others and fooling yourself. People who have no history of a bumpy road in their progression to leadership, should not as a rule, be entrusted with leadership in an organization. This is dangerous and setting them up for failure. When their personal lives are in tatters, the more reason not to entrust them with this responsibility. They can only become a danger to themselves and others.

ELEMENTS OF EFFECTIVE AND AUTHENTIC LEADERSHIP PRACTICE:

Leadership is **vision**, i.e. the ability to see a reality that does not yet exist. It is the will to defy the constraints of a current reality, to stretch oneself mentally. It is the determination to think the impossible and then to put plans in place to achieve the impossible. There can be no choice to lead without having a vision. Leadership without vision represents the past, a movement backwards, reverse thinking. It represents stuckness in a comfort zone, the blind leading the blind.

To have a vision is to align you to the future, to live with creative tension. Creative tension holds the possibility for forward movement, to move to higher levels and lift you up; to stretch yourself. And the first place to stretch yourself is in your mind. Moving to higher levels allow the leader to live with and embrace risk taking, to live with uncertainty and ambiguity, to live with and embrace your vulnerability and coming to terms with your inner fear for failure.

The importance of vision should not be taken lightly. If leadership is about struggle then vision is the solution we offer society to overcome and guide that struggle. It should be a vision that defies the constraints of a current reality. It is about moving out of your comfort zone and learning to live with disturbance all the time.

Leadership is about **responsibility**. Remember, Stephen Covey talks about “response-ability”. Leaders have the ability to respond to their circumstances and not just to play victim to what is happening to them. You can never lead authentically unless you cast aside the victim mentality, thinking that the whole world is against you. People who suffer oppression and abuse of all kinds tend to fall in this trap. For as long as you think you are a victim then you cannot move to act, to change your circumstances. You always expect the perpetrator to act first. They must change before you change. Needless to say, no change will take place.

Effective leaders rid themselves of this victim mentality and take charge of their own life and the life of the organization. They don’t blame the donors for not funding them or changes in the external environment. In short, they refuse to play the blame game. They act and act decisively to impact on their external environment, knowing they have the inner power to bring about change through taking responsibility.

Kaplan says that leadership is also a **privilege**. “Privilege is, of course, a double-edged sword. It is gift which is bestowed, but also power to be wielded. Privilege brings power and leadership is nothing if it is not about power. Intrinsic to the nature of power is its potential for abuse. Power does have the ability to corrupt, hence the importance of recognising the need to cultivate wisdom

– the indefinable quality of maturity – rather than relying merely on skill and knowledge. It is equally necessary not to deny or avoid the attribute of power, nor to diminish its value. Without power, a defining characteristic of leadership is lost.”¹⁶

Leadership is about **focusing**, about knowing what *not* to do. In a world of more and more choice, effective leaders know what to do and what not to do. They follow one of the most important laws in organization - **the law of concentration**. They know that to build effective organization they cannot dissipate their energies. It must be concentrated. Especially in a non-profit environment, where there is a constant lack of resources, concentration is vital. In my experience I always deal with organizations that are trying to do too much, having too many objectives. In the end they hardly meet any of the objectives because they want to be everywhere. The result is that they are nowhere.

Effective leadership is about **focusing your energies** on the needs where you can make the biggest difference based on your available resources. This is not easy for non-profits. Born in the struggle to address human needs, and driven by the passion to make a difference to human lives, we want to do as much as we can. In the pioneer stage of our work we tend to want to help everyone. But this is only a stage and should be recognised as that. It is important that out of the focus on quantity is born the need to focus on quality, on where the biggest impact can be made after your pioneer period of experimentation.

To focus also means to let go, to decide what **not** to do. It means to make sacrifices, to give things up. And the word sacrifice comes from the word sacred. To be sacred means to be spiritual, to come into touch with your spirit. To let go and make sacrifices can be very painful at times. And this makes it difficult to lead. Without the ability to let go, to make sacrifices, the leader will try to please everyone, **competing for popularity**. It becomes a constant battle to avoid the difficult decisions, to avoid the short term pain. I have learnt over the years that you can decide to either have *short term pain and long term gain* or *short term gain and long term pain*. Bad leaders go for short term gain, for instant gratification, and in the end destroy their organizations.

Precisely because leadership is about struggle it is also a **calling** and must be practised with dignity. It is about inspiring (not only motivating) others to act. The word **inspiration** derives from the word **spirit**. Leaders always try to get in touch with their inner spirit. You can only inspire if you get in touch with your own spirit and stay in touch with it. Not many people in society are fit for

¹⁶ Allan Kaplan, *Leadership and Management* (1998) p. 2

organizational leadership. My estimation is that only between 15%-20% of people are fit to occupy positions of organizational leadership. To think everybody can occupy this position is wishful thinking. This does not mean that when people have proved themselves in others areas of their lives (both personal and organizational) that they should not be afforded the opportunity to lead. But don't leave them in that position when the signs of failure start to emerge. Remove them immediately before they do more harm to others and themselves.

Leadership is about **discipline**, the discipline to act decisively. Remember the word discipline comes from the word “disciple”. Leaders become their own disciples. They learn to follow themselves first. **An effective leader is also an effective follower.** You learn to follow yourself first – your own cause! In a world of complexity, the leader can never know everything, nor profess that s/he does. This makes it imperative for the effective leader to allow others to lead at times, those who are specialists in their own areas of work. This can happen in many ways. You can mirror your staff or volunteers. When you do this then you work with someone in her/his department for a couple of days or weeks. It is the responsibility of the other person to educate you about what they are doing and how it links up with the bigger objective of the organization. Here you consciously play the role of follower. This can inspire your followers to become leaders themselves. It can cultivate their untapped potential. It also shows your humility and tempers any tendency towards elitism.

Remember, leadership is a discipline in its own right and must be studied as such. It is an art and not a science. There is no set of techniques, rules or series of commandments with which a leader can arm him/herself and be assured of success. What you do today you may not repeat tomorrow. What works today may become obsolete tomorrow. In a world of ambiguity you can never know. You can only try. **And if you don't try you will never know!**

What is management?

Traditionally the term “management” refers to the set of activities and often a group of people, involved in five general functions namely, planning, organising, leading, co-ordinating and monitoring activities. Management is also the *process* by which certain predetermined **objectives are achieved through the effective utilisation of resources**. This is how Peter Drucker puts it:¹⁷ “A manager, in the first place, **sets objectives**. He determines what the objectives should be. He determines what the goals in each area of objectives would be. He decides what has to be done

¹⁷ Peter F. Drucker (1955) *The Practice of Management*, pp. 303-304

to reach these objectives. He makes the objectives effective by communicating them to the people whose performance is needed to attain them.

Secondly, a manager **organises**. He analyses the activities, decisions and relations needed. He classifies the work. He divides it into manageable activities. He further divides the activities into manageable jobs. He groups these units and jobs into an organization structure. He selects people for the management of these units and for the jobs to be done.

Next a manager **motivates and communicates**. He makes a team out of people that are responsible for various jobs. He does this through the practices with which he manages. He does it in his own relation to the men he manages. He does it through incentives and rewards for successful work. He does it through his promotion policy. And he does it through constant communication, both from the manager to his subordinate, and from the subordinate to the manager.

The fourth basic element in the work of the manager is the job of **measurement**. The manager establishes measuring yardsticks...He sees to it that each man in the organization has measurements available to him which are focused on the performance of the whole organization and which at the same time focus on the work of the individual and help him do it. He analyses performance, appraises it and interprets it. And again, as in every area of his work, he communicates both the meaning of the measurements and their findings to his subordinates as well as to his superiors.

Finally, a manager **develops people**. Through the way he manages he makes it easy or difficult for them to develop themselves. He directs people or he **misdirects** them. He brings out what is in them or he stifles them. He **strengthens their integrity or he corrupts** them. He trains them to stand upright or he **deforms** them. (my emphasis)

Every manager does these things when he manages – whether he knows it or not. He may do them well, or he may do them wretchedly. But he always does them.”

It is dangerous to see management and leadership functions as something separate. You need to have both. These days more emphasis is put on the leadership abilities of managers, e.g. developing vision and mission, setting clear objectives, mentoring and coaching others to achieve more, etc.

According to Scot Peck management can be regarded as the “***profession of professions***”. The role of a manager is the most stressful and the profession of management is the most complex. Management is the youngest of professions. Some people are called to become managers but the majority is not. Management is a position of great ***power***. Some people with an unbridled lust for power seek positions of management for which they are unsuited and unqualified. Rather than a profession they are called to, it becomes a position they abuse!¹⁸ They cling to the position not because of the responsibility it carries to perform but because of the financial benefits and social status it provides. In short, it feeds their ego!

Mindless promotion (without proper selection, induction, monitoring and evaluation) leads to the wrong people ending up in management positions. Some people also “drift” into management due to their seniority in the organization and because they are “academically” better qualified than others or simply high talkers. How did you end up in your management position? How did you qualify for this profession? What did you do to earn the trust of others to be managed and led by you? What sacrifices did you make to earn the respect of others?

There is a collective ignorance in our society that the role of leading and managing is more than just a job. The responsibility calls for more than just training or “capacity building”. The general tendency is for people who are great in performing in a particular department of work are automatically promoted into management. This is very dangerous. It is dangerous because it confuses technical ability (e.g. working on a computer or managing the books) with human ability, i.e. working with human beings. Human beings are complex organisms and working with them is a complex task. It requires an understanding of the highest order and a willingness to learn all the time. Mindless promotion is therefore a dangerous practice and can only undermine an organization.

C: The differences between leadership and management¹⁹

Leadership	Management
<i>Innovates</i>	<i>Administers</i>
<i>Focuses on people</i>	<i>Focuses on systems</i>
<i>Inspires trust</i>	<i>Relies on control</i>

¹⁸ Scot Peck (1993) *A World Waiting to be Born*, p. 225

¹⁹ Adapted from Stephen Covey (2004) *The 8th Habit: From Effectiveness to Greatness*: pp. 360-364

<i>Long range perspective</i>	<i>Short range view</i>
<i>Asks what and why</i>	<i>Asks how and when</i>
<i>Eye on the horizon</i>	<i>Eye on the bottom line</i>
<i>Originates</i>	<i>Imitates</i>
<i>Challenges the status quo</i>	<i>Accepts the status quo (work within the constraints)</i>
<i>Does the right thing</i>	<i>Does things right</i>
<i>Get people to want to do what needs to be done</i>	<i>Get people to do what needs to be done</i>
<i>Is original</i>	<i>Is a copy</i>
<i>Develops</i>	<i>Maintains</i>
<i>Is his own person</i>	<i>Is a foot soldier</i>
<i>Keeps his eye on the horizon</i>	<i>Keeps his eye on the bottom line</i>
<i>Has a long range perspective</i>	<i>Has short range perspective</i>
<i>Focuses on people</i>	<i>Focuses on systems and structures</i>
<i>Put emphasis on intangibles (the invisible)</i>	<i>Focuses on tangibles (the visible)</i>
<i>Deal with the unknown; unexplored territory; defy reality</i>	<i>Deal with the known; with what is; with constraints</i>
<i>What things mean to people</i>	<i>Deal with how things get done</i>
<i>Coping with change</i>	<i>Coping with complexity</i>
<i>Making happen what wouldn't happen anyway. Working at the edge of what is acceptable</i>	<i>Exercise authority and influence to achieve levels of performance consistent with previously demonstrated levels</i>
<i>Create a common vision; motivate others to contribute to that vision; align self-interest to that of the organization; Focus on persuasion</i>	<i>Allocate scarce resources against organization objectives; set priorities and design work for the achievement of results; focus on control</i>
<i>Are architects</i>	<i>Are builders</i>
<i>Get extraordinary results from ordinary people</i>	<i>Get well-planned and well-executed outcomes</i>
<i>Achieves the unexpected</i>	<i>Achieves the predictable</i>
<i>Focus on principles</i>	<i>Focus on techniques</i>
<i>Ask "Is the ladder against the right wall"?</i>	<i>Climbing the ladder fast</i>

D: Leadership and Eldership:

Another quality that goes beyond leadership is eldership. These are men and women of great wisdom that can only develop over years of experience. In the American Indian culture they are referred to as elders. This is a higher level of leadership – leaders in touch with their spirit.

The differences between leaders and elders can be summarised as follow:²⁰

Elders	Leaders
Stands for everyone	Seeks a majority
Sees the trouble maker as a possible teacher	Sees trouble and tries to stop it
Tries to show the truth in everything	Strives to be honest
Supports democracy but also listen to dictators and ghosts	Supports democracy only
Try to get others to become elders	Try to be better at their jobs
Have no mind of their own; they follow the events of nature	Try to be wise
Takes only a moment to notice what is happening	Needs time to reflect
Always learn	Already knows
Studies the moment	Needs a strategy
Honours the direction of a mysterious and unknown river	Follows a plan
Let things be	Tries to act

²⁰ Arnold Mindell (1995) *Sitting in the Fire*, p. 184

The final test:

The final test of true leadership lies not in the organization but outside of it. That means that while you are leading inside the organization, you will never know whether you have been successful or not. What you leave behind is the true test of leadership. Creating the conditions for the reproduction of the organization is the ultimate test of leadership. It is about leaders and managers who can work themselves out of their jobs. Whenever I ask managers what their most important task is, they never tell me that it is to work themselves out of their jobs. Well, unless you can accept this reality you cannot lead, you only mislead. You are deceiving, for your role is always temporary. Of course this idea is anathema to most managers and leaders who suffer from perpetual insecurity or who create organizations not out of need but out of expediency or job creation for themselves. These are people who can never move on. They get stuck and they destroy others and themselves in the process.

This is how Peter Drucker puts it:

“The test of any leader is not what he or she accomplishes. It is what happens when they leave the scene. It is the succession that is the test. If the enterprise collapses the moment these wonderful, charismatic leaders leave, that is not leadership. That is – very bluntly – deception.”

About separating leadership from management:

“...[As] for separating management from leadership, that is nonsense – as much nonsense as separating management from entrepreneurship. Those are part and parcel of the same job. They are different to be sure, but only as different as the right hand from the left or the nose from the mouth. They belong to the same body.”²¹

E: The 5 different levels of leadership and implication for organizational practice²²

1. **POSITION:** (Rights) People follow because they have to. Your influence will not extend beyond the lines of your job description. The longer you stay here the higher the turnover and the lower the morale (at all levels of the organization including staff, volunteer and board members)

²¹ Peter Drucker in Galagan, P.A. (1998): pp. 52, 22-27 as quoted from *The 8th Habit* by Stephen Covey, p. 362 (2004)

²² John Maxwell (2002) *Leadership 101*, p. 72

2. **PERMISSION** (Relationships) People follow because they want to. People will follow you beyond your stated authority. This level allows work to be fun. Caution: staying too long on this level without rising will cause highly motivated people to become restless.
3. **PRODUCTION** (Results) People follow because of what you have done for the organization. This is where success is sensed by most people. They like you and what you are doing. Problems are fixed with very little effort because of momentum.
4. **PERSONNEL DEVELOPMENT** (Reproduction) This is where long range growth occurs. Your commitment to developing leaders will ensure ongoing growth to the organization and to people. Do whatever you can to achieve and stay on this level.
5. **PERSONHOOD** (Respect) People follow because of who you are and what you represent. This step is reserved for leaders who have spent years growing people and organizations. Few make it to this level. Those who do are bigger than life. This is a transitional level from leader to elder. This is the highest form of leadership.

LEADERSHIP AND UNCONSCIOUS USE OF RANK:

Arnold Mindell tells us that “We all have some form of rank. Our behaviour shows how conscious we are of this rank. When we are heedless of rank, communications become confused and chronic relationship problems develop.”²³ For example, you sit in a meeting as a director and ask for participation by everybody but you do all the talking or when a staff member develops a point, you interrupt the person without apology. What you say and do are two different things. You are sending a double signal. This is an abuse of your rank as a director. People will then stop participating in the meeting or discussion.

There are different forms of rank, namely:

1. Economic rank – using your access to material wealth
2. Social rank – using your status (i.e. you are the president of the country, etc.)
3. Gender rank – using your power as a male or female
4. Emotional rank – using your emotions to manipulate others
5. Psychological rank – people who experienced and overcome extreme hardship and using those experiences to look down on others who experience similar pain as “victims”

²³ Arnold Mindell (1995) *Sitting in the Fire*, p. 49

6. Educational rank – your access to quality education might make you think that others who lacked this are illiterate
7. Language rank – the language and words you use in relation to the people you communicate with

Rank can also be expressed between parents and children, doctors and patients, consultants and clients, donors and recipients, directors and staff/volunteers, principals and teachers, teachers and pupils, developed and underdeveloped countries, priests and followers, etc.

For example, I was working with a client where their main donor got used to “punish” them for submitting reports late without trying to understand and appreciate the inner dynamics and external challenges that caused this malpractice. The “punishment” was in the form of withholding funding until the relevant reports were submitted. I pointed out to the donor that this is an abuse of their rank. A relationship based on a developmental objective is by its very nature a relationship of equality and when one partner is “punished” then this objective is compromised and rank is abused. The same donor insisted that the organization report in a language that the donor was comfortable with instead of providing the organization with an option to report in their language of choice. This was an abuse of language rank. Many consultants are also guilty of this. They never check people’s language preference. They assume that people must speak their language. The result is that no one learns anything meaningful and people are shut up even before they can start to communicate. If you cannot speak the language of a particular group of people, get an interpreter. If you are serious about other people and their ability to understand you, then you have to make the sacrifice and go the extra mile to accommodate them.

Make sure that you always understand your rank that you carry with you and use it consciously. Rank is not necessarily a bad thing. It is when it is used unconsciously without the awareness of its effect on others, that it can become bad.

WHAT EFFECTIVE LEADERS PRACTICE:

BEWARE OF YOUR SHADOW²⁴

So, what is your shadow? Allan Kaplan refers to the shadow as that thing or energy that arises when we have too much or too little of something or strive too much or too little towards

²⁴ Robert A. Johnson (1993) *Owning your Own Shadow*

something. He says: “When we direct our energies in too focused a fashion, a balance is lost; yet life strives towards balance.”²⁵ For example, you are fiercely fighting against poverty but you are poor in other respects, e.g. relationships with other people, don’t look after yourself, mental poverty, etc. You start to romanticise poverty. I once worked with a health institute caring for sick people but internally the relationships were very sick. It was a sickness that pervaded the institute. Remember, the more you strive for something the more its opposite will appear. The sharper the light of consciousness the more intense is the darkness of the subconscious. Where you have high peaks you also find deep valleys. Where you have strengths you also have weaknesses, Your shadow is not necessarily a negative or destructive phenomena. It is when you deny this shadow that it is invested with destructive energy. You lose control over it and it starts to control you. So, how do you approach your shadow? Don’t fight it. Make it your friend, your ally. Be aware of it. Embrace it and integrate it. When you push it away then you live in denial. Then it will haunt you, control and ultimately destroy you!

POWER + PRIVILEGE – PRIVACY: PUTTING THE LEADER ON TRIAL

I am always amused when I hear leaders in NPO’s bemoan the fact that they have no privacy in their personal lives. Well, what do you expect? To think you can have privacy in an organization is to suffer from serious delusions. The risk of leadership is about the risk of occupying a space that makes you visible and vulnerable. If you try to deny this it will haunt you wherever you go. In leadership there is always a trade off between power, privilege and privacy. You cannot have the first two and refuse to let go of the third one. In an NPO it is actually worse since we work with public funds and other resources entrusted to us. When you betray that trust how can you claim privacy or even confidentiality as some corrupt leaders prefer to call it?

Sorry, but you will always be under scrutiny. Not only what you do inside the organization but also outside of it. If you don’t like this intense scrutiny then step down because you are then not qualified to lead. To lead is a choice, a choice to accept power and privilege, to occupy that space provided for you, a very sacred space. But it is also a choice not to accept power and privilege, to maintain your privacy and to abandon that space! This is why Drucker says that a leader is paid to be uncomfortable. As a leader you are always on trial. Whatever you say, do, write or even not say, not write and don’t do is always being scrutinised. As Drucker said, “But a leader is not a private person, a leader represents.”²⁶

²⁵ Allan Kaplan (2002) *Development Practitioners – Artists of the Invisible*, chapter 11

²⁶ Drucker (1990) *Managing the Non-profit Organization*, p. 48

COMBAT HERO WORSHIPPING:

All leaders are fallible because they are human. There is no perfect leader. When people start to hero worship you then it is not about you really. It is about them and what they lack in themselves. They develop expectations about you that you are not even aware of. When you cannot meet those expectations then they will crucify you, forgetting it was all about them and not about you! Where you see this phenomenon, fight it. You may feel good in the beginning when others put you on a pedestal, but there is a price to be paid later on. Most of the time it will happen that the very people that put you on that pedestal will try and destroy you at a later stage. I have heard this from many leaders in various organizations.

PAY ATTENTION TO INVISIBLE LEADERSHIP:

This is probably one of the least appreciated elements of leadership development. Simply put, it means what are you doing when no one is watching? What are you doing behind closed doors? How well do you treat yourself and your family, your partner, children, friends, etc? What are you doing to advance the interest of your organization when no one is watching? What do you do at night, what are you reading and studying? How disciplined are you when on your own? Some people may not know it but great leaders are made through the things they do when nobody can see them. They make sacrifices without expecting credit for it, build relationships, caring for others, helping others grow without expecting anything in return. They don't abuse their partners and the trust others put in them. They don't use others as tools to advance themselves. They defend others even in their absence. They don't manipulate or take short cuts. In short, they build inner power, a power that cannot be taken from them. They build integrity. They learn to become whole. And they constantly strive for balance.

Many times great leaders create the unintended impression amongst subordinates that it is easy to manage an organization. It is like someone running a 100-metre hurdle effortlessly and someone in the crowd thinking how easy it looks. When the person in the crowd attempts the same thing, he realises how difficult it is. The point is that the athlete was not observed during training, when they constantly practised, when she was preparing for the race. Invisible leadership is like practising when no one is watching. You are on your own. Remember a race is not only won while **running** it. It is won while you also **prepare** for it. Invisible leadership is like preparing for your race. You have to practice all the time. There is no end in how much you can learn. So, what are *you* doing while no one is watching?

IMAGE+IDENTITY = INTEGRITY

Just like organizations, leaders also have an **image** that they project to the outside world. But your image (*that which is visible*) and your true **identity** (*what you do privately*) may not be the same. Your true identity refers to what I have discussed under invisible leadership. There must be congruence between what you stand for in your public and private life. I have seen many of my own close comrades who failed this test. Some of them still do. I have also failed this test miserably until I started to work more seriously on myself.

When there is an imbalance between your image and your real identity then you will suffer from a lack of **personal integrity** or inner character. What you stand for in public and what you do in private is not consistent. Scot Peck reminds us that the word integrity comes from the word integration. And integration he says means to bring the parts together.²⁷ The opposite of integration is separation. When things separate, they disintegrate or they fall apart. When you lack personal integrity then you fall apart. It is in this situation where leaders who are not authentic or real are forced to wear masks to cover up their treacherous deeds. They cover up, sow division, recruit camp followers to compensate for their own insecurities, ignore policies and objective criteria when making decisions, or use policies to benefit them personally, play up to the camp followers who provide legitimacy to their masks, and become generally reckless!

The same applies to organizations where you also have an image and an identity. Sometimes you read beautiful reports about the work of organizations just to find out later how corrupt these organizations are internally. Then there is a lack of **organizational integrity**. (See the part dealing with board development) For example, an organization may preach about gender equality just for you to find out that its own female members feel marginalised and oppressed.

When you lack personal integrity as a leader it becomes **impossible** for you to develop organizational integrity. You cannot have one without the other. And you are not born with this quality. You have to develop it. It is a process. You have to be open and honest with yourself.

When you see signs of disintegration, learn to watch yourself and correct your behaviour. Admit your mistakes or indiscretions and move on. Learn to become whole. It is a process and a very painful one. There are no short cuts. When you live in denial about this, then you become unfit to lead as well as a danger to yourself and others. So, get real!

²⁷ M. Scott Peck (1993) *The Different Drum*, pp. 234-253

THE TASK BASED vs. EMOTIONAL BASED RELATIONSHIP:

As a leader you have to make decisions about people working with you all the time. You have to decide on their placement in the organization, their promotion or even demotion, salary levels, evaluate their performance, etc. It is therefore a good thing to know as much about the staff member as possible to guide you in your decisions. When you approach the development of a person in a holistic manner, then finding out as much about the person helps you to understand the other person. But there is also a danger. This is the danger of getting too close. You are unconsciously sucked into the person's personal life. You become aware of the person's trials and tribulations and can allow these to influence your decisions about this person. This is dangerous.

The difficulty is that there is a fine line between knowing enough about someone to assist that person in her development and maintaining a distance to allow for objectivity in decision making. At an extreme level you can have two individuals who are emotionally involved and where these lines are totally blurred. And it cannot be otherwise because the demands of a ***task-based relationship*** (at work) are totally different from the demands of ***an emotionally based relationship*** (in your personal life). In the first instance you are contractually bound to perform certain tasks and deliver certain results and in the second instance you have a choice to stay in that relationship. You are not subject to deliver certain predetermined results for which you are financially rewarded.

Where individuals report to each other and they are emotionally involved then you may have a recipe for trouble. You will unconsciously put each other under unnecessary pressure in order to prove to others that you are objective. When one of the parties is not producing the results based on the predetermined performance criteria, then the temptation to be subjective can be great. But this will not help. Unless you work in different departments and report to different people, you should rather review your relationship and the impact it has on the organization. This also applies in the case of family members or friends working together. And remember, even if you try very hard to be objective there will always be other staff members and volunteers who (because of their own personal agendas) convince themselves that you are favouring the other person. I know this because I had personal experience of this phenomenon. I was compelled to make the difficult decision to end a relationship that lasted for four years. And even after ending this relationship I was still perceived to be subjective towards the other party! So, be warned.

HAPPINESS IS AN INSIDE JOB:

As a leader your job is to make others happy. Right? Well, that is very wrong. In fact, it is dangerous thinking! It is not your task to make others happy. I have met many human resource managers who labour under this illusion. They tend to think that they are employed to maintain good human relations that will lead everyone to be very happy. The emphasis in their work is therefore on how much people pay, endless teambuilding activities, overlooking certain malpractices, etc. All of these aimed at making and keeping a person happy.

Well, your job is **not** to make people happy. It is to help others **grow**. It is to continuously create an environment where people can realise their own potential and where ordinary people can learn to do extraordinary things. For people to expect that your job should be to make them happy is an impossible expectation. It is impossible because happiness is primarily an **inside** job. It must start with you.

This myth of leaders employed to make others happy flows from a flawed understanding of what relationships are all about. Some married couples firmly believe that it is the duty of the husband and wife to make each other happy. Wrong! Scot Peck argues strongly against such thinking that can only lead to so much frustration. According to him, you get married to help each other grow. When that growth is not taking place you are bound to have a breakdown in that relationship.

The pain inherent in that process always accompanies your personal growth and development. You cannot avoid that pain.²⁸ When true leaders therefore take responsibility to make others grow and develop, they also face the risk of people who will try to avoid that pain. When people practice avoidance behaviour (a form of denial) then they start to project that pain onto to other people. The leader usually becomes a convenient target. Remember, you are paid to be uncomfortable. This is another source of that discomfort. People that are not very conscious of the dynamics of organization will tend to personalise this inner conflict that they are experiencing.

Effective leaders that are truly committed to create an environment to make others grow and develop will therefore not always be very popular. And that is so because they have to force people to confront their own pain. Leaders who strive for cheap popularity will help people to avoid this inevitable pain. But this also makes them the most ineffective. Decide whether you want to be *effective* or *popular*?

²⁸ M. Scott Peck (1983) *The Road Less Travelled*, p. 13

When staff members or volunteers complain again that they are not very happy and when they expect you to make them happy, please share the following poem with them:²⁹

We convince ourselves that life will be better once we are married, have a baby, then another.

Then we get frustrated because our children are not old enough; and that all will be well when they are older.

Then we are frustrated because they have reached adolescence and we must deal with them. Surely we'll be happier when they grow out of the teen years. We tell ourselves our lives will be better when our spouse gets his/her act together, when we have a nicer car, when we can take a vacation, when we finally retire.

The truth is that there is no better time to be happy than right now. If not, then when? Your life will always be full of challenges. It is better to admit as much and to decide to be happy in spite of it all. For the longest time, it seemed that life was about to start. Real life! But there was always some obstacle along the way, an ordeal to get through, some work to be finished, some time to be given, a bill to be paid. Then life would start.

I finally came to understand those obstacles were life. That point of view helped me see that there isn't any road to happiness. Happiness is the road!

So, enjoy every moment. Stop waiting for school to end, for a return to school, to lose 10 pounds, to gain ten pounds, for work to begin, to get married, for Friday evening, for Sunday morning, waiting for a new car, for a mortgage to be paid off, for spring, for summer, for fall, for winter, for the first or the fifteenth of the month, for your song to be played on the radio, to die, to be reborn... before deciding to be happy.

Happiness is a journey, not a destination. There is no better time to be happy than NOW!

LIVE AND ENJOY THE MOMENT...

BE BRAVE - FIRE YOURSELF!

A leader acts like a coach. Coaches don't play the game with their team players. They help to **prepare** them for the game. That is why I say that a game is not really won while you play it. It is first won while you prepare for it. Have you seen how some coaches like to stand on the sideline and freak out at players who commit errors while playing? They throw tantrums, become angry, shout at the players and just generally lose self-control. Are you also like this kind of coach? Do

²⁹ Passed on to me by Johan Bowers, ex-chairperson of the RAG Board

you also throw tantrums at board or staff meetings, lose self-control and become aggressive? Well, if you are then you are in the wrong job. You don't trust yourself. You have not prepared well enough. When coaches perform badly, when there are no proper results, when they cannot show much for their high salaries and perks, they get fired. Sport codes are riddled with such examples. And it cannot be otherwise. For a leader that underperforms is a danger to the organization and also to himself. He should be ruthlessly removed, for the sake of himself as well. The non-profit sector has a lot to learn from the sporting codes!

There was a case of a director in Cape Town who was so obviously under performing for years, but who earned a horrendous salary. Managers in the corporate sector must have envied him. Instead of his board getting rid of him years ago, he actually proposed that the organization should dissolve! Outrageous you might think, but in the NPO sector this is common practice. If they don't propose dissolution of their organizations, then they make sure they get rid of the boards, the very people who appointed them! In one case the entire board resigned from an organization. Instead of the director resigning due to this vote of no confidence and **restoring the integrity** of the organization, this man decided to continue as if nothing happened. Needless to say, he continued earning a huge salary for plundering and killing the organization. When confronted by others about his destructive behaviour, he boldly claimed that he was **"protecting the integrity"** of the organization. He was reminding me of the United States government who goes on a world crusade to **advance democracy by destroying it!** So, this gentleman was **"protecting organizational integrity" by destroying it.** And whilst he was able to provide salary increases, bonuses and loans and generally went on a spending spree, he had enough followers. Until all the funding dried up course! Well, if you don't perform according to the demands and criteria of performance placed upon you, please do yourself a favour: Be open and honest and fire yourself!

THE ORGANIZATION IS NOT YOUR LIFE!

In my days of utter confusion I used to think that the organization is my life; that my work is my life. Later I realised how dangerous this kind of thinking is and the bad practices it generates. And it actually happens without one being aware of its consequences. On the surface it sounds very progressive and a statement of total loyalty and commitment. But this is only on the surface.

I have learnt that to regard your organization as your life is to unknowingly promote a form of sectarianism. This is how a close comrade of mine, Ronald Wesso, aptly puts it: "An organization becomes a sect through subjecting the humans who create it to itself. In a way people relate to an

organization as gods. They create, build and sustain it – without them it cannot exist. In a sect this is also true. But something astonishing comes to happen - the creation of gods over the creators. Instead of something human individuals create jointly in order to live freer and better, these individuals come to accept they have been created in order to free and better the organization. Rather than shaping the organization to serve their needs and lives, the individuals shape their lives and subject their needs as befits the organization until tragically, the organization becomes their sole purpose; they lose their lives to the organization.”³⁰ Peter Drucker once said: “If you make the organization your life, you are defenceless against the inevitable disappointments.”³¹ Well, ask me. I should know!

So, make sure you keep your personal life separate from your organizational life. Make sure you spend time to develop your personal life and not subject it to the life of the organization. When you do this, letting go of the organization and giving up formal power is much easier and less painful. It is like a woman who gives herself completely to her husband. She sacrifices everything, until the day when they have to separate or divorce. The woman is devastated! She only knew **one** life! The life of her husband! Her husband became her sole purpose for living. (Remember this saying: **“I will die for you!”**) Her own independence has been sacrificed on the altar of total loyalty and she never prepared herself for the inevitable disappointment. A divorce or temporary separation is sometimes the only solution for this person to reclaim her independence and even sanity! So, be careful and remember the organization is **not** your life.

This is what Peter Drucker had to say about this phenomenon:

“I would not want any person to give his or her life to an organization. One gives one’s very best efforts.” And again “When effective non-profit leaders have the capacity to maintain their personality and individuality, even though they are totally dedicated, the task will go on after them. They also have a human existence outside the task. Otherwise they do things for personal aggrandizement, in the belief that this furthers the cause. They become self-centred and vain. And above all, they become jealous.”³²

WHY YOU MUST WORK YOURSELF OUT OF YOUR JOB!

When I ask leaders and managers what is their most important job they usually come up with different responses, none of them the right one as far as I am concerned. **Your most important job is always to work yourself out of your job!** For as long as you stay in your job you will

³⁰ Ronald Wesso (2003) *When God Is Called A Party*, an unpublished paper

³¹ Drucker (1986) *The Effective Executive*, p. 260

³² P. F. Drucker (1990) *Managing the Non-profit Organization*, pp. 20-21

never know if anyone has really developed, or if you really made a long term sustainable impact. You will never know if you have passed the final test of leadership – the continuation of the organization. For as long as you stay you can only stunt the growth and development of other members including yourself.

Leaders that fear what will happen to them after they leave their jobs prefer to stay in their comfort zones. Confronted by a sea of unemployment they are literally scared to take a step out of their organizations. They fear the worst. But this is precisely the point. It is about their fears, their personal interests and not the interests of the organizations they lead. It is about what will happen to **them** and not what will happen to the **organization**. They get trapped and start to project that fear onto the organization. They start to confuse their needs with the needs of the organization. Precisely because your most important task is to work yourself out of your job, succession planning cannot be delayed until you take that step. You have to work on it all the time. Where there is nobody to succeed you, look on the outside. Be honest with those who harbour leadership ambitions within the organizations, even those who are most in denial about it.

HERE ARE SOME GUIDELINES FROM MY EXPERIENCE:

1. Make sure you spent time on succession planning. This is a crucial part of a risk management strategy and taken very seriously in the corporate sector. Shareholders who invest in a company take their money very seriously. We do not do the same in the NPO sector because it is not really our own money on the line. Well, no one knows what will happen to anyone at any stage and therefore you should apply your mind to who will succeed you as a leader.
2. If you don't have the right people within the organization, look outside. Scout for available talent. This is not easy in the NPO sector. The skills and experiences we look for are scarce and therefore expensive. You cannot start looking for those skills and experiences when you are about to leave.
3. If you have a choice, make sure that your successor is already employed whilst you are still in the organization. This will give you time to mentor, coach and properly induct the person. Leaving this to somebody else is a high risk and can only create the space for someone with hidden motives to usurp power and compromise the integrity of the organization. I know of an organization where someone appointed as acting director to help find the successor to the previous director decided to be acting director for more than a year instead of the prescribed three months. This person had no prior experience of managing an organization at that level

and it was not long before the organization was caught in the grip of a severe crisis. To crown it all, this person was handsomely rewarded by his board for work not done! This was at a time when the organization was facing a funding crisis. (Remember the early example of the director who ***“protected the integrity”*** of the organization?)

4. Planning for succession can never be done in great haste or under pressure. Consult with other leaders who have had similar experiences and get advice. Get your board involved as well. They will have to make the final decision in any case so let them help you. Remember that you should never choose your successor. Yes, you make recommendations and give advice since you know and understand the demands of the job. But your board must decide finally. It must be an objective decision and not a subjective choice. Leaders can sometimes fall into the trap of selecting people who remind them of themselves, i.e. they look for a copy. This is dangerous! A copy is simply an imitation of the original and is always weak. When you make such a selection you will set the other person up for failure.
5. Make sure the central task is clarified because this will determine the person you will finally select. Clarify what the organization requires at that stage. What skills, competencies and expertise are necessary to carry out that task successfully? Look for a track record, for a record of success. And don't forget to check and double check references. Talk to those who worked with the potential candidate before such as donors, network partners, previous superiors, etc. Get a cross section of opinion. Ask for previous assignments successfully completed. This is a strategic position and you have to be thorough. Give this person an assignment before the position is finalised and check the results.
6. And when you leave make sure that you have a back-up plan if your initial plan backfires. When I left my organization years ago, I made many mistakes in this regard, some with disastrous consequences! You don't have to make the same mistakes. Talk to those who have already been through this experience. Consult them. And remember, don't rush this decision. You are dealing with the most strategic position within the organization. At this level the organization will rise or fall.
7. And be careful for picking the perfect number two in the organization; the person who thinks that the top job will automatically become his/hers once you leave without showing anything

for it. This is very tempting. It saves you all the money in the world and since you know the person for a long time and have worked with him/her, it becomes expedient to appoint the number two. When I left my organization years ago, the same pressure was exerted to do this. I refused to fall in this trap. I knew we had to look outside for talent. The central task has outgrown the internal members. Some people did not like this but I had to be honest with myself and the organization. I wanted to live with my conscience. But as soon as I left, the decision to look outside was abandoned immediately. The organization is now an empty shell! The board resigned, almost the entire staff were retrenched or left in anger and disillusionment, projects were closed down, funding dried up, staff loans were paid out left, right and centre, bonuses and increases were paid and organizational property vandalised. The last time I heard this person was still in charge! I don't know of what!

This is what Drucker wrote about appointing the number two:

“Partly out of emotional commitment, partly out of habit, the perfect number two is put in the top spot, and the whole organization suffers. The last time I saw this was in one of the world's largest community chests. Fortunately the number two who was picked by his predecessor because he was so much like her realised after a year that he didn't belong in the top job and was utterly miserable in it – and he left before either he or the organization had been badly damaged. But that is a rare exception.”³³ In my experience I only know of two cases where the number two abandoned the position after they realised that they were not up to the pressure required by the job. And in both cases it almost happened too late!

EFFECTIVE LEADERS ARE SELF-MADE:

I am always confronted with the question: “Are great leaders born?” My answer is always NO! In any case I must still find a person who can identify a great leader at birth! I am not aware of any scientific tool that can measure this process.

The fact is that effective leaders are self-made. Even if you have all the potential to become a great leader, you still need to be trained, mentored and coached. Great leaders don't fear the strengths of others more experienced than them. And remember, leadership cannot be taught like you teach history at university. Leadership is a practice, a discipline in its own right. So leadership is about doing and not dreaming. Not everybody is fit for leadership, especially at the highest level of the organization. Here it is not just about developing certain characteristics and then you become an effective leader. This is wrong thinking. You have to practice and practice correctly.

³³ Ibid, p. 26

And the place to start is in your own personal life. Personal leadership precedes organizational leadership. Like I stated in my introduction, it does not mean that you will automatically qualify as a great leader, but it is a necessary requirement.

EFFECTIVE LEADERS ARE ALSO EFFECTIVE FOLLOWERS:

There is no leader who can claim to know everything. To think this is self-delusion of the highest order! To know something means to be aware or conscious of something. Sometimes this is equated with being clever, to have knowledge that others don't have. In a world of complexity this understanding can be dangerous sometimes. It is summed up in that old slogan by Francis Bacon namely: "Knowledge is Power!" Nothing is said about how the knowledge is applied, of the morality of applying knowledge. It is like the brilliant scientists in the United States who have enormous knowledge about science but uses it to develop weapons of mass destruction! Now how useful is this kind of knowledge anyway?

Did you notice the slogan on the dedication page of this book? It says "Knowledge is power but Consciousness is light!" And this means that how knowledge is applied is as important as the knowledge itself. Effective leaders understand that knowledge without consciousness is dangerous. But more is involved. What we also need is **conscious consciousness**. This is the awareness/knowledge that you **cannot always know**! Life is too complex for any one person to know everything. In a knowledge based society that is highly specialised effective leaders understand that they should be humble and admit from time to time that **"I don't know"**. To admit that you do not know and that you need help from time to time is a **sign of strength** not weakness.

It is a good practice therefore for effective leaders to get out of their own office or comfort zones and assume the role of being a follower. I used to spend time in various departments in my organization working with and next to the office administrators, finance staff, and so on. I also used to rotate the chairpersonship in meetings by delegating to others to chair. Here I assumed the role of the follower. In the beginning people were very nervous. For some chairing a meeting was a frightening prospect! But this was how I expressed my need to be educated by my staff. Here I consciously stepped out of my role as leader and consciously assumed the role of a follower.

It is important in a highly specialised organization that staff understands the need to educate their leaders. But it is more important for the leader to show that he is in need of education. Five dynamics unfold during this process:

1. The leader gets **first hand exposure** to the day-to-day challenges experienced by the member in her work.
2. The **hidden potential** to exercise leadership of the member can be uncovered and cultivated.
3. The leader **communicates his humility** to the member and his desire to lift the person up to the level of becoming an effective leader.
4. Staff members will value the time the leader spend with them to see what **they are good at**.
5. By listening to your staff member in a non-threatening environment (you are in their space) you promote **upward communication** by listening to them about the challenges they face.

SO, WHO IS SUFFERING FOR YOUR ORGANIZATION?

This is a very important question and one where there is a collective ignorance in many organizations. In any organization, there will be someone taking up (unconsciously of course) the role of sufferer. This is not accidental. This is a simple group dynamic. You see, wherever human beings come together, there will always be issues amongst them. These issues emanate from people's past experiences. Some people may have been abused, physically or mentally, some may have grown up with single parents or even no parents at all. Others may have been denied a decent education whereas others may have had painful experiences of torture, etc. The fact is that we live in an imperfect world and therefore we are all imperfect human beings trying to cope with a world in a painful transition. When groups come together, be it in the family, organization, your friends, school, etc. you will always find that the group strive unconsciously to maintain its own group health. It is trying to cope as a group or a team. It tries to cope because the issues we all bring to the group cannot be left in a vacuum. Remember that nature abhors a vacuum. Someone therefore unconsciously steps forward to fill that vacuum. This is the person who is absorbing the issues for the group to maintain its collective health. In the traditional family we call this person "**the black sheep**". At school this person is labelled "**the problem child**". The fact is not that the child is a problem but that the teacher has a problem understanding the child! What the teacher does not realise is that the child is protecting the group (or class in this case) or that the black sheep in the family is protecting the entire family (or white sheep)!

This person who suffers for the group is also found in your organization. It is not always easy to locate this person but try to find out who is the most depressed or who is having the most issues in the organization. Sometimes the leader steps forward unconsciously to play this role. In my

experience the secretaries sometimes take up this role since they are linked to everybody's issues in the organization. Members tend to confide more easily in them because they are so approachable. They have to be since they work with your external clients who will also tend to confide in them! They perform the role of a sponge soaking up all the issues in the organization so that a healthy environment can prevail. That is why they are sometimes the most difficult people to work with because they do not understand their role.

EXERCISE 1:

- 1.1. *Explain how you qualified to be in your current position of leadership. What processes were followed? Who appointed you? What criteria were used? How did you prove your capacity to lead? (Please note: If your answers to these questions are vague, then you are probably in the wrong position and should get out of it as fast as you can.)*

- 1.2 *Basing yourself on the five different levels of leadership, where would you place yourself? Write down why you would place yourself on that level and explain what you are doing to move to a higher level.*

- 1.3 *Contact a leader who worked her/himself out of a job. Ask the leader what she thinks she did right to achieve this. Who succeeded her and was the organization able to continue without her? Write your responses down on a separate page.*

Each of us should be the change we want to see in the world – Mahatma Gandhi

Significant problems cannot be solved at the same level of thinking we were when we created them – Albert Einstein

**In times of change, the learners will inherit the earth while the learned will find themselves beautifully equipped with a world that no longer exists
– Eric Hoffer**

The task of a leader is to develop more leaders not followers!

Effective managers work themselves out of their jobs!

Successful leaders follow the same advice they prescribed to others!

CHAPTER TWO



THE CHALLENGES OF LEADERSHIP AND MANAGEMENT

**“It is not what happens *to* me that matters but what happens *in* me!”
(John Maxwell)**

Leadership and management in the non-profit organization

Chapter 2: The challenges of leadership and management in a non-profit organization

1. So, what is organization?
2. Leadership and ambiguity in NGO's
3. Leadership polarities
4. The organizational fit model
5. The elements of organizational life
6. Mediating natural tension – what many leaders should know!

1. So, what is organization?

The word organization comes from the word organ. An organization is in essence an organ **of society**. It is the coming together of various individuals (even two people for that matter) who agree that they will develop an organ-*isation* to address a particular need in society. By addressing that need effectively they hope to add value to society and at the same time adds value to them, i.e. they will grow personally as well.

If you understand the above, which most people take for granted sometimes, then the following becomes clear about organization:

- It consists of a group of people and is not a one man or woman show.
- The members come together to address a need or strive to change something outside of themselves.
- In addressing that need outside of them, they should grow in the process and not stagnate in their own development.
- Because we are all so different with various and sometimes conflicting needs, the organization requires objective mechanisms to regulate the behaviour of its members (constitution, policy and procedures).
- Since the need is outside in the environment, the organization needs to have a vision (something that speaks to the outside) and mission that will keep the members focused and provide meaning to their activities.
- An organization that gets trapped on the inside (e.g. always having endless meetings, planning, etc.) can lose touch with the outside and hence its fundamental purpose.

- In trying to add value to society, the organization needs to establish a means to determine whether that value is being added or not, i.e. it must know whether it makes a difference or not. This means that the organization needs to measure the impact it is making in relation to its target group and their needs it is trying to address. In a business organization this is fairly simple. If a business does not generate profit (i.e. customers do not buy their products) then they will know that they are wasting their time and the products they sell are irrelevant. In a non-profit organization, it is not so simple. Here the product is not so tangible like in a business. Here the product is change; human change cannot simply be subjected to arbitrary measurement. Because human beings are so complex it is difficult to measure when they change. The point is that human beings will change when they are ready to change and not because they attend a programme offered by an organization.
- Still, we need to know whether we are making a difference. Otherwise we will be using resources without having to account for the relevancy of our interventions. The question is how to measure? Frankly, there is no final answer to this question. It is a question that must be revisited all the time. For in human change we do not only look at bottom lines or quantitative results but at **qualitative impact**. Since human beings **live in relation** to other people we need to measure the change in **relationships**. And no time limit or constraint can be put on this. For some it may take a few days or months and for others a few years.
- Albert Einstein was quoted as saying: “Not everything that counts can be counted. And not everything that can be counted, counts.”³⁴ Geoffrey Bellman puts it differently: “The most important things in life cannot be measured, made tangible, quantified, packaged, boxed, or tied down. In fact, the most important things in life are not *things* (his emphasis) at all. What we want out of life is not for sale, for lease, or for rent.”³⁵
- When change in relationships needs to be “measured”, then all your traditional tools of measurement become useless. Predetermined outcomes and indicators of those outcomes lose their meaning. You have to spend time listening and documenting **people’s stories**. They are the best **“indicators”** to tell you how their relationships have changed. This may not be music to the ears of donors who have to account whether their money is making “impact”. But there is no other way! Real development is always a slow and most times a very painful process. It cannot be rushed because of some donor agenda.
- Remember, we are all measuring every day. In businesses it is easy to measure. Like I said, you look at the bottom line. In NPO’s it is not that simple. It cannot be because NPO’s are diverse organizations. What is important for one type of NPO to measure is not the same for

³⁴ As quoted in Allan Kaplan’s (2002) *Development Practitioners, Artists of the Invisible*, p. 129

³⁵ Geoffrey M. Bellman (2003) *The Consultant’s Calling*, p. 167

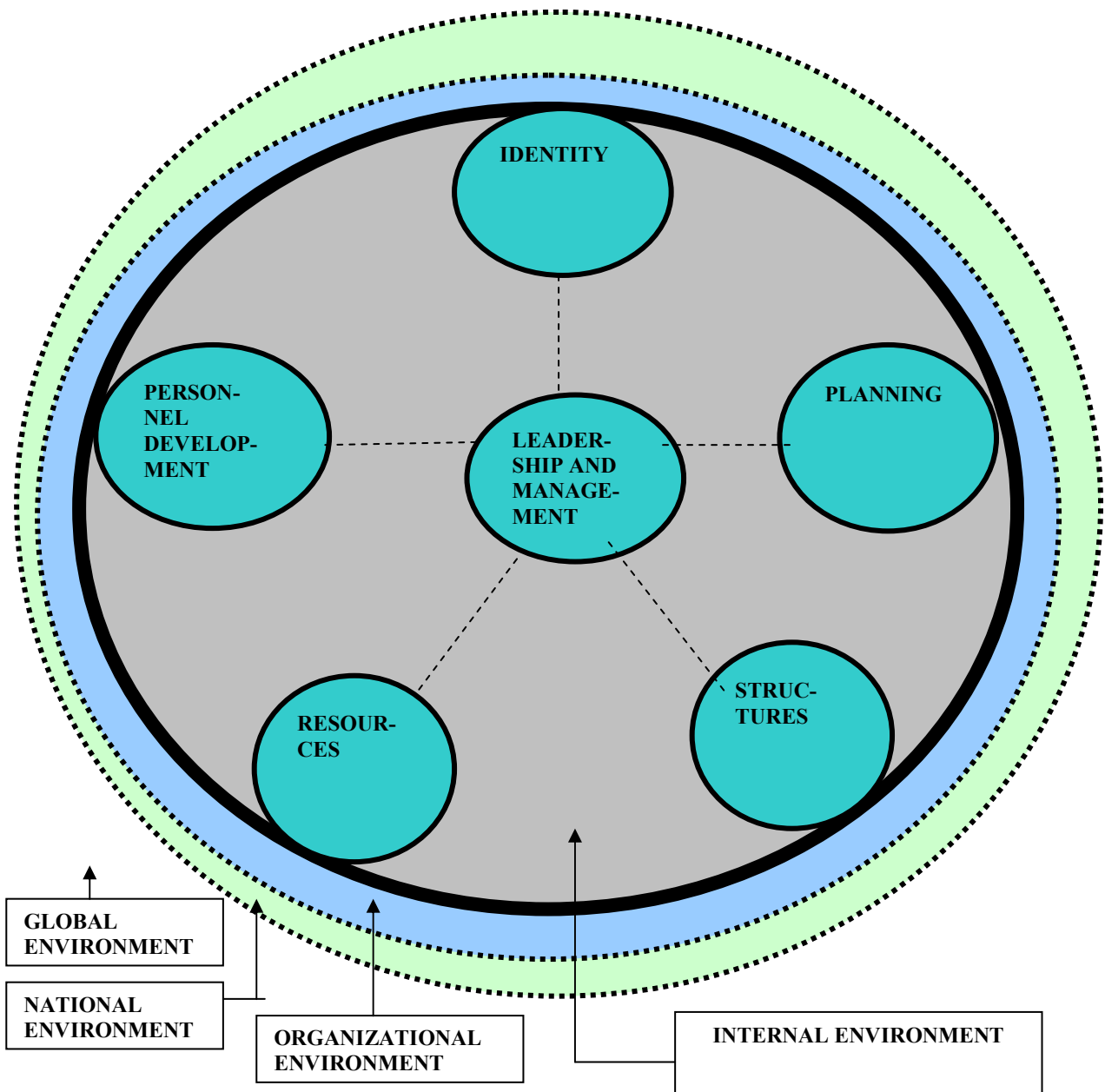
another type. For example, a relief NPO providing food to a community faced with drought can easily measure the impact they are making. The need is immediate and tangible. But for another NPO focusing on human rights, youth development, women's development, it is not so straightforward. To use the same tools to measure as in the example above is foolish. But this is exactly what some donors expect you to do. What is important is not just **how** to measure but also **what** to measure. And as I stated, this can be different from NPO to NPO based on how they define what they **regard as value** for their target group.

- The **vision** of the organization must be followed by a clear **strategy** (how to) to carry the vision forward. It is the strategy that determines the type of structures that will be designed internally to intervene externally and not the other way around. A lack of clarity around strategy will lead to structural confusion as well as the people resource (human capacity) required at all levels of the organization (i.e. staff, board, volunteers, donors, etc.) to carry it out. Another way of putting it is to say that form follows function. It is like building a house. You don't just start building a house and then afterwards decide what functions the different rooms must serve. You decide beforehand what functions the different rooms must serve and then go about to plan and build them. Many organizations get trapped by too many structures that do not serve a purpose in relation to their fundamental strategy. They then suffer from organizational paralysis because the link between the **vision-strategy-structure** is lost.
- An organization in its beginning stages will always experience pain. This is not accidental. Just like a mother giving birth to a baby experience pain, so the birth of an organization is accompanied by pain. This pain is expressed in various forms, e.g. the lack of resources like funding, material resources, ignorance about process, member conflicts, etc. The purpose of the pain is to value your organization and defend it against those who want to destroy it or hijack it. Secondly the purpose of pain in organizational birth is to help you to build the internal capacity within the organization to survive through difficult times in future. This point is extremely important to understand (especially for external donors). Sometimes you find organizations that are funded driven, i.e. they are created by donors who pump a lot of funding into them. They will therefore skip this stage of experiencing pain and therefore lack the internal capacity to survive in future. When the funding dries up the organization will die a slow death.

ELEMENTS OF ORGANIZATIONAL LIFE:

THE EXTERNAL ENVIRONMENT

THE GLOBAL CONTEXT:



Every organization operates in a global context. We are part of the world, a world becoming smaller and smaller everyday. Global processes affect all of us. A decision made in the American White House will have direct or indirect consequences for us in South Africa. When decisions are made about development aid in the Europe, it impacts directly on our own work. It is therefore

important that we have a basic understanding of the world around us. This understanding does not have to be right or wrong but an understanding we must have.

THE NATIONAL CONTEXT:

Global processes impact on the South African society. Just think about trade liberalisation, privatisation, out-sourcing, etc. Think about the explosion of the information technology and its impact on society. For example, in South Africa, we have become largely insulated against these influences for many years as a result of the years of isolation. But the borders have opened up and now we are also exposed to the harsh realities of the global environment. South Africa itself also grapples with its own challenges borne out of the struggle against apartheid repression and exploitation. Our national agenda is informed by these struggles.

ORGANIZATIONAL CONTEXT:

All of society is nothing but a conglomeration of organizations. The family is one of the oldest organizational institutions in society. The state is one the biggest organizations in society. Even a gangster group is a form of organization. Just think about it. You find your leader or leaders, your workers, the skills to plan the next crime, feedback systems and delegation of duties, there is hierarchy, etc. In short, there is an order borne out of the necessity to survive! This is the essence of organization. Remember, organizations can be used for good or bad purposes.

THE INTERNAL ORGANIZATION:

IDENTITY:

Every organization starts with building an identity. Just imagine when a baby is born. What do the parents first think of? A name of course! We also think of a name when we give birth to an organization. That is the first form that its identity assumes. Just imagine you call someone in a crowd without knowing the name of that person!

Part of building the identity of organization is to build the value base and culture of that organization. What makes the organization unique from others? What are the rules and regulations that govern the work of the organization? What is the mission and vision of that organization? If your identity is not clear and very strong then your organization will have little control over its own future.

PLANNING:

In order to promote the mission and realise the vision of your organization, you must learn to plan. We use to say - If you fail to plan then you plan to fail! You must know where you are going in order to know how to get there. Your organization therefore requires short-, medium- and long term objectives. You determine this through a process of strategic planning or other forms of planning.

STRUCTURES:

As soon as you have clarified your plans of where you are going to, then it becomes important to start implementing those plans. Plans can only be implemented via structures. In other words, it is one thing to conceive the house, it is quite another to build it! Building the house is part of putting up the structures. When structures are set up in an organization, processes start to operate immediately within those structures. Processes can be hierarchical or participatory, democratic or autocratic, etc. It can be transparent or closed. Processes also deal with the flow of information in your organization. This is generally called marketing. We tend to confuse marketing only with external marketing, i.e. building the image of the organization in the public eye. But we always tend to ignore internal marketing. That means the flow of information *within* the organization. Internal memorandums, letters, minutes of meetings, etc. all refer to internal marketing. People also do internal marketing in their personal lives. When you visit friends you will notice family pictures on the walls, poems, important academic and other achievements displayed, etc. This is just another way of individuals promoting a certain image of themselves!

RESOURCES:

Some of these resources can be classified as human-, material and financial resources. But there is also another resource. We call it the spiritual resource of an organization. Very few of us are aware of the importance of this resource or that it even exists! This resource refers to the spirit in your organization. Are members working as a team, co-operating, being helpful and friendly, or are they engage in gossiping, whispering campaigns, back-stabbing, defending their territories, etc. If that is the spirit then your organization is growing inwards. People have lost focus on the mission and vision. To put it simply, your organization is busy dying!

YOUR PERSONNEL DEVELOPMENT PLAN:

This can be your full-time staff, volunteers and board members. Here it is important to note that your staff members need to understand their job descriptions, what is expected from them. They need to know the conditions of their employment, their contractual obligations towards the

organizations and vice versa. They should know what their benefits are and very importantly, they should be guided by a personnel development plan. Does your organization have a clear personnel development plan? If so, write down on a piece of paper some of the components of that plan. If you are unable to do this, then your organization is in serious trouble!

LEADERSHIP AND MANAGEMENT:

This is the component right in the middle. Why do you think it is in the middle? Why are all the other components attached to it? It is because without this component everything else will simply collapse! Without leadership and management no organization will be able to function. It will be like a body without a head! Leadership and management are the driving forces behind an organization. It is like a driver in a car. The car cannot move without a driver. The driver guides the car in the right direction. Sometimes the road is bumpy and treacherous but the task of the driver is to maintain control and direction. Imagine a car without a driver? Obviously it will be disastrous! But this is not all. Imagine a car with an untrained or inexperienced driver? The same result – disaster or absolute chaos! Think about your own organization. Do you have trained and experienced drivers? What has been the result?

A car may move along with a broken windscreen or door. Or it may move slowly with a flat tyre. But without a driver nothing can happen. Think for yourself, how many organizations have not died out as a result of poor leadership and management? Can you think of any such organizations? Try to think about the root causes of their demise.

2. LEADERSHIP AND AMBIGUITY IN NPO's³⁶

- Contradiction, and the tensions that arise out of contradiction, are the very stuff of leadership. Ambiguity and uncertainty, the consequences of contradiction, come with the job. They cannot be wished away. Leadership is the ability to act decisively given ambiguity and uncertainty, rather than in their absence. Bad leadership is a denial of this.
- That the results of one's actions are always unknown (and unpredictable) at the time of having to act leads inevitably to uncertainty. Leadership becomes ineffective when in the face of this uncertainty it vacillates, or refuses to act or acts without humility.
- To act decisively and to take responsibility for one's actions, while knowing and acknowledging that one may be proved wrong through no "fault" of one's own, and that there is no final way of knowing, is the mark of a great leader. This is a leader who has "greatness of spirit".

³⁶ This entire section has been adapted from Allan Kaplan's paper on *Leadership and Management* until p. 62

- The leader must create a true whole that is larger than the sum of its parts, a productive entity that turns out more than the sum of the resources put into it.
- Leaders must harmonise in every decision and action the requirements of the immediate and long range future. S/he cannot sacrifice either without endangering the enterprise. They must keep their nose to the grindstone while lifting their eyes to the hills. They cannot afford to say “We’ll cross that bridge when we get to it.” They must prepare for crossing distant bridges long before they get there.³⁷ (See Peter Drucker, *The Practice of Management*, p. 303)
- “Holding the whole” and “breaking boundaries” is another ambiguity. In respect of the organization, group or community that you are leading, you are responsible for ensuring participation, ownership, meaning and belonging. Communication, transparency and consultation and understanding that “a convoy only moves as fast as the slowest ship” inform the activities aimed at protecting the boundaries of the organization for which you are responsible. The downside of protecting the boundaries is that it can lead to isolation, a conservative or reactionary tendency to approach the world and a loss of relevance.
- Max De Pree said: “Communities and organizations always tend towards stagnation unless intervention – leadership intervention – is consciously aimed at combating this.”³⁸ Leadership ensures that the organization is at the cutting edge, in fact, that it has a cutting edge.
- The leader must break patterns of thinking and behaving that have built themselves into routines and which lull people to sleep. But leaders must maintain continuity while simultaneously promoting change. They must manage transition that implies chaos. Transition refers to that intersection between the old and the new. It is a place where rules are broken and disappear. Habit and routine are replaced with periods of chaos. These can be blessings and opportunities but if prolonged can become dangerous. It can lead to organizational paralysis!

2. Leadership and polarities – towards a model of organizational leadership

WORKING WITH PEOPLE:

- People are notoriously different. In one organization we can find people who are:

³⁷ Peter Drucker (1955) *The Practice of Management*, p. 303

³⁸ As quoted by Allan Kaplan (1998) *Leadership and Management*, p. 3

- motivated for love of their work
 - motivated by money
 - motivated by power and ambition
 - not motivated at all
 - take responsibility but show no creativity
 - are creative but show no responsibility
 - some are not interested
 - some are trained and others not
 - some are flexible and open to suggestions while others are rigid
 - some has a high sense of self-management and others need structures and procedures to make them perform
 - some work co-operatively while others consider each day as a possibility to for riding into battle
- A leader will aim for the ideal, i.e. a moderately productive environment. A community of souls where each is able to participate and find meaning, in which people respect each other as well as the rules which arise to regulate their behaviour, and where individual creativity is able to flower.
 - To facilitate this community of people, a leader should have an overview of different aspects of organizational life such as:
 - Staff recruitment and induction
 - Legal and economic conditions of employment
 - Staff and volunteer training
 - Monitoring, evaluation and supervision
 - Counselling and development
 - Teambuilding and conflict transformation
 - Communication
 - Effective leaders do not necessarily get actively involved in all of the above activities. Delegation is an important leadership capacity and must be used intelligently (see chapter on delegation).

First polarity – confronting/supporting

- Leaders intervene in the development processes of others by either supporting or confronting them or both.
- This is also referred to as hard (confronting) and soft (supporting) interventions.
- Both have their positive and negative sides. Hard interventions are used when members get stuck in their work, there is no performance or certain behaviours become intolerable. Leaders may become concerned or worried about certain dynamics and that dire consequences might ensue if they are not changed.
- Although hard interventions can be necessary it can also become dangerous. Even if this form of intervention succeeds there is little cause for celebration. Someone's process has been violated. Someone has been hurt and may become less open and more defensive in future. The person can become closed and reactive, learning to plot against the leader.
- Soft interventions are an attempt to provide support. They assume trust in the ability and integrity of the other. Soft interventions are nurturing and collaborative. It involves waiting longer than usual to intervene; trusting that people will reach their own conclusions about productive behaviour; and providing a structure for people to arrive at their own conclusions.
- The downside of soft interventions is that it can run the risk of being paternalistic. Be careful that support does not degenerate into a patronising attitude on the part of leadership.

DEVELOPING IDENTITY:

- What the organization does, how it is accomplished and whether it is relevant or effective or not, is a further primary concern for leadership.
- The leader's job is to keep the organization at the cutting edge of its particular field, to ensure it is doing the right thing, is relevant, effective and in demand. Members must partake in developing identity, draw meaning and motivation from it and feel it is theirs.
- Organizational identity is further strengthened by organizational performance and the impact that performance has on its client.

Second polarity – Focusing/Grounding

- A leader must be able to focus his/her thoughts, the organization, the diverse and scattered energies and inclinations of a range of different people. Importantly, effective leaders are focused on what NOT to do. Two faculties are required:
 1. The capacity to vision, to project oneself and one's organization into an unknown future, to see beyond the present, to imagine that which is not yet; to think beyond the boundaries set by external constraints and internal force of habit; to see opportunities where others see threats; to see the gift of challenge brought by crisis and danger.
 2. The ability to choose a course of action, to choose between options. This is very difficult because to choose involves giving up something, to make a sacrifice.
- Grounding is concentrating on what can be. Not what can be achieved but what we are or have achieved. Grounding looks at the constraints of reality. It looks at successes and failures, current strengths and weaknesses. It looks at the here and now!

DEVELOPING STRUCTURE:

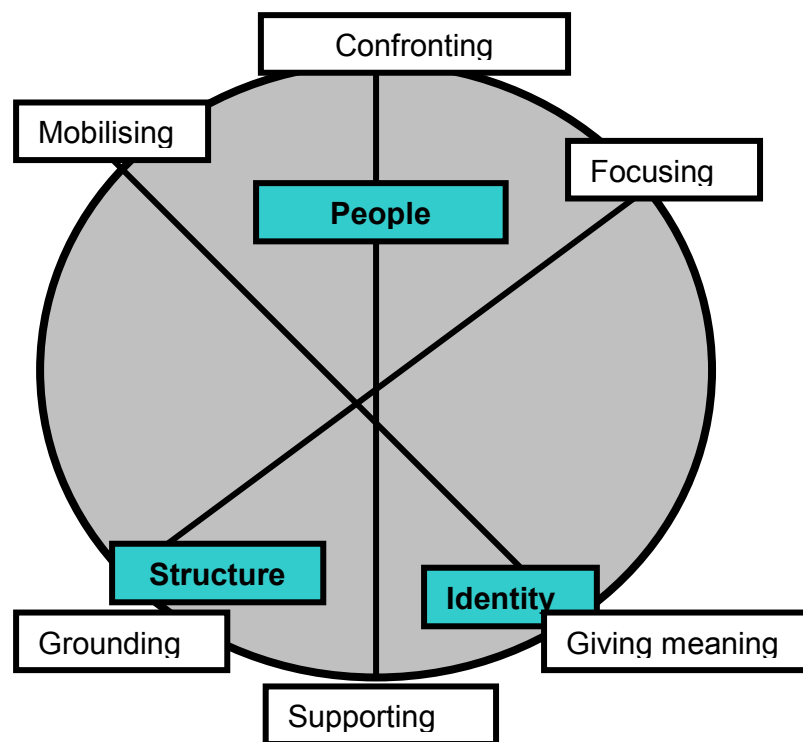
- Organizations require structure. They require form. They are not collectivities of free-floating activity. The larger the organization, the more complex the structure. Rules, procedures, policies, etc. are required. Nothing productive can be achieved without these regulatory mechanisms.
- But rules and procedures can also lead to paralysis and stifle creativity in members. Structures and rules should be kept to a minimum and should be adapted to current organizational function and strategy.
- Structures must enhance communication and not inhibit it. It must provide security and meaning to members. Too much change can lead to chaos and fear. Rigid and inappropriate structure can curtail creativity, flexibility and responsiveness.

Third polarity – Mobilising/Giving Meaning

- Giving meaning refers to leadership providing a sense of security and familiarity to members. Its like a house with a foundation, a roof, doors, windows, etc. There is a sense of continuity, of pattern and routine inherent in the structures and procedures in the organization.

- The leader commits to due process, to the concept of equality to membership. Arbitrary action and decision making is avoided. Members have recourse to a structure that exists objectively irrespective of the whims of the individual leader. The leadership stance here is one of stability and maturity.
- The danger of insularity, complacency and stagnation can assert themselves here. This includes the danger of rigidity, of form no longer following function, of inflexibility.
- The leader must maintain movement, act as a mobilising force. In this instance, the leader is not a father or mother figure but youth, questioning, rebelling, taking nothing for granted.

A composite model:



STAGES OF ORGANIZATIONAL DEVELOPMENT

Just like human beings, organizations usually go through different stages of development. There are some exceptions of course. A very few organizations never proceed beyond the first or second phase.

PIONEER STAGE:

This can be regarded as the childhood phase of the organization. Normally started by one individual with a vision to make a difference e.g. fighting women abuse, fighting for the landless, build organizational capacity, promote development amongst young people, etc. At this stage the organization is very small with few resources. Some start by working from home or a very small office. The pioneer will tend to do everything and everybody will look up at her for leadership and guidance. There are very little of systems, procedures and structures. During this phase the emphasis is on building identity, mobilising support for your cause and recruiting members. This is an experimental phase where you toy with different ideas of how to transform intentions into results. The pioneer and the co-workers make huge sacrifices during this stage. There are little money and material resources and donations are made from members' pockets. It is rare for people to earn meaningful or any salaries at this stage. The members are close to each other and feel part of a big family. The pioneer takes decisions and it is mostly informally. When it is a membership-based organization, many members will come and go during this stage. This is also referred to as the dependent or childhood stage of the organization.

RATIONAL OR PROFESSIONAL STAGE:

The can be regarded as the adolescent stage of the organization. During this stage the focus is moving away from the pioneer to the other members in the organization. With exposure to capacity building, members will start to specialise in a particular function within the organization e.g. financial administration. Emphasis is now put on developing structures and systems, policy and procedures to streamline the work. More power is distributed amongst the members and the pioneer learns to consult more. In fact, members will demand more participation in decision-making. With the emphasis on structures and systems a hierarchy will also now develop. During this stage a board will be established and the organization will begin to become more focused in its programmatic work. This can sometimes start in the pioneer stage already but will be consolidated in the rational stage. Demands for proper salaries will now be made. More and more emphasis will be placed on formalities like following procedure and observing policy, following protocol and developing communication channels. Members now start to communicate through

memos, letters, e-mail messages, reports, etc. The warmth characteristic of the pioneer stage is now replaced by a coldness of procedure and protocol. It is also during this stage that the pioneer will either change his role or leave the organization. Some will come back to join the board in order to maintain continuity in the organization and preserve the institutional memory. A second layer of leadership will emerge during this stage. This is also regarded as the independent stage of the organization.

INTEGRATED OR NETWORK STAGE:

This can also be regarded as the adult stage of the organization. A rethink of the purpose of the organization will take place at this stage. Vision and mission will be revisited. At this stage the organization will become more interdependent and start to consolidate links with other partners. The inward focus during the previous stage will be replaced by a more outward focus as the organization will start to appreciate the value it brings to the world. This is also referred to as the interdependent stage of the organization. During this stage you do not necessarily give up your independence but start to share yourself and your strengths more vigorously with others in your network. Independence and interdependence start a dance of organizational balance.

ASSOCIATIVE STAGE:

This is the final and most highly developed stage in the development of an organization. During this stage individuals work in association with each other. They are all very strong organizationally and do not require all the trappings of formal organization. They will work together and once an assignment is completed they will move on. Consultants with years of experience usually work in this way.

A DIAGNOSTIC MAP OF ORGANIZATIONS IN THE FIRST THREE PHASES OF DEVELOPMENT:³⁹

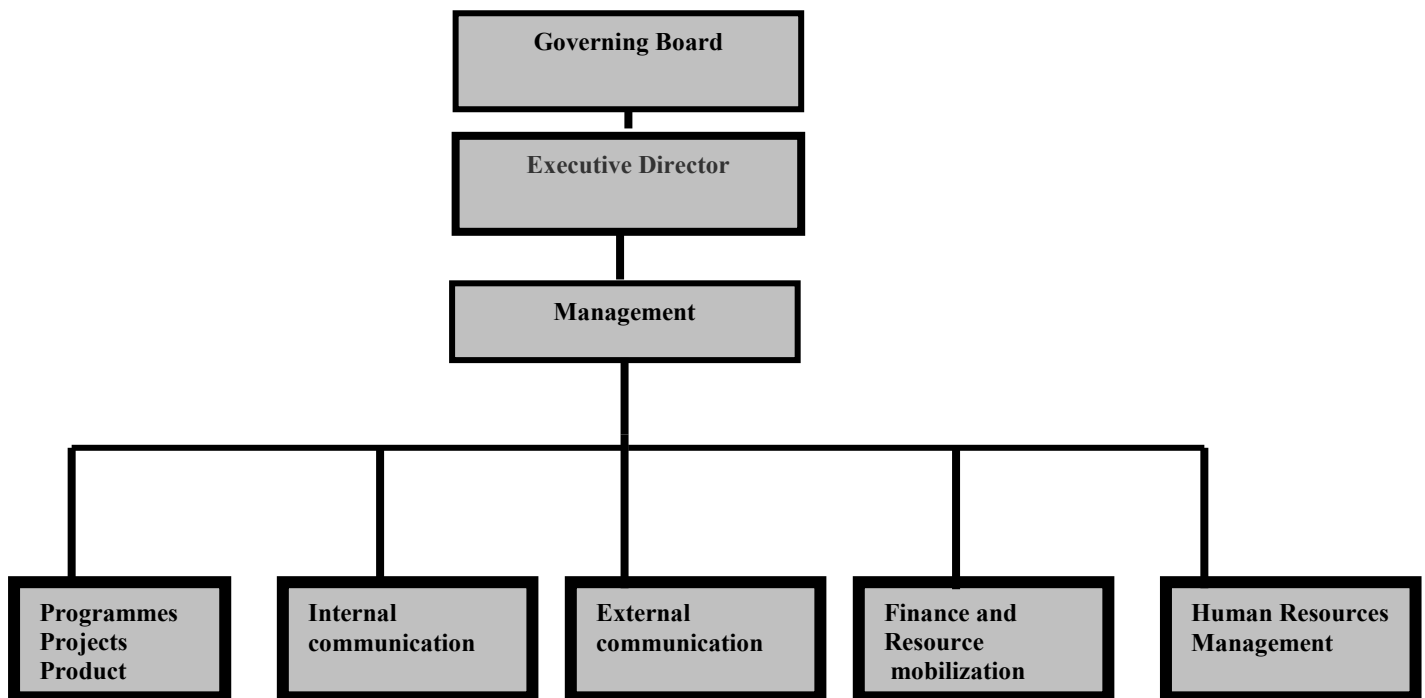
	Pioneer	Differentiation	Integrated
1. Physical	Posters Small Room Shack	Multi-level Security	Warm User friendly
2. Procedures	Informal Flexible None/my way	Formal Inflexible Top-down	Effective Human Flexible
3. Quality of	Close	Minimal interaction	Nurturing

³⁹ James Taylor (2003) *Organizations and development – towards building a practice*, p.42

relationships	Open Friendly	Communication on paper Formality	Participative Respectful
4. Values, policies and climate	Values Personalised Family Personal pioneer	Strong on rules Resolutions Technical Authoritative	Integrity Respect for individual Client focus Risk taking Holistic Inclusive Integrated
5. Identity	Identity bound up with pioneer	Reflected in physical Strong at top Weak at bottom	Achieving relevance Purpose driven

MEDIATING NATURAL TENSION: (THE NO-GO THEORY)

An organization that is specialised in its functions, normally have the following structures in place:



Let us look at the functions of the above structures. Remember that in small organizations you may not find that all the above structures exist. Some of the functions may be combined. In well-developed organizations you may find all these structures exist.

1. Governing Board:

This is your highest accountability structure. Here the strategic direction of the organization is determined. Formulation of policy is also of primary concern at this level. Members of a governing board stand outside of the daily operations within the organization in order to develop objectivity when it comes to making critical decisions about the organization. They mediate when it comes to staff concerns and are responsible to appoint people in strategic positions, especially your director who accounts to them directly. (See section on “How to get your board on board”) When this structure breaks down then the potential for corruption at the lower levels is huge.

2. Executive Director:

This is the most crucial and strategic position in your organization. This is where the proverbial buck stops. Whatever goes wrong in the organization becomes the responsibility of this person. This person is the interface between the board and the management i.e. between those who decide **where** to go (strategic vision) and those who work out **how** (strategic operations and implementation) to get there. This is the most uncomfortable position in any organization since it is here where all the natural tensions (as I will explain further on) must be managed. The selection of this person must never be rushed for the sake of expediency. The wrong person at this level can mean the life or death of an organization. The functions or tasks to be performed at this level should be few because they are so strategic e.g. resource mobilization, strategic focusing, recruitment of board members, management development and recruitment, financial planning, donor cultivation and reporting to donors and networking, i.e. cultivating strategic partnerships to add value to your programmes and projects.

3. Management:

This is the operational level in the organization and here people are directly involved in the operations on a daily basis. The decisions made here are mostly technical in nature as it relates to the day-to-day management of the various departments or programmes and projects. Four key people should be on this structure namely your director, programmes manager, finance manager and human resource manager. Minutes of meetings must always be strictly kept since crucial decisions are taken at this level that explains why certain decisions are taken that affect the operations in the organization. External auditors normally request these minutes to make sense

why certain financial expenses were committed. When this level of accountability starts to break down then you can be sure that corruption will be rife. Management members (especially those with personal friendships) will vote each other increases, promotions or staff loans, i.e. they may lose all objectivity in decision making.

4. Programmes:

Of the five departments at this level, this is the most important one. The reason is simple. Programmes or projects are directly linked to your vision and mission or to put it differently, it is to operationalize the vision and mission, or the vision and mission in practice. This is the level where the real work is done and the organization expresses its reason for its existence. This is where the value that you bring to the world via your target group is determined. It is here where you measure whether you make a difference to the need you address or not. This is where you try and test, experiment, risk, monitor and evaluate, conceptualise and abandon projects. People working at this level should not be trapped in too much procedure and red tape since it will impede their creativity to deliver the most effective programmes. And remember, programmes always consist of three stages namely:

1. **Pre-activity stage:** this refers to programme conceptualisation, design, planning, setting objectives, defining indicators of success and criteria for involving your target group, marketing, mobilising resources, recruiting partners, setting up systems and structures, building human resource capacity to deliver, determine a division of labour, source funding, etc.
2. **Activity stage:** doing the actual work, be it facilitation, training, advocacy, monitoring, build houses, accommodate abused women, getting feedback from beneficiaries, etc.
3. **Post activity:** graduations, tracking of beneficiaries, follow up support, internal or external evaluations, reporting to stakeholders, documenting successes and failures and sharing experiences.

NPO's are generally very weak with documenting their experiences and sharing, something that is slowly changing since the mid-1990's. You cannot be serious about any programme intervention unless you build into your intervention the conscious intent to document and to share. Your work is about human development and it is foolish to keep the results of your work (whether good or bad) a secret! Take this book for example. I am able to share my own experiences with a wide audience in the NPO sector and even beyond. When you **consciously plan** to document and

share your experiences then you need to consciously decide to also allocate time to do it. You need **quality time** to reflect and document. By documenting your successes and failures you also add a deeper meaning to your work and increase the levels of motivation amongst programme staff.

5. Internal Communication:

Normally referred to as office administration, this department is responsible for communication systems between the various structures and departments. Communication can be via memos, letters, verbal, e-mail, etc. An efficient administrative system is crucial to support programmes.

6. External Communication:

This is about building the image of the organization in the external world. This is communication to your current and potential donors, network partners, beneficiaries (past and present), government and the general public. Many organizations do not spend too much time communicating with the outside world. This is wrong. With today's technology it is becoming very easy and cost effective to do this. E-mails, websites, faxes, newsletters, etc. are all ways of building your image. Sending articles to newspapers and making press statements can also help. And don't forget the telephone. Organise forums from time to time or attend existing forums. Become visible and others who can support you will become visible. Develop a comprehensive external communication strategy if you

don't have one. Your organization cannot be serious about its vision and mission if it does not communicate how it performs to the outside world in relation to it. Then you are wasting your time. Your organization will have become a home for careerists with little or no interest in why you exist in the first place.

7. Finances:

Here people are responsible accounting for the financial and material resources entrusted to you. Policies and procedures are fundamental to the operation of this department. Any lack of the two can cause numerous frustrations that will inevitably affect your output in the field. People in this department have a natural tendency to take themselves too seriously and not see the link between their work and the rest of the organization. They tend to isolate themselves and view their work simply as a technical exercise and not as a support to those in programmes.

8. Human Resource Management:

This department has the responsibility to recruit and capacitate the right people for the right job. Staff evaluation and performance appraisals for promotion or salary increases are done here. Staff development plans, wellness programmes, inductions, disciplinary hearings and those things related to staff performance are managed here. Once again, organizations do not spend too much time on this function since it is seen more as a cost than a benefit. The performance of any organization depends on the collective performance of the whole organization. And an organization can only grow if its members grow. HR is instrumental in that growth.

MEDIATING NATURAL TENSIONS:

Between which departments do you normally find the most conflict will take place and why?

Yes, you are right. It is the programmes and finance department. Let us do a role analysis of the two departments and examine the source of this conflict:

Programmes	Finance
Linked to needs on the ground; in touch with the target group, very energetic	Gate keepers, questions everything; work within four walls most of the time, low energy levels
Always seeking opportunities, taking risks	Control focus, policy and procedures important
Work on the outside	Work on the inside – cut off from the needs on the ground
Flexible approach and creative; highlight effectiveness	Rigid approach – books must reconcile – perfectionism Conservative by nature; highlight efficiency
Like to pilot, try new things, experimentation	See resources (money) going out – everything is a cost
Hate procedures and rigidity	Love predictability and certainty
Embrace change easily	By nature very conservative

Can you add more characteristics that make the two departments unique? What do you think is the picture emerging? It is simple. The source of the conflict/tension is their different roles. It is not a question of either or. You must have both departments doing their work effectively. The most important department is always your programmes since they are linked to your vision. This is where your target group is located. This is the reason for your existence. This is why you mobilise resources.

All other departments must serve programmes and not the other way around. This does not mean that people in programmes can do what they want. In a time of funding gaps, your finance

department will play a more important role to control the scarce financial resources. In a time of extreme tension, your director must play a mediating role between the conflicting demands of the two departments. A weak leader/manager will heighten this tension and cause unnecessary conflict.

Failure to understand the above dynamic can lead to a personalisation of this tension and worsen your organizational challenges. This means that you now start to blame individuals. This is dangerous! When you personalise a problem then you can never find a solution. Why? Because you expect someone else to change! Nobody can really change on someone else's terms. There is always resistance. This is only human. Many organizations break up or collapse because of a lack of understanding of this dynamic. Be careful that you do not fall into the same trap!

This is how Peter Drucker summed up this tension:⁴⁰

In discussing the difference between efficiency (as emphasised by the finance department) and effectiveness (as represented by programmes) he stated: *"The efficiency approach insists that results will automatically come if things are done right, and therefore mistrusts any deviation from proper procedure. The effectiveness approach, however, points out that in any social effort, 80 percent of the results are achieved by the first twenty percent of the efforts and that the remaining 80 percent of the efforts only produce 20 percent of the results. In the first approach efforts are seen as central; in the second results. In the first the hallmark of good management is order. In the second, it is vitality. The efficiency approach sees administration as desirable and as the strength of an organization. The effectiveness approach sees it as support, a necessary evil to be confined to the minimum needed to prevent collapse. The efficiency approach wants to make mediocrity capable of producing predictable results again and again. It is based on a realistic view of man (sic), and of men in organization. The effectiveness approach wants to liberate creative energy. This too is a realistic view of man. "*

POLICIES – PROFITS – PEOPLE: THE THREE TYPES OF ORGANIZATIONS

Society can be broadly divided into three types of organizations, namely:

1. The state sector
2. Business sector
3. Civil society sector

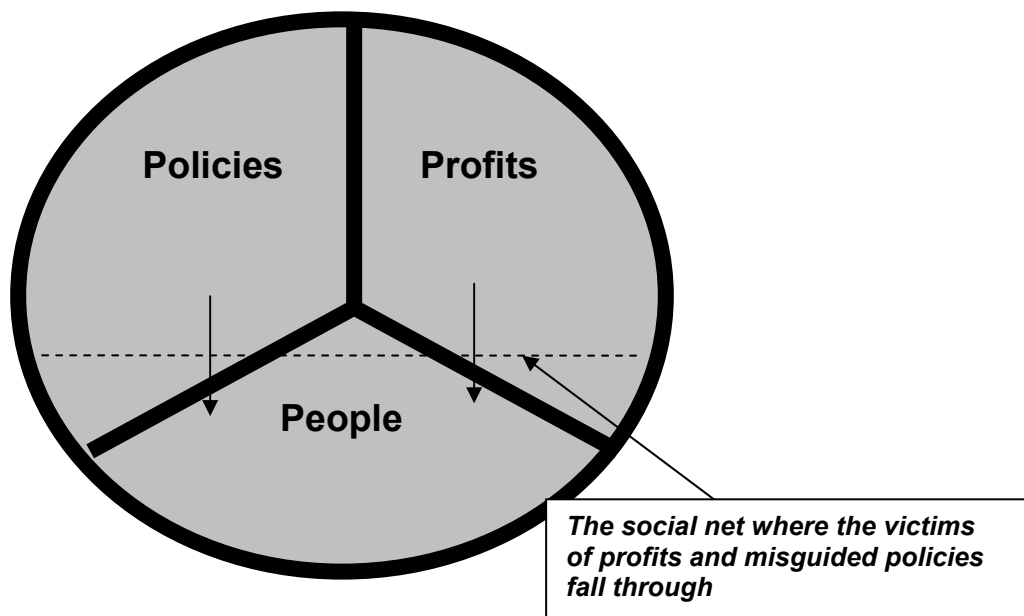
⁴⁰ Peter F. Drucker (1969) *The Age of Discontinuity*, p. 245

The state sector represents all the institutions such as the government, police, army, judiciary, etc. The primary function of this sector is to design policies that regulate the behaviour of human beings in society. The same function is performed by policies and procedures within an organization. When this is not done then you will have disorder and general chaos. This is also commonly referred to as the rule of law.

The primary aim of the business sector is to address societal needs and wants and in the process generate profits to reproduce the enterprise. When substantial profits are not generated then the enterprise will close down.

The primary focus of the civil society sector is to work with the people who are the victims of government policies and unbridled profits based on insatiable greed. This is where the leaders on the ground spend most of their time. This is where you will find the economically disenfranchised, the marginalised, the rejected, the unemployed, those suffering from HIV/Aids, etc.

In short, the three sectors can be summed up in the following way:



Please note:

Did you notice the peace sign reminiscent of the 1970's? What does this mean? It means that without a strong civil society focusing on the basic needs of people, society will descend into chaos and disorder.

EXERCISE 2:

2.1 Look at the Elements of Organizational Life Model. Where do you think the strengths of your organization lie? Where do you think you can improve? Explain what you are doing to build on your strengths and to eliminate your weaknesses?

2.2 Write down how does the tension between the programme- and finance staff expresses itself in your organization? What are you doing to manage it?

2.3 Referring to the 4 stages of organizational development, where do you think your organization is currently at and why? Write down the main features of your current stage of development and what you are doing to consolidate this stage.

We are not so much human beings seeking a spiritual experience, but spiritual beings seeking a human experience – Teilhard de Chardin

To attain knowledge, add things everyday. To attain wisdom, remove things everyday
– Lao Tsu

Confusion is a word we have invented for an order which is not yet understood – Henry Miller

**The wicked leader is he who the people despise. The good leader is he who the people revere. The great leader is he who the people say:
“ We did it ourselves!” Lao-Tzu**

Anyone can hold the helm when the sea is calm

What lies behind us and what lies before us is tiny matters compared to what lies within us

CHAPTER THREE



ESSENTIAL TASKS OF LEADERSHIP AND MANAGEMENT

**“The one who influences *others to lead* is a leader without limitations!”
(John Maxwell)**

Leadership and management in the non-profit organization

Chapter 3: Important leadership skills

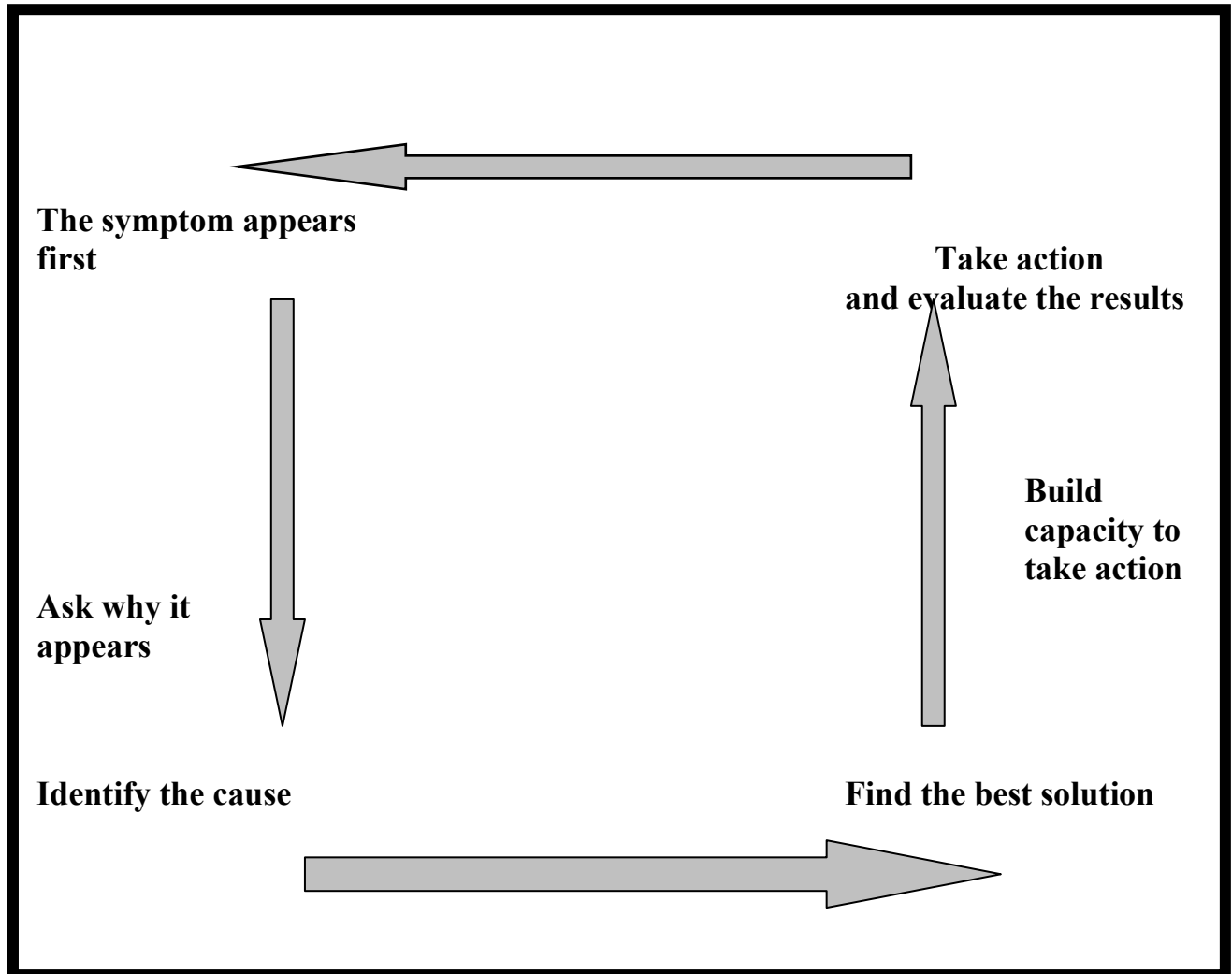
Problem solving and effective decision making

As a leader you will be confronted with problems everyday. Not only your own but also those of your colleagues. Have you noticed how many people come to you to solve their problems for them? Just think back over the past few months how many staff members or volunteers approached you. Members come to you because they think **you** must solve **their** problems. They have the mistaken idea that you get **paid** to solve their problems. You must have ready solutions for everything. It is important that you do not become trapped in other people's problems. Remember, members involved in the daily operations of an organization will always first identify a symptom and not a cause of a problem. They will therefore tend to report symptoms to you. This is not accidental. Since they are isolated from the bigger picture they tend to be immersed in the challenges of their departments. It is difficult to see the systemic link to other departments. A fundamental cause of a problem can only be identified when you analyse the whole and not only the part of an operation.

To help you analyse problems properly, look at the model in figure 2.⁴¹ What can you learn?

1. We tend to identify first the symptom of a problem. This is normal since the emergence of a symptom is the first sign that something is wrong.
2. It is important that we ask why the symptom appears. That means you must go deeper into the symptom. If it is a recurrent symptom, then you are most likely dealing with a systems problem. Now you try to identify the cause.

⁴¹ Copied from a strategic planning report by Jan Webster for the Youth Development Network – 1999



The following questions can help you:

- What can you see that causes you to think there is a problem?
 - Where is it happening?
 - How is it happening?
 - When is it happening and how often?
 - With who is it happening and why?
 - It is good to write the problem down. Ask yourself what is supposed to happen but what is actually happening.
3. Then you search for solutions. Try to be creative and refrain from using tried and tested solutions. Be innovative. Try something new.
4. You then build the capacity to implement the solution and the means to monitor its implementation.

Example: There is a lack of finance in the organization. Now follow the steps as outlined above.

Remember:

Defining complex problems:

- If the problem seems overwhelming, break it down until you have descriptions of several related steps.

Verify your understanding of the problem:

- Consult a peer or someone from another department to verify your analysis of the problem.

Prioritise the problem:

- When confronted with more than one problem, try to prioritise the urgent ones. Then deal with them step by step.

Remember: A test of an effective leader is the ability to recognise a problem before it becomes an emergency. Another way of putting it is to say that ***a good leader anticipates problems***. When a problem is on top of you, then you have already abdicated your responsibility as a leader. Then you become trapped in crisis management.

Here is what great leaders do to recognise a problem:⁴²

1. They sense it before they see it (intuition)
2. They begin looking for it and asks critical questions (curiosity)
3. They gather data/information (processing)
4. They share their feelings and findings to a few trusted colleagues (consultation and communication)
5. They define the problem (writing and analysis)
6. They check their resources to deal with it (assessment)
7. They make a decision (leading)
8. They follow up (check implementation and evaluate)

Effective decision-making

Effective decision-making and effective decisions should not be confused with simple problem-solving. There may be certain similarities but they are not the same. Problem solving mostly happens at the **operational level** whereas effective decision-making mostly happens at the **strategic level**. Managers in various departments or projects normally operate at the operational level while directors and board members operate mostly at the strategic level.

Leaders who make a lot of decisions on a daily or weekly basis are working at the wrong level. They will be too involved at the operational level. Programme managers and heads of department should make decisions or solve problems at the operational level. Effective leaders capacitate managers to do these themselves. They free themselves to think about the strategic issues and how to intervene strategically with strategic decisions. Please note that during the pioneer stage of the organization, where the focus of work is on the pioneer, the leader will be forced to operate at the operational level since the work will not be so specialised. In a developed and more specialised organization, this should be reversed. Strategic decisions deal with issues such as the future focus of the organization, succession planning, restructuring and de-structuring⁴³ of projects or programmes, etc. These decisions are taken at the highest level of conceptual understanding. They are not taken lightly and require time to think them through.

Here are some guidelines to decision-making at the strategic level:⁴⁴

1. A decision is always **a judgement between “almost right” and “probably wrong”**. As a leader you will never know whether a decision is the right one unless it is implemented. So

⁴² John Maxwell (1993) *Developing the Leader in You*, p. 67

⁴³ Restructuring is about doing the same things differently whereas de-structuring means not doing something at all.

⁴⁴ For a fuller elaboration on this process see Peter Drucker, *The Effective Executive* (1967), chapter 6 and 7

there is always risk involved in making a decision. If you try to avoid this risk you will probably never make a decision.

2. Involve as many people *before* you make the decision by **testing their opinions**. In an organization with high specialisation you are going to find that most members will have something to say before a decision is made. Get them involved. Listen to them. Consult them. Find out why they think the way they do. Recognise and validate their voices. Remember, if you don't involve other people then you are not running an organization. You are running a one-man or one-woman show! And this is a negation of true organization. And this implies that everybody except you is stupid and cannot think.
3. Try hard to **find the critical voices** in the organization. They will normally tell you something that you have missed; something you failed to consider. Insecure leaders normally feel threatened by the critical voice because they do not understand its role. It is the critical voice that may help you to understand whether you should run with a decision or be more cautious. Or even to abandon the decision at all. Finding the critical voice is to allow for **organised dissent**. A decision cannot be effective unless you have people arguing different viewpoints. As Drucker states: "The first rule in decision-making is that one does not make a decision unless there is disagreement."⁴⁵
4. Disagreement in the decision-making process allows you to consider **viable alternatives**. Since no decision is full proof or perfect when subjected to the test of reality, disagreements allow you to develop those alternatives to fall back on when something goes wrong with the implementation.
5. You also need disagreement to stimulate people's imagination. You must expose your members to different ways of perceiving and understanding a challenge. This is part of their growth. When you make all the decisions then you deny them this potential for growth. Involving others also allow them to **own the outcome** of the decision-making process and **facilitates implementation**.
6. Always ask yourself whether a decision is **necessary at all**. Implementing decisions require resources, system changes and sometimes a temporary disruption of work in the organization. You can avoid all this by simply asking whether you need to make a decision. A question to ponder is: **what will happen if I don't make this decision?** How will our future be affected as an organization? If your answer is "not much" then don't make the decision.
7. Make sure you **build in capacity** to implement the decision. Many organizations fail this test. They make wonderful decisions but cannot implement it because they lack the

⁴⁵ Peter F. Drucker (1967) *The Effective Executive*, p. 151

human, material, financial capacity and sometimes the willingness (re: the will). Failing to implement turns your decision into a good intention, into a dream. And dreams don't change organizations nor do they ensure impact. **Action does.**

8. Since ***no decision is perfect*** and must face the test of reality, you need to build in feedback mechanisms to inform you about the results of the implementation process. You need to know what effect the decision is making. And try to avoid just hearing what others are telling you or reporting. Go and see for yourself. In a small organization this is easy but in a large organization you need to make a special effort. People will tell you what they think you want to hear. So check for yourself.
9. Effective decisions always generate your ***“prophets of doom”***, people who think the medicine tastes too horrible. But we all know from childhood that the medicine that tastes horrible does the trick to get us cured. Prophets of doom are people who do not like the final decision. They go for the medicine that tastes better. They are people who will try and avoid the ***short term pain*** of an effective decision. They go for ***short term gain***, for the sweet medicine. They are the persons who will go out of their way to undermine the implementation of a decision. They will plot and scheme. Unfortunately, the sweet medicine never works; it only allows you to become more sick and sometimes die a slow death! Remember, you are not employed to make decisions that are popular or that people like but decisions that are effective and get things done; decisions that can ensure the survival and reproduction of the organization.

Like I stated earlier, when I left my organization a few years ago this process was also playing itself out. After much consultation a decision was taken to find someone from the outside to lead the organization on my departure. A consultant was even contracted to facilitate a succession planning process. I felt that we did not have the requisite skills, experiences and expertise at the highest level of the organization internally to appoint someone. This was after various options were considered and plans put in place to implement this decision. On my departure some people with their own issues and hidden agendas felt that they were going to reverse this decision. The medicine was too bitter for some of them to swallow. The inevitable decline of the organization then started. They preferred the sweeter medicine!

EFFECTIVE COMMUNICATION⁴⁶

Communication is the life-blood in any organization. When blood is cut off to the heart a person will suffer a stroke or heart attack and possibly die. Leaders who do not spend time

⁴⁶ Slightly adapted from “The 21st Century Supervisor—A manual for managers until p.89— author and date unknown

communicating effectively will also cause their organizations to suffer a stroke or heart attack. Bad communication can also be a source of endless conflict. In an NPO this is more important since leaders communicate to various constituencies all at once e.g. your board, staff, volunteers, donors, network partners, beneficiaries, etc.

Good communication is more than just saying or writing the right thing. How we communicate is always affected by the situation, frame of reference or context, emotional status, who is saying it or writing it, etc. To put it differently as Drucker said, “*a whole person always comes with the message, not just the message.*”⁴⁷ Or, it is not what is being said but who is saying it!

NOTE:

Words – how they are chosen, strung together and voiced – have the ability to clarify, influence, persuade, motivate and inspire. How you express yourself has a significant impact on your image and long-term success.

TYPES OF COMMUNICATION:

- Face to face versus remote/indirect
- Interactive versus one way
- Mass versus individual or small group
- Verbal versus non-verbal
- Permanent versus transient (brief)
- Downward, upward or sideways

SOME BARRIERS TO COMMUNICATION:

- Someone is nervous
- Personal reaction; e.g. like or dislike
- It takes longer to talk than to listen
- Emotional reaction – preparing a reply before listening to everything
- Questioning is not encouraged (downward communication)
- Communication is perceived as an instruction

STEPS IN COMMUNICATION:

⁴⁷ Peter F. Drucker, (19-) *Drucker on Management*, p.

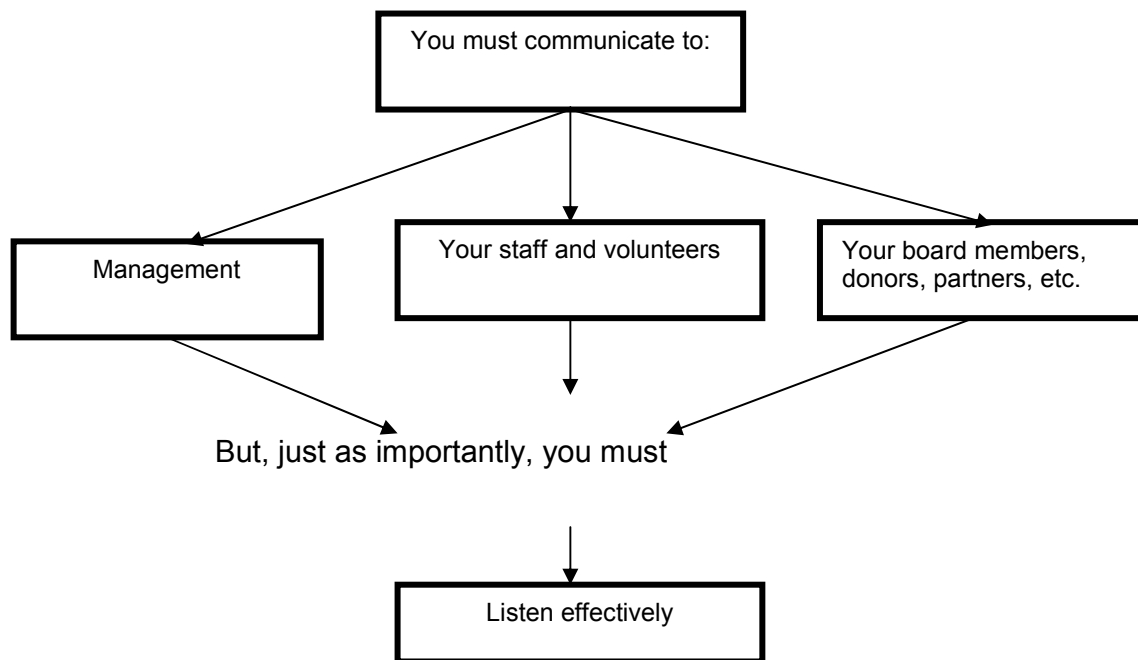
1. Understand the recipient of your message
2. Plan what you are going to say
3. Get the attention of the listener
4. Communicate to your listener
5. Encourage feedback
6. Evaluate the feedback

EFFECTIVE COMMUNICATION IS EVERYBODY'S RESPONSIBILITY:

Good communication lies in three directions:

1. To your board, donors, and partners: Decisions are made on the basis of known acts and the manager expects to be kept fully informed by you on:
 - Matters on which s/he must report or decisions
 - Matters which may cause controversy
 - Trends, attitudes and morals
2. To your staff and volunteers: They expect at all times to know about matters that will affect them and which interest them. Each staff member is a public relations officer for your organization. They are only part of something for as long as they FEEL part of it. The need to know what is happening, especially where it affects your work and performance is important to each one of us.
3. To your managers: Your organization may have various departments. If overall objectives must be achieved, then all departments must work in harmony and effective communication is vital.

Look at the following:⁴⁸



Remember, your organization is like a community. The word communication is derived from the word community. Community means to come together, live together, strive and struggle together towards common objectives. Failure to observe proper and healthy communication means that you compromise this community. Communication breakdown therefore also results in community breakdown. When normal communication channels are problematic, then members find their own alternative or informal channels to communicate. This can only worsen the communication problem since every member will add his/her own version to what is communicated.

EFFECTIVE LISTENING:

Many of us are bad listeners (including me). There is a physiological reason for this. The capacity of a human being to listen ranges from 400 to 600 words per minute. However the average speaking rate is about 125 words per minute. This give us ample time to think about other things while someone is talking. Poor listening is also due to a lack of training. At school we are taught many skills such as writing, speaking (oral), reading, etc. But no school teaches listening skills! And this is the skill used the most often everyday!

WHAT ARE SOME OF THE BARRIERS TO EFFECTIVE LISTENING?

- The listener has pre-conceived ideas
- The listener thinks s/he knows more than the speaker (“I have heard this before”)
- The listener is worried about something else, e.g. time
- The listener is tired or physically uncomfortable
- The listener is envious of the speaker or afraid
- The listener is not interested
- The listener is anxious to input his/her own ideas
- The speaker mumbles, cough or has a strange accent
- The speaker uses jargon or inflammatory words
- The speaker uses words open to any interpretation
- External noise
- Interruption (cell phone, etc.)

DIFFERENT LEVELS OF LISTENING:

You can listen at 4 levels when someone communicates with you:

1. **Listen with your head** (rationalise, try to make sense, logical level)
2. **Listen with your heart** (listen for emotion, the feeling behind the message)
3. **Listen with your feet** (what is moving the person, what is the motivation?)
4. **Listen with your soul** (What is inspiring the message? Remember, the word inspire comes from the word spirit; this is the most difficult and under-develop level; here you try to listen to the unspoken)

WHAT KIND OF LISTENER ARE YOU?

The biased listener:

He is not listening. He has tuned out and is planning what to say next. Our bias can become prejudice and we may tune out people because of their age, accent, occupation, background, religion, etc.

The distracted listener:

Many people fit into this category at one time or another. Internal or external distractions prevent you from giving undivided attention. It is important that you ensure your environment is free from distractions to facilitate effective listening. There is also a

responsibility on the communicator to make sure that the environment is conducive for effective listening, especially if they need a rapid response.

The impatient listener:

This person interrupts and does not allow others to finish what they have to say. To become a patient listener, learn not to interrupt. Practice this with a colleague or friend. People will not listen to you unless you are prepared to listen to them.

The passive listener:

You never know whether this person is listening or not because you don't get any feedback. This is the total opposite from active listening. During active listening a person probes, questions, comments, etc. to express interest in your communication. When you ask a person "Did you hear what I have to say?" then that person was listening passively.

HOW CAN YOU IMPROVE YOUR LISTENING SKILLS?

- Check your environment – eliminate distractions
- Check that you are ready to listen – able to give total attention
- Check understanding by asking questions, probing, etc.
- Check your body language, how you sit, eye contact, etc.
- Listen with an open mind
- Observe the body language of the communicator – what is not being said in words (check double signals)

As a manager, if you prefer to read something instead of listening first, then please communicate this to your subordinates. This is important especially if they expect you to make a decision about something.

EFFECTIVE DELEGATION:

Effective delegation is about getting work done through other people and providing them with the opportunity to grow in their jobs. By giving more responsibility and authority to others, managers free themselves to attend to more strategic issues.

THE SYMPTOMS OF POOR DELEGATION:

1. Team motivation/morale is low
2. You are doing all the work (burn out!!)

3. Your team is confused/conflict/tense/anxious
4. You get too many questions about the delegated tasks

WHAT ARE THE ADVANTAGES OF DELEGATION?

- Increased productivity
- Increased motivation
- Team skills are developed
- Better distribution of work through the group
- Staff become more independent and learn to appreciate their interdependency and build self-esteem and confidence
- You can meet deadlines
- Members can develop ownership

STEPS IN DELEGATION:

- Study your work and select tasks that you may delegate
- Identify the most suitable person (time, skills, experience, attitude, etc)
- Prepare and motivate the member. Explain the task clearly. Make sure you are understood. Ask the member to repeat the task to you. Leave room for initiative in the task description
- Set objectives and standards and clarify areas of concern. Provide training or coaching if required.
- Make sure the member has the necessary authority to do the job properly
- Communicate with members who will be affected to reinforce the authority
- Keep in touch with the person for support and monitoring (agree beforehand on timelines)
- Evaluate performance
- And compliment/praise - Acknowledge a job well done but be careful that people do not become dependent on compliments to perform. Maintain a balance at all times. Remember, people must develop the inner motivation to perform and not because they are externally motivated by another person. External motivation through compliments will come and go but internal motivation is more lasting.

REMEMBER: Task completion is still the responsibility of the one who delegates. If something goes wrong, then you are *still* responsible, not the one to whom you delegated. Be careful of setting people up for failure by ignoring the above steps.

WHAT TO AND WHEN NOT TO DELEGATE:

- Control of those working under you
- Decisions requiring your perspective and experience
- Confidential work affecting your staff
- Work delegated to you
- Initial and final approval of a task
- A genuine emergency
- Hiring, firing and salary issues

EFFECTIVE MEETING MANAGEMENT:

Meetings are one of the most used forums in organizations. Think about it. You will most probably be involved in a meeting every single day. Yet, most managers do not spend enough time to think through WHY they must meet. In many organizations there are either too many meetings or meetings are disorganised and lead to frustration. In some instances people do not think it is necessary to meet at all! What is your experience?

WHY MEET IN THE FIRST PLACE?

“We meet because people holding different jobs have to co-operate to get a specific task done. The knowledge and experience needed in a specific situation are not available in one head. It has to be pieced together out of the experience and knowledge of several people.”⁴⁹

TYPES OF MEETINGS:

Consultative: Here you need to get the relevant members together to consult about a specific issue/s before making a decision. You call the group together since it will save you time to see them separately. You also need them to listen and debate the various viewpoints so that you can look at the issue/s from different perspectives. When everybody agrees about something then there is something that is being missed. You want organised dissent to emerge. Where I came from we used to organise what was called “Day Council” meetings every Monday morning. These were essentially consultative meetings where heads of department came together on a weekly

⁴⁹ Peter Drucker (1967) *The Effective Executive*, p. 45

basis to clarify their respective tasks for the week ahead. No decisions were taken at these meetings but the discussions here **informed** decisions taken at a higher level.

Operational: These are meetings to discuss, clarify, plan and evaluate the operations in the organization. Operations can range from programmes/projects, finances, fundraising, marketing, people development, etc. During these meetings you check whether you are on track in terms of your stated objectives in relation to your strategic goals. Are we doing what we set out to do? What is happening in the field? Management meetings are mostly operational. During these meetings you will likely identify issues of a strategic nature that must be dealt with at the strategic level.

Strategic meetings: These meetings normally happen at a board level. At this level the organizations strategy is evaluated as well as policy matters. Not many of these meetings normally take place and the decisions flowing from them are few. The emphasis here is on the quality of the decision and not the quantity. Leaders play a big role in these meetings. Meetings to strategically assess the organization fall into this category.

Informal/unstructured: These are meetings happening after formal meetings. People who are low talkers normally (unconsciously) organise these meetings to convey their point of view. Members who are very close (party/socialise together) also have a lot of these meetings. Some members go into structured meetings with “decisions” taken at informal meetings. Although this is quite normal it can become dangerous if not understood as an extension or substitute for a formal meeting. The focus by these individuals is to implicitly *agree to agree* and to focus on **WHO** is saying what and not **WHAT** is being said. The **emotional attachment** is stronger than the **task attachment**.

REMEMBER: “Meetings are by definition a concession to deficient organization. For one either meets or one works. One cannot do both at the same time.”⁵⁰

Think back to your last meeting. Was it successful? Did the meeting achieve its stated objective? Was there full participation by everyone? Was everybody affected by the discussion in the meeting invited? Meetings can either be effective or ineffective. The time you spent in meetings is a cost to the organization so you need to optimise the benefits of meetings.

⁵⁰ Ibid, p. 45

A productive meeting is a tool for effective management communication (face to face) and can serve as a vehicle for the development of specific plans. Successful meetings don't just happen. Ingredients of successful meetings are:

- Careful planning
- Good leadership
- Pay attention to detail

STEPS IN PLANNING A MEETING:

- Establish the purpose/objective of a meeting
- Who must (not) attend the meeting?
- Prepare the agenda
- Determine the time and venue
- Any other logistical arrangements (seating, documentation, etc.)

MEETING OBJECTIVES:

Ask yourself: Why do we meet? What must the meeting accomplish?

- Are we going to share new information and provide feedback? (operational)
- Co-ordinate efforts of a specific nature and obtain group support (strategic or operational)
- Win acceptance for a new idea, plan, or system (operational)
- Reconcile conflict (operational)
- Motivate members of a group (consultative)
- Solve a problem within a group, etc. (operational)
- Discuss a policy issue, review strategies, objectives? (strategic)

MEETING AGENDA:

An agenda clarifies what you want to cover and the time frames available to discuss certain points. Be realistic and don't clutter the agenda with too many points. This can only lead to frustration since certain points are skipped and not properly discussed.

Keep this in mind when preparing an agenda:

1. List the items in an order of priority
2. Put a time frame to each one as a guide
3. Write an explanation of each item if necessary to prevent confusion
4. If someone will deal with a specific part, put his/her name to it.

ORGANISING THE MEETING:

Questions that arise are:

- When and at what time must the meeting be held? (note gender considerations, i.e. women who must cook at a certain time, prepare supper, look after children, etc.)
- Where the meeting must be held?
- Who should be at the meeting? How will they get to the meeting?
- What could be possible constraints for people to attend the meeting? (e.g. child care, transport, cooking, etc.)
- When selecting the venue check the size in relation to the number of participants, seating arrangement, lighting, heating, ventilation, visual aids required and whether it is in a working condition.

SOME SUGGESTIONS TO CONDUCT EFFECTIVE MEETINGS:

1. Listen to what is being said, but stop someone who is digressing from the subject matter, repeating a previous point or her/himself.
2. Control the meeting by directing the discussion (“We have not fully dealt with point no. 1”)
3. Introduce topics on the agenda and if necessary explain why it is on the agenda; provide a context .
4. Summarise when each topic has been dealt with (“So, am I right to say that we have agreed to....”)
5. Try not to dominate a meeting; control the high talkers and acknowledge the low talkers
6. Avoid power plays in a meeting, abusing rank, etc.
7. Decide your role in advance (to listen and direct or to participate in discussion) Give over the chair if you feel you want to participate.
8. Make sure all relevant documents (reports, previous minutes, funding agreements, newsletters, correspondence, etc. are available at the meeting) Avoid interrupting the meeting because you need to find a relevant document. This is a symptom of BAD planning!
9. Make meetings fun! It does not have to be so boring. Rotate the chair and give feedback. Allow new members to take responsibility to chair a meeting and give group feedback. Make meetings a learning experience. Coach prospective volunteers before the meeting. This will enhance ownership.

Effective team building

One of the first things organizations do when faced with perpetual staff conflict is to call in a consultant to do a team building exercise. They spent a lot of money on a one or two day camp or retreat where everybody has a chance to get to know each other all over again and bring out certain issues. This is usually very traumatic for some people and they will even cry, kiss and make up. It sounds all very good. But it never works! The only positive outcome for the consultant is that he/she makes a lot of money because these team building camps are normally very expensive.

LET US GET BACK TO SOME BASICS:

1. Team building is a process and **not** an event!
2. Team building takes place whenever members interact with each other, i.e. in a meeting, informal discussion, over lunch, etc.
3. Team building is part of a process of relationship building in any organization and must be approached consciously.
4. Relationships in a workplace are task orientated (people don't work together because they are good friends or like each other). They work together because they have a common objective in mind. In a non-profit organization it is to effect human change through delivering a service (product).
5. Some organizations approach team building as a once off event. Then they organise team building camps. This is wrong and dangerous. A team building camp must be **part of a process** and a **not a substitute** for the process.
6. Some organizations organise teambuilding camps in reaction to perpetual staff conflict and as a quick fix to solve it. It **NEVER** works and cannot work.

DEFINING A TEAM (Together Each One Achieves More)

"A group of people committed to working co-operatively towards a common objective, using accepted rules and procedures to undertake identifiable tasks and roles aimed at achieving the objective."

ELEMENTS OF EFFECTIVE TEAMS:

Effective teams have:

- a common objective and purpose
- agreed core values
- strategies to achieve objectives

- accepted and negotiated rules and procedures
- strong leadership
- rewards
- feedback mechanisms
- have agreed conflict transformation steps negotiated in advance

EFFECTIVE TEAM MEMBERS:

- **Have team commitment:** Understand the team purpose and are prepared to make sacrifices to achieve objectives.
- **Have participatory skills:** Openness to work together. Have a positive self-concept and good interpersonal skills. Listen well, observe, give feedback and be assertive.
- **Have constructive conflict transformation skills:** Understand that team conflict is inevitable and should be used constructively to transform relationships. See other team members as a mirror to look at themselves.
- **Is rank conscious:** They are aware of their position in the team and the authority and responsibility they have to get work done. They don't abuse their rank to get their own way. They are sensitive to those with a lower rank; this includes race, class and gender sensitivity.

SOME OBSTACLES TO EFFECTIVE TEAMS:

- The team may not be **necessary**. The task can be carried out by one person only. We sometimes assume almost automatically that a team is required for any task.
- Someone is not a **team player** and can work well on his/her own. Allow this person this freedom but make sure that the team is not sabotaged.
- **Unresolved issues** amongst team members (sometimes personal issues)
- **Disrespect** amongst team members (sometimes simply bad manners)
- **Too many objectives** that confuse and paralyse the team
- Team members lack the **capacity, resources or competence** to complete a task
- **Lines of accountability** are confusing; there is responsibility for the task but no authority
- Some team members cannot **handle criticism**.
- Some team members have the **wrong attitude**. They perceive the team as a necessary evil.

Relationship building process amongst team members:

The glue that keeps team members stick together is trust. It is like an army going into battle. The officers must trust their troops otherwise they might be in the firing line, or a soccer team facing an opponent. Team members must trust that you are on their side. Imagine a team member who goes out of his/her way to sabotage his/her team? This is crazy! Still we find in many organizations (for various reasons) people working against each other. It is like one member tripping a fellow player on the field preventing him/her from scoring a goal!

Relationship building is a process. This is how it works:**Phase one:**

Trust building: A level of trust precedes any relationship. There must be particular warmth to it. This is the first stage in the trust building process. The phase is represented by the element of *fire*. Any feeling of discomfort will make it difficult to proceed to the next stage.

Phase two:

Openness – Once sufficient trust is present the team member will become more open and reveal more about herself. She will be eager to participate in meetings and become more assertive. She will feel safe. This is important for a team leader to understand and to appreciate any misconceptions that a team member might have. You cannot deal with a problem unless you become aware about it. This phase is represented by the element of *air*.

Phase three:

Flexibility – Openness will allow a team member to become more flexible. Once we know how you think and what you think we can become mutually flexible, i.e. to change certain habits after negotiation and consultation. Flexibility is represented by the element of *water*.

Phase four:

Structure – Any change must be structured. You cannot keep changing all the time. Too much change all at once will disorientate team members. Structure provides a sense of security, safety and continuity. Structure is represented by the element of *earth*.

Throughout the process trust remains an important component. Every phase you move to will reinforce trust. The more trust, the more openness and flexibility. And the more openness and flexibility the more team performance you can achieve. When a team leader becomes closed and

rigid, then the other members will follow that example. People learn from what you **do** and not what you **tell** them!

UNDERSTANDING YOUR TEAM MEMBERS:

TEMPERAMENT:

So, what is temperament? According to Tim Lahaye⁵¹ “Temperament is the combination of traits we inherited from our parents. No one knows where it resides, but I think it is somewhere in the mind or emotional centre (often referred to as the heart). From that source it combines with other human characteristics to produce our basic makeup.”

So what is the actual origin of temperament theory? It was Hippocrates around 450 BC who saw the root of one’s temperament as being derived from the humours dominant in the body: blood (sanguine), bile from the liver (choleric), phlegm (phlegmatic), and bile from the kidneys (melancholic). A view that was popular amongst ancient astrologers and philosophers classed individuals according to the elements of natural order, i.e. air, fire, water, and earth.

A warning: Temperament is not necessarily the only influence upon a person’s behaviour. Socialisation, i.e. how we grow up, our culture, educational influences, etc. can all exercise powerful influences on our actions. But temperament is always the number one influence on your life, whether you like it or not. In most of the temperament tests I conducted with staff members of client organizations, people felt relieved to find out why they would act in a certain way at times. I am primarily a choleric temperament and when I was introduced to temperament theory I was amazed at how my own behaviour (sometimes unconsciously) was explained. I came to realise that most of the personal conflicts in many organizations are combinations of temperament differences and organizational unconsciousness.

Team leaders need to understand the natural temperament of their team members. There are four basic temperaments:

1. Choleric (Fire)
2. Sanguine (Air)
3. Phlegmatic (Water)
4. Melancholy (Earth)

Everyone normally has one dominant temperament and two secondary ones. One temperament is latent or under-developed. Find out what is your temperament and help your team members

⁵¹ Tim Lahaye (1984) *Why You Act The Way You Do*, p. 21

discover theirs. Once you know you will be able to understand each other better and work together. Working together will become fun!

A LOOK AT THE FOUR TEMPERAMENTS – SEE WHERE YOU FIT IN:⁵²

PEACEFUL PHLEGMATIC (THE WATER TEMPERAMENT)

<p>EMOTIONALLY:</p> <p>Low-key personality</p> <p>Easygoing and relaxed</p> <p>Calm, cool and collected</p> <p>Patient, well balanced</p> <p>Consistent life</p> <p>Quiet but witty</p> <p>Sympathetic and kind</p> <p>Keep emotions hidden</p> <p>Happily reconciled to life</p> <p>All-purpose person</p> <p>Rhythmic, slow</p> <p>Slow to anger but explosive when pushed too far</p>	<p>AT WORK:</p> <p>Competent and steady</p> <p>Good at process, at seeing the whole from beginning to end</p> <p>Peaceful and agreeable</p> <p>Has administrative ability</p> <p>Mediates problems</p> <p>Avoids conflicts</p> <p>Finds it hard to be heard</p> <p>Bring good solutions at the right time</p> <p>Needs deadlines</p> <p>Good under pressure</p> <p>Takes time but finds the easy way</p>
<p>AS A PARENT:</p> <p>Makes a good parent</p> <p>Takes time for the children</p> <p>Is not in a hurry</p> <p>Can take the good with the bad</p> <p>Doesn't get upset easily</p>	<p>AS A FRIEND:</p> <p>Easy to get along with</p> <p>Pleasant and enjoyable</p> <p>Inoffensive</p> <p>Good listener</p> <p>Dry sense of humour</p> <p>Enjoys watching people</p> <p>Has many friends</p> <p>Has compassion and concern</p>

THE KEY CHALLENGE FOR A PEACEFUL PHLEGMATIC:

⁵² Adapted from CDRA manual (2000) p. 15-19 (A good book to consult is *Personality Plus* by Florence Littauer)

Try to find your fire! This will bring out more decisiveness and allow you to become more productive.

HOW TO WORK WITH PEACEFUL PHLEGMATIC IN YOUR TEAM:

Take your time and don't rush them

Move carefully and clearly

Give them the main information and avoid too many details

Give them alternatives and time for consideration

Don't expect immediate answers from them

When the timing is right, they will move

THE ACTIVE CHOLERIC (FIRE TEMPERAMENT)

<p>EMOTIONALLY:</p> <p>Dynamic, energetic and active</p> <p>Very principled</p> <p>Compulsive need for change</p> <p>Must correct wrongs</p> <p>Fears failure</p> <p>Strong willed and decisive</p> <p>Not easily discouraged</p> <p>Independent and self-sufficient</p> <p>Exudes confidence</p> <p>Hot, quick to react and impatient</p> <p>Want to be right but not popular</p>	<p>AT WORK:</p> <p>Goal oriented, sees the whole picture</p> <p>Organises well, uses time well</p> <p>Seeks practical solutions</p> <p>Moves quickly to action</p> <p>Delegates work</p> <p>Makes the goal</p> <p>Thrives on opposition</p> <p>Can be blind to their effect on others</p> <p>Impatient with meetings – have come with answers</p> <p>Can create unnecessary work</p> <p>Good at thinking, judging and deciding</p> <p>Not good at feeling, perceiving and intuition</p>
<p>AS A PARENT:</p> <p>Establishes goals</p> <p>Motivates family to action</p> <p>Knows the right answer</p> <p>Organises the household</p>	<p>AS A FRIEND:</p> <p>Has less need for friends</p> <p>Will work for group activity</p> <p>Will lead and organise</p> <p>Is usually right</p> <p>Excels in emergencies</p>

SOME KEY CHALLENGES FACING ACTIVE CHOLERICS:

Respect and acknowledge the gifts of other temperaments (especially those who are slower and less decisive)

Be conscious how you affect others emotionally

Allow for process, wider participation and ownership

Try to be less quick to judge

HOW TO WORK WITH AN ACTIVE CHOLERIC IN YOUR TEAM:

Get straight to the point and do not complain. Be clear, decisive and bring good arguments, facts and details.

Be prepared to be challenged

Present or move to clear plans

Think through or work on identifying consequences and back-up plans

Help them to understand the need to bring others on board

THE POPULAR SANGUINE (AIR TEMPERAMENT)

<p>EMOTIONALLY:</p> <p>Appealing personality</p> <p>Talkative and a story-teller</p> <p>Life of a party</p> <p>Good sense of humour</p> <p>Memory for colour</p> <p>Physically holds on to a listener</p> <p>Emotional and demonstrative</p> <p>Enthusiastic and expressive</p> <p>Cheerful and bubbling over</p> <p>Quick to anger but soon forgotten</p> <p>Curious</p> <p>Good on a stage</p> <p>Wide-eyed and innocent</p> <p>Lives in the present</p> <p>Changeable disposition</p> <p>Sincere at heart</p> <p>Always a child</p> <p>Self-conscious of their effect</p>	<p>AT WORK:</p> <p>Volunteers for jobs</p> <p>Does many things at once</p> <p>Does not always complete – get bored when novelty wears off</p> <p>Thinks up new activities</p> <p>Looks great on the surface</p> <p>Creative and colourful</p> <p>Has energy and enthusiasm</p> <p>Inspires others to join</p> <p>Cannot say no</p> <p>Concerned with interaction and conflict</p> <p>Charms others to work</p> <p>Adaptive but does not know where they stand - fickle</p>
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AS A PARENT:

Makes home fun
Is liked by children's friends
Turns disaster into humour
Is the circus master

AS A FRIEND:

Makes friends easily
Loves people
Thrives on compliments
Seems exciting
Envied by others
Doesn't hold grudges
Apologises quickly
Prevents dull moments
Likes spontaneous activities

HOW TO WORK WITH A POPULAR SANGUINE:

- Be informal and don't get straight to the point
- Create a positive mood
- Give or facilitate vivid pictures
- Don't be too structured
- Give or help them to find limits to change (they accept change too easily)

SOME KEY CHALLENGES FOR POPULAR SANGUINE:

- Follow through and complete your tasks
- Find internal and external boundaries
- Try to listen deeply

THE PERFECT MELANCHOLY (EARTH TEMPERAMENT)

EMOTIONALLY:

Deep and thoughtful
Moral
Serious and purposeful
Genius prone
Talented and creative
Artistic or musical
Philosophical and poetic
Appreciative of beauty

AT WORK:

Schedule and plan oriented
Perfectionist, with high standards
Detail conscious
Persistent and thorough
Orderly and organised
Neat and tidy
Economist
Sees the problems and expect the worst

<p>Sensitive to others</p> <p>Self-sacrificing</p> <p>Easily depressed</p> <p>Self-critical</p> <p>Can be paranoid</p> <p>Conscientious</p> <p>Idealistic</p>	<p>Finds creative solutions</p> <p>Needs to finish what is started</p> <p>Likes charts, graphs, figures and lists</p> <p>Resist change</p>
<p>AS A PARENT:</p> <p>Sets high standards</p> <p>Wants everything done right</p> <p>Keeps home in good order</p> <p>Picks up after the children</p> <p>Sacrifices own will for others</p> <p>Encourages scholarship and talent</p>	<p>AS A FRIEND:</p> <p>Makes friends cautiously</p> <p>Content to stay in the background</p> <p>Avoids causing attention</p> <p>Faithful and devoted</p> <p>Will listen to complaints</p> <p>Can solve other's problems</p> <p>Deep concern for other people</p> <p>Moved to tears with compassion</p> <p>Seeks ideal mate</p>

HOW TO WORK WITH PERFECT MELANCHOLY:

- Accept that change will be difficult
- Find experiences that link with the new situation
- Acknowledge difficulties and problems
- Give a full description of alternatives with their reasons and problems
- Don't be overly positive
- Sometimes by feeding their resistance/negativity you can provoke them to be more positive

KEY CHALLENGE FACING PERFECT MELANCHOLY:

Try to look beyond the self and for the lighter side. See change as an ally and not just an enemy.

SOME LESSONS FOR MANAGERS:

- When you understand your own temperament, then you will learn to understand others as well.

- Temperaments can reveal your open and hidden potential as well as fundamental weaknesses.
- It allows you as a manager to understand how to build on the strengths of team members and make weaknesses irrelevant.
- We all contain all four temperaments, with one being very dominant (I am choleric) and two being secondary with one lying very dormant or uncultivated.
- We are not our temperaments – they are simply cloaks that we wear or the way we present ourselves.
- Being aware of our temperaments can help us to free ourselves from any dominance they exert, to deal with their shadow aspects.
- Help us to find ways to bridge these differences.
- Help us to appreciate the strengths of all the temperaments and guide us to place people in the right positions, e.g. sanguine people are perfect sales representatives or marketing consultants. They are not good at being managers since have great difficulty managing themselves. Choleric people are born leaders and can inspire others to great action. They normally produce beyond expectation and have no difficulty overcoming obstacles and challenges. However, behind four walls they are not very effective, e.g. as administrators, finance managers, etc. They are action orientated.
- Melancholy people are very good at administration. They thrive as finance managers and like to work with figures, lists, charts, etc. They have an eye for detail and will normally see something in your policy documents that you overlooked. But they are not good leaders and fail to inspire others. They are good gatekeepers and therefore make enemies quickly.
- Peaceful phlegmatics are good administrators and normally fit well into routine jobs. Since they lack boundaries they always need to be reminded and are likely to miss deadlines all the time. They are also almost always late for everything. Don't put them into a highly pressured management position. You will set them up for failure unless they have proven experience.

A FINAL LESSON ON TEAMBUILDING – FROM NATURE!⁵³

Nature has many lessons to teach human beings about organization, if only we would learn to live in harmony with it and not in opposition to it. If only we can start to regard nature as a friend and not an enemy. One of those lessons is about teambuilding.

⁵³ Shared with me by Chrislene Sadan, chairperson of the Kensington Haven Night Shelter in Cape Town.

Have you ever wondered why geese fly in a “V” formation? You might be interested to know what scientists have discovered about why they fly that way. Here it is:

1. **FACT:** As each bird flaps its wings it creates an uplift for the bird immediately following. By flying in a “V” formation, the whole flock adds at least 71 percent greater flying range than if each bird flew on its own.
1. **TRUTH:** People who share a common direction and sense of community can get where they are going quicker and easier because they are travelling on the trust of one another.
2. **FACT:** Whenever a goose falls out of formation, it suddenly feels the drag and resistance of trying to go it alone and quickly gets back into formation to take advantage of the lifting power of the bird immediately in front.
2. **TRUTH:** There is strength, power and safety in numbers when travelling in the same direction with whom we share a common goal.
3. **FACT:** When the lead goose gets tired, he rotates back in the wing and another goose flies point.
3. **TRUTH:** It pays to take turns doing hard jobs.
4. **FACT:** The geese honk from behind to encourage those up front to keep up their speed.
4. **TRUTH:** We all need to be remembered with active support and praise.
5. **FACT:** When a goose gets sick or is wounded and falls out, two geese fall out of formation and follow him down to help and protect him. They stay with him until the crisis resolves, and then they launch out on their own or with another formation to catch up with their group.
5. **TRUTH:** We must stand by each other in times of need.

EFFECTIVE CONFLICT TRANSFORMATION:

A definition of conflict:

“...The state in a relationship or interaction where two or more people are attempting to have differing needs met in a way that creates discomfort and results in negative reactions.”⁵⁴

Please note my use of the term conflict transformation. Too many books focus only on conflict resolution, i.e. they approach it as an event or a state and not as a process. Conflict should be used as a ***process to transform***. Depending on your understanding of conflict, it can result in one of two outcomes namely, the building or the breaking of relationships. ***Constructive conflict*** helps to build relationships whereas ***destructive conflict*** (when conflict is personalised) help to

⁵⁴ M. Cielens and M. Aquino (1999) *The Business of Communicating*, p. 101

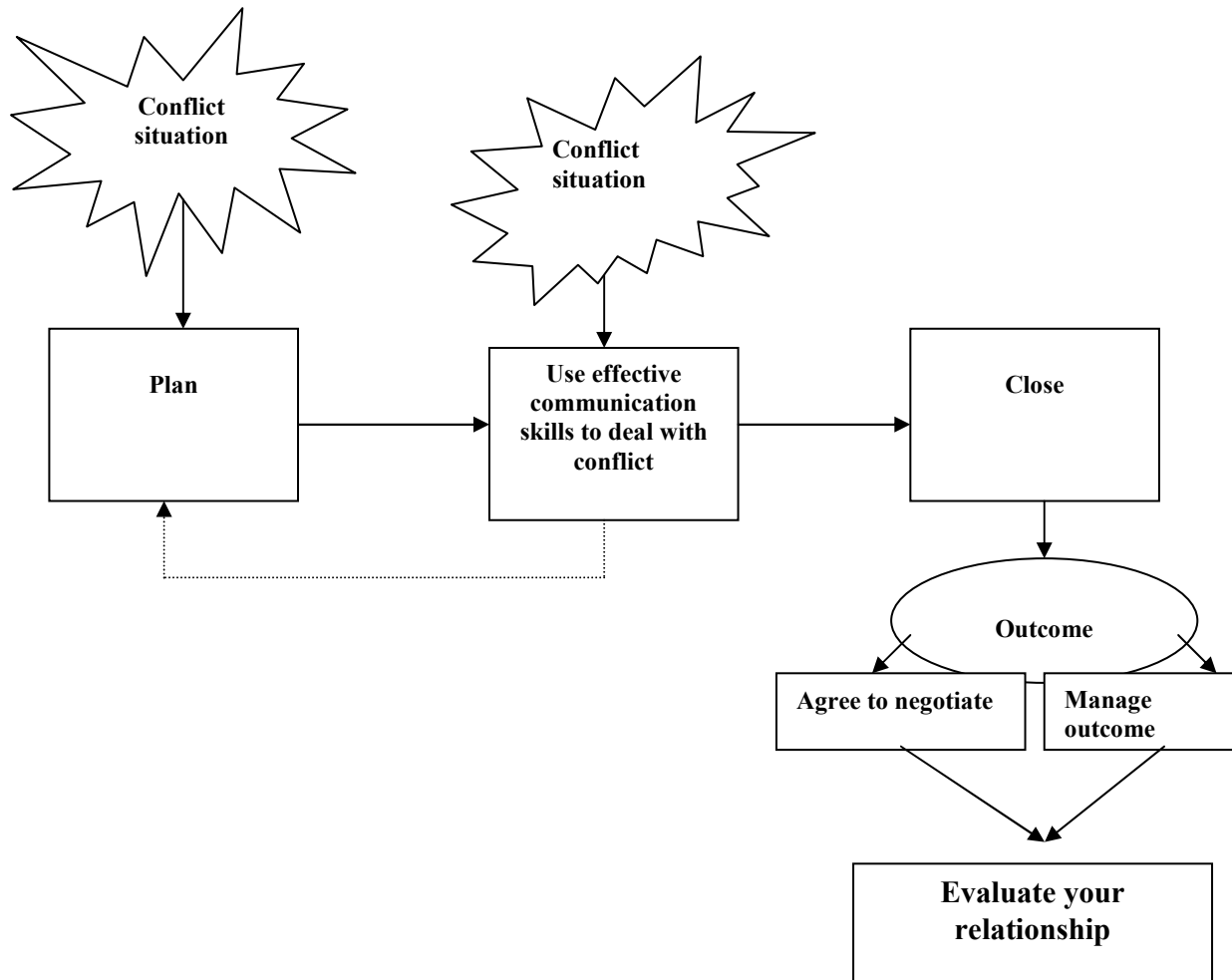
break down relationships. If seen as a constructive process that can facilitate the building of relationships then you appreciate it as a necessary dynamic in any organism, in fact as a dynamic force to move an organism forward. If not properly understood and managed, it can also destroy as happened to many good organizations in the past. Let me use the example of a car engine.

A car engine consists of many parts working together to propel the vehicle forward. As the parts work together, friction is caused. To manage the friction we use a ***lubricant*** called oil. The oil ensures the smooth working together of the parts. Remove the oil and the engine will cease! The car cannot move forward anymore. An organization also requires oil to lubricate the different parts (members working together). That lubricant is called ***respect!*** Despite the friction (or conflict), which is inevitable, there is still ***respect*** amongst the members. Take the respect away and the engine will cease; the organization will die!

SOME STEPS IN CONFLICT TRANSFORMATION:

- Encourage disagreement and promote organised dissent (bring the conflict out into the open)
- Set clear guidelines for expression of dissent for e.g. no swearing or bad language, stick to the issue, don't personalise, etc.
- Make sure everybody is heard; protect the critical voice or devils advocate; sometimes they see something that you have missed!
- Ask two people/sides in a conflict to isolate points of agreement
- Plan how to implement areas of agreement
- Postpone areas of disagreement (or make it irrelevant)
- Close effectively
- Follow up on outcomes
- Evaluate to check impact

A MODEL TO USE CONFLICT AS A TOOL FOR TRANSFORMATION:⁵⁵



⁵⁵ Ibid, p. 114

EFFECTIVE PEOPLE DEVELOPMENT

Assisting people in their development is one of the primary tasks of a leader and manager in a NPO. In fact, it is **the** task. To build the capacity of staff and volunteers ensures the perpetuation or reproduction of the organization. It ensures that the vision and mission can be taken forward when the leader has to move on. Remember, an effective leader develop others as leaders and an effective manager work herself out of a job. An organization can rise or fall based on the leadership quality. The same principle also holds true for your staff and volunteers. The quality of your staff and volunteers also determines the future growth of the organization. Remember that ***an organization can only grow if its members grow***. And as a leader, you must set the example. You cannot assist others in their development without developing yourself first (see chapter on self-development).

Well, if you are unable to help people develop themselves as leaders and managers then you are busy with the wrong work. This does not imply that everyone is capable of becoming effective leaders and managers. As I said earlier, a very few people are destined to become effective leaders and managers ***in organizations***. But where you see potential, there you must create an environment for that potential to flourish. Remember that people develop themselves. No one can develop somebody else.

Assisting your staff and volunteers in their further development starts with recruiting the right people. Where I came from we threw overboard the most basic rules on recruitment. The reason was simple. Working with marginalized youth I believed that we should give everybody who showed some enthusiasm to make a difference a chance to work in the organization and so develop themselves. For some people this worked but for the majority it was a disaster. Some of those who showed enthusiasm were in any case just looking for job to survive. That is why in most cases the wrong people were recruited with very bad consequences. And it was not their fault. They should never have been recruited in the first place. Jobs were designed for them and not the other way around. The result is that you try to cover for people's weaknesses and don't focus on their strengths. They have been set up to fail and as a leader I had to take responsibility and the blame. It is like a cricket captain who is forced to set a field for a bad bowler! You are bound to lose the game before you start playing. There is more pressure on the other players. In an NPO that pressure will be mostly absorbed by the director, causing her to lose focus on the strategic functions within the organization for which she is appointed. A dangerous situation indeed! By the time she has to get to her own responsibilities she is too tired dousing flames. Can

you really blame the member recruited by you? No! You are responsible and therefore you have to act to correct this mistake.

WHAT ARE THE LESSONS?

1. You always recruit people's strengths and not their weaknesses. You recruit what they can do.
2. When recruiting people, please protect the integrity and objectivity of the process that you follow to recruit them. Even if a family member should apply for a job, make sure that they are also subjected to the same process.
3. When someone is recruited make sure the person is put on probation, i.e. a trial period to prove herself. Make sure the person is given the opportunity to apply the strengths that they marketed to the organization. Give her an assignment to complete and then make an assessment. A period of three months for a person in an operational capacity is adequate. In a strategic position like directorship or senior programmes officer a six months period will do. It takes longer to settle down in these positions. When you are in a more operational capacity your work tend to be more technical in nature like financial administration, etc. But in a strategic capacity your work is more about building relationships and this can take time since the people you have to build relationships with are mostly outside the organization.
4. When people are appointed and do not perform, make sure the person received the necessary training to do the work. If the person did not perform despite careful induction and proper training, then reconsider the person's contract. Remember, to appoint a person is easy but to let them go in NPO's is difficult, especially when the person is high up in the organization. At this level they will normally spoil for a fight to retain their privileged position. The pull of financial reward can sometimes be very strong especially when other options for employment are limited. I know of a director who rather made sure that the entire board left but he was adamant that he will stay on despite all the evidence of mismanagement and incompetence. As I write this piece that organization is now fighting for its life with half the staff already retrenched so that enough money can be saved to pay this person and of course those who are protecting him in his job.
5. Make sure a temperament analysis is done to determine the placement of people. Self-placement is desirable but not always possible. This can take too much time.

6. When helping people to develop in their jobs, please apply the principle of ***going slow but not going low***.⁵⁶ What does this mean? Simply that it is better to work with someone for a longer time to grasp a particular skill but you must never compromise on standards. Rather work slowly but don't go low on standards. High standards in an organization allow people to respect themselves and the organization. In an organization where standards are low people lack respect for themselves and their beneficiaries.

8. When evaluating people, don't use the evaluation as a judgement tool, i.e. to get back at somebody. Evaluations should be used as a tool to facilitate people's development. An evaluation must be holistic, i.e. it must cover both work related performance and personal development. No organization employs only half a person (i.e. his work skills) but a whole person. Therefore your evaluation must be holistic because you are interested in the whole person. Where an evaluation is linked to salary increases or promotions you are bound to compromise the purpose of an evaluation. In this atmosphere people start to lie and deceive. You are bound to get all the ***wrong*** information from the ***right*** people. In fact, you will be setting people up against each other since staff members who are always at each other's throats know that during evaluation time they will get back at each other.

9. Encourage three forms of evaluation namely:

Self-evaluation: The member takes responsibility to consciously reflect on her own performance and learns to take corrective action before a structured external evaluation. When the structured evaluation takes place she will already have thought about her work, where she performed well and where she needs to improve.

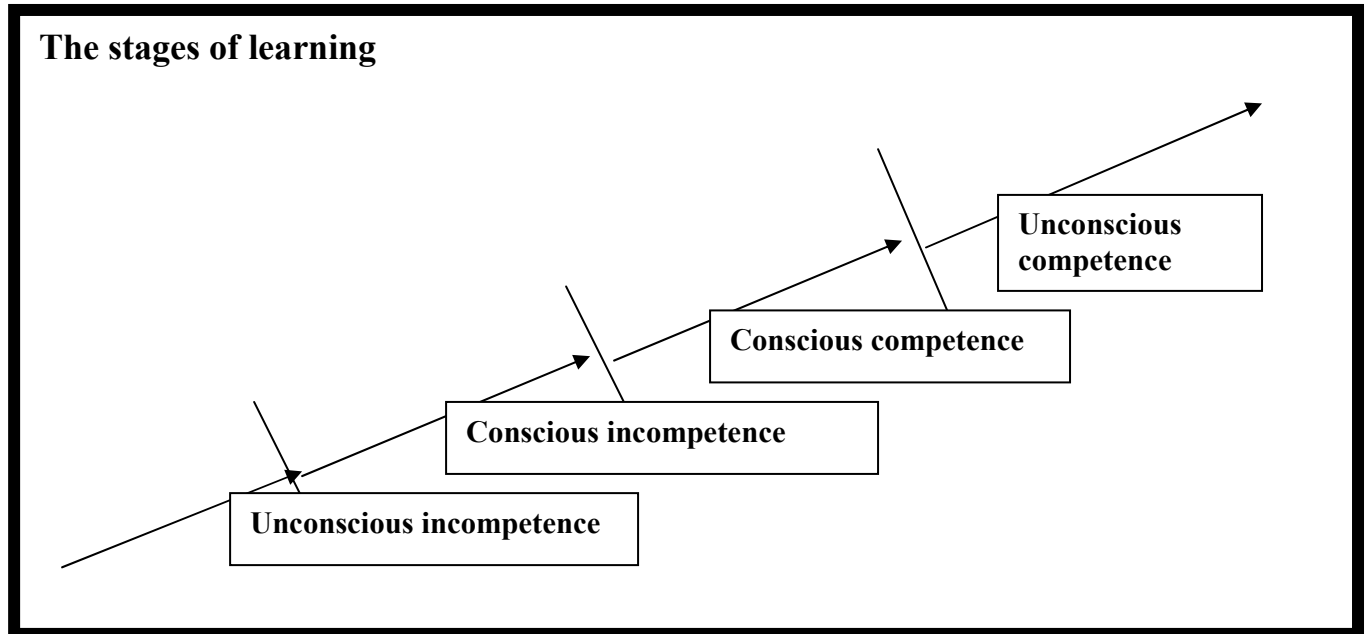
Peer evaluation: This is a person working very closely with the staff member. Avoid a peer who is also a close friend (emotional relationship). This will compromise the objectivity of the process. Friends usually tell each other what they want to hear and not what they should hear. No evaluation is however free from subjectivity but close friendships can only maximise it.

Management evaluation: If you are a manager or director supervising the member directly or the member reporting to you, then this is your task. Check the consistency of feedback about the person being evaluated. Where there are major deviations, debate this and get clarity. Since the

⁵⁶ See Peter Drucker (1967) The Effective Executive

evaluation is used as a tool of development, everybody will be more open because the purpose of the evaluation is not to penalise but to discover strengths and to build on it.

10. When assisting others in their development, especially where a hard skill is trained, please note the following stages of learning the person will follow:⁵⁷



11. When training a person to learn a hard skill and sometimes even a soft skill, remember the above stages of learning. The first stage is **unconscious incompetence**. Here the person does not even know that he is incompetent, e.g. that he cannot drive a car or write a funding proposal. She does not even know that cars exist. Once the person becomes aware, then they enter the stage of **conscious incompetence**, i.e. they become aware that they cannot do something. The third stage is when after some training they manage to address their incompetence and is able to do something e.g. driving a car albeit with fits and starts. They will still look at the gears and be fully aware of what they are doing when they drive or write a proposal. This is called **conscious competence**. The last stage is when the person, after continuous correct practice and more correct practice, simply gets into her car and starts driving without even being aware of the procedures she follows. They just write proposals without thinking too much about it. This is **unconscious competence**.

12. As a manager you will normally spent the most time with a person during their training at the 2nd stage of conscious incompetence. At the 3rd stage of conscious competence you will start to leave the person with less supervision to build self-confidence and to show that you trust the

⁵⁷ I was introduced to this model by my lecturer, Linda Cooper, during studies in Adult Education at the University of Cape Town.

person to make mistakes but to correct it himself. At the 4th stage you hardly interfere in the work of the person since they are now fully competent.

13. It is nice and good to speak of following objective processes of recruiting the right people but we all know that most small organizations cannot afford to pay big salaries and as such regard this as a luxury. Forget about having the money to finance these processes! This is unfortunately the hard reality. My experience is that many people appointed in various positions are due to past and present friendships, comradeships or party political affiliations, etc. Some people were very close in the heat of the liberation struggle and sometimes shared the same ideological thinking. How do I know this? Well, I was also guilty of such appointments! Although this is understandable it is wrong. Most of my challenges with people development were exactly with this kind of appointees who actually did not perform and were not capable of performing because this is not why they were selected in the first place. The objectivity and integrity of recruitment processes were dangerously violated and it came back to me with a vengeance! With the structural unemployment that we are faced with you can forget about people willingly giving up their positions of non-performance for the prospect of perpetual unemployment. For those who do it is more of an exception than the rule. I know of only one person in my experience that just decided to move on when he realised that he was wasting his time in the organization. The majority cling for dear life to their positions! And they will even demand salary increases and bonuses. All over South Africa we find this same phenomena playing itself out in government, especially local government with municipal managers appointed for political reasons and not because they are managerially competent. So, nobody should be surprised that they are not delivering essential services. They were not appointed for that reason in any case!

Understanding the change process with your staff members and volunteers

One thing that is constant in all organizations is change. Why? Because life is not static! The world is rapidly changing and that will inevitably affect your organization. Any organism (people, families, communities, organizations, government, business, etc.) always tends towards stagnation unless it is able to adapt to change. This is what Max De Pree said many years ago.⁵⁸ Failure to adapt to change can lead to organizational death. People are also constantly affected by change. When staff members and volunteers experience change, the following change

⁵⁸ As quoted from Allan Kaplan (1998) *Leadership and Management*, p. 3

processes may play themselves out. And remember, when normal change processes are unconsciously skipped it will always come back at you or the organization with a vengeance!

PHASE 1 - DENIAL:

This is when individuals refuse to admit any change is necessary. People will avoid confronting the issues and will not turn up for meetings, etc. Many people cannot move on from this stage without specific help, namely – they need lots of information about the reason for change. Create an awareness that they will be left behind if they do not move on. Do not confront them judgementally!

PHASE 2 - ANGER:

This is when people indiscriminately lash out in their effort to regain control. It often turns from congenial to anger (observe their language, verbal and body). People need the following support:

- Do not avoid
- Create space for expression
- Legitimise the anger
- Do not devalue the person

PHASE 3 - TESTING:

This is when people in the organization realize that avoidance is not an option and is the first phase of acceptance. Some people, if they cannot move to this stage go through loops of denial, anger and depression. When people are willing to test and try, give constant encouragement and support – break issues down into smaller steps and develop ways to implement the change (they need something concrete to hold on to).

PHASE 4 - ACCEPTANCE

Acceptance does not necessarily mean happiness. At this stage people need to be helped to feel more in control of the changes wherever possible.

REMEMBER:

Change ***always*** (or most of the time) brings about casualties. This is sometimes unavoidable. Not everybody will agree to a particular course of action. Members should be respected and allowed to voice their disagreement. If not, they will plot behind your back and find camp followers. Or they will try to cause as much damage before they leave the organization. They may even recruit allies

(when they are outside) and try to control the organization via “remote control” (using somebody else).

To manage change effectively, your organization must understand what your “changeless core” is. That means you need to know what it is that you are NOT prepared to compromise on. What do you stand for? What is the reason for your existence? What are your core principles or values? What makes you unique?

WHY GOOD MANNERS ARE IMPORTANT:

I come from an organization where I mostly worked with young people who were seriously marginalised for years. They were subjected to the crudest form of gutter education. They were literally taken from the streets and capacitated to do something for themselves. Needless to say, in the process of assisting them in their own development, there were always those who brought bad manners with them from the streets. I used to say: ***“You can take young people out of the ghetto but you cannot take the ghetto out of them.”*** It is important that you highlight the importance of good manners in an organization; the importance of respect. And it is always both ways. Good manners allow different people with different backgrounds, different ideas and expectations, to work together. This is called attitude. I don’t care how little you know but if you have the right attitude then we can work together because you are open to learning. Simple things like saying ***“thank you”*** and ***“good morning”*** before you start with your work or saying ***“sorry”*** are essential ingredients for constructive relationships. We don’t have to agree on everything but we can still respect each other. We don’t even have to like each other because the common task brings us together. If you encounter people who are rude and show disrespect in what they say and even communicate in writing, allow them rather to go and work somewhere else. They become like a cancer infecting the entire organization and before you know it, everybody is sick, including you!

SO, HOW MUCH SHOULD YOU EARN?

Non-profit organizations are not businesses. Therefore we know very little when it comes to how much staff members should earn for work done. I must admit I was also very ignorant a few years ago. You see, we are driven by the passion for people and we only want to ensure that our work gets done. Sometimes you get irritated by those who keep moaning about how much they earn. But as our organizations become more professional, salaries become an inevitable burning issue. In my experience staff members are not necessarily concerned about how much they are earning, but more about how much they are earning in ***relation to another staff member.***

THE WRONG QUESTION:

Again, in my experience, most organizations are asking the wrong question when they determine salary scales. They ask: ***“How much can we afford to pay this person?”*** Or they ask: ***“How much money do we have in our budget?”*** Both questions are wrong. The question that must rather be asked is: ***“How much is this person worth?”*** In other words, if we can afford it, how much should we be paying this person in the first place? Asking this question is important because you must establish the value of a person and the value that they will add to the organization. It is also important for the self-respect of the person. When it comes to volunteers this question is also important so that you can determine how much you are saving in terms of financial costs. That is why services rendered by volunteers must be costed and transformed into a monetary value. This will provide you with an insight about the sustainability of the organization.

Here are some guidelines from my experience to help you determine salaries:

1. Ask yourself which sector you operate in and what are the salary scales, e.g. human rights, rural development, youth development, etc.
2. Remember, the non-profit sector is not the state or the business sector. So, salary levels will drastically differ even though these days it is changing very rapidly.
3. How big is your organization? What is the size of your staff and volunteers?
4. What is the scope of your operation? Do you work locally, regionally, nationally or even internationally? An organization that operates nationally will have different salary scales for certain members than a local organization.
4. What are the core tasks of the person and what are the core outcomes?
5. What are the person's level of accountability and the level of responsibility? Remember, accountability is more important than responsibility. For example, a director is accountable for what happens in the entire organization whereas a bookkeeper is responsible for capturing financial data and preparing reports. When something goes wrong financially an auditor will not seek answers from the bookkeeper, but from the director.
6. What are the ad-hoc tasks that the person must carry out from time to time?
7. The level of experience and record of success that the person brings.
8. Any other extra qualities that will maximise the person's output.
9. What are the educational qualifications that the person brings with her?
10. The normal and abnormal hours of work that the person will have to work to achieve her outputs?
11. What are the extra material benefits that will be linked to the person's salary?

Please note:

In non-profits experience will always be more important than educational qualifications. This is so because you cannot buy experience. You either have it or you don't. The total salary package must always be determined and not just the cash value of the salary. For example, some staff members may be accommodated on the organization's property, which means that they will be saving rental expenses or they may have access to transport provided by the organization. This is extra value added to the salary. It should be costed and added to the total package since this will be an expense for the organization.

And very important, make sure that your staff members know what the criteria is for determining salaries. They don't have to know how much each one is earning but they have the right to know how the salary is determined. This is to protect them in case nepotism rears its ugly head and certain staff members earn more than others for doing the same or even less work. In certain organizations there are staff members who shamelessly earn (especially corrupt directors) horrendous salaries then the organizations are busy dying. In one case in South Africa recently the media reported about a national health organization where a director almost earns more than the state president per annum! I met some staff members belonging to this organization recently who were sworn to silence on this matter. A commission of enquiry was instituted by the relevant government department to investigate the matter. I am not so sure what there is to investigate?

EFFECTIVE REPORT WRITING:

As a leader and manager, there are two things that will define your basic responsibilities on a daily basis. That is to verbally communicate and to report in writing what you are doing in relation to your basic tasks. In so far as report writing is concerned, you will be reporting in writing most of the time to your board members and donors.

Here are some tips when preparing written reports:

1. Understand your audience that you write to
2. Plan your report writing
3. Be honest when you report. Report both successes and failures and explain how you plan to address failures.
4. Don't lie by omitting facts or distort facts to suit you.
5. Don't make excuses when reporting about failures.
6. Follow reporting guidelines if it is part of a funding agreement. If you wish to deviate from those guidelines, inform your project officer first.

7. Never write your report under pressure

8. Report writing is a focused conceptual activity and requires a peaceful environment so that your thought processes are not interrupted. Try to write your report at home where it is more quiet.
 9. Always try to prepare a first draft, circulate it for proof reading and then prepare a final draft.
 10. If other people need to submit relevant information make sure that you give them ample time to do so. If your report must be submitted in a month's time, tell them to submit the information in the second week for the latest. There will be those who will always be late so you will have another two weeks to play with.
 11. Remember that a report forms part of your structured activities. That means that you will know most of the time when to submit reports. If you miss the deadline, you only have yourself to blame.
 12. Ensure that you submit your report to your donors at least a week in advance. This allows you to check with them whether they require any changes to be made before the final submission. It also shows them that you are organised and disciplined.
 13. Make sure that your reports are always neat, attractive (include photos and stories of beneficiaries) and without any grammatical errors. Ensure that donors or your board get used to your high standards in reporting. This shows that you respect them, yourself and others who will read it.
 14. Remember that anything you write is but only an expression and extension of who you are and what you stand for. Therefore, make sure that whatever you write is an unambiguous statement of who you are!
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ORGANISING YOUR WORK FOR EFFECTIVENESS

THE IMPORTANCE OF A WORK PLAN!

In one of his many books Peter Drucker said something to the effect that “The job of a manager does not begin with managing other people. It begins with managing himself. If that is not done, nothing else is likely to be achieved. It is not difficult to be an effective manager. All it needs, bluntly, is hard work. It needs the willingness to acquire the right habits, and the practice to make these habits second nature.” The necessity of leaders in non-profit organizations to consciously organise their work is becoming more and more vital. The importance of work plans has been seriously downplayed reflected in the behaviour of certain leaders and managers I worked with over many years. This is what I observed in my experience:

1. A focus on just ***keeping busy*** for the sake of keeping busy
2. Managers do their ***own thing*** without any relation to their agreed area of work responsibility
3. A lack of focus on the ***quality*** of their output
4. Managers become side tracked by ***unforeseen*** developments
5. A ***lack of prioritisation*** on what is ***important*** and what is urgent
6. A lack of ***division of labour***, i.e. two or more people would be doing exactly the same thing
7. Undisciplined members ***piggy back*** on the hard work of others
8. Important tasks are ***left in abeyance*** without any explanation
9. ***Self-development*** is either absent or feature as a necessary evil

When managers are required to supervise the work of other members, it becomes imperative that they pay urgent attention to the practice of organising their work in order to be more effective.

WHY A WORK PLAN IS IMPORTANT?

1. IT IS YOUR COMPASS:

Can you imagine walking in a constantly changing and unknown jungle trying to reach your destination without a map? Well, a work plan is a map in the organization helping you to reach your destination. And your destination is to deliver the results in relation to the commonly agreed objectives of the organization that are linked to your strategic focus and vision. If you fail to take your map seriously, spend time to prepare it, study it and revisit it regularly, then you are going to

get lost. The results you deliver are then by default and not by design. In this case you will mostly dissipate your energies and lose focus. This is why some managers can go to work most of the time without any idea of what they will be doing.

2. FOCUS ON YOUR CORE TASKS:

It allows you to focus on your core tasks, i.e. the tasks for which **only you** are responsible. This is what you are paid to do. A principle of effective management is never to do something that someone else can do.

3. IDENTIFY AD-HOC TASKS:

These are tasks that arise in the course of your work. Most of the times these are tasks that can be performed by other people and that is when you learn to delegate to the right person and follow up because it remains your task until it is fully completed. When you delegate please make sure that:

1. You delegate to the **right person**
2. The person understands what **needs** to be done
3. The person has the **capacity** to deliver
4. The person has **access to the resources** necessary to complete the task
5. The person knows **where to get support** if required
6. The person understands the **deadline to the task**
7. The person understands the **importance of the task**
8. The person understands what will happen if the task is **not completed**
9. **Follow up** is done to check task completion

4. DEALING WITH THE UNFORESEEN:

To deal with the unforeseen you need to see and understand what you **must** do and more importantly, what NOT to do. That means you need to know that which cannot be chopped and changed. In this way you can prioritise between what is important and what is urgent. Since no plan is perfect, work plans must allow for flexibility to deal with the unforeseen. At least 25% of your time must be devoted to the unforeseen. So, it does not help to keep busy just for the sake of keeping busy! In management the focus is on quality of work and not quantity. The higher up in the organizational hierarchy of responsibility, it is more important to do less but to achieve more. That means that it is not important how busy you are but **what you are busy with** in the first place. The question that must guide you is: **“Am I adding permanent value to the organization and its work or just killing time?”**

5. SELF-MONITORING AND EVALUATION:

This is self-explanatory. A plan always allows you to monitor and evaluate your own work. In this way you can take self-responsibility for your *own* work instead of expecting others to constantly supervise you like a policeman or woman. To expect this is to suffer from a dependency syndrome. Of course this does not obviate the need for external monitoring and evaluation. But it must start with you first. If you do not know how to do it, ask other managers to help or guide you.

6. OBSERVING TRENDS IN WORK STRUCTURES:

Work plans allow management to observe trends in the work structures of members. Here they look for changes that are once off or continuous. When the latter happens then intervention is required in terms of long-term change of a work structure. It may mean appointing a new person or getting a volunteer to take on some of the tasks of an individual. It could also mean redeployment or a change in the responsibility of a member. The cumulative effect of such changes directly influences your staff development programme. It also allows one to check whether a staff member lacks focus or whether the focus of the organization in a particular area of work is unclear. Correct identification of the problem is therefore facilitated.

7. FACILITATE SELF-DEVELOPMENT:

An important component (if not the most vital one!) in your work plan is your self-development. No organization employs one half of a human being. They always employ a whole human being. So your development must be holistic. It is not only important to focus on your job responsibilities but also you as a tool to execute those responsibilities. For example, of what use is someone with a beautiful and impressive work plan but not able to execute it due to perpetual bad health? This is useless!

I used to work with someone who suffered from diabetes. And we all know it is a lifestyle sickness. Strangely, the section dealing with self-development in his work plan was usually always empty! I always asked him of what value he thinks his work plan was if he is lying in a hospital. Well, physical health (regular exercise, eating and drinking right, adequate sleep) is important. Mental health (reading, writing, studying, reflection, planning and visualizing) is important! Relationships are important! Proper handling of personal finances is important! And so on (read section on personal money management).

THE PRACTICE OF WORK PLANS:

Managers who plan to use a work plan as a tool of organising their work must please note the following:

1. A work plan is submitted every three months, i.e. four times per year. It is submitted in the 2nd week of the new quarter for discussion and clarification.
2. A work plan is filed after corrections have been made and feedback provided.
3. An interim evaluation is conducted after the first 8 weeks to check that you are still on track and to intervene if necessary.
4. A final evaluation is conducted in the second week of the new quarter.
5. Your work plan must ensure that your planned tasks are linked to the strategic vision of the organization.
6. There must be continuity between your new and previous work plan.
7. Your work plan must clearly identify your core, ad-hoc and routine duties.
8. You must constantly refer to this map to check that you are still doing the right thing.

In my experience there are not many organizations that attach much importance to people organising their work properly in an NPO. Needless to say, in the corporate sector this is vital. You must justify yourself as a cost to the company otherwise you are out! Remember what Drucker says. If you want to become effective, start practising the right habits. And as a leader and manager right habits start with organising your work and taking responsibility for it. That means, taking your work plan seriously!

EXERCISE 3:

1.1 Think about a time when you faced a major change. Look at the four stages as outlined above and describe in detail how you went through the four stages.

1.2 Think of a time when you delegated a task to someone else. Look at the different elements of delegation and write down which ones you followed? What was the outcome of the delegated task?

1.3 Think back to your last meeting. After having read how an effective meeting is run, write down whether you think your last meeting was successful or not and why?

1.4 Write down who are the different teams in your organization. Write down why you think the teams are effective or not. What can you suggest to improve team performance in your organization?

[illegible]

1.5 Conduct a temperament test on yourself. Based on this test, what do you think is your dominant temperament? How does your temperament help you in your leadership role?

[illegible]

Your team members don't care how much you know until they know how much you care!

Have the right people in place then step back and let them own their work!

The trouble with doing nothing is that you never know when you are finished!

Do what you can, with what you have, where you are!

Success is not measured by the position you have reached in society but by the obstacles you overcome to get there!

The great thing in this world is not so much where we are, but in which direction we are moving!

CHAPTER FOUR

IMPORTANT LEADERSHIP RESPONSIBILITIES

**“A great leader never sets himself above his colleagues except in
carrying responsibilities!” (John Maxwell)**

Leadership and management in the non-profit organization

Chapter 4: Important leadership responsibilities:

In this chapter I will look at the following responsibilities of leadership in the non-profit organization namely:

- *Professional fundraising and resource mobilisation to achieve organisational objectives*
- *Organizational sustainability*
- *Effective proposal writing*
- *Best practices in developing donor partnerships*
- *Some sustainability strategies*
- *“Good” and “bad” donors*
- *“Good” and “bad” recipients*
- *Taking relationship responsibility*
- *Effective board development*

ABOUT PROFESSIONAL FUNDRAISING:

LET US GET RID OF ILLUSIONS!

Fundraising forms one of the most important activities in any organization. But how many of us are trained in the art of raising and mobilising funds? When confronted in meetings with the appointment of a fundraiser or treasurer, how many of us bury our faces, too scared to be nominated? We simply hate fundraising, too much aware of the huge responsibility that such a duty imposes on us. With so many organizations issuing appeal after appeal for funds and a public that is suffering from donor fatigue, everybody dreads the responsibility of being a fundraiser.

FUNDRAISING IS NOT AN EVENT!

With many organizations struggling to make ends meet, a proper understanding of fundraising becomes imperative. There are too many worthwhile development projects collapsing everyday as a result of a lack of funds. We need a more holistic and integrated understanding of this process we call fundraising. Yes, it is a process not an event. Too many of us confuse fundraising with huge carnivals and bazaars, etc. Yes, they all have a place in this process, but fundraising is not an event.

The aim of this chapter is to show you how this process operates. It is to bury all the myths about fundraising. It is to capacitate you with the most basic tools of raising funds in order to allow you to build and sustain a healthy organization. It is to show you how fundraising forms but one component of an entire organization and how this process impacts on other processes in the organization. To understand all these things become important because we do not raise funds for ourselves but to promote the cause of development.

WHERE DO YOU STAND?

After this chapter I hope you will realise that fundraising is everybody's business. There may be someone doing the co-ordination but essentially we are all fundraisers and in an organization we can either facilitate or impede this process. But nobody is neutral. While you read this chapter, I want you to ask yourself "Where do I stand in relation to this process?" Whether you like it or not, we are all involved in this process.

THERE ARE NO QUICK FIXES:

It is not my intention to provide you with quick fixes about how to make a quick buck. If this is your expectation, then you are reading the wrong book. I can only share with you the hard work involved in the fundraising process. If you want to know how much money can be made by acquiring the right tools and techniques, then you are also reading the wrong book. Why do I say this?

A MYTH:

Yes, it is a general myth that fundraising is only about money. It certainly involves money, but fundraising is not **only** about money. In fact, fundraising is **not** even about money at all. Money becomes only a by-product of this process. Essentially fundraising is about building **trust** between people. It is in this process of building trust that people develop the desire or need to **give**. And to give becomes a powerful form of human expression. This form of human expression has been with us since time immemorial.

JUST THINK ABOUT IT:

To test the above idea, just think about a recent incident where you had to help someone. Maybe you borrowed someone money, gave advice about something, spent time with a friend or relative resolving a problem, did somebody a favour like providing a lift, or anything else. What do you think was crucial in your desire or willingness to assist? You will agree with me that the crucial element was **trust**. There may be a myriad of other reasons, but **trust** must have been present.

WHY PROFESSIONAL FUNDRAISING? SOME CURRENT DONOR TRENDS

Professional fundraising is a relatively new concept in the African context. Why do you think are organizations in Africa compelled to focus on fundraising as a professional activity? Yes, there are many factors. Let us examine a few trends.

1. PROLIFERATION OF ORGANIZATIONS:⁵⁹

In the case of South Africa, it is estimated that there are approximately 101 289 organizations in South Africa that can be classified as non-profit organizations. Of this number 53 929 are classified as informal/voluntary organizations. 11 459 are classified as section 21 companies, 16 105 are classified as religious organizations. Trust and foundations are estimated at 3891, co-operatives at 644, political parties at 2448 and stokvel/burial societies at 2472.

2. SOCIAL PROBLEMS:

We are all aware of the social problems confronting our society as a result of the apartheid system of oppression and capitalist exploitation. We are all aware of the massive unemployment problem, decline in health care, formal education, drug abuse, gangsterism, etc. All this is compounded by a weak economy that is shedding jobs, privatisation, casualization of labour, the move of companies into off shore investments, etc. To make matters worse, governments are cutting back on subsidies and spending more on weapons, i.e. they are investing in the industry of DEATH!

3. DECLINE IN FOREIGN FUNDING:

Since the 1994 elections, foreign funding has steadily been flowing out of the country. International donors are saying that we now have a democratically elected government who must solve our problems for us. Those who are still with us are developing exit policies as they are planning to move out. Many Western governments are now looking at other regions of the world such as Eastern Europe and Russia to invest development aid. Already South America and parts

⁵⁹ Mark Swilling and Bev Russel (2002) *The size and scope of the Non-profit Sector in South Africa*, p. 21

of Asia have experienced a massive decline in foreign funding over the past few years. Many foreign governments providing development aid to South Africa, have entered into bilateral agreements. This means that they are giving directly to the host government who is responsible for disbursing financial resources to other organizations. Some have entered into multilateral agreements meaning that they give both to government as well as to NGO's.

WHAT HAS BEEN THE RESPONSE OF THE NGO AND CBO SECTOR?

Indeed, what has been the response? Many organizations that failed to adapt to changing conditions totally collapsed. South Africa became a graveyard of such organizations. Having been pampered by international donors who used them to get rid of apartheid, they lost their purpose after the 1994 elections. Big organizations became victims of this strategy. Those who did not collapse are now in the throes of serious internal conflict and squabbles, uncertainties and general confusion as they try to survive. All their weaknesses that were concealed during the days when external funding was still in great supply have now surfaced. And it has surfaced with a vengeance! Lack of management and leadership capacity, lack of vision and proper mission, lack of planning skills, staff and volunteers who are demotivated with a low morale, no proper accountability systems and many more are haunting these organizations. Is your organization also haunted by it?

The organizations that survived were few. They were forced to refocus, reposition themselves and started to network. **Coalitions** and **consortiums** were formed and NPO's started to focus on their collective strength. Lobbying became the new buzzword as these organizations started to advocate for a more enabling environment. Many of these organizations started to focus on their human resources by building staff capacity. Volunteers were recruited to save on salaries and other overhead expenses.

TOWARDS FUND DEVELOPMENT AND RESOURCE MOBILISATION:

For the past few years, many NPO's have realised that it is not just enough to go through the ritual of setting targets each year, sending out proposals to donors and hope that they will respond positively. There has been a rethink of your traditional fundraising methods. Now people are referring to fund development and resource mobilisation. This is a more integrated approach and examines all the needs of the organization over a 3-5 year period. You then start a comprehensive educational campaign to inform your relevant stakeholders about your needs to the point where they will want to support your work. This is a more long term approach and more

proactive. This does not mean that fundraising is obsolete, but it is limited. Resource mobilisation looks at all the resources in and outside the organization to assist in achieving its objectives.

THE 8 PRINCIPLES OF FUNDRAISING:

1. FUNDRAISING DOES NOT MEAN TO BEG!

How many people believe that fundraising means to beg? Yes, there are many who think like this. Maybe you are also one of them? Well, fundraising does not mean to beg. If this is your way of thinking, then you are in the wrong business. You are psychologically disarming yourself even before you go into battle. How can you think like a slave or a victim in the world of development? It is a contradiction.

When we fundraise then we do so because we want to build relationships in the service of development. Building the capacity of others to develop themselves is our business. Not begging. We should be proud of this vocation. Nay, it is a calling, a mission in life! Others are too busy making profits out of the labour of others, while we are facilitating development. We have nothing to be ashamed of. There is no reason to beg.

When others refuse to give in the process of us *asking*, then we must respect their decision. We may disagree with it and try to persuade them to support, but they have their right to say no. Some may say no today only to say yes tomorrow! The point is that there is nothing wrong with saying no. When others say no then they actually force us to think creatively of alternative ways to secure resources for development. They compel us to look at ourselves and prevent us from becoming over-dependent. In any case, we all say no to others almost on a daily basis in our personal lives!

2. IT IS PEOPLE WHO HELP PEOPLE:

Just think about it. In the end fundraising is a normal human activity taking place everyday, human beings giving to other human beings. To create a new society many of us gave our lives, sweat and blood, knowledge, time, etc. When aunt Susan borrows sugar from aunt Gwen who is her neighbour, then they are raising funds. You do not necessarily give to a group of people or an organization. You give to a person.

3. IT GIVES OTHER PEOPLE THE OPPORTUNITY TO GIVE:

How many people in your community would like to become part of your cause? But they simply do not have the time. Their lives are preoccupied with many other concerns like their children's future, their jobs, their health and so on. Many are teachers and other professionals. Some are business people. Fundraising provides many of these individuals with an opportunity to get involved. By giving to your organization, they are expressing themselves. They are saying **yes** to your project or organization. And any contribution, however small it may be, is a vote of confidence in your organization!

4. IT MEANS TO ASK:

Fairly straightforward, isn't it? Not really! How many people are afraid to ask? They are brilliant fundraisers, but when they must clinch the deal (so to speak) then they falter. They do not have the courage to ask. Sometimes, they say to themselves: "I have asked so many times, how can I ask again?"

5. IT IS HUMAN NATURE TO GIVE:

This is so true! Even the worst criminal has it within her/him to give. Deep inside of you, you have the desire to give. All human beings grow up with this need for self-expression. It is our ability to ask (how we ask, when, what for, how much, etc.) that unleashes that nature in human beings.

6. IT MEANS BUILDING FRIENDSHIPS:

This is very important. We do not only ask for resources when we are in need. We do not only run to people when **we** are requiring funds. When things are going well, then we vanish. They do not hear from us. Behind any donor (a person who gives) is a human being, someone with a life of his/her own. Try to find out more about this person. Find out when they celebrate their birthdays or what are their hobbies. Get to know the person. In short, build friendships! When you are in need, where do you go? Yes, you go to your **friends**! And sometimes your parents, husband or wife are your most reliable friends! When I work with clients, I request them to jot down the name of their personal best friend. I then ask them to write down all they know about this best friend in terms of childhood, educational background, career development, family life, etc. I usually find that the lists are endless. Then I ask them to do the same with the person representing their most important donor. If I find two sentences then that is too much! Get to know the people behind your external donors. They are also your friends.

7. FUNDRAISING MEANS TO PLAN:

I am always shocked at how many organizations are unable to tell you what their specific targets are for a particular year or period. How can you measure your success unless you work according to clearly defined objectives or targets? Planning is absolutely crucial in the fundraising process. Success or “failure” can only be measured in terms of what you planned to achieved. Many organizations do not even know about budget control meetings, financial planning meetings or strategic planning sessions. How organizations can survive without these basic tools of control and implementation boggles the mind!

8. SERVICING:

Have you heard about the “grab-and-run method”? Some of you may not have heard about it, but you may have used it in practice! Unconsciously of course! This method implies that you raise funds and then disappear. The donor never hears from you again. Until your organization finds itself in the next financial crisis of course! Make sure that you keep your donor up to date with the most current information about your project. Send them newspaper articles, newsletters, letters, photographs, etc. Feed them with information. An informed donor is one that will give. And they will continue to give. Donors want to know what impact their funds are making. Nay, they have the *right* to know! Don’t only think that your progress report will inform them. That is not enough. Design special donor updates. Show them that you *want* them to know!

THE SELF TEST: ARE YOU PREPARED TO FUND YOURSELF?

Sometimes when I work with a client who is preparing funding proposals for donors, then I always let them do a self test. What does this mean? It simply means that you learn to submit your funding proposals first to yourself as an organization and then decide if you are prepared to fund yourself. If you should have access to the amount of money being requested in your funding proposal or even if it is your own personal money, are you prepared to sacrifice it for your organization? Get a committee together in the organization and play out this scenario. If, for any reason, there is doubt amongst your own members about the feasibility and “fundability” of your project, then please do not submit it to an external donor. Do not waste their time if you are yourself in doubt about your own proposal.

This may sound quite simple an idea but I must still find an organization that practices this. There is either no time to do this or we simply don’t care. I have encountered organizations where I will never even dream of risking my own money on them. But then these same organizations would apply for funding as if everything is fine. There are some organizations where there is no board, and if they have one it is more of a rubber stamp for the director, where projects are closed down,

reducing the value being added to its target group, petty corruption in the form of inflated salaries voted to staff members, no performance, loans being dished out to staff, etc. And then you find that these organizations would still apply for funding! They would even go so far as to accuse donors of not taking them seriously! This may sound rather ridiculous but it is true.

THE PLANNING CYCLE:

There are many planning tools on the market these days. Many of them have been adopted from the corporate sector. Many of them are complex and a large number of organizations don't follow them at all. I believe in keeping it simple and straightforward (KISS).

UNDERSTAND YOUR EXTERNAL ENVIRONMENT:

You must first understand your external environment. Some people form organizations just for the sake of it. The **NEED** is not clearly identified or taken for granted. They lack an understanding of basic market principles. Remember, your organization is a product. It cannot sell unless there is a need for it.

THE VISION AND MISSION:

Out of the need to exist develop the vision and mission. The vision is your dream of a reality that does not yet exist. Your mission is the implementation of that dream. It is the day to day, minute by minute actions that you take to realise that dream.

ASSESS THE NEEDS OF YOUR ORGANIZATION:

Once your vision and mission are clearly defined and correct, then you need to establish what you require to realise your dreams. What are the needs of the organization? And not only the visible or material needs, but also the invisible needs like training of staff, etc.

DETERMINE THE COST IMPLICATIONS:

Now it is time to determine how much it will cost you to satisfy your needs as an organization.

DESIGN A STRATEGIC PLAN:

Now you need to determine the resources that you have available measured against the objectives that you set yourself. Make sure your objectives are SMART – that means it must be:

S – SPECIFIC

M – MEASURABLE

A – ACHIEVABLE

R – REALISTIC

T - TIME-BOUND

ACTION PLAN:

Your action plan must clearly define the following:

What is the issue - what needs to be done

How will it be addressed - methods

By whom – people resources

When will it be addressed – timing

What resources will be required - material resources

Quantify your actions and the results you hope to achieve – how many?

Identify the pre- and post activities – what will happen before and after the activity?

Understand why you want to take a particular action – your underlying assumptions

To whom will you account – where will the buck stop?

Any follow up that was carried out – what has been done already?

IMPLEMENT THE ACTION PLAN:

Here you need to move into action. This means carrying out the action plan. This involves basic management functions such as delegating duties, double check, making appointments, attending meetings and clarifying expectations, etc.

UNDERSTAND THE FEEDBACK:

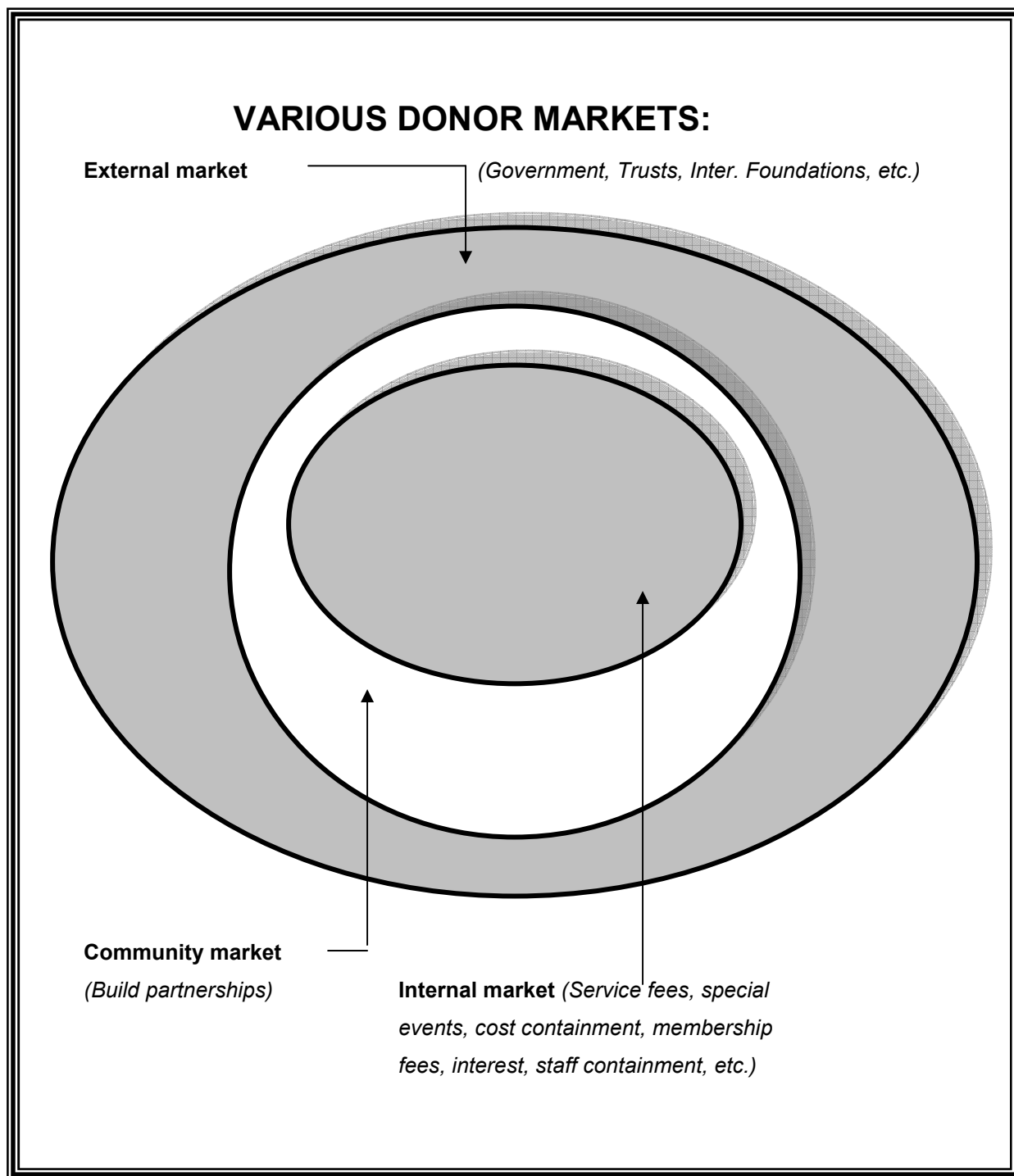
Out of this process a lot of information will be generated. We call this feedback. It means you will be receiving and giving information. What is important is to act on this information. Information may come to you formally or structured (in meetings, during consultations) or it may come informally (in passing). You need to decide what information is useful and what to ignore.

EVALUATE THE RESULTS:

Your actions will lead to specific results. Evaluate those results. Are you still on track with your plan or is there a need for a change in strategy? How far are you from your target? Have you been too optimistic or maybe too pessimistic in your projections?

Please note:

When your organization is fairly new, then you may have to first complete a full cycle of this process. Later on, you may skip some of these stages.



THE INTERNAL MARKET:

This market is within the organization. This reflects the activities over which the organization has control. Only the members know how much they can sacrifice for the organization. You have control over your services and other activities. Examples of generating income in this market include cost containment strategies like recycling paper, not wasting electricity, not abusing the telephone, etc. Your biggest expense will always be your staff costs, so try to contain staff expenses by not employing full-time staff when a part-time staff member is required. Or look for a volunteer if feasible. Your internal market is important because you can exercise some control over these income generating and saving activities.

THE COMMUNITY MARKET:

This market refers to your ability to raise funds in your broader community. Raising financial resources may not be the most important objective here. It may be more important to ***build partnerships*** in this circle of organizational influence. Here you may be able to access volunteers with specific expertise and other material resources. In this circle your primary objective should be to build the image of the organization. In this market you also have access to professionals, schools, colleges, universities, business people, churches, local government, etc. Look at your programmes and projects and ask yourself how can we form strategic partnerships with them. And remember, an effective partnership always starts with you asking what you can do for the other party, how your organization can add value to them. This is the fundamental basis for a partnership. And remember, building partnerships takes time. You must be patient.

THE EXTERNAL MARKET:

This market refers to the foreign donors, corporate donors, etc. This is where you may be able to generate most of your funds. This is where your most skilled employees should be working and spending most of their time. Preferably your director or most senior person after her/him should be doing this work. Be careful about appointing consultants in this position. They can definitely be a resource. But they must work with someone senior in the organization and supplement what is already happening. To abdicate this responsibility is dangerous and reckless since the lessons and experiences being acquired in this department of work will never filter down to the rest of the organization. The main tool in this market to access donors will normally be your funding proposal. Writing funding proposals is a conceptual task requiring a deep understanding of how the organization works. This is why not everybody is fit to work at this level. They need to be trained first and some people may never be able to work at this level even after intensive training.

WHY DO PEOPLE GIVE?

Many people give to organizations for different reasons. During your donor cultivation you need to find out what are the fundamental reasons for people to give to you. This is important since the reasons for giving (*the why*) determine *what* you ask for.

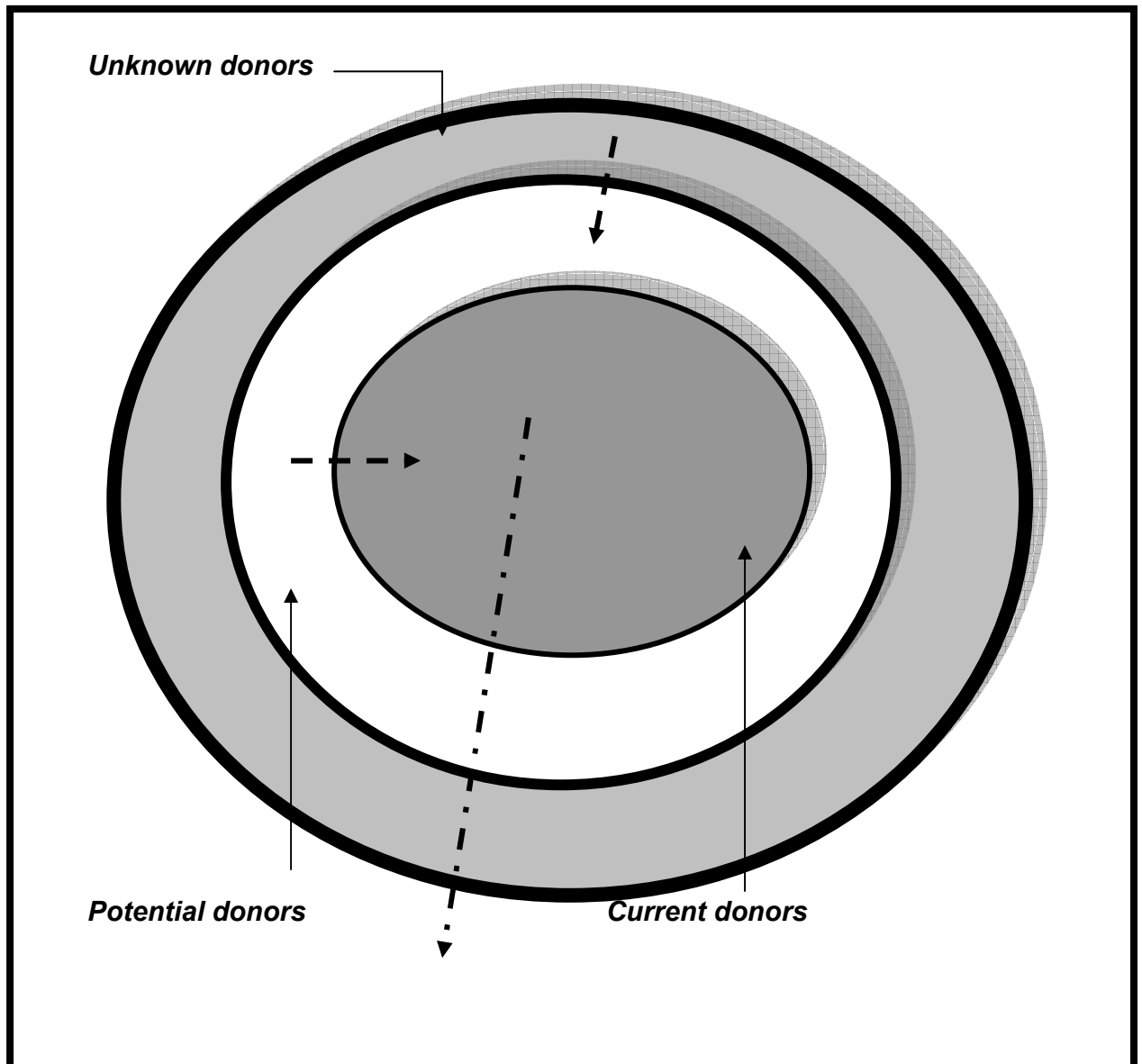
Here are some reasons why people give:

1. They like what you do
2. For marketing purposes
3. Because you've asked
4. They have resources to share
5. They like you (as a person)
6. For tax purposes
7. There is something in it for them
8. Returning a favour
9. Identify with your cause
10. You submitted a very good proposal
11. You address real needs
12. Buying influence
13. They feel guilty
14. For religious reasons
15. It is part of a community social investment programme
16. They want to identify with success
17. Fear
18. Because they have money
19. You have helped them
20. It is the flavour of the month

EFFECTIVE DONOR MANAGEMENT

When many non-profit organizations collapse financially, I always find the reason for this collapse in their failure to understand proper donor management. Read this carefully and find out if your organization follows this process. If not, you may be in big trouble already.

This is how it works:



Please note:

- You always deal with 3 types of donors namely, the current-, potential and unknown ones. The current donors are the ones funding your organization at the moment. They have signed funding contracts with you and you are reporting on how you spend their money.
- The potential donors are the ones that know about you but are not funding you yet. There is the potential or the possibility for funding since the donor knows about your organization and its work. Maybe with some more donor cultivation this possibility of funding will become a reality.
- The unknown donor does not even know that you exist. This is where your marketing and communication strategy comes in. It is to create the visibility amongst different stakeholders about the work that you do. Once donors know about you then the potential will always exist for funding.

Some lessons from the above:

1. Always remember that your current donors will most likely **NEVER** remain with your organization forever. The natural gravitation or movement of donors is **OUT** of the current donor circle. It is common practice for donors to limit their period of funding for at least 3 years. After this period they will expect you to become either fully or partially financially sustainable.

2. It is therefore important that you do not wait for the funding period to lapse before cultivating new potential donors. Remember, donor cultivation is an ongoing process and never stops. This is why we say that resource mobilisation is a 24-hour job. As current donors move out new ones must move into the current donor circle. Your cultivation of unknown donors is also a continuous process. It never stops. Failure to understand and practice this will lead to organizational suicide. This is also why it is important that those entrusted with leading organizations should be free to spend as much time on this as possible. In this area of responsibility, you can never do enough.

STRATEGIC COMMUNICATION

So, what is the process of communicating with donors and what do you want to achieve in the end? Strategic communication refers to a process of communication that is conscious and planned. There is a strategy involved with clear outcomes to be achieved. We practice this form of communication everyday without realising it.

A simple definition of strategic communication is:

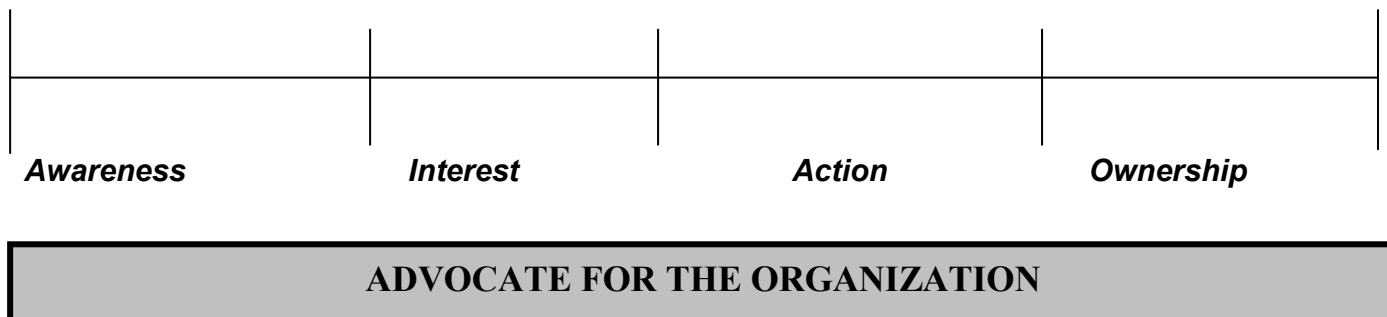
To request the right

- **thing** from the right
- **person** at the right
- **time** in the right **manner**
- to get the right **result**
- to fulfil the right **need!**
- to make relevant **impact**

And that's it! When you skip or ignore any of the above, it is most unlikely that you will achieve the right result and hence fulfil the right need. Just think about this example in your daily life:

Your child requests that you assist her with her homework while you are watching your favourite movie. Not only this. But the child also screams at you! What is going to happen? It was the right request to the right person but at the wrong time and in the wrong way (screaming). There is likely to be no positive result and hence no fulfilment of the need and hence no impact.

The same happens to donor cultivation. There are various stages in the strategic communication process, namely:



1. Awareness: Before any donor can give to you they first need to know that you exist and what you do. That awareness can be achieved by various means. With the ladder of effective communications I will explore various ways to create awareness amongst donors about your organization.

2. Interest: It is one thing to create awareness but something else to cultivate an interest in your donor to move to the next stage. Many donors may know about you and your work but have no interest in what you do. You make them develop interest in your work by highlighting your focus

areas, success stories and the impact you make. You sell to them innovation in addressing needs, reliability, accountability, transparency and honesty. In short, you sell integrity to them.

3. **Action:** This is when donors approach you for possible funding, sign funding agreements and actually starts supporting your work. How you deal with your donors during this stage, will determine if they move to the next stage. If you practice good donor relationship building in terms of reporting, openness, keeping to agreements and asking for permission to deviate from criteria initially laid down, getting the donor involved in your work, then the donor relationship will become strong. The donor will then move easily to the next stage. Should anything go wrong and they feel upset about certain malpractices it is unlikely that they will move to the next stage.
4. **Ownership:** This is the stage where the donor feels like they are part of your family. They want to share your success with you. They feel that a part of them has been invested in your organization and are now ready to move to the next stage.
5. **Advocacy:** This is the final stage where a donor strongly identifies with your organization or project and they become advocates for it. That means that they are prepared to sell your organization or project to other donors or potential partners. Remember, the best people to sell what you do are those who have experienced your work. Get people involved! Get them onto your board or committees. Let them experience what you do. I used to work with a donor who constantly peppered me with newspaper articles and always referred me to other donors. This was a sign that she was an advocate for the organization. Our organization received funding for about seven years from this donor!

I am always approached by many organizations with requests to assist with fundraising and proposal writing. Needless to say, by the time when they approach me they are already in a financial crisis. When this is the case, then I am fairly certain that they do not have a financial problem. They are most likely to suffer from a **management problem**. No leader can wait and wait and be aware of all the signs of impending financial crisis and not do anything about it. Remember, effective leadership is not about handling a crisis well. It is about anticipating a crisis! My approach is therefore not to help with funding proposals and a fundraising programme, but to conduct a sustainability analysis for the organization. Fundraising and proposal writing are a short-term response to long-term challenges. It is like someone who is in debt and who goes to a loan shark. It is never a long-term solution. It is patching up the problem. The person who is

continually in debt does not have a money problem but a problem of lifestyle. Giving the person money without change in lifestyle is dangerous.

In the same way an organization without a well thought out sustainability strategy and well-monitored action plans with collective buy-in from board down to staff and volunteers, does not have a financial problem but a management one. Of course, there can be the occasional situation where despite a sustainability strategy you still struggle to recruit the right donors. But this is an exception. But then a good sustainability strategy will have made provision for a back up, because you always anticipate the worse. Following is a particular approach to understand sustainability followed by a certain approach to financial management.

LET US LOOK AT ORGANIZATIONAL SUSTAINABILITY

A DEFINITION:

Allan Kaplan defines sustainability as:

“... achieving the ability to keep moving, changing and achieving one’s response-ability to inevitably shifting circumstances, rather than assuming that those circumstances will ever be finally and successfully resolved, once and for all.”⁶⁰

Viewed from this perspective, it becomes clear that sustainability is **not only** about financial sustainability. It goes beyond finances to strategic organizational issues. Of what use is it anyway to have a lot of money in your bank account just to find out that you are not making impact in your organizational interventions? Or that you are unable to manage your finances effectively leading to the potential for financial mismanagement and hence a serious lack of donor trust?

Organizational sustainability is therefore a constant interplay between the need, solution and capacity. Those in leadership must constantly check the relationship between the 3 components. *(See the Organizational Fit Model)*

MANAGING FUNDING GAPS AND SUSTAINING YOUR ORGANIZATION FINANCIALLY

This is the process I followed in managing funding gaps. We always paid salaries despite donors paying in their money later than promised. A funding gap period can be different from organization to organization. This depends on the cycle of funding agreed to between you and the donor. NGO’s that are reliant on international funding are very vulnerable to funding gaps.

⁶⁰ Allan Kaplan (1999) *The Development of Capacity*

THE STRATEGIC PLAN:

Here you scan the environment for any major changes and checking that you are still on track in terms of the need that you are addressing, your strategy and your capacity to effectively execute your strategy. It is this plan that allows you to determine your material and financial needs over a period of at least 3 years. Here you determine what you **NEED** to do and **MUST** do in order to achieve your strategic objectives and not what you would **LIKE** to do. It is important that your strategic planning involves as many staff and volunteers as possible as well as people with relevant expertise.

Your strategic plan and direction will inform your staff selection, resource mobilisation strategy, partners, etc. Your strategic partners should be strategic since they are determined or selected by the value they add to your organization in pursuance of your strategy to make impact. A sustainability strategy should be designed to meet the financial requirements to implement your strategy. This strategy should include:

1. Who are your existing donors and how can you retain them?
2. How many core donors you need to recruit over the relevant period and how much you will request from them?
3. How many special donors you need to cover special projects?
4. How much you can generate from own income?
5. The resources you are able to mobilise in terms of materials, skills and expertise, volunteer labour, etc.
6. A cost containment policy
7. Investments and other potential sources of income e.g. bequests

THE ANNUAL FINANCIAL PLANNING MEETING:

Once your strategic direction is clear as well as your financial strategy then you need to know what your annual financial plan will look like. Here it is important that your finance staff, directors and program managers should meet to determine what it would cost to address your organizational needs for that year. This is done in the context of your overall strategic plan. All possible expenses should be included with provision for a 5% contingency fund. This will allow you to deal with those unforeseen costs or unforeseen increases.

Remember, projected income should always be calculated at a minimum and expenses at a maximum. This will allow you some flexibility and allow you to effectively minimize your expenditure and maximize your income.

A report about this meeting should be submitted to the Board for approval and circulated to the rest of the staff. They all need to understand what the implications are for everyone since they all have a role to play in terms of the sustainability of the organization.

THE QUARTERLY FINANCIAL PLANNING MEETING:

An annual plan should not be hidden away in a finance office to gather dust. It must be visible in order to check that you stick to it or to check that your projections are correct or not. This meeting over every 3 or 4 months allows you to check the trends in your spending and income. Major trends must be analysed. Here your finance staff should know what to look at and what to report. Don't stress about minor expenses and income. Focus on the big ones, the ones that can seriously compromise your plan and lead to a crisis such as staff costs (normally the highest in any organization) capital expenditure, etc. A half-day should be set aside for such a meeting and information to be studied should be circulated in advance, preferably 2 days before the time. This will allow those who need to attend to study the relevant information and make their own analysis and inferences.

This meeting will allow you to revisit your financial strategy in relation to actual income and expenditure. Recommendations must be made in terms of any changes to this strategy as well as measures to contain costs if necessary. It is important that the implementation of these recommendations should be monitored and someone be held accountable.

THE MONTHLY BUDGET CONTROL MEETING:

This is a vital meeting to determine expenses and income on a *monthly* basis. The finance staff in collaboration with the director or her assistant should be responsible to determine the budget for the next month. This should be done after consultation with relevant program staff to determine overall needs within the organization. Senior program staff should be encouraged to forward requests for possible expenditure before the meeting. The budget control team is guided in their decisions about expenditure by the following:

1. What financial resources are immediately available? You cannot spend money that you don't have.
2. What has to be spent?
3. When must it be spent?
4. What is urgent and what is important?
5. What potential income *will* come in?

Please note:

Based on the above, it is clear that not all requests for expenditure can always be accepted. Staff members should know why a request has been denied so as not to personalise it or think that favouritism played a role. Mechanisms for agreeing to an unforeseen expense in the absence of a budget control meeting should also be clear. Here it is important that the director should have the authority to approve in consultation with the finance staff depending on the amount.

When senior program staff submits requests for expenditure they should be guided by the following:

- Is this expense important at this time?
- How will it affect my work in the short term?
- How will it affect the work of others in the organization?
- Are there alternatives that can be explored?
- Have I considered the cheapest available quotation without compromising quality?
- Did I follow the necessary procedures when I made my request?

A report should be submitted to the director and relevant program staff. The budget must then be monitored on a weekly basis to check expenditure and income projected against actual income and expenditure. Where there are major deviations or pressures for expenditure, the authorization of the director should be sought. It is also a good thing for the finance staff to compare actual monthly budget line items against projected items. This will also reveal a trend that will help you to develop a picture of what is happening. This will allow you to adjust your projections for the coming period.

Please note:

We work in a very volatile funding environment. We have very little control over the funding agendas of donors. Sometimes funds are approved but take considerable time to be paid into your account. As mentioned earlier, this results in **funding gaps** that you have very little control over. The only control you have is **how you prepare and respond** to a funding gap. The above guidelines can help you to respond to these gaps and allow you to identify them way in advance. There are some NGO's that respond to funding gaps by cutting or withholding staff salaries. Some respond by utilizing a bank overdraft. I have met many organizations where withholding staff salaries become the norm, **the rule rather than the exception**. Although it is understandable I think it is very unacceptable. In my experience I have never withheld staff salaries at any stage

during my time as director. And this was for 10 years. And we were exposed to funding gaps every year. NPO's are the most vulnerable to funding gaps during the months of January, February, March and April. It may be different for other NPO's. In my final year as full-time director our estimation of the funding gap period was out by about one month and I was forced for the first time to apply for a bank overdraft.

My apartment was then put up as collateral. The overdraft only lasted for two weeks and was immediately cancelled. When a funding gap appears it is likely that your monthly budget control meetings can easily and unconsciously be transformed into a quarterly planning meeting. Instead of just planning for the next month therefore the meeting is forced to plan for a longer period. There is nothing wrong with this. But awareness is called for. Frustration can set in if you do not understand why a certain meeting can lose its purpose. Members then start to blame each other.

IDEAS FOR FINANCIAL SUSTAINABILITY:

- Cost containment strategy
- Diverse donor base
- Constant cultivation of new donors
- Staff containment if necessary
- Effective telephone and fax use
- Strict cost recovery for services
- Income generation projects
- Selective voluntarism
- Enlist skills and expertise through strategic partnerships
- Negotiate for discounts where possible
- Use public transport where possible
- Use various accounts strategically to generate enough interest
- Cultivate companies whose products that you use, e.g. Nampak (toilet roles)
- Friends of our organization
- Sell manuals at a small fee
- Diversify your services, e.g. consultancy, training, etc.
- Develop a sustainability fund
- Identify individual donors for a bequest (this is a long term activity)

In her book “Life Beyond Aid”⁶¹ Lisa Cannon describes 21 strategies to develop sustainability.

Here is the list (some overlap with the list above).

- Know what you mean by sustainability
- Assess where you are now
- Draw a framework that shows where you are going
- Think strategically every day
- Diversify and localise your income sources
- Develop a partnership with a corporation
- Start generating your own income
- Charge fees for services
- Contract out your expertise
- Motivate your staff to bring in new business
- Measure the impact of income generation
- Make your financial management more participatory
- Organise and use financial information for effective decision
- Reduce costs
- Finance the core of your organization by charging overheads
- Start a capital reserve fund
- Invest reserve funds

SOME IDEAS OF HOW TO CONTACT DONORS:

<i>The medium:</i>	<i>How and why?</i>
<i>Newspaper articles</i>	Your media strategy should involve regularly writing to newspapers about issues on which your organization focus. This is also called advocacy. Build relations with journalists. Invite them to your graduations or other special events. Write a press release. Community newspapers are always looking for interesting stories. Feed them! Articles in a newspaper are like sowing seeds. You never know where it will germinate.
<i>Brochures</i>	Update your brochures regularly and send them to targeted donors both current and potential donors. Do this at least 2-3 times per annum. For donors to consider funding your organization, they must know what you do.

⁶¹ For a more deeper elaboration, see Lisa Cannon (1999) *Life Beyond Aid: Twenty Strategies to Help Make NGO's Sustainable*

<i>Newsletters</i>	If you do not have a newsletter then you are not serious about your work. You must have an organ to communicate to the outside world. The need you are addressing is in the outside world not behind four walls. Tell potential donors what you are doing and how you are doing it. Share your success stories and your challenges. Be open and honest.
<i>E-mail</i>	Keep this short and sweet. Funding enquiries and proposals are normally transmitted in this way. Try to get permission from your potential donor that this method of transmission is okay with them.
<i>Fax messages</i>	Again, keep this short, not longer than 4 pages. A funding enquiry can be sent this way.
<i>Face to face meetings</i>	This is the best form of communication. You are present to answer any possible question that the donor may have about your work. Try to get your potential donor to your office or project. Bring them to where the action is. Always try to close the gap of communication between you and the potential donor. This will minimise any miscommunication.
<i>Television</i>	Not many organizations use this medium. Try it! This is one of the most potent ways to create awareness amongst unknown donors about your work.
<i>Video</i>	Keep this short, not longer than 10 minutes. Donors are overwhelmed with requests for financial support. They do not have the time to watch a movie.
<i>Radio</i>	Have a strategy in place to get on to radio often enough to create awareness about your work. With the mushrooming of community radios, there is ample opportunity to get your messages across to unknown donors.
<i>Word of mouth</i>	This is when other people advocate your work and you don't even know it. Remember: People will only spread knowledge about your work if they like what you do. Give people a bad experience and they will kill you wherever they go.
<i>Annual report</i>	If you produce an annual report, send it to your various stakeholders. This shows your commitment to accountability; accounting for the funds entrusted to you by others. It also celebrates your successes and provides an insight into your challenges.

THERE IS NO SUCH THING AS A REGRET LETTER:

I am sure that you must have received a regret letter before. Well, I will now show you that a regret letter does not exist. It is only a figment of your imagination. For me, a regret letter is nothing but a delayed yes or a yes to somebody else.

Let us look at this thing called a regret letter. Try to remember what donors normally communicate when they send you a “regret letter”. Let me help you:

They normally inform you that:

1. You applied too late or you missed the deadline
3. Their budget is depleted and you must try again next time
4. Your work does not fall in their focus area
5. They do not fund small projects but only networks
6. Sometimes they thank you and wish you well in your future endeavours

Remember, When you receive any letter from any donor, then that is already a yes. Why? Because:

- Donors receive hundreds if not thousands of requests for funding
- They have to employ people just to read your proposal
- When they reply to your request then it means they know who you are. That is why they will issue you with a reference number. So when you write again, they will see that you are on their file already. You have overcome the first stage in strategic communication, i.e. they are aware about your work.
- Their letters are littered with useful information such as correct addresses, telephone and fax numbers, e-mail numbers, names of board members and it is signed by someone. So next time when you communicate with them, you will know exactly whom to address your request to!

This is how you work with the responses they provide:

Donor response:	Your response:
Proposal submitted is too late	Make sure you submit way in advance next time
Already exceeded their budget	Same as above
Not in their focus area e.g. women development not youth	Send the information to a women development organization . It may be no to you but yes for development!
Only fund networks and not small projects	Join a relevant network as soon as possible!

So, go and find all your regret letters. You may be sitting on a gold mine!

SECTION 2:

HOW TO WRITE THE WINNING FUNDING PROPOSAL⁶²

The following are some of the core elements of a funding proposal.

THE ELEMENTS OF A WINNING PROPOSAL⁶³

- THE COVER LETTER
- TITLE PAGE
- INTRODUCTION
- PROBLEM STATEMENT
- UNIQUENESS OF THE ORGANIZATION
- OBJECTIVES
- EXPECTED BENEFITS
- OPERATIONAL PLAN
- PERSONNEL
- EVALUATION
- THE BUDGET
- ATTACHMENTS AND OTHER DOCUMENTATION

THE WRITING OF A FUNDING PROPOSAL

There is no correct method for the writing of a funding proposal. The type of method, sequence or composition of a funding proposal depend on many factors such as that which is required by the donor or the type of project for which funding is required. Some donors also have their own application forms designed to make it easier for organizations to apply for funding.

Please note that flexibility is important with the type of approach that is followed and with the writing of the funding proposal.

The following elements must be paid attention to when writing a full proposal:

⁶² Adapted from notes received in a workshop facilitated by Philip Balie in 1995 at the Human Sciences Research Council in Cape Town

THE COVER LETTER

This briefly describes the content of the proposal. It should not contain too much detail and must not sound intimidating. Try to avoid being prescriptive and please do not beg. The most senior staff member (usually your director or project coordinator) will sign your cover letter. The chairperson of an executive committee or board can also co-sign.

TITLE PAGE / COVER PAGE

This contains the following information:

- Name and address of the organization that applies
- Telephone- and fax- and e-mail numbers
- Title of the project
- Time-period of the project
- Name of the potential donor
- Date of submission
- Fundraising- and NPO registration number of your organization
- Name of your contact person

INTRODUCTION:

The introduction:

- Describes the general aims and objectives of the organization and the date when it was established
- Describes briefly similar projects that already exist
- Describes the organization's target group / clients
- Provides some statistics that support/motivate your proposal

THE PROBLEM STATEMENT

- Identify the target group
- Identify the needs that your organization wish to address for e.g. access to employment for unemployed youth or fighting poverty by providing access to productive land.
- Explain the scope of the problem or the need you wish to address.

If you have research information available, inform the donors how big the problem really is. How many people are unemployed or how many people live in poverty.

- **Describe how social values will be influenced.**

Explain how the unemployment problem causes young people to resort to criminal activities to make a living or how a lack of access to productive land hinders people from developing sustainable livelihoods. Explain what impact does the problem have on the community and provide an indication of community resources or the lack of it to address the problem or the need.

- Here are the five basic questions when the problem statement is analysed and formulated:
 - *What is the problem / need?*
 - *Where is the problem?*
 - *When does the problem occur?*
 - *What is the scope of the problem?*
 - *Who is affected by the problem?*

THE UNIQUENESS OF THE ORGANIZATION

- Indicate why your organization is the most suitable to address the problem

Your proposal should convince the donor that your organization is the most suitable to address the problem. What qualifies you for funding and not another organization? Why should the donor consider your proposal at all? Provide reasons for a certain approach or method that you will follow. Motivate why your organization will deliver the best results. Use your track record of past projects to help convince the donor that you can be trusted.

OBJECTIVES:

- Describe the objectives / results that you want to achieve and at what cost
- The stages / phases in addressing the problem
- Remember, your objectives must be SMART:
 - **S**pecific and practical
 - **M**easurable
 - **A**chievable
 - **R**elevant and realistic
 - **T**ime-bound

EXPECTED BENEFITS

- Indicate the benefits for your target group for e.g. access to sustainable income, increased self-esteem, decrease in the poverty levels, reduction in crime, more community cohesion, access to information, etc.
- A potential donor may be interested to find out how the project will lead to:

More knowledge about better or more effective methods

New program / project material

Models for other projects

And fit in with national- or provincial government focus areas e.g. in South Africa you have the Integrated Development Plans at regional and local community levels.

Remember that donors work with many organizations addressing similar needs or problems in different parts of the country and even the world in the case of international donors. They need to know how they can share your experiences and success stories with other organizations. In this way impact can be enhanced, something donors are very serious about.

OPERATIONAL PLAN

- This is the core of the proposal
- It is a realistic management plan for the total duration of the project
- It describes the structural relationship to the rest of the organization
- Indicates the commencement date and the date of completion of every task and activity, preferably in a monthly sequence
- In practical terms the plan will specify:
 - What will be done?
 - By whom?
 - How it will be done?
 - When it will be done?
 - Resources needed to execute tasks
 - Indicators of success
 - Who is accountable for task completion?

PERSONNEL

- The success or failure of a project depends on the personnel who is responsible for the project work. Donors feel more comfortable with people who are:
 - *Qualified*
 - *Have the ability to initiate projects and complete it successfully*
 - *Have the necessary experience*
 - *Have integrity*
- It is advisable to provide job descriptions of the personnel for example:

- Job title
- Educational qualifications
- Specific responsibilities
- Authority for the project
- Previous experience in similar projects

MONITORING AND EVALUATION

- Evaluation must be carried out to determine whether objectives are being achieved. Remember, to evaluate means to establish the value of something. This evaluation must be done in line with your stated objectives as outlined in your proposal. Before you can evaluate you need to monitor constantly what you are doing to check for any deviations in your project plan. Monitoring is primarily about gathering relevant information and processing it. An evaluation can be internal or external. Many donors prefer external evaluations because it is more objective. Internal evaluations tend to be more subjective and the organization can tend to report what the donor wants to hear.
- When you plan to evaluate, explain to the donor that your evaluation will include:
 - An evaluation criteria
 - Certain techniques to be used
 - Design
 - Time-period (when it will be done)
 - Who will do it
 - Why it will be done
 - Your commitment to submit an evaluation report

THE BUDGET

- Is a comprehensive and realistic monetary description of your organization's projected income and expenses over a specific period of time. Your budget will cover the following categories of expenditure:
 - Operational expenses for the project or programme
 - Capital expenses for the project or programme
 - Core cost expenses for the organization to run the project e.g. rent, communication, transport, etc.

Please note:

Some core cost expenses may also reflect in operational expenses e.g. telephone expenses for the project and for the organization. If you miss this then you will tend to under budget and sit with

a shortfall at the end of the project period or you will tend to use financial resources from other projects.

Also specify the income that your project will generate. This is important since you need to show the donor that the project is financially sustainable. Indicate whether other donors have been approached and what they have committed. Do not forget to specify donations of material resources and commitment of voluntary labour by volunteers. Specify your access to certain expertise that can lead to project success.

NPO's are generally not very good with costing project expenses. If you struggle with this aspect, contact other organizations with more experience to help you. Avoid inflating your budget. Donors will pick it up quickly. Try to negotiate low or reasonable fees from suppliers or consultants. Show the donor that you will respect their money and not abuse it.

HERE IS AN EXAMPLE OF A BUDGET:

**LET US CALL THIS ORGANIZATION THE WOMEN'S ACTION GROUP AGAINST ABUSE
(WAGAB) PLEASE FILL IN THE TOTAL AMOUNTS:**

PROJECTED BUDGET FOR THE PERIOD 01 APRIL 2006 TO 31 MARCH 2008

Budget line item:	Year 1	Year 2	Overall budget
	(2006 – 2007)	(2007 – 2008)	
OPERATIONAL COSTS (as app. 7% of total costs)			
1. Salaries	40 000.00	50 000	90 000
2. Stationery	1 500	1 600	3 100
3. Printing	2 500	2600	5 100
4. Electricity	300	400	700
5. Communication	5 000	6 000	11 000
6. Website development	600	600	1 200
7. Water & rates	500	600	1 100
8. Sanitary equipment	200	200	400
9. Internet	300	350	750
10. Mortgage bond	1000	1000	2000

11. Air-conditioners	300	350	750
12. Insurance – car	500	550	1050
13. Insurance – house	600	650	1250
14. Alarm systems	130	140	270
15. Newspaper subscriptions	100	110	210
16. Bank charges	250	260	310
17. Postage	600	650	1250
18. Petrol & oil	500	520	1020
19. Transport	100	120	220
20. Refreshments	75	80	155
21. Cleaning materials	150	165	315
22. Audio-visual	45	55	100
23. Office repairs & maintenance	300	320	620
24. Medical supplies	30	45	75

TOTAL OPERATIONAL COSTS

STAFF DEVELOPMENT AND ORGANIZATIONAL CAPACITY

1. Financial management skills	10 000	12 000	22 000
2. Organizational management skills	10 000	12 000	22 000
3. Advanced computer literacy	5 000	5 000	10 000
4. Accreditation	30 000		30 000
5. Succession planning	15 000		15 000
6. Project management skills	10 000	12 000	22 000
7. Human resource development systems	15 000		15 000
8. Advocacy strategy	10 000	12 000	22 000

SUBTOTAL

SUSTAINABILITY AND**ORGANIZATIONAL DEVELOPMENT**

1. Strategic planning and reviews	15 000	16 000	21 000
2. Resource mobilisation strategy	10 000	12 000	22 000
3. Board development	10 000	12 000	22 000

SUBTOTAL**PROJECTED PROGRAMME****BUDGET**

1. Trainer fees	500 000	550 000	1 050 000
2. Marketing	50 000	60 000	110 000
3. Graduation	40 000	45 000	85 000
4. Rental of training centre	70 000	80 000	150 000
5. Transport	7 000	8 000	15 000
6. Communication	40 000	50 000	90 000
7. Training centre maintenance	15 000	20 000	35 000
8. Manuals	20 000	25 000	45 000
9. Workshop materials	10 000	12 000	22 000

SUBTOTAL**PLACEMENT AND TRACKING (outsourced)**

1. Placement and tracking of 200 participants	150 000	180 000	330 000
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SUBTOTAL**POST PROGRAMME SUPPORT**

1. Post assessments	10 000	11 000	21 000
2. Legal advice	5 000	7 000	12 000
3. Club cards	10 000	12 000	22 000

SUBTOTAL**PROJECTED INCOME:**

	Year 1 (2006 – 2007)	Year 2 (2007 – 2008)	Overall budget
1. Royal Netherlands Embassy	1 200 000	600 000	1 800 000
2. De Beers Fund	50 000	50 000	100 000

3. Ford Foundation	25 000	25 000	50 000
4. National Lottery Board	100 000	150 000	250 000
5. Nelson Mandela Children's Fund	50 000	50 000	100 000
6. Own income	400 000	400 000	800 000

TOTAL INCOME***TOTAL PROJECTED OPERATIONAL EXPENSES:******+ PROJECTED PROGRAMME EXPENSES:******= ?******LESS TOTAL PROJECTED PROGRAMME INCOME******= ?******REQUEST TO THE DONOR FOR THE AMOUNT OF******= ?*****Please note:**

1. The operational expenses are a percentage of total operational expenses. Most donors prefer to fund at least 7% of total operational expenses. The above example only provides for the 7% budget per annum. A donor may request that you submit your total operational expenses per annum.
2. The above amounts are only examples and should be understood in the context of an organization applying for funds for a training programme.
3. Donors expect that you break down huge amounts especially for salaries. Explain how many staff members are included.
4. Communication refers to telephone and fax.
5. When you deal with a 3 year budget then you must project the inflation rate and build it into your increases.
6. Some items may only be once off expenses and will not appear the following year.
7. Explain to the donor how you will generate your own income to ensure financial sustainability.

ATTACHMENTS AND OTHER DOCUMENTATION

- Add an organizational structure (organogram) to show where your project fits into the total organization and the lines of accountability
- If you apply for the first time include your constitution and NPO certificate if you have one
- Newspaper cuttings of your organization's work

- Letters of support
- Letters of support from board members or members of the community
- Letters from your client group
- Photos of similar project activity

HOW DO YOU FIND THE RIGHT DONOR?

ASK YOURSELF THE FOLLOWING QUESTIONS:

- *What are the policy, criteria and focus of interest of the donor?*
- *If a company, does it have a social investment programme?*
- *Is it local or foreign funds?*
- *Will the funds be acceptable for the community?*
- *What does the donor finance? Operational or capital expenses?*
- *What is the general size of their grant?*

INFORMATION ABOUT POTENTIAL DONORS

- Prepare a list of potential donors with the following information:
- Precise address, both postal and street address
- Telephone-, fax- and e-mail number
- Contact person with initials, correct surname and job title
- Total previous applications to the same donor
- Number and total amount received from the donor
- Make telephonic contact with the relevant funding officials
- Decide how the funding proposal will be composed

SO, WHERE DOES ONE START?

PROPOSED SEQUENCE

- The Problem / Needs Statement
- Describe the objectives
- Operational Plan / Implementation
- Expected results
- Personnel involved
- The Budget
- Evaluation process, procedures and proposed methods

- Attachments and other documentation
- Complete the title page
- Write the cover letter and executive statement

FUNDING ENQUIRIES – HOW TO ACCESS DONOR FUNDS QUICKLY

It is a good strategy to draft a funding enquiry as soon as your funding proposal has been completed. Many donors are aware that there are organizations that do not have access to the expertise to draft comprehensive funding proposals. They therefore make it easier by designing their own forms to be filled in by the applicant.

A funding enquiry is a way of checking with the donor:

1. What they are funding (their focus areas)
2. The format in which funding should be requested

When drafting a funding enquiry, please make sure that you:

- Keep it short (not more than 2 pages)
- Give a brief description of your organization, its vision and mission
- Say what you are enquiring about (the project or programme)
- Highlight your successes (impact that you make)
- Indicate your organization's ability to deliver results
- Give an idea of your accountability structures (governance and financial)
- Don't forget to request from the donor whether they would consider a full proposal from your organization.

This is how I managed the funding enquiry:

1. Prepare the two page enquiry and fax it to the donor late at night. Why fax? Because then they must read it, unlike an e-mail that can be deleted because they do not recognise the writer. Why late at night? Because then the telephone lines will be open!
2. When the secretary check mail in the morning they will pick up your fax and put it in the relevant incoming mail tray.
3. Make a phone call after 9.00 a.m. the next day to check that the enquiry was received and check how long it will take the donor to give you a response.
4. If the donor tells you to expect a response within two weeks, don't hassle and irritate them by phoning everyday. Wait for the two weeks and if there is no response, call them again or send them a fax to enquire about their response.

5. I used to link my enquiry for a response to our need in the organization to plan and project our income for the next quarter. This link will show the donor that you are organised and focused in what you do and that their response will assist you positively in your work.
6. Donors can respond by informing you that you don't fall in their focus, or that they will send you relevant forms to fill in or guidelines on when and how to send a more comprehensive funding proposal.

USING FUNDRAISING CONSULTANTS:

It has become common practice amongst many organizations these days to recruit fundraisers to do their funding for them. There is nothing fundamentally wrong with this approach. The danger however lies in the dependency syndrome that develops between fundraiser and the organization. The fact is that mobilizing the resources that you need as an organization to execute your strategic focus is always **firstly** the responsibility of the leader in an organization, not the fundraising consultant. This is not a task to be delegated to somebody else. The consultant can help to facilitate this process of mobilizing resources but this is where the responsibility must stop.

Many leaders see the appointment of a fundraiser as an easy way to escape their own responsibility. When the funds therefore do not come in they can easily blame the fundraiser without understanding that raising funds will always be a risk. As the leader you usually know the organization better than anyone else and will be able to promote its work much better. Let a consultant help you find the right donors, build the funding relationships and long term strategies but do not abdicate this responsibility. Mobilizing the relevant resources in an organization is the responsibility of everyone and your director always takes the lead in this process. Any other approach can result in a quick fix and you will pay the consequences.

I know of an organization that also took this route of having a fundraiser to address its financial woes. It paid the fundraiser handsomely just to find its staff on short time a few months later. Remember, sometimes you do not have a funding problem but a management problem. Don't confuse the one with the other!

HOW TO IDENTIFY GOOD AND BAD DONORS:

Remember, just like you find good and bad NPO's, so you will also find good and bad donors. Here are some characteristics to identify the good from the bad ones:⁶⁴

⁶⁴ James Taylor, et al: (1998) *Action Learning Series: Community participation and financial sustainability, Case studies and lessons from development practice*, pp. 83-84

<i>“Good” donors</i>	<i>“Bad” donors</i>
<ul style="list-style-type: none"> • give feedback after a visit, give a report, get involved • give time frames and keep to them • are interested in process as well as product • are transparent about criteria, and give partners a chance to impact on these criteria • have minimal bureaucratic procedure and red tape • are consistent • are flexible and sensitive to changing needs • assist in skills development by taking organizational needs into account • build networks between recipients where appropriate • remain informed about the priorities of their partners through regular visits and careful reading of reports • continue to fund over a long term if the recipient is effective and accountable 	<ul style="list-style-type: none"> • engage in ‘drip-drip’ funding, i.e. they give insufficient amounts at unpredictable intervals like a leaking tap • are inefficient in operation and timing • have whimsical agendas which change often • write contracts biased towards themselves, i.e. they impose conditions without negotiation; and contractually exclude the possibility of recipients taking legal action against them • determine the agenda based on their own (usually first world) values and experiences • do not commit themselves to the long-term nature of the problems they are involved in addressing • make quick visits which are too short and irregular to build relationships and trust, and ignore prior appointments made by those they wish to see • place their own “spies” in the recipient organization • gossip about recipient organizations with other donors • do not honour their agreements • have hidden agendas • are inefficient, i.e. respond slowly or not at all to letters; lose proposals and reports • are dishonest • grant money to their personal friends • use NGO’s for their own agendas in a way

	which is detrimental to the NGO <ul style="list-style-type: none"> • spend too much money on themselves
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HOW TO IDENTIFY “GOOD” AND “BAD” RECIPIENTS:

Just like we have good and bad donors, we also find good and bad recipients of donor funding. Study the list below and check if you are guilty of being a bad recipient:

<i>“Good” recipients</i>	<i>“Bad” recipients</i>
<ul style="list-style-type: none"> • formalise agreements • write regular reports to keep donors informed • are able to negotiate confidently and openly • comply with terms of agreements • state clearly in proposals how they will monitor progress • spend time building relationships face to face • negotiate with donors changing agreed expenditure • share audited financial statements with donors, recipients of services and staff • share both successes and failures with donors • ensure that budgets sent to donors are based on reality • keep up-to-date with their donors’ vision and focus • ensure good financial administration and management • understand why the donors supports their organization or programme (i.e. how they are in line with the aims of the donor) • acknowledge the receipt of funds • recognise the contribution that funds have 	<ul style="list-style-type: none"> • are not transparent to donors • waste and mismanage resources • do not plan ahead • change direction at the whims of the donors • are unwilling to acknowledge their own shortcomings • communicate badly, e.g. do not acknowledge funds received or respond to letters • fail to respect agreements • do not work at developing their relationships with donors • gossip about donors to other NGO’s • have no long term financial or operational plans • build the relationship between themselves and the donor on key individuals only.

made to the achievement of objectives	
<ul style="list-style-type: none"> • pay responsible and realistic salaries to staff • ask for feedback from donors on reports and proposals and engage in dialogue 	

When you subscribe to most of the characteristics of a “good” recipient, ***then funding will chase you***. You will always have donors looking for you, wanting to support your development work. You will have existing donors referring you to other potential donors. When you are not regularly being referred from one donor to another, then you need to check if you are not becoming a “bad” recipient. If you are, then you will find yourself mostly chasing after funding. And then, of course, you will always be in a funding crisis and busy with crisis management. You will be living a hand-to-mouth existence.

WHY DONORS AND RECIPIENTS ARE EQUALS

This relationship is by definition one that is based on a developmental objective. It is aimed at achieving a common objective, even if that objective is sometimes not clearly defined and articulated. When you deal with a “bad” donor, or “bad” recipient, then that relationship to achieve that common objective is compromised. When this happens it is better for the relationship to be severed for the inherent equality that underpins that relationship is being compromised. If this is not done then you have a partnership based on a superior and inferior party. And this is not developmental. This does not mean that when an NPO is a “bad” recipient, that the other party does not first try to engage the recipient and build in the necessary awareness and capacity to change the situation. And vice versa. But if your intervention fails, then it is better to sever the relationship, for you will both be fooling each other. Remember, the ***process of funding*** is as important as the funding itself; because funding is only an instrument, a means to an end. And that end is always transformation, transforming relationships. And that relationship starts with the recipient and the donor.

RELATIONSHIP RESPONSIBILITY IN YOUR ORGANIZATION:

ONCE AGAIN, LET US GET RID OF ILLUSIONS!

Many non-profit organizations in my experience do not take relationship building very seriously, (*this is referred to as client/customer care in the corporate sector*) especially with their beneficiaries. We tend to think that this is only the business of companies and most recently the South African government with its “Batho Phele” principles. The reason is very obvious. NPO’s usually serve people who cannot afford their services and therefore they will mostly appeal to external donors for financial support. There is therefore not always a direct link between the continuous financial sustainability of the NPO and its main beneficiaries.

Businesses take their client relationship building very seriously. For them there is a direct correlation between their financial income and how they treat their clients. But the business model of client relationship building is seriously flawed. It is a myth. As far as they are concerned clients are only those who use their services or buy their products, hence contributing to their bottom line. This is a dangerous approach and is at the bottom of the self-fulfilling prophecy that: **“The customer is always right!”** What rubbish! If your customer/client is **always right** it means by implication that your staff or volunteers are **always wrong!** It is this approach that leads workers in businesses to put on a mask when they work with clients. They are not allowed to be themselves. They have to pretend all the time. They never know when they are doing anything right. They receive hours and hours of training on how to treat their clients, but then they are still told at the end: **“Okay, we have now trained you how to deal with our clients, but please remember, despite this training, you will always be wrong!”** Any right thinking person will tell you that this approach is senseless and can only reduce workers to a bunch of robots.

The fact is that clients can also be wrong. It is human to make mistakes, to misinterpret, misunderstand, have wrong expectations, etc. Nobody is doing justice to anyone by pretending that a client can never be wrong. When a client makes a mistake then it becomes an opportunity to clarify, build and intensify **real** relationship. By pretending that the client can always be right is to deny yourself this opportunity to build this relationship. You therefore open yourself up to abuse by potential clients who know that whatever they do and whatever agenda they have in mind, they will always get away with it!

SO, WHAT IS RELATIONSHIP RESPONSIBILITY?

Yes, so what is it? Remember that building relationships is an everyday process. It happens not only at work but in every sphere of human interaction. It happens at home, at work, amongst your friends, at church, everywhere. The first place that your relationship building must start is within you. Yes, you are your most important client. This is the inside-out approach. This is the human approach. You cannot build relationships with others unless you can effectively build it with yourself first. When you adopt this approach, then the question of *“Is the client always right?”* simply falls away. It becomes irrelevant! For it now is not a matter of *who* is right and *who* is wrong but *what* is right and *what* is wrong!

TAKING RELATIONSHIP RESPONSIBILITY:

Remember what we discussed with the teambuilding process. Well, the same process applies here as well. Let me repeat.

Phase one:

Trust building: The start of any relationship is preceded by a level of trust. There must be particular warmth to it. This is the first stage in the trust building process. The phase is represented by the element of *fire*. Any feeling of discomfort at this stage will make it difficult to proceed to the next stage. In nature, for anything new to start warmth is also required. Think about a hen and an egg. Without warmth, the chicken cannot be hatched! In the same way, for a relationship to be “hatched” warmth is required.

Phase two:

Openness – Once sufficient trust is present the client, team member or staff member will become more open and reveal more about her. She will be eager to participate in meetings and become more assertive. She will feel safe. This is important for a manager to understand and appreciate any misconceptions that a client might have. You cannot deal with a problem unless you become aware about it. Denial is a stage where problems are kept in the dark. Try to hide anything from a potential client that is necessary for the relationship building process, and you will pay the price at some stage. This phase is represented by the element of *air*.

Phase three:

Flexibility – Openness will allow a client to become more flexible. Once we know how you think and what you think we can become mutually flexible, i.e. to change certain habits after negotiation and consultation. Your clients can only be willing to access your services if you have been open

enough with them. Think about a donor who is aware about certain challenges in your organization, but still funds your work with the proviso that you pay attention to these challenges. Flexibility is represented by the element of **water**.

Phase four:

Structure – Any change must be structured. You cannot keep changing all the time. Too much change all at once will disorientate clients. Structure provides a sense of security, safety and continuity. When a donor signs a funding agreement with your organization, then they are structuring their relationship with your organization. This structuring provides a sense of security and certainty in the organization. Structure is represented by the element of **earth**.

Throughout the process trust remains an important component. Every phase you move to will reinforce trust. The more trust, the more openness and flexibility. And the more openness and flexibility the more team/staff/donor performance you can achieve. When an organization becomes closed and rigid, then your clients will follow that example. People learn from what you **do** and not what you **tell** them!

YOUR VARIOUS CONSTITUENTS:

Let us now look at the various constituents in your organization you have to build relationship with in your work everyday.

Person:	Focus areas:
You	You must feel competent in your current position. Do you have a plan to build your capacity continuously? Is your life balanced in terms of looking after your body, your mind, relationships with others and your spiritual development? Do you feel stressed out? Do you make time for your own self-development? If you are not clear about the above questions, then your relationship with yourself is weak. Your relationship with other constituents will be in danger. You cannot practice with others what you cannot practice with yourself first.
Your staff and volunteers	You should know your staff and volunteers very well. Know their temperaments, know their strengths and limitations. Try to find out more about their stories, i.e. their past, personal life histories, achievements, etc. Make sure that they are well inducted, continuously trained and capacitated. Negotiate clear staff contracts and adjust them when necessary. Make sure they always know what

	they have to do. Support and confront when necessary. Help them to design clear work plans and life plans. Let them see conflict as a tool of transformation. Compliment when appropriate and continuously inspire. Continuously clarify expectations. Help them to know when they have reached their ceiling of development in the organization and help them to move on. (see the section on managing change with your members and people development)
Your board	Be open with them all the time. A well-informed board is an involved board. Submit reports on time to them. Use their skills. Get them involved. Appoint and induct them properly. Treat them as friends and not just tools to ensure accountability. Go the extra mile for them. Be clear about their areas of involvement e.g. policy and strategic matters. Give them recognition. Don't try to manipulate them. Find out what makes them tick, why did they join the board? Then build on those things that motivate them. Be clear about their areas of involvement; clarify expectations. Get your board on board; let them attend special events, act as speakers at graduations or the launching of new projects; attend donor meetings with you; show interest in board members as people; evaluate them like you evaluate your staff and negotiate clear performance agreements.
Your donors	Be open with them as well. Submit reports on time. Go the extra mile. Build friendships with them. Find out who is the person behind the title as donor. Share success stories with them. Call them and chat to them. Don't hide problems and challenges. Send them gifts when appropriate. Invite them to your events. Write about them in your newsletters. Name training rooms or devote publications to them. Be innovative about working with them. (See section on "good" recipients)
Your network partners	These refer to partners that you work with in your sector. Also be open with them. Inform them about your work. Develop network updates. E-mail it to them. Highlight your success stories and elements of good practice. Learn from them. Visit them as much as you can. Show them that you are interested. Develop exchange visits. Read their annual reports and other publications. Invite them to your special events like graduations, workshops, etc. Share information with them e.g. donor contacts. Make them love you for extending yourself.

Your beneficiaries	<p>These refer to the people in whose name you request funding. Also be open with them. Share important information with them. Make sure you address their needs. Make them feel welcome and part of a family. Don't pretend. Give your best even under difficult circumstances. Go the extra mile! Act on their concerns. Show that they are important to you not only as clients but as people in their own right. Give them more than what they expect from you. Let them love you and embrace you. Let them come back for more all the time. Maintain contact with them even after they complete their training or a project is complete. Recruit them as volunteers where possible. Let them become your advocates.</p>
Consultants	<p>The use of external consultants has become ubiquitous in the NPO sector these days. In fact, there has been a mushrooming of people calling themselves consultants since the early 1990's. External consultants should only be used when absolutely necessary. Too many organizations are becoming too dependent on consultants to do work for them and not with them. You want a consultant who can leave behind capacity within the organization when they are finished with a contract. Consultants are nothing more than knowledge workers selling experience to your organization. Therefore, always check the experience of the consultant you contract. Ask for a CV and contact their referees to establish credibility. Beware of consultants who move from contract to contract with no follow up support and after care. Consultants who maintain expensive lifestyles don't spend much time doing after care and follow up support. They have to charge expensive fees to maintain their expensive lifestyles. And beware of those who bombard you with charts, graphs, useless statistics and endless models that only confuse more. These consultants lack organizational experience and substance and must compensate for this with models. And check whether your consultant is doing some mandatory voluntary work with those who cannot afford to pay professional fees. Or are they further marginalizing the marginalized that they so glibly talk about? When you contract, make sure that the terms of reference are clear and when it changes, document the change. Leave no room for confusion. As a consultant myself I try to do only 10 days paid work</p>

	<p>and the rest I spend on doing voluntary work, after care and developing myself. I try to maintain a simple and inexpensive lifestyle so that I don't have to expect my clients to pay for the way I choose to live. My fees are based on what I think I am worth, what the market determines and what my clients can afford. I don't see my role as making a lot of money but making impact and making a difference with my experiences. I have clients that I will never charge because they simply don't have the financial resources to pay me. And that is fine. My reward is the trust that they put in me to work with them and their space that they sacrifice for me to occupy. My final reward is my continuous growth as a development practitioner and as a person.</p>
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GETTING YOUR BOARD ON BOARD:⁶⁵

YOUR BOARD IS NOT A NECESSARY EVIL!

Developing your board, or effective governance as it is commonly known, is a great challenge for many NPO's in the African context. Wherever I go it is more the exception than the rule to find a well governed organization. Where I come from my personal experiences were the same. There are many reasons why we grapple with board development but one reason I think is because we don't have a tradition of effective governance in the African context born out of our concrete realities on the ground. Whereas our counterparts in the North deal with an ageing population with an abundance of skills lying around to be recruited onto boards we in the South sit with the exact opposite. This phenomenon is exacerbated by an army of unemployed people using their involvement in organizations as a means of job creation. However, it is the task of leadership to overcome these constraints. We have to learn to develop effective boards **despite** these realities.

SOME COMMON BOARD CHALLENGES:

Whenever I meet directors, I usually hear the following complaints about board members:

1. They don't attend meetings regularly
2. They want to run the organization
3. They want to prescribe to staff how to do their work without them having the requisite experience
4. They don't support the director when needed
5. They meet with staff behind the back of the director
6. Some stay too long on the board without any intention to move on

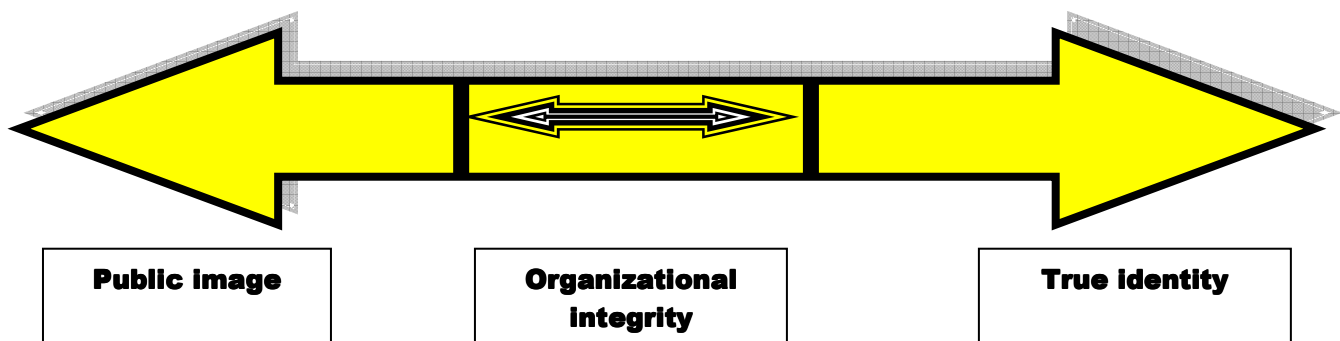
⁶⁵ B. Pavalicevic (undated) *Good Governance: Challenge to Non-profit Boards*

7. Board members develop friendships that compromises their objectivity
8. They don't read reports and almost never provide feedback to the director
9. They don't assist the director with resource mobilization
10. They don't take a keen interest in the work of the organization
11. Some board members want to control the finances of the organization

WHY WE NEED BOARDS?

There are many obvious reasons why non-profit organizations need boards. I do not wish to dwell on them here. You know most of them anyway. The most obvious of course is that it holds the management accountable for the resources (financial and material) entrusted to it by the private and public institutions. What you ask for in a funding proposal and what you promise to deliver must be consistent. Your board ensures this.

But there is another big reason why you need a board. It is to hold you accountable to your **public image** (your vision, mission, objectives, core values) and what you practice in reality i.e. your **true identity**. Put differently, what are you doing when no one is watching? From time to time many organizations are put to this test. And many fail miserably. It is a test that comes in many forms. Some members being dishonest, others committing fraud, donor agendas being embraced for expediency to ensure the next funding contract, etc. The real job of an effective board is to protect the organization against these malpractices.



THE 3 DIFFERENT LEVELS OF BOARD INVOLVEMENT:

To recruit the right board members is not easy in our context. To overcome this constraint I have learnt over the years to approach this challenge by distinguishing three levels of board involvement. Remember, you are trying to recruit a skill and not necessarily a person. The person only represents the skill/s you are looking for to **add relevant value** to your vision and mission and generally to your organised relationships in the organization. Too many times we tend to give up on a potential person because s/he is not available for whatever reason such as time, other commitments, etc.

THE 1ST LEVEL – ACTIVE INVOLVEMENT:

This is the ideal level at which we would like board members to be involved. Attending meetings, signing up for sub-committees, visiting the organization regularly, reading relevant documents, etc. It is always a great challenge to get people to commit to this level of involvement.

THE 2ND LEVEL – STRATEGIC INVOLVEMENT:

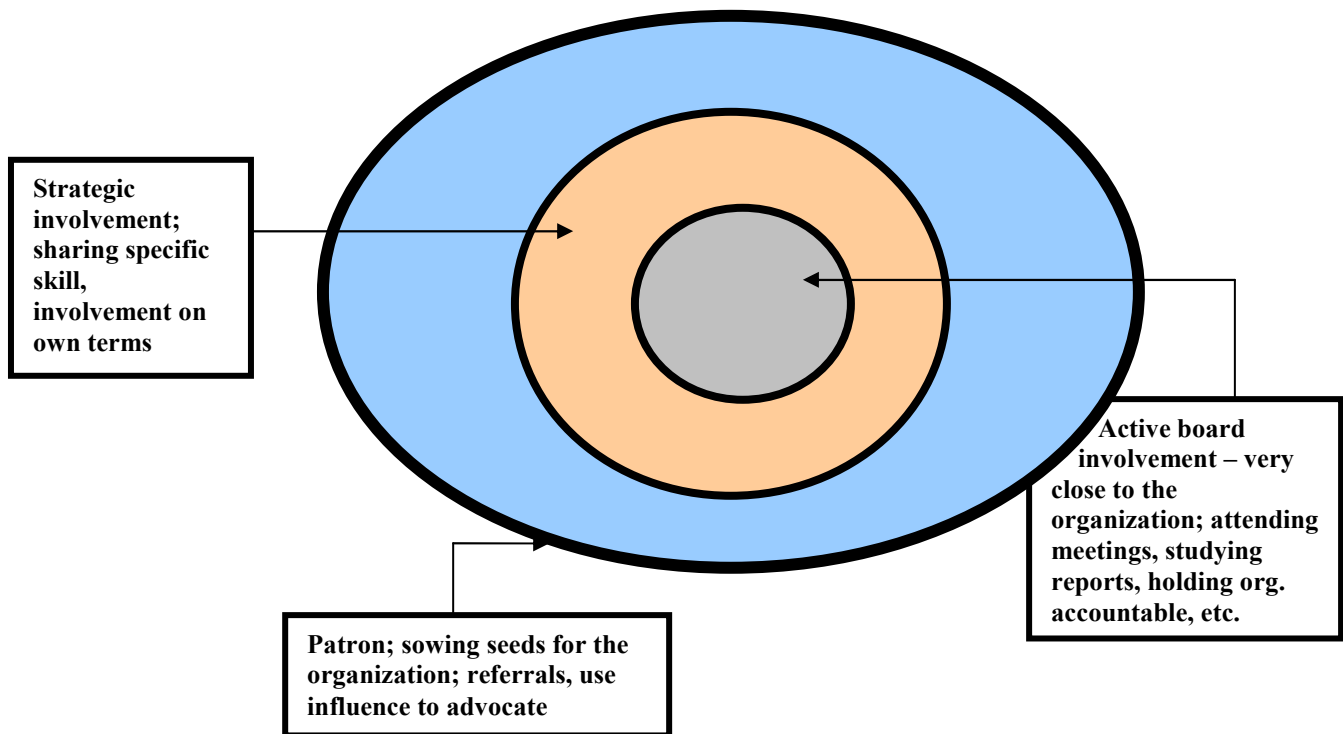
This level helps you to overcome the first. Remember, you are trying to recruit a skill/s, so when someone is not available at the first level, get them to become a strategic adviser. That means that you do not expect the person to attend all your meetings and committing to all the responsibilities of being an active board member. But you can get the person to commit to **add value to your organization** by signing up as a strategic adviser. Get the person to commit in writing that s/he will play this role. This shows donors not only what you have in terms of skills, expertise and capacities, but also what you have **access** to. So, whenever you need advice or voluntary services in terms of the expertise of the strategic adviser, you will have access to it.

As an organizational development consultant I am inundated with requests from client organizations and others who would like me to join their boards. I usually decline. But I always offer to act as a strategic adviser. That means I can still help to add value in a way that suits me whether it is offering a free workshop or spending time with a director discussing a particular concern or making referrals when possible.

THE 3RD LEVEL – INVOLVEMENT BY ASSOCIATION (PATRON)

At this level you recruit someone with a high level of integrity and who is well-known in the community with credible influence. The idea is to link your organization to the ideas and ethos that this individual espouse. You add value to your organization by **association**. Finding such a person is not easy and can sometimes be dangerous because you cannot control this person. It is

a level fraught with risk. The benefit though is that this person can open doors for the organization and advocate its vision and mission. This is how it looks:



RECRUITING THE RIGHT BOARD MEMBERS:

Many of the problems that surface when a board starts to collapse can be located at the recruitment stage. Those recruited are not always the most suitable candidates for board involvement. This is what I find when I work with boards:

People are recruited because:

- They had nothing to do in any case
- Being friends with someone on the board
- Helping the organization to fill up the numbers to ensure credibility with external donors
- False promises were made that the member is not going to be so involved
- Comradely considerations (previous association in struggle era)
- It becomes a stepping stone for full-time employment or future job contracts

There are of course more wrong reasons but the above are the most common in my experience.

SOME RULES ON BOARD RECRUITMENT:

- You are recruiting a skill and not just a face
- A clear recruitment strategy should be in place
- Cultivating new board members is a continuous process (just like external donors) and not when existing members plan to resign or when their terms of office expire
- Set up a sub-committee to coordinate the recruitment process
- Put in place objective criteria and processes to appoint new board members
- Make sure new board members are properly inducted into the organization and that they understand their role in relation to management to avoid role confusion
- Everybody should be encouraged to cultivate and recommend new board members but only the board approve appointments. Staff members cannot make appointments otherwise it is like a team choosing its own referee!

HOW TO FIND OUT THE SKILLS THAT YOU NEED:⁶⁶

I normally take my clients through the following exercise to determine the skills they require on their board. I will advise you to do the same:

Skills required:	1	2	3	4	5	6	7
Legal	X			X			
Accounting							
Media			X				X
Public relations					X	X	
Human Resource Development							
Development (sector specific e.g. housing, women, youth, land, etc.				X			X

Please note:

- From the above it is clear that there is an absence in accounting and human resource development skills. Any recruitment strategy will therefore target people representing these skills.

⁶⁶ B. Pavalicevic (undated) *Good Governance – Challenge to Non-profit Boards*, p. 44

- The numbers indicate the number of board members on your board. The numbers can be substituted with names of existing board members.

HOW TO KEEP YOUR BOARD ON BOARD:

Your board members should be treated like external donors. They may not provide a lot of financial support but they make it possible for your organization to access the financial support that you need to run the organization. If you treat your board like a rubber stamp then you will lose them as soon as they have been recruited. In this case you are using and abusing them and they will definitely not stay on board.

I have already (see above) discussed some ideas of building relationships with your board members, but here are some more:

1. Treat them with respect
2. Be open and honest
3. Show them that you care about them as people first and secondly as board members
4. Provide them with practical tasks e.g. speak at graduations, receiving donors, etc.
5. Keep them informed at all times
6. Submit regular short reports. An informed board member is an involved member!
7. Don't waste their time with unnecessary and useless meetings
8. Don't let board members do your work for you. You are paid to do it yourself!
9. Take an interest in the family of board members. They must also make sacrifices to allow their fathers and mothers to serve in your organization.
10. If you can afford it, pay board members a sit-in fee or transport allowances when attending meetings or special events.
11. Make sure board members have something to eat after or before meetings.
12. Allow members to facilitate workshops in relation to the skills they represent.
13. Stay in regular contact with your board via e-mail, telephone, fax, sms, etc.
14. Issue certificates to board members to express gratitude for their sacrifices and involvement.
15. Build relationship for the long term and not just while board members are in the organization.
16. Send thank you cards (or sms, faxes or e-mails) to thank board members for attending meetings or events.
17. Negotiate and clarify terms of office constantly to avoid members feeling "bad" when they have to leave.

SOME IDEAS OF WHERE AND HOW TO FIND THE RIGHT BOARD MEMBERS

- Remember, board cultivation (like external donor cultivation) is a continuous process and not just when you experience a crisis of board membership.
- Ask fellow directors for names of potential board members
- Check annual reports of other organizations in the same sector like yours for names of board members. Sometimes board members resign from one organization and don't mind to get involve in another one to share their experiences.
- When you attend network forums, check out potential board members.
- Advertise in local, regional or national newspapers. This is risky but it is how you manage the process of selection that is important. By advertising (not a widely used practice) you throw the net wide to catch the best board members. Be specific in the advertisement about your needs and requirements to limit chance takers or people trying to use your organization to pursue personal agendas.
- If you operate on a local community basis, use posters to advertise for board members at strategic places in your community.
- Use your brochures, personal letters, e-mail, pamphlets and your website (if you have one) to raise your need for appropriate board members with the relevant skills.

THE PROCESS OF RECRUITMENT AND SELECTION:

This is normally a stage that most organizations skip. They simply do not spend enough time during the recruitment process. This can lead to serious frustrations for potential board members at a later stage of their involvement. Remember, the recruitment process of a board member is almost exactly the same as when you recruit a staff member. This is how it works:

- The candidate must submit a CV
- Develop a short list of promising candidates
- Set interview dates with those on the short list
- Interview short listed candidates and decide on the final candidates
- Send letters of appointments and relevant documentation
- Prepare for the 1st board meeting and prepare the induction process
- Indicate what the board member's responsibilities will be (i.e. how many meetings he/she must attend, any subcommittee involvement, which documents to study, etc.)
- Indicate a clear term of office (i.e. how long the board member will be involve in your organization)

I have found in my experience that the latter point is never clarified with the result that many board members become dead wood on many boards. This causes many problems since they will be the ones holding the organization back in a time when drastic change is called for. They usually pine to the good old days with nostalgia.

THE INDUCTION PROCESS

This process is not taken very seriously in most organizations. And it comes back to you with a vengeance! Learn to take time to induct new board members. Here are some guidelines to help you with an induction process normally led by the director and board chairperson. This is important so that any question that comes up during the process can be addressed immediately.

The board member:

1. Must receive clear tasks and what is expected from him during his term of office on the board
2. Must receive all relevant strategic planning reports, financial reports and the latest audit report
3. Must receive a list of names of fellow board members, staff and volunteers
4. Staff contracts must be submitted to the member
5. Funding agreements must be provided
6. Rental agreements entered into by the organization

The member must be allowed time to meet with staff members and volunteers to find out who is doing what in the organization. I sometimes find board members who do not even know all the staff members working within a particular organization. Still, they are required to make decisions about those staff members that can affect their future!

THE BOARD NEEDS TO SUPPORT ITS DIRECTOR

When a director is newly appointed, she may need a lot of support from her board. Needless to say, support should be ongoing. This support should come primarily from your board chairperson. It takes time for a new director to find his feet and the support provided by the board allows the person to settle down. As a newly appointed director, you may have to deal with staff that may not have agreed with your appointment and will try to sabotage you. This is where the board steps in to deal with people who try to make your life difficult. In my experience, this is how a board and in particular the chairperson, can support you to become more effective:

1. Make special time to meet with you e.g. a breakfast or lunch time meeting to discuss issues that cannot be addressed at a board meeting.

2. Be available at all times when needed (obviously not in the early hours of the morning!)
3. Attend all board meetings and read all relevant documents before such meetings.
4. Spend time with you to plan those meetings to make it more effective and efficient.
5. Stand in for you (especially public events) when you are too busy.
6. Visit the office regularly for informal conversations.
7. Don't meet with staff and volunteers behind your back unless it is confirmed with you beforehand.
8. When difficult decisions have to be communicated to staff and volunteers, accompany you to staff meetings to explain certain decisions.
9. Spend quality time to evaluate you and give you constructive feedback.
10. Remove any obstacle that can impede you in the execution of your work.

Please note:

A director that feels insecure and incompetent in his job will always try to play board members off against each other or even play staff off against the board. This is a tactic aimed at protecting himself (and his salary of course) and not advancing the interests of the organization. Board members must be careful not to fall into this trap. This can also happen where a director or staff members are seeking special favours from board members and will go out of their way to undermine the director. This is dangerous. Board members must refuse to become useful tools in pursuance of petty agendas. This is not good for the health of an organization. Secret meetings and conniving only create suspicion and mistrust that will cause everybody to suffer in the end, including the beneficiaries and of course the connivers themselves.

In my experience, many board members feel honoured to serve on boards. They will usually be approached by a director to serve on a board. What many do not understand is that as soon as they start serving on a board, they are entrusted with a power that can make or break an organization. The director is distributing power to the board, even the power to fire him if he is incompetent, lazy and not performing according to expectation. However, in my experience, when problems related to director performance surface, then you will find that board members will rather resign instead of getting rid of the director. This is especially true where board members are fairly new and afraid that they may be held accountable by public institutions or auditors for corruption committed in their name. When this happens, you can be sure that the organization will be dealt a death blow. No potential board member worth her salt will in any case join such an organization which means the organization is effectively buried.

BOARD AND MANAGEMENT ROLES AND RESPONSIBILITIES

When conflict starts to develop between boards and management, then I usually find it is the result of a lack of understanding of roles and responsibilities. In fact, whenever I do board training and take board members through an exercise to see how well they understand their own roles and responsibilities, then I am amazed at how many times they get roles and responsibilities wrong!

Remember, some roles and responsibilities are not cast in stone and may differ from organization to organization. But there are some that will always remain the same. When I work in small organizations (that is not highly specialised) then the roles and responsibilities will differ from how it is practised in a more developed and specialised organization. For example, some small organizations refer to their board as a management. It is important to understand this context otherwise more confusion can be created than clarity.

Here is a list of roles and responsibilities:⁶⁷

Roles and responsibilities	Management	Board members	Director	Board chair-person
Determine the vision, mission and objectives				
Write funding proposals and take responsibility for overall resource mobilisation				
Implement policy decisions				
Appoint, supervise and fire the director				
Recommend policy to the board				
Keep board members informed about the work of the organization				
Organise and prepare board meetings and decide the agenda				
Plan, implement and evaluate programmes				
Recruit new board members				
Induct new board members				
Administer the work of the organization				
Handle conflict between staff members				

⁶⁷ Ibid, p. 31

Prepare board meeting minutes				
Recommend potential board members				
Build public relations				
Prepare and write reports for the board				
Sign funding agreements on behalf of the organization				
Evaluate overall results of the organization				
Organise and attend strategic planning sessions				

As an exercise, get your staff members, volunteers and board members together and let them fill in the above list. See how well they all understand their roles and responsibilities. Try to see also where they differ and try to resolve those differences in understanding. Where you cannot reach consensus, consult with other organizations or get a consultant to facilitate a board development workshop with you.

SECTION 3:

STRATEGIC PLANNING:

HOW TO DEAL WITH ORGANIZATIONAL CHANGE

Think about this. What do you do when you start feeling sick? Well, chances are that you will most probably go to see a doctor. Right? The doctor will then examine you and after a thorough check will make a prescription to address your illness. The fact is that your diagnosed illness could have been the result of an accumulation of factors that led to your illness, i.e. that led to changes in your body system. The symptoms of illness are only the outward expression that something in your body went wrong and hence to a health breakdown.

The doctor will use his/her expertise to cure the breakdown in your health, i.e. to restore your body's equilibrium. Please note the role of the doctor, i.e. to *cure*. It is not to prevent a future breakdown in your health but to cure only. The problem with a curative approach is that most of the time it will address the symptoms of the problem only. You will be back at the doctor very soon with the same problem.

The fundamental problem with our health system is that it is predominantly curative in nature and not very much preventative. The reason: money or profits. The more you visit a doctor, the more money will have to be paid. And the poorer you become of course! Not only money wise, but also health wise!

So, what does all this have to do with strategic planning? Let me explain. The one thing that is constant or absolute in life is change. Change is around us everyday, both the visible and the invisible. When you fall ill over a period of time then it is the result of invisible changes that took place in your body system. In the same way, an organization can also fall sick due to changes that took place within or outside the organization. Strategic planning is one of those organizational tools that one can use to address and be ***ahead*** of those changes. Please note my emphasis on being ahead of change and not trying to manage change. It is common currency these days for “experts” to teach people how to manage change. This is wrong. Change cannot be managed. Management is about control and change cannot be controlled. The same principle applies to time. It cannot be managed. And why is that so? Because it is not tangible, it cannot be touched and controlled or manipulated. To talk of change management is a misnomer. It does not exist. No wonder the more organizations plan to manage change the more they fail to do so! We live in a

society obsessed with managing everything, to be in control of everything. We must learn that not everything can be controlled.

Imagine a pregnant mother (faced with inevitable change) tries to manage the change she will be confronted with soon. She cannot wait for the baby to be born to make critical decisions about the future. ***She has to act before the baby is born.*** That means she has to ***stay ahead*** of the inevitable change! Strategic planning can also help you to ***anticipate*** and ***initiate*** change. In this way, your organization can become an agent of change where members embrace change and do not fear it. Change is then perceived as an ***opportunity*** and not a threat.

THE WRONG APPROACH:

The problem with many organizations in my experience is that they view strategic planning as an event. It is that big event that you have every end of the year and where you get a consultant to facilitate it. Well, strategic planning is not an event but a process. And the aim of this process is not only to address the changes in your organization once a year, but to help your organization ***build a strategic consciousness***. That means you need to develop the ability to deal with change without just having to wait for the big event where you have your external consultant to provide expert advice about your strategic direction.

Building this strategic consciousness is not very easy. It is a process and a very hard one. It means building the consciousness of members within the organization of what organization is all about, their role in it, your vision, mission, purpose, and objectives and how you know when that purpose is fulfilled. Building organizational consciousness does not obviate the need for regular strategic planning sessions nor does it obviate the need for an external consultant to facilitate such sessions. But building this consciousness will ***deepen the ownership*** of the members over the process and inspire them to deal with organizational changes and not become victims of it. It is like teaching a patient to take ownership over his/her body and critically look at his/her lifestyle instead of just running to a doctor for a prescription. This is what happens to many organizations when they also run to external consultants for help whenever they experience a problem. They therefore prevent the organization from building its own ***internal capacity to solve its own problems***.

This chapter will try to explain how you can go about building this strategic consciousness to take ownership to address fundamental changes in your organization. Remember, the solution to any organizational challenge ***lies within the organization itself***. You just need to develop the self-

confidence and internal capacity to discover that solution. Building a strategic consciousness can help you to develop that self-confidence. The role of an external consultant is to facilitate processes that can help to deepen that organizational- and strategic consciousness and hence your self-confidence. The problem with many external consultants is that they have their own agendas and instead of facilitating processes, prescribe solutions to move on to the next contract or extending the existing one. That means that they do not respect your own organizational process and can do more damage than good in the long term.

SO WHAT IS STRATEGIC PLANNING?

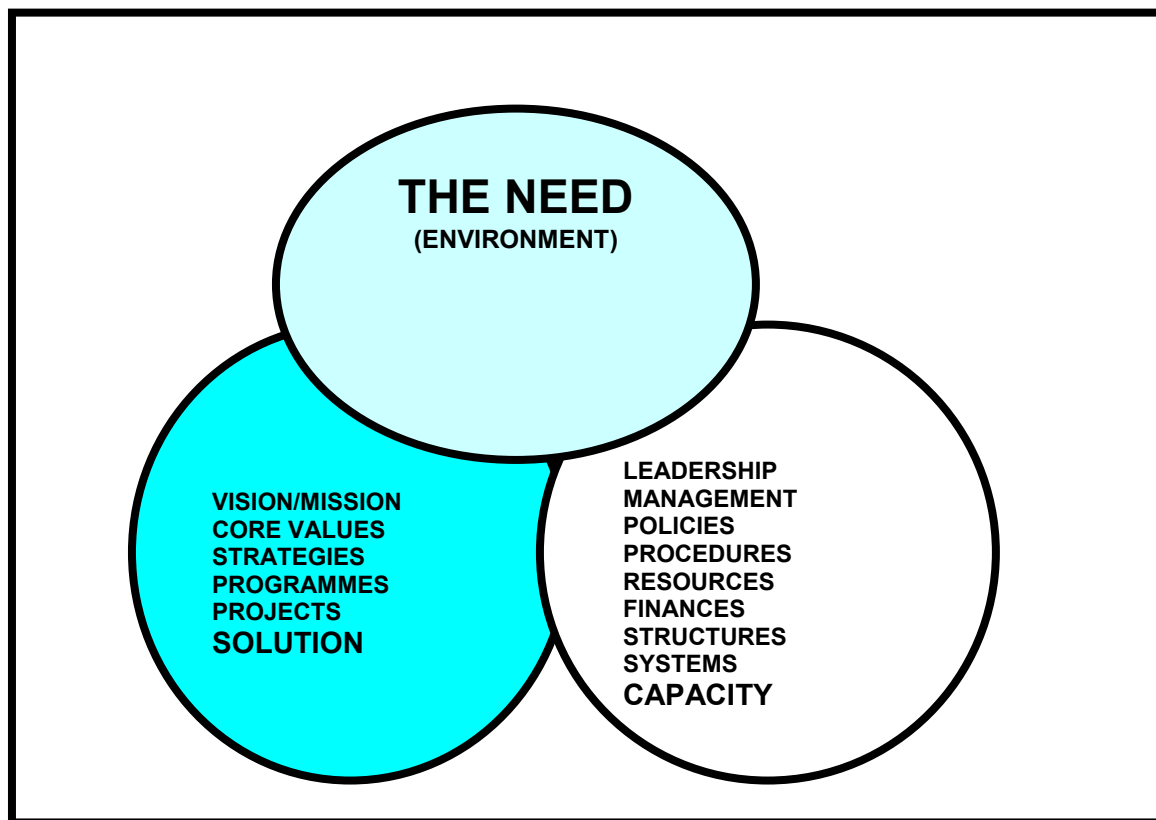
Well, it is a process to address change both small and big, within an organization. This is a process that is natural to human life. For example, when a baby is born the parents have to prepare for big changes, set objectives and put plans into place to ***prepare for those changes***. Failure to prepare can create chaos and confusion and most probably destructive conflict that can destabilise the entire family and lead to fragmentation. A baby born into a family is a big change and preparation is essential to deal with this change. But small changes also happen from time to time like children growing up with their natural needs changing all the time. When you do not pay attention to these changes you can be caught off guard and be faced with a crisis.

Strategic planning is therefore the *conscious* selection of a method and a set of activities to address change that will lead to the achievement of a particular or set of objectives. These objectives are interlinked and in line with your organizational vision. The method chosen will ensure

- Effective utilisation of resources
- Organizational continuity and direction
- Minimise risks by putting in place the best possible plan of action

WHAT ARE WE LOOKING AT WHEN PLANNING STRATEGICALLY?

THE ORGANIZATIONAL FIT MODEL: PUTTING YOUR ORGANIZATION ON TRIAL:



This model makes us understand the importance of knowing your environment and hence the needs that flows from it. Once the need is clearly identified, then you need to understand the solution that you will be offering or how you will intervene as an organization. This refers to your strategic vision and mission. Part of the solution is also the programmatic intervention that you offer. Lastly, you need to know whether your organization has the capacity to deliver the solution. This can include competence in leadership and management, financial and material resources, policies and procedures, etc.

In short, you have:

THE NEED – SOLUTION – CAPACITY

It is important to constantly check that your organization addresses the real need. If not, it will soon become irrelevant. If there is no proper solution identified, i.e. there is no effective strategy in place then you will find that people don't know what to do and start reading newspapers. Such organizations create the grounds for corruption since they are well resourced but don't know what to do with the resources. Members then start helping themselves! When you lack the capacity to deliver the solution then you are engaging in dreaming or wishful thinking. Wonderful plans but with no resources to do the work.

Organizational sustainability is therefore a constant interplay between the need, solution and capacity. Those in leadership must constantly check the relationship between the 3 components. Remember, strategic planning is a process of putting your organization on trial. You cannot allow members to emotionally cling to projects or programmes. If something does not work, it must be scrapped irrespective of whose pet project it is. To detach in this way is not easy for most members since they fear being without a job. But the process of strategic planning is to make your organization more effective and not more popular!

STRATEGIC PLANNING AND ITS ADVANTAGES:

- Change without clear objectives can create problems and strategic planning allows you to clarify your objectives and how they are linked to vision and mission.
- A clear plan of action can be designed that can lead to impact.
- Projections about your organizational future can be made.
- Facilitates the process of monitoring, evaluation and management of the organization.
- Better management of resources can take place.
- Prioritisation of resources in order of implementation
- Identify urgent problems and methods to solve them
- Organised and discipline modes of operation are facilitated
- It is important so that the organization can control its future
- The organization provides focused attention to selected issues
- Discipline members to evaluate the environment and the organization even when everything goes well

- Facilitate the anticipation and initiation of change and exploiting emerging opportunities

COMPONENTS OF A STRATEGIC PLANNING SESSION:

This consists of:

- A brief overview of the development of the organization
- Clarifying the vision and mission of the organization
- An environmental scan
- The internal analysis (what is happening within the organization in terms of projects/programmes, administration, etc.)
- The SWOT analysis
- Identify key strategic issues
- Time-table of action steps and accountability
- Monitoring and evaluation of the strategic plan and documenting the results

OVERVIEW OF THE DEVELOPMENT OF THE ORGANIZATION:

This involves:

Providing a short introduction about:

- A brief history of the organization
- Describing your target group
- Explaining the needs of the target group
- Describe the phases of development of the organization
- Lessons learnt in the process

VISION OF THE ORGANIZATION:

- This is your unique insight into a problem
- It is a long-term ambition
- Analysis of the problem/need that led to the establishment of the organization
- Gives an idea of what you strive for
- It's an element of the value system that gives the organization a unique character
- What makes the organization unique and the value that you bring to the world

- Explains the connection between the day to day routine of the smallest task and the greater purpose of the organization

MISSION OF THE ORGANIZATION:

- This is a statement that reflects the fundamental objective of the organization
- What is it that the organization would like to address in relation to the target group that needs to be achieved
- The impact that the organization would like to exercise in the long term
- The main means through which the target group will be served
- It must be simply formulated
- It must inspire members
- It forms an integral part of the identity of the organization
- An organization without a strong sense of identity will have no control over its future
- It explains how the organization executes its work in the external world and in its internal organization

ENVIRONMENTAL SCAN

This is an:

- Analysis of the external factors that may impact on the work of the organization in a positive or negative sense
- Analyse external factors relevant for the organization
- It is important to first understand your target group in the current political and socio-economic climate

THE FOLLOWING ELEMENTS CAN HELP YOU WITH THE APPLICATION OF AN ENVIRONMENTAL SCAN:

GOVERNMENT:

What are the development priorities with regard to your target group? What is the preparedness to make resources available or the facilitation of a legislative framework to promote development amongst your target group?

PUBLIC POLICY:

Pressure from various pressure groups for a new policy direction as it may affect your target group e.g. affirmative action, educational policy that will recognise the importance of informal education, the establishment of a youth commission, RDP, etc.

SOCIAL AND CULTURAL:

Will the values of people change over the long term? How will economic processes impact on human relations? Will lifestyles change drastically? Which impact will the AIDS pandemic exercise on human relationships?

ECONOMIC:

Will the economy improve and if so what impact will it have on the unemployment situation? What if the economic situation deteriorates? How will your organization act in such a scenario?

THE MARKET:

How big is your target group? What are their specific needs? How many other organizations operate in the same market? Do you compete with them, do you ignore them or do you work together?

OTHER ORGANIZATIONS:

What are the possibilities for acquiring resources from other organizations or to network with them? Are we affiliated to umbrella organizations or networks? If not, why not? Is there a tendency to create bigger networks? If so, how do you position yourself?

THE SWOT ANALYSIS:

S – Strengths

W – Weaknesses

O – Opportunities

T – Threats

Strengths – identify those things that your organization do well

Weaknesses – identify weaknesses by asking the following questions:

What needs currently addressed by the organization are becoming less important? Are our members of staff and volunteers properly trained for their specific tasks? What is our financial position now and what will it look like in the immediate future? Does the organization find itself in a growth phase, maintenance phase or in a phase of stagnation?

Type of services offered:

Who is using our services and any unique characteristics about our clients and services?

Organizational personnel:

Services offered by staff and their unique qualifications and roles within the organization

The roles of volunteers in relation to our clients, members of the community, funding and regulatory resources

Governing Board:

Responsibilities, skills required, organization, leadership, training and recruitment

Facilities:

What is the general state of our facilities and what is our ability to deliver services and to provide resources?

Operating procedures and policy:

Discuss any new policy or necessary changes in the organizational structure.

Financial overview:

Collect information about the organization's current financial status and future needs. Determine where most of your financial resources are generated and where most of it is spent. Investigate other areas of cost recovery, etc.

Fundraising programme:

Discuss the previous, current and future fundraising campaigns and plans.

Opportunities and threats:

This refers to the external factors that may affect the work of the organization.

Opportunities:

Are there positive developments in the external world whereby the organization can benefit or which could facilitate the work of the organization?

Threats:

These could be developments that could impact negatively on the work of the organization, e.g. the drying up of funds for development work.

Identify key strategic issues:

Out of the SWOT analysis will normally flow problems that will need to be resolved immediately. These problems are usually of a critical nature.

The following issues that normally crop up:

Do our projects still address the needs of our target group? Which projects can be abandoned and which require restructuring? Is there a need for better marketing of our projects? Which methods can be utilised? Are there new needs amongst our target group that must be addressed?

What does our funding pattern look like? Should we become more focused in our funding campaigns? What is the internal capacity of the organization to generate its own funds and what are the external possibilities?

Should the organizational structure remain the same? If change is necessary, where should we change? Should our staff be retrained to become more effective with the execution of their organizational duties? Is there a need for more staff members? What qualifications are we looking for? Where will we recruit them?

The identification of critical issues has the advantage in that the attention of the organization is focused on the issues that beg for resolution. Not all the critical issues can be resolved immediately. Critical issues should be prioritised in terms of **urgent** (that which requires immediate attention), **important** (that which requires attention in the short-term e.g. within 3-6 months) and **not so important** (that which requires attention in the long term).

Once the issues have been prioritised, draw up an action plan to address these issues:

Questions that could be asked to make the action plan more practical for implementation:

- What should be done? (Focus on the activity)
- Why should it be done? (Focus on your underlying assumptions)
- When will it be done? (Focus on the timing)
- Who will do it? (Focus on the people resources)
- How will it be done? (Focus on the methods of implementation)
- What will be required to do it? (Focus on the material-, financial and spiritual resources)
- How will we know it has been done successfully or not (Focus on the monitoring and evaluation processes)
- Where will the buck stop if it has not been done (focus on accountability for the task)

It is important that every action that is undertaken should be quantified, e.g. if the action is to send project or funding proposals to potential donors then it must be asked how many funding proposals will be prepared and to how many donors will it be submitted?

Accountability:

A system of accountability or feedback is necessary to ensure that actions agreed upon are effectively executed and to identify obstacles with the execution of certain actions. Members should know where to report in the case where certain problems are being experienced with the execution of certain tasks. There should be common agreement about who will be responsible to ensure that actions related to the strategic plan are executed and if not, why not.

Evaluation of the Strategic Plan:

The strategic plan must be flexible to reflect the changing environment. The plan should be evaluated from time to time by a strategic planning committee. It is advisable to set definite times for the evaluation of the strategic plan. Evaluation of the plan provides the strategic planning committee with the opportunity to see where progress has been made and where change is required.

Some lessons from experience:

1. The success of a strategic plan does not lie in the big workshop and how well it is facilitated. It lies in its **preparation**. Everybody must get involved in preparing for a strategic planning process. Collecting and processing information is important before the workshop. Make one member responsible to drive this process and holding others accountable.
2. Do not become obsessively attached to whatever is decided at a strategic planning workshop. Remember, any plan is only a guide and must be tested against reality. We do not choose reality but we respond to it. If a different reality presents itself than what you anticipated in your strategic planning process, then learn to abandon plans if you have to.
3. Some members grow sentimentally attached to projects and programmes and have great difficulty to let go even if the projects/programmes do not work anymore. Since their own personal money is not on the line, the more difficult it is for them to abandon what does not work.
4. It is a good practice to have an external consultant to facilitate your strategic planning process. But beware of the consultant who just walks in without preparation and sometimes without reading one document to help them gain an understanding about your work. They are usually not interested in the process but only the product (i.e. the consultant fee). And be careful of

consultants who don't do any follow up. The one who does not come to check what has been implemented and what the effect was of the implementation.

Some more advantages of strategic planning:

- Provide the organization with the opportunity to harness its resources and to focus attention on the most critical issues which threaten the survival of the organization
- Opportunities can be grabbed, plans can be adapted or reformulated and actions can be undertaken to correct possible errors of judgement which were the result of faulty assumptions
- It provides a general direction with specific actions. It focuses both on the process and the content of ideas
- A common vision and direction forward will develop amongst all the members
- The various components of the organization learn to work together and the co-ordinate their energies
- The organization is being forced to make tough decisions in terms of what is important and not so important for the road ahead
- Facilitate efficient evaluation of the work of the organization
- The organization becomes more organised and disciplined in its mode of operation
- Resources can be better managed especially where such resources are scarce

But the most important is:

If you fail to plan – you plan to fail!

The game of life is not so much in holding a good hand as playing a poor hand well. Therefore, it is not whether you win or lose, it is how you play the game!

Fear is the way we look at things, not in the things themselves!

Dead fish cannot swim upstream. They can only go with the flow!

EXERCISE 4:

4.1 Does your organization have a sustainability strategy? If yes, write down your responses to the following questions:

A: How do you rate the involvement of your board members in the organization?

B: How much time do you spend outside the organization building and strengthening partnerships, learning from others and searching for opportunities?

C: Do you have a communication strategy? Write down the various elements of that strategy. Also write down how you are documenting your successes and challenges and how you share your learnings with partners.

D: What is your current level of own income in relation to your overall budget? What are you planning to increase your own income base? Who are your current donors and what is your strategy to cultivate new ones?

CHAPTER FIVE



SELF-MANAGEMENT AND SELF- DEVELOPMENT

“When we are foolish we want to conquer the world, but when we are wise we try to conquer ourselves!” (John Maxwell)

Leadership and management in a non-profit organization :

PART 5: SELF MANAGEMENT AND SELF-DEVELOPMENT

1: LEADERSHIP AND MONEY MANAGEMENT: HOW TO START LIVING TO WORK AND NOT WORKING TO LIVE!

This section is to show you how to work with your own money in order to ***start living to work and not working to live!***

It has become common practise in many organizations these days where leaders abuse their positions to enrich themselves financially. The temptation to steal, whether by illegitimate means or even seemingly legitimately, (when policies and procedures are put in place to benefit the leader and sometimes supporters) is rife in many groups. This chapter is to help you not to fall into this trap where money is controlling you and your behaviour. It is aimed to prevent you from falling in a debt trap and then seeking or cunningly create opportunities in your organization to get you out of it.

THE THREE TYPES OF PERSONS USING MONEY:

There are three types of persons in society who use money. Ask yourself which one do you represent?

1. The first person using money always ***has enough left after having paid her debts***. She has enough to save for a rainy day. She plans how to spend her money and apply the principles of budgeting.
2. The second person ***just makes it every month***. He scrapes the bottom of the barrel. He has nothing to save but does not have a need to borrow money to survive. This person is very vulnerable for unforeseen expenses since he failed to make provision for them.
3. The third person is ***forced to borrow money every month after paying his debts***. In fact he has to borrow money to pay debts as well! This person is in constant crisis management.

So, where do you fit in? If you find yourself in numbers two and three, then I have advice for you: Don't even think of leading an organization! You are unfit and will be a big risk and most probably use the organization for financial gain. Should you end up in leadership then those

who allowed you should take co-responsibility when you wreck the organization and plunder its resources.

A PROBLEM OF LIFESTYLE:

Remember, a person who comes to you borrowing money from time to time, don't have a financial problem. The lack of finances is simply the outward expression of a deeper problem. In essence the person has a problem of lifestyle! He is living beyond his means. What he is earning and spending is not in balance. This person must change his lifestyle first. When you feed this person with money then you are an accomplice to help destroy this person. You are partly responsible for feeding his problem.

THE EXTERNAL ENVIRONMENT:

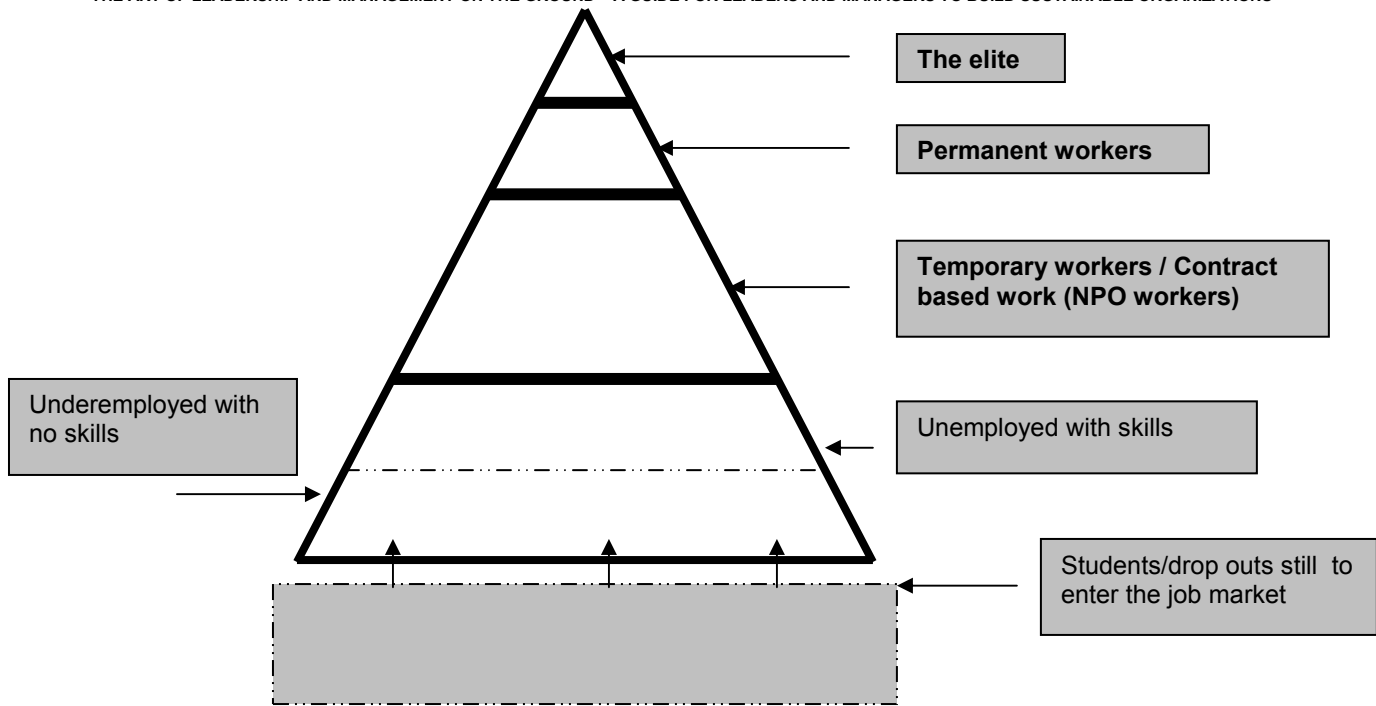
Do you understand the external environment in which you live? Do you know why some people are spending so much? Do you realise that some people get trapped into buying what they don't need, with money they don't have, to impress people they don't even like? This is due to:

1. A culture of competition and mindless consumption we live in and which is promoted in society.
2. A culture of debt that is promoted everyday, i.e. you are encouraged to borrow money all the time to satisfy superficial needs and not real needs.

Are you also one of those persons who receive unsolicited invitations from various companies to take out credit cards or to take out the next big loan? It is becoming easier these days to access credit in order to incur debt. Have you been tempted to sign up as well? Be careful, the people pushing these schemes are not concerned about your real interest. They don't care about your personal growth. They want you to worship money like a god. If you fall into their traps then you are in trouble and not fit to be in leadership.

THE NON-PROFIT ENVIRONMENT;

As a leader working in the non-profit environment, you will be subjected to all the ebbs and flows of this environment. You will know that you are a perpetual contract worker. (See figure below) Your work and pay depends on the next funding agreement that you are able to secure. This makes your financial position also very much insecure and will directly influence the way you manage your finances. Funding gaps for example are inevitable. How do you then go about to manage your finances? What are the things you should know?



HOW SOCIETY IS ORGANISED:

Look at the above sketch. What do you see? Yes, society is organised in a hierarchical manner.

1. ELITE: These are the people at the top. They are responsible for designing and imposing policies that ultimately benefit them. They are the captains of commerce and industry and those in government. These are the ones who are becoming richer and richer while the poor becomes poorer and poorer.

2. PERMANENT WORKERS: They are the workers who have permanent contracts. They are mostly highly skilled and specialists in their own field. They enjoy huge benefits such as medical aid, provident fund, housing subsidy, other allowances, etc. and the bosses try hard to retain them due to the scarcity of their skills. However, over the last two decades, more and more workers at this level have lost their status as permanent workers and have been reduced to the lower level of temporary workers or contract workers.

3. TEMPORARY WORKERS/CONTRACT BASED WORKERS: At this level the workers are working based on short term contracts. Some workers are permanently on contracts. Why is this so? So that the bosses can save on the benefits and increase their profits. Workers are viewed as a cost and they try to limit the cost of production. Workers at this level have no

certainty about employment since they can work today and be unemployed tomorrow. People working in NPO's are also contract workers since their work is based on funding agreements concluded with donors. This makes their work inherently insecure and of course more demanding.

4. UNEMPLOYED WITH SKILLS: There are two types of unemployed categories. The first one is those who are unemployed with skills. They are the ones who are retrenched as temporary or permanent workers. People at this level usually try to start their own enterprises with the skills they have accumulated through their work experience or try to secure employment in certain sectors of the economy.

5. UNEMPLOYED WITHOUT SKILLS AND WORK EXPERIENCE: This is the level where youngsters who leave formal education are trying to enter the job market. Due to an outmoded educational system, they find themselves unprepared for a changing globalized world. They lack the skills and experience to become economically productive and to develop sustainable livelihoods.

6. STUDENTS/DROP-OUTS: At this level you find the students at school or those who drop out for various reasons.

7. "CRIMINAL ELEMENTS": This is the last level. These are people who simply give up trying to access the formal and informal job market and develop survival strategies (regarded as illegitimate by society) to cope with life. They operate mostly on the margins of society. Their ranks are swelled by those on level five and six since they are very vulnerable.

Remember, your access to money will depend on the position you occupy in the pyramid.

HOW DO YOU RELATE TO MONEY?

This refers to your relationship you have with money. If left on your own, how do you normally treat money? Are you a natural spender or do you work sparingly with it? Depending on your answer to this question that will be your temperament or one can also say your degenerative tendency. The benefit of working sparingly with money is that you will always have enough to go around. The downside is that people will perceive you as being selfish. When you are a spender (i.e. always buying when you see an opportunity) you can easily deal with taking risks and creating opportunities (remember you can only make or create money if you spend it). The

downside is that you take too many risks sometimes and can end up in constant debt. The key is therefore to be aware of both temperaments and to cultivate both inside you. If you reject one in favour of the other, then you are not balanced and this may have disastrous consequences.

SOME RULES ABOUT THE USE OF MONEY:⁶⁸

1. Money must **circulate**. Do not stash money away purposelessly. It is a form of energy and must circulate all the time. This is what Deepak Chopra writes about the circulation of money: "Another word for money is "currency", which also reflects the flowing nature of energy. The word currency comes from the Latin word "currere" which means "to run" or to flow. Therefore, if we stop the circulation of money – if our only intention is to hold on to our money and hoard it – since it is life energy, we will stop its circulation back into our lives as well. In order to keep that energy coming to us, we have to keep the energy circulating. Like a river, money must keep flowing; otherwise it begins to stagnate, to clog, to suffocate and strangle its very own life force. Circulation keeps it alive and vital."⁶⁹ And let me add, money here don't only refers to hard cash, but also mental money, money in the form of sharing ideas, voluntary work, giving advice and moral support, etc. This is also energy that must circulate!
2. Let money be your **servant** and not your **master**. You have to control your money and not allow your money to control you. People who allow their money to control them start **worshipping money like a God**. They are therefore always frenziedly busy to accumulate money just for the sake of accumulating it. There is no objective that is linked to their personal growth.
3. Do not **chase after money**. Let money chase you! This is an old Chinese saying and means that when you make running after money your sole focus, you will never find it. You may get your hands on some money in the short term, but you lose it in the long term. People who are compulsive gamblers know this.
4. Know when **you have enough**. Some people never know when they have enough. Getting their hands onto more and more money becomes an obsession. Later they learn to steal from others!
5. Whatever money you make, learn **to share at least 10%** of it with other people.
6. **Pay yourself at least 10%** every month from your own money. Put this money away and do not touch it. This is an investment you are making for a rainy day. Without this investment you can make yourself very vulnerable for unforeseen expenses.

⁶⁸ Adapted from B. Proctor (1984) *You are Born to be Rich*, p. 5

⁶⁹ Deepak Chopra (1997) pp. 28-29

SOME PRINCIPLES TO REMEMBER:

1. CLARIFY YOUR PERSONAL OBJECTIVE:

You cannot just spend money for the sake of it. Nor can you just plan how to spend it for the sake of planning. You need to be clear about your *personal objective* in the long and short term. What is it that you want to achieve in your personal life that is linked to your personal development? Clarifying this objective determines when you know you have enough otherwise you will fall in the trap of mindless accumulation of money. This is what is happening to people who are overtaken by greed and simply accumulates money for the sake of it. When this happens then money becomes your master and not your servant.

2. TAKE YOUR MONEY SERIOUSLY AND TREAT IT WITH RESPECT!

This may sound very simple, but can you account for every cent that you spent last month? Chances are that you will not be able to do it. Why? Most probably because you don't treat your money seriously and do not treat it with the necessary respect. One sign that you are treating your money with respect is your ability to account for every cent that you spent. That means that you are able to track the flow of your income and expenses. Once you start to guess, then you are on the wrong track. Of course, this is the ideal and ideals and reality seldom coincide. But if you cannot sit down and account for how and on what you spent money on and how you generate it, then you may fall into one of two categories, namely:

1. You just manage to survive
2. You are always in debt

Now indicate how you currently keep track of these expenses. If not, indicate how you plan to keep track of them in future.

1. By debit order?
2. By receipts?

Do you have any other method?

3. BUDGET REGULARLY

This is self-explanatory. If you earn most of your income on a monthly basis, then it makes sense to budget on a monthly basis. A weekly review of your budget will be useful to check that you do not go beyond your budget constraints. This allows you to monitor your income and expenses.

4. RECORD YOUR BUDGET IN WRITING

How many times do we budget but everything stays in our heads? This will not help you much. If you take your budget seriously then you will record it on paper. In this way you can hold yourself accountable. For as long as you do not record it, then you cannot hold yourself accountable. Recording your budget also allows you to share it with those who can directly or indirectly impact on it, like your children or husband. When they make demands on you then you will be able to show them why you cannot entertain a specific request for expenditure. This will also educate them to become more disciplined with their own expenditure. Your children or other family members will therefore learn from your example.

5. BUDGET ANNUALLY, MONTHLY AND EVEN WEEKLY IF NECESSARY

Do you have an annual budget? I mean do you have an idea as to how much money you will be expecting to earn or generate and how much you project to spend for this year? Do you know what you plan to do with your income? How much money do you plan to save? Most probably you don't! Sit down and work on your resource mobilisation objectives for the year. If you don't then you will be living from hand to mouth. As you generate income so you will spend it. Once your annual budget plan is clear, then you can plan your monthly budget in order to achieve your annual objectives. A budget without clear objectives is useless. It is like planning for the sake of planning. There is no end in sight! Such a process is a waste of time.

6. TRY TO STICK TO YOUR BUDGET AS FAR AS POSSIBLE

It is senseless to budget and not to try and stick to your budget. Of course, there will be many unforeseen factors that will impact on your budget but you need to stick to it as far as you can. When you need to drastically deviate from your budget first discuss this with your partner or relevant stakeholders and consider the consequences.

7. BUDGET FOR THE UNFORESEEN (CONTINGENCY)

No budget plan is perfect. It is only a guide. There are many unforeseen factors (disruptive elements) that can affect your budget like increases in interest rates, accidents, sickness, etc. At least 5% - 10% of all your expenses per month should be allocated towards the unforeseen or as a contingency. This will allow you to handle emergencies without having to borrow.

8. DISTINGUISH BETWEEN NEEDS AND WANTS

Very few people understand the difference between needs and wants. You can save yourself a lot of money if you buy what you need and not just what you want. For example, you may need a

jean, but to buy a particular label (that is more expensive) could be a want. Make a list of the things you currently possess that were needs and those that were simply wants:

9. ALWAYS MAKE PROVISION FOR A 10% SAVING IN YOUR BUDGET

When you earn a steady income, then it is useful to save at least 10% of your income every month. This is money that you do not want to touch. It must be saved in an account that you do not have ready access to. The money in this account will earn you regular interest also known as residual income. This means that the money will be working for you without you having to move a finger. If you cannot afford 10%, then start with a smaller percentage. But you must learn to pay yourself first!

10. UNDERSTAND YOUR SOURCES OF INCOME

You always have two sources of income namely:

- (a) **Primary source:** this is normally your main source of income e.g. your monthly or weekly salary. You have control over your primary source since you have a measure of certainty that you will receive this income.
- (b) **Secondary sources:** these are sources where you do not have much control over the income e.g. loans, savings, etc. Very few people spent time on diversifying their sources of income and make themselves vulnerable for financial crisis.

11. DON'T BUY TO IMPRESS PEOPLE YOU DON'T EVEN LIKE!

Make sure that the things you budget for are the things you need and not to impress other people. Sometimes people feel good when others compliment them for what they have (material goods). They therefore go out of their way to impress others by buying the things they don't need. Inevitably they end up spending a lot of money on useless commodities because it is more about satisfying a psychological **need for acceptance**. Money is simply the medium through which they express it.

12. COMPARE PREVIOUS BUDGETS WITH CURRENT ONES

It is important to compare previous budgets with current ones in order to pick up trends in your expenditure. For example you could discern a trend related to your telephone account or food budget. Once you pick up a trend in income or expenditure then you will be able to know where to cut or minimise expenditure and where to maximise income.

13. DO I REALLY HAVE TO BUY IT?

When budgeting for a particular item, first ask yourself whether you need it, want it and whether you need to buy it. Instead of paying money, ask yourself where you can get an item without having to pay for it e.g. training, material resources, expertise, etc. Teach yourself to spend money only when you have to. Try to be creative before you simply spend money.

14. BE CONSCIOUS OF INVISIBLE EXPENSES

Very few people budget for invisible expenses. An example is bank fees. When you draw money from an ATM, you always pay a fee to use that machine. When you borrow money to a friend in the form of a cheque then you need to remember to allocate for the cost of the cheque (about R6.50) as well as the processing of it at the relevant bank.

15. LOOK FOR CHEAPER GOODS BUT WITH QUALITY

Always look for items that you need that are cheaper (at a discount) but with the same or better quality. Sometimes we have the tendency to just buy what we see instead of shopping around first. Especially when you plan to buy expensive items with long term financial commitments (like cars, houses, etc) learn to do your research first. It is dangerous to just buy at the first opportunity.

16. BEWARE OF IMPULSIVE BUYING

Unless you know what you always buy and how much you are restricting yourself to buy, then it is useful to have a shopping list when you go shopping. Many people become victims of impulsive buying and buy whatever catches the eye. This is dangerous. Try to keep your children at home when going to shop, especially end of the month shopping. They love to put pressure on you to buy what you do not need. In fact, they are natural disturbers!

17. HAVE SOMEONE THAT CAN HOLD YOU ACCOUNTABLE

When you are married or live with someone then it is useful to ask your partner to hold you accountable for how you manage your budget. Without this accountability you will tend not to take your budget seriously. Keeping each other accountable can become a good exercise in developing your relationship as well. You will both learn to become more responsible and living proactively. Remember that couples with continuous financial woes also do damage to their relationship since they spread negative energy that pushes each other away.

18. MAINTAIN A LIFESTYLE THAT YOU CAN AFFORD

Many people fall into financial crisis because they want to maintain a lifestyle that is inconsistent with their level of income. Once you fall into this trap then you will always try to find an easy way out by borrowing money. The danger is that you find yourself getting trapped into a cycle of debt, i.e. you have to start spending money that you don't have. That means you have to pay money for using money (another person's money!). We call this paying interest on loans. We live in society that encourages debt in order to maintain a system of exploitation. Those who encourage this have no interest in adding value to your life. Be careful of not falling into this trap. Not only will it affect you but also your family and your work performance.

UNDERSTANDING SOURCES OF INCOME:

1. You are a source of income – use your brain to think of ways to increase your income.
2. Understand your strengths and how to sell it to generate income. Remember we are all potential consultants with specialised knowledge that somebody else needs. Sell that knowledge!
3. Make a list of the material resources you have at your disposal and how it can be converted into income.
4. Apply cost containment where possible.
5. Organise discounts where possible or trade offs.
6. Where do you spend the most and how can you limit or eliminate it?
7. Where do you earn the most and how can you increase or maximise it?
8. Make a list of your sources of income and expenditure – what can be eliminated as expenditure and what can be increased as an income?

DISRUPTIVE ELEMENTS THAT CAN AFFECT YOUR BUDGET:

The following are things you cannot foresee that will impact on your budget. This is why you need to have a reserve fund. If not, then you will be very vulnerable and can easily fall into uncontrolled debt.

1. Illness (somebody has to see a doctor)
2. Loss of a job and a primary source of income
3. Unforeseen increases e.g. petrol, food prices, etc.
4. Urgent requests to borrow from family, friends, etc.
5. Theft
6. Accidents
7. Unplanned pregnancies

8. New relationships (e.g. a boyfriend or girlfriend)

9. Inflation

10. Pressure to provide loans

11. Uncontrolled non-fixed operational expenditures like a telephone, etc.

WHAT YOUR PERSONAL BUDGET SHOULD LOOK LIKE:

PROJECTED INCOME:	AMOUNT:	PROJECTED EXPENSES:	AMOUNT:
Primary source: (indicate definite or not definite)		Operational (fixed)	
Monthly salary		Rental (or mortgaged bond) and levies	
Subtotal		Car payments	
		Transport (public)	
Secondary source: (indicate definite or not definite)		Rates and tax	
Interest on investments		Accounts (clothing, etc.)	
Donations		School fees, medical aid, etc.	
Loans		Sub total	
Sale of materials			
Subtotal:		Operational (non-fixed)	
		Bank fees	
Grand total:		Water and electricity	
		Petrol	
		Food	
		Social activities	
		Sub total	
		Capital expenses	
		Television	
		Total	
		Savings and contingency	
		Grand total	

Please note:

1. First work on your sources of definite and potential income. Always plan your expenses ONLY on your definite income. Never plan expenses on what you THINK you may receive as

- income. This is dangerous since you cannot exercise control over what others will promise to give to you.
2. After calculating your income and expenses, you should preferably end with a surplus. If not, then you can either break even or worse, you'll end up with a deficit. When this is the case then you need to revisit your budget to see where you can:
 - (a) Cut on existing expenses
 - (b) Maximise potential income or do both
 3. A person can normally cut on non-fixed operational expenses like telephone since you can exercise control over its use or delay the buying of capital goods. Remember, if you are not familiar with budgeting, find yourself a financial adviser or someone you can trust to assist you and hold you accountable.

Remember this poem about money:⁷⁰

It can buy a House, but not a Home
It can buy a Bed, but not Sleep
It can buy a Clock, but not Time
It can buy you a Book, but not Knowledge
It can buy you Medicine, but not Health
It can buy you Blood, but not Life
It can buy you a position, but not the respect that goes with it
It can buy you Sex, but not Love

So you see money isn't everything and I tell you all this because I am your Friend
And as your Friend I want to take away your pain and suffering...
So send me all your money and I will suffer for you.
A truer Friend than me you will never find.
CASH ONLY PLEASE!

⁷⁰ Author unknown

Don't chase after money. Let money chase you!

Remember, that you need to start living
to work and not working to live!

The world is full of givers and takers. The
takers may eat better, but the givers sleep
better!

No one finds life worth living. You must
make it worth living!

The greatest tragedy in life is not death but
life without a purpose. It is dangerous to be
alive and not to know why you were given
life!

PART 2: Managing and developing yourself and the obstacles to self-management

Do you remember the quotation on the front cover? Read it again. Then read it again.

“My experience over the years has made me realise that for successful transformations in any organization, community or society, every leader must be prepared to undergo an internal transformation – a painful process cleansing a leader from all the contamination of an unconscious, unthinking, gender-, race-, and rank blind society. Like steel forged in the white heat burning the impurities so a leader is moulded on the anvil of those invisible social forces that must lead to change - human change, a change that must lead those at the margins to have more access to resources and power over choices. The leader of today will have to be prepared to sit in the fire of transformation without getting burned.”

What is the central message?

The central message is that development and transformation is first of all an inside job. It starts with you! You must take responsibility. What are you doing today to transform yourself for tomorrow? What are you reading, practising or doing right now? Remember we create tomorrow by what we do today. So, what are you doing?

The first question you must ask yourself before planning your self-development is: “What do I want to be remembered for?” Will I die one day and just be forgotten? Or will I leave behind a legacy that is treasured and respected by the next generation?

So, what is driving you? What is your plan for life? What are your vision and your mission? Where are you going to and how are you going to get there?

Your self-management cannot be effective unless you answer the above questions unambiguously. Developing yourself begins by you serving an ideal, something outside of you. Once you know what that ideal is then you identify your strengths and develop them. You do not ignore weakness but you make it less relevant by building on your strengths, by building on what you have.

MOVING TOWARDS SELF-AWARENESS AND AWARENESS ABOUT YOUR WORLD

No person can exercise any control over their lives unless they understand themselves first. This is called developing self-awareness. An awareness of who am I? Understanding yourself starts with understanding your strengths, your talents and the things that make you unique. Go back to your temperaments and study your inherent strengths. You must have strengths; it does not matter who you are.

Think about a glass of water that is half full and half empty. Every human being has both sides in them as well – a full and empty part. The full part represents your strengths. Write down your strengths. Consult friends, family members and teachers and let them confirm with you what they think your strengths are. Once you finish this process, you need to build on those strengths. Amongst your strengths, find the one thing that you do very well and concentrate on that. Maybe you love writing, facilitation, speaking, giving advice, etc. Read up on that skill, talk to other people about it, especially those who are doing it already. Become single-minded about developing that talent or skill.

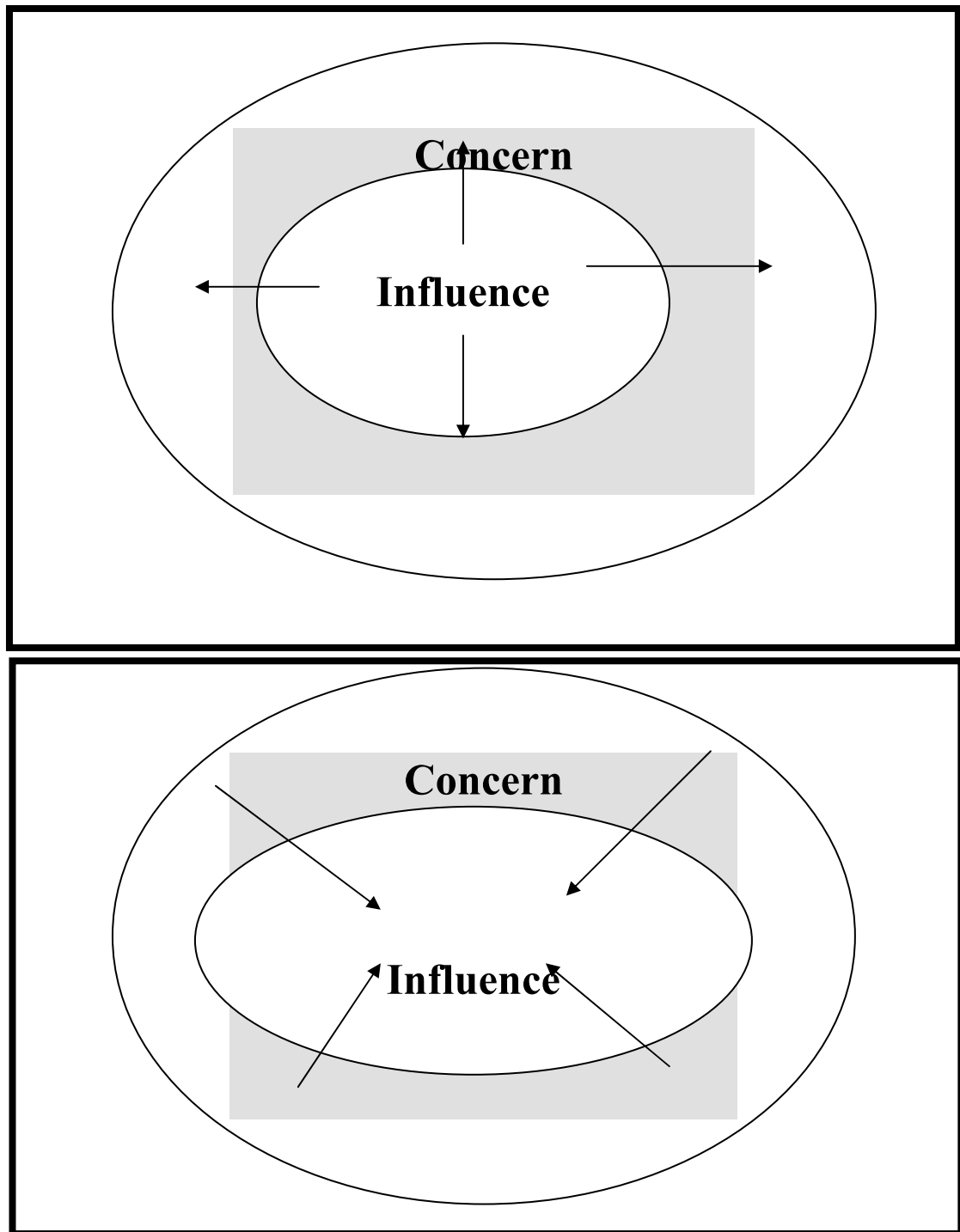
And don't forget your weaknesses. Eliminate your weaknesses by building on your strengths. Pour more and more water into your glass and the emptiness will become less and less. It may never disappear but you can make it irrelevant. By focusing on your weaknesses you can only become distracted and start imitating others. This is when you start putting up a mask to hide the real you. You put artificial pressure on yourself. You cannot develop yourself based on what you don't have. You can only build on what you have already - your strengths!

But this is not enough. Effective leaders try to understand the world around them, the global processes and historical developments. They try to learn from the past to understand the present and to prepare for the future. This does not mean that you must necessarily have a correct understanding of your world around you. The point is to **have an understanding**. The world today is too complex in any case to try and have a correct understanding. It is like trying to find the only truth about how the world operates.

Striving towards this absolute truth can only lead to dogmatism that is the negation of creative and critical thinking and practice. Avoid this kind of thinking at all cost. It is this kind of thinking that leads to sectarianism, a belief that your group or organization has the only answer to the problems of humanity and everybody else is wrong and must follow you.

DON'T BECOME A VICTIM OF MENTAL DEATH

Look at the sketches below:⁷¹



⁷¹ Stephen Covey (1989) *Seven Habits of Highly Effective People*, p. 85
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Covey said we all have two circles operating in our life everyday, the circle of influence and concern. Where do you operate when you have a concern? Do you worry and worry. Well, then you are operating in your circle of concern.

When you act in your circle of influence, then you act on the one thing you have most control over and that is yourself. You work on “I” and “I” stands for influence. The more you work in your circle of influence, the more that circle will expand and grow. The circle of concern will hence become smaller and less relevant. You now start to control the concern and do not allow the concern to control you.

Look at this example. As a leader of an NPO you are faced with a decline in funding from external donors. What do you do? When you use the above approach, you can develop one of two options:

<i>Circle of influence:</i>	<i>Circle of concern:</i>
Effective leaders will: Look at alternatives to external funding e.g. developing own income base Increase cost recovery for services Become more efficient when collecting fees for services rendered Develop cost containment strategies Do more donor research and prepare funding proposals and funding enquiries Change strategies and develop better projects in line with your vision, etc.	Bad leaders will: Will blame everybody (the environment, donors, partners, board members) except themselves! They will worry and worry until it is too late; they will start to close projects down and retrench staff.

When you work only in your circle of concern, then that circle will become bigger and bigger. It will become so big, that your circle of influence will disappear. And psychologists will tell you ***that is how suicide is committed***. A person loses complete control over their influence over their concerns. They develop a victim mentality, i.e. everybody is against them. Even those who genuinely try to help are regarded as the enemy.

You see, suicide is not an event. It is a process. Long before a person decides to kill him/herself (or an organization) death will have occurred a long time ago - mental death. You choose to give up on life before you decide to consciously kill yourself. You choose to destroy your organization long before it collapses.

So, when you are confronted with challenges, where do you operate, in your circle of influence or concern? If it is the latter, then you will soon become a victim of mental death. In an organization, you will start to project that negative energy on everyone around you. Everybody will be wrong and you will be right despite all the signs of death. Your enemies will multiply as you try to hide from open and honest criticism. You will become defensive and surround yourself with a clique of stooges where the single principle will be to **agree to agree!** Then it becomes important not **what** is being said, but **who** is saying it!

There is a story about a Chinese man operating a tattoo shop in America. His friend visited him one day to observe him in his job. As the Chinese man was busy with a client, a huge biker walked in and demanded that the words “Born to die!” be tattooed on his shoulder. The Chinese man obliged. When done, his friend walked up to him and asked how someone could be so negative? How can someone advertise himself to die? The Chinese man then replied in his own broken English: **“Before tattoo on body, tattoo must be on mind first!”** That means before a person can advertise to die, death must have occurred already – in his mind! So, what is the tattoo on your mind at the moment?

6 WAYS TO EXPAND YOUR INFLUENCE:⁷²

In his book, the *Seven Habits of Highly Effective People*, Stephen Covey enumerates six ways to build trust or as he calls it, make deposits in other people’s emotional bank account. In this way, you will be able to expand your personal influence amongst other people. I list the 6 ways here.

1. Try to understand other people

Normally, our first response when confronted with problems is to find out who is responsible. Not because we want to understand, but because we want to judge. Everyday we issue statements of judgement against other people without making any attempt to understand from the other person’s point of view why they have done something in a certain way. Judgement is the opposite of understanding. When you try to understand you learn to ask a simple question: Why? The more we ask this question the more we can learn to understand instead of just wanting to be

⁷² Ibid, pp. 190-198

understood. Remember: understanding does not imply agreement. It means a temporary giving up of your position in order to put yourself in the position of somebody else. It means to move from your comfort zone into a more painful zone. Remember, to give up something (your position in this case) means to make a sacrifice. And sacrifice involves experiencing the pain of letting go. If you try to avoid this pain (which we do most of the time) then we cannot let go and hence will have difficulty to learn to understand others. Remember, the word to understand means to **stand** (take up a position) somewhere. We naturally prefer to **stand** where we are (to see something from our own perspective) (and in our comfort zone) instead of trying to stand next to another person with another perspective. We do this since we try to avoid (unconsciously sometimes) the pain of temporarily giving up our own position.

2. Pay attention to the small things in life

It has become characteristic in the world we live in for people to always want to make the big impression. Buy the big car, the best dress, the big function (even if you cannot afford it), etc. Imagine you get married to a partner and you buy her an expensive ring worth R20 000.00. She will be very impressed and very excited of course. And you can be sure that everywhere she goes she will make sure that people notice that ring. Right?

But imagine that with your first anniversary you are so busy that you forget about it. Your partner waits in vain for you to arrive home to celebrate this most important day in her life. A candle light dinner is prepared with romantic music to surprise you. But you fail to turn up. How will she feel? And of what value will your ring be? See? The thought of remembering an anniversary is more important than a ring! And the thought actually costs you nothing!

And there are many small things we forget to do everyday. Like smiling, saying thank you, phoning people up and saying: "How are you? I miss you!" It is ironic that most people have cellular phones these days to communicate. But we communicate less and less. In fact most people never have enough airtime on their cellular phones in any case. The cellular phone is more of a status symbol than a tool of proper communication. When you do have airtime then you cannot even speak properly because it is so expensive. So most people send each other a *"please call me"*.

And we do not smile anymore. Most people are walking around with poker faces everyday. Learn to smile and show people that you are approachable, that they can talk to you. It takes 26 muscles

to smile and 72 to look boring. Put value on your face by smiling. I know I am not that good looking. But when I smile, it is a different matter! And learn to greet other people.

Let me say something about greeting:

A few years ago I was introduced to a book called “The Fifth Discipline” written by the world renowned systems theorist, Peter Senge. For those studying and practising in the field of organizational development, this is compulsory reading.

What struck me about this book were not its contents regarding systems theory although it is regarded as a classic. What struck me were the opening lines on the first page. In a book almost as thick as the bible, Peter Senge introduced the reader to the book with the Zulu words, “Sawubona!” He explains that in Zulu these words have a profound meaning, namely: “I see you!” Did you notice that this is also how I started this book?

You see, in Zulu, people don’t say, “How are you?” They know that most of the time we lie to each other. We say, “I am fine” but this is more of a conditioned response than a genuine expression of wellness. So, in Zulu they say, “I see you”. Because they know when I see you, you will also see me. Put differently, when you see me, you recognise my existence. And when you recognise my existence, you also recognise your **own** existence. So, when I recognise your existence, I recognise that you exist as a human being, and therefore I am also human. I am therefore human because I accept that you are human and that you exist.

So next time when you walk past other people and make no attempt to greet, remember, you do not recognise them as human beings. And when you realise that, also remember that you deny your own existence as a human being.

I often hear the comment, ***“But what if I greet someone and s/he does not respond?”*** Well, my response is always simple. Persist in greeting them, again and again. When people don’t greet you back, then this is not YOUR problem. So don’t make other people’s problem your problem! Just because someone denies his own existence does not mean you have to do the same. Greet them again and again. You will discover that at some stage (when they are ready), they will respond. You will then have helped them to rediscover their humanity! In other words, you will have done your human duty.

At the place where I gym, I encounter a lot of people who refuse to greet. I always expect this so I don't feel that bad. (Sometimes it hurts, because we are human!) But I also know I must try again and again. In this respect I regard it as my moral duty to help others. And I have some wonderful examples of people who have opened up and started to greet me before I can greet them!

Where I live, the same thing happens. I am surrounded by a number of conservative whites where I live. When I first move into my apartment, they used to just stare at you when you greet them. They must have thought that I am mad or abnormal! So, when I entered the lift I always greeted them, sometimes very loud to make sure that they hear me. For a while they ignored me but nowadays when I enter the lift they greet me first!

So, the lesson is simple. Greet everybody, all the time. Don't be selective in who you greet. It is painful and it hurts when people do not respond to your greeting. Human beings are vulnerable and must accept it and live with it. Not deny it. So, learn to get in touch with your vulnerability and hence your humanity. Start to see other people and that they exist. In this way you will get in touch with your true self. In this world where everybody is always in a rush, we are living past each other. We are alienated from each other. We do not see each other anymore. Greeting each other can go a long way to reverse this destructive culture that has destroyed the human spirit. So greet and start seeing others and yourself! Learn to become human again! Learn to hug and not just greeting with your extended hand as if you want the other person to stay away from you. Learning to hug means to learn to become real again, to learn to touch each other again, to become human again!

3. Clarify expectations

This is so easy but never done. Whenever you form a relationship with anyone, whether at a new job or a new friendship, learn to clarify what is expected from you. And also what you expect from the other party. A lot of destructive conflict can be avoided if this is done consciously. When relationships break down you will normally find that what was expected was not clearly defined. When conflict emerges then it is a sign that expectations should be clarified, both the most obvious and the assumed ones.

4. Live with integrity

This simply means that you must practise what you preach. It is no use you preach personal development but you break yourself down. Remember, the word integrity comes from the word integrated which means to make whole. The opposite of integration is disintegration and that means to break apart or to separate. Living with integrity therefore means to become whole, to

become real, to remove the mask from your face and to honour yourself. This is not easy and the road to holism does not proceed in a straight line. It is fraught with painful challenges and constant meandering.

5. Make promises and keep it

People only trust those who keep their promises. Think about a shop where they disappointed you with their products. Chances are that you will avoid that shop in future. Why? Because you had a bad experience! If you disappoint people constantly then they will avoid you as well. And don't forget to make promises to yourself and also to keep it as well! You need to build trust in yourself as well. You are your first and most important client!

6. Apologise when making mistakes

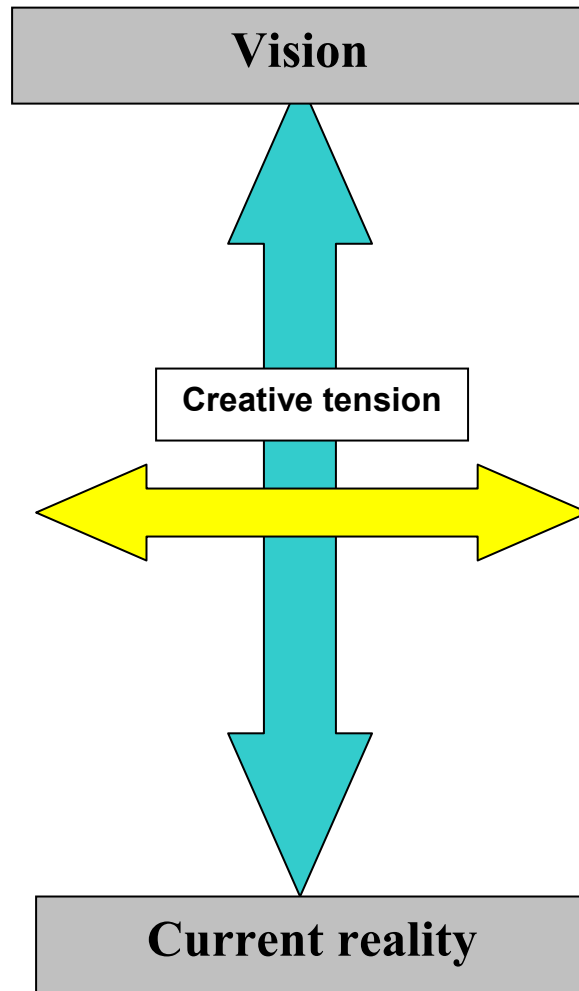
To make mistakes is human. We all do it almost everyday. To apologise for it takes some courage. We always want to be right, to be smart and to be in control. But people have little respect for those who persist that they are right when all the evidence show that they are wrong. When you make mistakes just apologise and move on. Don't try to defend the indefensible.

When you learn to practice the above, then you will increase and expand your circle of influence. You will constantly produce positive energy and this will attract the right people to you. This does not mean that you cannot feel down sometimes. But when you do feel down, don't apologise for feeling that way. Give yourself permission to feel like that. It is human to feel down sometimes. Just be honest about it.

DREAM WITH YOUR FEET ON THE GROUND!

Covey says that everything in life is created twice. You first have the mental and then the physical creation. Before you start building a house you need to plan it first. What the house will look like starts first in your head. This is the mental creation. When you start building the house then you construct the physical creation.

In an organization you need vision first. This is the mental creation. You cannot build an organization without clear vision, without knowing where you are going. Building that dream or vision is like constructing the house you dreamed of. The same principle applies in your personal life. You need to have personal vision. You need to know where you are going in life in order to know how you are going to get there! Look at the sketch below:⁷³



⁷³ Peter Senge (1990) *The Fifth Discipline*, p. 150

When you have personal vision, then you have an idea or a view of where you are going. But you need to base your vision or your dream on the current reality as it exists. Otherwise, you will be dreaming in the air and then you will crash! Peter Senge in “The Fifth Discipline” uses the above sketch to explain why it is so important for an organization to have vision. But this also applies to your personal life.

To dream or to have vision is to generate mental energy. It means to think beyond the constraints of current reality. It means to defy that reality. But that reality needs to be understood first. This is why self-awareness is so important. Awareness about who you are and the forces in your environment.

The result of having your personal vision and understanding your current reality is creative tension. It is like the elastic that you pull. By pulling the elastic you generate tension. You create the possibility of movement. Without pulling or stretching the elastic it will just hang in the air motionless. In management we call this the ***principle of stretching***. You must learn to stretch yourself all the time. Stretching yourself help you to build new standards, to rise above current constraints.

Once your vision is clear and the current reality is understood, then you need to set yourself some objectives - SMART objectives. These are objectives that are ***specific, measurable, achievable, realistic*** and ***time-bound***. It is now possible to mobilise the resources that will lead you to your dream. Without vision the resources you need to mobilise will remain vague. What sense does it make to attend workshop after workshop or read one book after the other? Where will this take you? And how relevant is it how much time you spent on these activities?

If your vision remains vague or when you lack a vision, the time you spent doing anything also becomes irrelevant. This is why the concept of ***time management*** advanced by highly qualified academics is so irrelevant. You cannot manage time. You lead your own your life and leading your life starts with building a vision. Building personal vision allows you to decide on your ***posteriorities***, i.e. deciding on the things you will ***not*** do. It determines what you say *yes* and *no* to. It allows you to manage your life day by day, minute by minute, hour by hour, week by week, month by month and year by year. It determines the big objectives and small tasks of how to get there. Therefore I believe in ***task management*** and not time management. People always ask me why I don't use a wristwatch. And I have been doing it for more than 6 years already! It is simple. I focus on my daily tasks. And I always try to limit them to at least 3 per day. So, who needs a

wristwatch anyway? I am not implying that you throw your wristwatch away. But try to take it off from time to time and focus on the **quality** of your tasks and not just the **quantity**. **Focus on doing less and achieving more.**⁷⁴

Constantly building vision is a life-long task and must be done consciously and not by default. As a leader in your organization you set the example by building personal vision and showing others how to do it. Without personal vision you can become a danger to the organization you are leading. An organizational vision should facilitate your personal vision and vice versa. Without this mental synergy you can find yourself in the wrong organization. The effect is that your organization is going in one direction and you in the opposite. There is bound to be a breakdown at some time. When this is denied then it can become the source of endless destructive conflict between people. When your vision is not in line with that of the organization then you need to let go and move on. Maybe you have grown beyond the vision of the organization and have bigger dreams or aspirations. Admit it and move on but don't try to redesign the organization based on your needs.

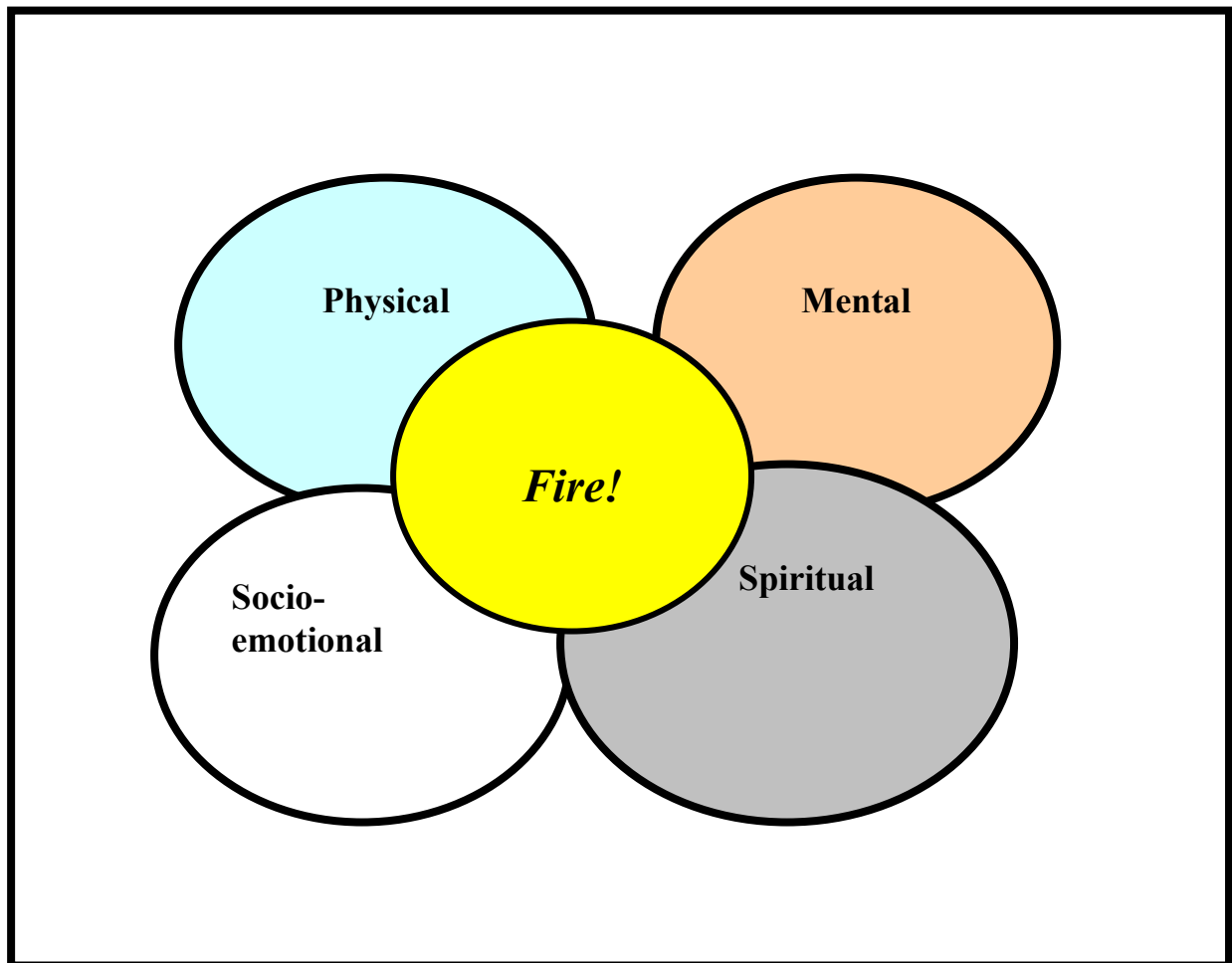
When I developed aspirations of doing fulltime consulting with organizations, I had to prepare myself to leave my organization where I was the founder. It would have been dishonest of me to change the vision of the organization to suit me now and my aspirations. Of course, I could stay on and earn a big salary. In fact, there was more than enough money in our account to pay me for another three years. But I felt I was not growing and decided to move on.

LEARN TO BALANCE YOUR LIFE

We are daily exhorted to balance our lives. But very few people will tell you what it is that must be balanced. Covey provides some insight. According to him there are four dimensions to our lives that need to be balanced. It looks like this:⁷⁵

⁷⁴ Deepak Chopra (undated) *The Seven Laws of Spiritual Success*

⁷⁵ Stephen Covey (1989) *Seven Habits of Highly Effective People*, p. 288



About your physical dimension:⁷⁶

Well, if you want to become a tool of change in your life and the lives of others, then you have to first be alive. And it all starts with your physical body, your flesh. A dead person cannot become a tool of change. So, what are you doing to look after your physical body? Do you exercise regularly? Do you keep fit? Are you engaged in cardiovascular-, stretching and muscle building exercise? Or are you drinking and smoking your life away? Are you poisoning your body? Do you sleep, eat and drink right?

Do you know how much the human body is worth? I was asked this question a few years ago by a professor who served on our board. I was a bit surprised by the question because my immediate response was that the human body is invaluable. It cannot be measured in money terms. And that is right. But the professor informed me that surgeons will tell you that when any part of the body is damaged and that part must be fixed through an operation, then the accumulated value of all those hundreds of operations can amount to at least 12 billion rand. And this was about 8 years ago! So you see, the human body is very expensive. It is a massive investment. But what are we doing with our investment everyday? Some of us engage in excessive smoking, consuming excessive alcohol, using drugs and neglecting our bodies. Instead of increasing our investment, we destroy it everyday!

About your mental dimension:

This is about developing your mind, your mental toughness. It is one thing to have **physical** muscle, but what about **mental** muscle? It is about giving your mind regular exercise. Reading, planning, imagining, dreaming, visioning, conceptualising, thinking out of the box, strategize, studying, etc. are all means to exercise the mind. In his best selling book, *“Thinking for a Change”*⁷⁷, John Maxwell identifies 11 ways of thinking namely: strategic, reflective, bottom line, possibility, creative, shared, win-win, focused, positive, holistic and spiritual thinking. How many of the above ways of thinking do you employ everyday? Remember, to think is to generate mental energy. The mental creation precedes the physical creation. If you cannot conceive it, you cannot achieve it. So, what and how are you thinking today?

⁷⁶ Consult Deepak Chopra's (2001) *Grow Younger and Live Longer: Ten Steps to Reverse Ageing*

⁷⁷ See John C. Maxwell (2003) *Thinking for a Change*

About your socio-emotional dimension:

No person is an island and we all live in relationship to each other. It is not only what happens **to** people that is important but what happens **between** them. We all relate to each other in a special way. Our whole society is made up of a myriad of relationships. Talk to any person living on the street and they will tell you that they were the victims of broken families and relationships. Their close family relationships were broken and they simply fell through the social net. So, what are you doing to maintain family relationships? And what about your relationship with yourself? We are all potential strollers unless we spent quality time with our family and valued friends. Remember, it is not **what** you have in life that matters but **who** you have in your life!

About your spiritual dimension:

This is about you and your role in the world. What do you think is your purpose in life? What is your mission? Are you here by mistake or do you have a plan for life? What is the value that you want to add to the world? How much time do you spend with yourself? Do you reflect enough on your life and the meaning you attach to it? Are you in touch with your own spirit? Or are you also trapped in the business (read busy-ness) of this world, where most things are spinning out of control and materialism and consumerism are worshipped? What are you doing today to be remembered tomorrow? What is the legacy that you will leave behind?

Rediscover your fire!

These are the four dimensions that must be balanced everyday. When you practice one dimension at the expense of the other then your life becomes unbalanced and unreal. You are then practising separation and not integration. You need to bring all four dimensions together and integrate them. By integrating them you will become real, you will become whole and you will rediscover your *fire* in life. There will never be one boring moment again! You will learn to see life as an adventure to be lived and not a problem to be solved. You will be on the path to discover your true purpose in life - your true mission! You will be able to build a legacy and you will be remembered forever. Remember, the greatest tragedy in life is not death but life without a purpose. It is dangerous to be alive and not to know why you were given life!

Covey says that by focusing on your physical dimension you will rediscover how to **live**. Focusing on your mind will make you rediscover the meaning of learning how to **learn**. Focusing on your socio-emotional dimension will make rediscover the meaning of true **love** and focusing on your

spiritual dimension will enable you to **leave behind a legacy**. This is what Stephen Covey calls the theory of the four L's.

THE TWO STREAMS OF SELF-DEVELOPMENT:

According to Peter Drucker, your self-development can proceed along two parallel streams:⁷⁸

1. Do better what you are already doing
2. Do something different

Listen to a signal (in your inner being) for the right time to change. Don't be pressured by other people. They have their own motives and sometimes agendas. Change when you are successful and you **feel** you are ready – not when you are in trouble. Ask yourself some critical questions: "Am I producing results or just relaxing in a comfort zone? Has my work stopped being a challenge and just a boring routine? Am I growing or not?" Remember, the purpose of work is to grow personally and not just to survive. The problem with many people is that they are not growing in their current jobs. They simply survive. Unable to face their own fears and born out of our frightening reality of growing unemployment, they simply prefer to continue in their old jobs even though they are stagnating. **They work to live and don't live to work!**

Remember, the most important task of a manager is to work herself out of her job. This is not easy but there is no other way to prove your effectiveness and the difference you can make. Of course, it will always be risky. But the biggest risk is not to do it. Remember the following poem⁷⁹ about risk when you ponder this decision one day:

*To laugh is to risk appearing the fool
To weep is to risk appearing sentimental
To reach for another is to risk involvement.*

*To expose your feelings is to risk exposing your true self
To place your ideas, your dreams before a crowd, is to risk their loss.*

*To love is to risk not being loved in return,
To live is to risk dying*

*To believe is to risk despair
To try is to risk failure.*

⁷⁸ Peter Drucker (1990) *Managing the Non-profit Organization*, p. 223

⁷⁹ I heard this poem the first time when I watched a video by Leo Buscalia, an American psychologist – Author unknown

But risks must be taken, because the greatest hazard in life is to risk nothing.

*The people who risk nothing, are nothing
They may avoid suffering and sorrow,
but they cannot learn, feel, change, grow, love or live.
Chained by their attitudes they are slaves,
they have forfeited their freedom.
Only a person who risks is truly free!!*

You cannot be performing optimally in your job if you are only surviving, waiting for the next funding agreement or when the existing funding agreements will cease. You are sending a bad message to your subordinates. You condone incompetence. You highlight your own weaknesses and not your strengths. Focusing on your strength helps you to discover your hidden potential and leads you to your passion. Remember, the ***greatest tragedy in life is not death, but life without a purpose. It is dangerous to be alive and not to know why you were given life.***

Focusing on your weaknesses, i.e. your fear to move on and face reality will make you also focus on other people's weaknesses as well. Then everybody becomes a problem. You have to convince them that they cannot do without you. You live in denial all the time. You learn to imitate and lose your originality. You put on a mask to hide your own fears. You spread negative energy wherever you go and start cutting people's heads off to look big yourself. This is a dangerous road to travel. This is selling your soul and not saving it.⁸⁰ When I left my organization a few years ago, I was determined to make sure that I leave when the organization was financially stable with a proper board in place for accountability. Of course, there was uncertainty. There will always be uncertainty. But effective leaders act despite uncertainty. There were also those who could not wait to see the back of me and others who was keen to see me stay. They both had their own reasons. But I did not grow in my job anymore and I had a duty to myself first. In retrospect I should have stayed on a few more months. But to see things in retrospect is always a luxury leaders cannot afford. The way things turned out when I left was not what I foresaw but that is now history. I have grown and developed more and serve a bigger sector at the moment. The impact I make now is more than what I could imagine. I had to work myself out of my job.

⁸⁰ Scot Peck's (1993) *A World Waiting to be Born*, chapter 15

Self-development can become self-renewal when you walk a different path, become aware of a different horizon, move to a different destination. At this stage find yourself a mentor, someone who can lift you. Make sure that you find someone who has already travelled the road that you planned to traverse. Avoid someone beset with his own fears. Remember, **for someone to lift you up that person must be on higher ground.** It is like an old Chinese saying, **“When the student is ready, the teacher will appear.”** A few years ago when I decided to leave my own comfort zone as an executive director and was consumed with self-doubt as to whether I am prepared to venture on my own as a consultant, I found inspiration in the following words of Goethe about committing oneself:

“Until one is committed there is hesitancy, the chance to draw back, always ineffectiveness. Concerning all acts of initiative (and creation), there is one elementary truth, the ignorance of which kills countless ideas and splendid plans: that the moment one definitely commits oneself, then Providence moves too. All sorts of things occur to help one that would never otherwise have occurred. The whole stream of events issues from the decision, raising in one’s favour all manner of unforeseen incidents and meetings and material assistance, which no one could have dreamt would ever come their way.”

“Whatever you can do, or dream you can, begin it. Boldness has genius, power and magic in it.”

Quoted from: W.H. Murray, The Scottish Himalayan Expedition

Do it now!



Self-development and self-renewal is about action. You become a bigger person, but you also become more effective and committed. You learn to let go. You learn to share power and distribute it to others. You learn to help create more leaders and not followers. Holding on to power can only make you weak. Someone who holds on to power is insecure. They don't trust themselves. They don't realise that sharing power makes you stronger as a leader and not weaker. This is why we say: *Power can corrupt and absolute power corrupts absolutely.* Sharing

your power as a leader will help you develop your inner power, a power that cannot be taken away from you.

So what will you **DO** as a result of having read this book? And what will you stop doing? Will reading this book just end in another activity (like all the other books you read on leadership and management) or are you going to act to bring about change in your own life? Remember, if you want to change the world, start with yourself. Why? Because you don't live in the world – **THE WORLD LIVES IN YOU!**

Yes, that is right. The world lives in you. We tend to think that we live in the world. This is wrong thinking. As human beings we are an inseparable part of the world and vice versa. We cannot change our outer world without first changing our inner world. By changing your inner world change will also be effected in your family, organization, community and society at large. But that change must start with you. To change means to think and to act differently. Change always involves making choices and choice means making a sacrifice. Like I stated earlier, to sacrifice means to give something up. It means to step out of your comfort zone and be prepared to suffer some pain. The reason why people are afraid of change is because of the inevitability of suffering some pain. They prefer to stay where they are and practice avoidance behaviour. However, the tragedy is that if you become resistant to change and transformation you only postpone this inevitability just for it to come back to you with a vengeance at a later stage. You will therefore suffer this pain with interest! And when you suffer it, it will not serve the purpose of continuous growth in you, but destroying you as a person. This is one of the symptoms of mental death.⁸¹

DISCOVER YOUR HIDDEN POTENTIAL – JOHARI'S WINDOW⁸²

In developing yourself, there are four windows through which you can look at yourself. This is called Johari's window. This is what it looks like:

⁸¹ Scot Peck (1983) *The Road Less Travelled*, Refer to chapter 1 where Scot Peck elaborately discusses the role pain plays in individual growth

⁸² Shared with me by Harlan Cloete, Executive Director of Koinonia Community Centre, during a strategic planning workshop in 2001 in Paarl

<p>What you know about yourself that others don't know</p>	<p>What others know about you that you don't know</p>
<p>What you and others know about you</p>	<p>What you and others don't know about you</p>

Please note:

The more you are open about yourself, the more your hidden potential will be discovered. Other people can only assist you in your development if you are open and honest about your strengths and limitations. Being in denial about them can only increase the shaded area and slowly starts to overshadow the other windows. The smaller the shaded area (there will always be a shaded area) the more you are aware of your hidden potential. Taking and living with risks regularly will greatly help to uncover your hidden potential.

This is very painful but necessary. People who have a propensity for lying never discover their true potential since they are constantly in denial. They become prisoners to themselves. They practice a form of violence against themselves that destroys the inner spirit. In this process their shadows take control and they become its willing follower committing and projecting violence (sometimes physical) onto others in their immediate environment.

LEARN TO UNDERSTAND YOURSELF BETTER:

In planning your self development, you need to ask yourself some critical questions:

1. What is my passion? What are my strengths and what do I love to do?
2. Where can I make the biggest difference with my strengths?
3. Who do I have to relate to in order to make this difference?

Your answers to the above questions will influence your life plan. As consultant I sit every December to review what I am doing, with whom I am doing it and what I required to do it with. I check what my clients are requesting most of the time and why. I check how I responded to their requests and what the impact was eventually. I gain some useful insights doing this exercise. I notice where opportunities are emerging as well as my ability or lack of it to take advantage of them. I also find out what skills I need to build on and who I will need to help me develop those skills and competencies. But more importantly, I also find out what **not** to do and where **not** to waste my limited energies.

Understanding yourself is a continuous process. It never ends. It requires quality time to reflect and to plan. Learn to involve others in this process. Ask them for feedback. Use them as a mirror to look into you. I find asking my clients for feedback very useful. Sometimes they might make you aware of certain strengths that were hidden from you as well.

Here are some useful questions to ask when trying to understand yourself in an organization:⁸³

1. Am I a gatekeeper or an opportunity seeker? Do I like to work on the outside or on the inside?
2. Do I like routine work or do I like to work in an unpredictable environment, with uncertainty and excitement, with constant pressure?
3. Am I a loner or a team player or even both? Do I work well with others or do I prefer to do my own thing?
4. Do I prefer to work in a big organization or a small one?
5. Am I a leader or a follower?
6. Am I a decision maker and executor or just a decision maker and allowing others to execute or run with my decisions?
7. Am I a reader or a listener? Do I prefer to first read a proposal and then discuss it or to first discuss and then read it?
8. Do I work best in the morning or in the evening?
9. Am I detail or big picture focused or both?
10. Do I like to fix problems in an organization or do I like to maintain what has been fixed?

All the above questions (and you can add more) may seem on the surface as quite simple. But they are important. For example I feel that I thrive in small organizations and so I consciously avoid the big ones where there are too many office politics and issues which lead to distractions

⁸³ For more reading on this topic Peter Drucker (1999) *Management Challenges in the 21st Century*, chapter 6

and limit the impact I can make with my strengths. I also prefer an environment where I have maximum freedom, flexibility and creativity. I try to avoid tying myself to organizations for too long and where I feel my skills are monopolised by one or two groups. I prefer to start an assignment, complete it to the best of my ability and move on. That is also why I prefer not to join governing boards even though I receive requests all the time.

Some people are great leaders whilst others will not even think of occupying these positions. They are simply born followers in an organization. They are great support to great leaders. They are brilliant executors. Tell them what to do and leave them alone. But put that same person in a leadership position where they have to conceptualise and visualise and that same person becomes paralysed, unable to act. It is important to find out early where you fit in.

Understanding if you are a reader or listener is also important. I prefer to read something first before a discussion where I have to listen. I preferred my staff members to write to me first before I discussed anything. In any case (I believed) you cannot take your ideas seriously unless you are able to put it on paper. I would then read, make notes, formulate questions and try to enter the mind of the writer. When we meet to discuss then I am prepared, has time to think through the issues and implications and can spend some quality time with the writer in exploring the issues raised. When staff submitted quarterly work plans, I followed the same procedure. It worked for me and the staff members also appreciated the quality feedback during these sessions.

Some people prefer to work in the background, behind four walls, with little disturbance. Finance people fall into this category. They thrive in this environment because their work is so, technical, routine and procedure based. Others prefer to be in the trenches, where the action is. They are activists and hate rigidity and procedure. They hate constant meetings and endless talk. They like to be at the coal face of action, working with people on the ground. Other people again love challenges in the work place. They hate it just to maintain organizations. They want to be where the action is and where the next challenge is. Ask yourself where you prefer to work? I remember a young women who worked for a company doing technical computer capturing. This was an office based job but she had a programmes and project background working in the field most of the time. When the company launched a community project to work with street people, this young woman jumped at the opportunity to utilise her skills and experience in this department. This meant she was working both as a volunteer in the community upliftment project and doing her normal work. It was not long before she became frustrated in her job. Her technical work started to bore her endlessly. Her strengths were applied in the wrong department. She became ineffective

and ultimately left her job, her frustration compounded by alleged favouritism by management. She performed the technical work not because she loved it but because she needed to survive. What the company should have done was to redeploy her and allow her to become involve full-time in the community project in line with plans for expansion into other communities. They lost the strengths of this young woman.

Understanding others:

Understanding others starts with understanding yourself first. As soon as you know your preferences in your work environment, then you need to ask yourself who must know this to make you effective in your job. Then you make time to communicate this to them. This is called relationship responsibility.⁸⁴ You take responsibility for how you relate to others. Once this happens then you need to ask your subordinates how they prefer to work. These questions form the basis of team work as soon as the common objective is clarified that you all strive towards. Too many times I found that staff members try to change the director to work the way they expect him/her to work. It is based on their bias. Subordinates need to understand that it is their responsibility to help make the leader effective, to educate the leader. Effective leaders bring this awareness to the attention of the followers. In this way everybody can become more effective.

YOUR LIFE PLAN: WHAT DO YOU WANT TO BE REMEMBERED FOR?

List three things that you can do in your organization to create lasting change over the next 3 years.

Action:	When?	What do I need to do it?	Who can help me to do it?	How will I know it is done?
1. An example from my own experience. Develop my board	Between January and April 2007	Recruitment committee, time, access to telephone, computers, e-mail, contacts, adverts, relevant documentation, etc.	Board chairperson, staff members, volunteers, network partners	New board members inducted, letters of appointment issued, board dev. workshop completed
2.				
3.				

1. ⁸⁴ Peter F. Drucker (1999) *Management Challenges in the 21st Century*, p. 183

List three things that you can do in your personal life to create lasting change:

Action:	When?	What do I need to do it?	Who can help me to do it?	How will I know it is done?
1. An example from my own experience: Develop more financial discipline by saving more and reducing debts	Jan 2007 – December 2009	Open up an investment account, Access to income, the will to do it , cut on unnecessary expenses	My bank, family, myself	Investment account has been opened, money is deposited every month, and debts are reduced.
2.				
3.				

SOME GUIDELINES TO LEAD AND MANAGE YOURSELF:

A: Monitor your work hours: The first sign of trouble is when you are caught up in too much work. Remember to plan your work. Distinguish between:

Structured tasks: these are tasks with specific deadlines like reports, funding proposals, meetings, etc. These are predetermined tasks, planned well in advance and over which you can have some control.

Responsive tasks: these are unforeseen tasks like people visiting the organization, invitations, unforeseen crisis, etc. You have very little control over these tasks.

Ad-hoc tasks: these are tasks that emerge during your daily routine e.g. when a staff member is absent and you must stand in, etc. You can exercise control over these tasks by delegating to others but there is a limit to how far you can do it. These are normally temporary diversions from your main responsibilities.

Reflective tasks: These tasks refer to mental work. The time you take to think about your work, to plan and to strategise. We do not normally allocate time to think about our work. This will normally happen by default or we will wait for the next strategic planning workshop once per annum.

Make sure that you have **2 hours** everyday as **discretionary time** (when you do not plan to do anything). This time will be spent on responsive, ad-hoc and reflective tasks. You cannot plan to work eight hours per day. This is suicide! You will never be effective in your job.

B: Ask yourself “What are my signs of stress?”

Signs of stress are “blow ups”, forgetfulness, loss of concentration, disappearing from the office, etc. Find someone who can check on you. You don’t have to go through this alone. Remember, you do not have to become a development missionary. You have not been born to save humanity! Respect yourself and accept your own limits. For many community workers, this is easier said than done. We feel that we have to be there for others. That is fine. But how many times are you there for yourself and your family? If you suffer from stress as you read this book, remember this story I will share with you now. Well, I have been there myself and when reading this story I changed my whole approach to my work.

Many years ago, a man was entrusted to keep the flame burning in a lighthouse. For this purpose he was provided with a ration of oil every month, just enough to last until the next month. But this man was very generous. He lived in a very impoverished community and people approached him from time to time to borrow some of his oil. During one month he gave away too much oil. There was nothing left to use for the actual purpose of the oil entrusted to him. And the result? Many people died as ships lost their way on the rocks. Who was responsible for their deaths? Are you also burning up all your oil? Who is going to suffer in the end?

Remember this story when you overwork yourself again, when you don’t make time for proper rest and reflection. You have a responsibility to yourself and others who entrusted you with leadership. Don’t abdicate that responsibility.

C: Allow others to grow - learn to delegate:

If you have a fear to delegate then you don’t trust yourself. It is not about the other person. It is about **YOU!** What is **YOUR** fear? Start to delegate! Give other people the opportunity to grow. Take the risk! Organization is not a one-person show. It is about teamwork. Delegate!

D: Keep the conversation going; avoid the “sound bite” mentality and share relevant information

A sign of an organization in decay is one where open conversation is replaced by whispering campaigns. Members talk more about the organization and its challenges **outside** and not **inside** the organization. This is because there is no proper and open conversation taking place inside the organization. In a world of “**sound-bites**” where serious and healthy conversation is actually negated, (watch for example how interviewers cut people off during television interviews) we unconsciously transfer that mode of “communication” into our organizations. There is almost never enough time to have decent conversation. Make sure that you do not fall into the same trap. Stop communicating in “**sound-bites**”. And keep your cell phone off, please!

And learn to find yourself a speaking partner. Someone you can trust, someone more or less at your level. Agree to meet at certain times to debrief. Talk about your challenges. Be as open as possible. You don’t have to go through your challenges alone. Remember, the first step to deal with an issue is awareness about it. Communicate as much as you can. This is the life-blood of your future and your organization. Share information as much as you can. Remember, Margaret Wheatley⁸⁵ reminds us that the purpose of information is actually to **help form** each other, in other words **in-formation**. Whenever information is shared, we are in the **process of being formed** and helping to form others. The opposite of formation is **deformation**. When relevant information is not properly shared, we can become deformed. We can become organizationally sick.

E: Ask yourself what is important and what is urgent?

Many people are addicted to urgency. They feel good when they are constantly busy. People admire them. In fact, we live in a culture where busy people are respected. Just think when you phone someone who says she is too busy. You probably think that must be a very important person. Well, sometimes they can also be fairly disorganised. They can be busy being busy. Remember, when you are too busy then you are trying to be everywhere but you are also nowhere! You are then trying to make an impression and not impact. You compromise one of the most important laws in organization and that is *the law of concentration* - to be focused. This is the source of burnout!

Make sure you spent time on the important things in your life like family, your health, your mind (study, reading, etc.), your relationship with others and yourself, quiet time to reflect and plan your life. Develop other interests. Learn to go to different places, meet new people and do different things. Make your life interesting, stimulating and adventurous!

⁸⁵ See Wheatley, M., *Leadership and the New Science: Learning about Organization from an Orderly Universe*, Berrett-Koehler, San Francisco, 1992

F: BURNOUT – A PERSPECTIVE FROM PERSONAL EXPERIENCE⁸⁶

How does one avoid staff burnout? These are the following steps:

1. Recognize your role in the world:	<i>Do you really think you are a development missionary who must save the world? If so, what are you running away from in your own personal development? What are you afraid of? I used to be like this during my first five years or so as director. Until my eyes opened up.</i>
2. Plan realistically	<i>Well, there are only 230 working days in the year and if you fill them all with activity you will have no time for reflection – you become shallow and eventually “dry up”. Remember, two hours everyday you need to do nothing. You will see how this time is filled up by the unforeseen.</i>
3. Have a speaking partner	<i>Debrief after an exciting or draining process. This lets you down from your “high” and you will not become addicted to the “fix”. Although a psychologist can be very helpful to assist you, I think it is important that as a leader you adopt a speaking partner in your organization. Speaking partners are two people who trust each other and are open enough to reveal as much about their frustrations, concerns, hopes and dreams. Speaking (without expecting immediate solutions) is already a form of therapy and can be helpful. The partners can arrange their own time and space to meet and to share. If you need a psychologist to help with counselling then she can complement this process instead of leading it. Ownership will then be in the hands of the speaking partners. It is your life and you must remain in control of it. Handing control to other people will let you blame them when your expectations are not being fulfilled. Then you start playing the blame game!</i>
4. Develop other areas of your life by taking time out!	<i>Learn to take a step back from your work from time to time. Go on a sabbatical for a couple of months or a year. Spend quality time with yourself and reflect about yourself and your future. Ensure your life is creative and fulfilling – this will serve you in your job and your future in a much more sustainable way. Can you imagine a netball-, soccer- or rugby team playing a game without stopping. Very absurd, hey! They</i>

⁸⁶ Adapted from a strategic planning report by consultant Janice Webster, Youth Development Network, 1999

	<i>take time out to reflect, evaluate and plan better. So, why should you not do it as well?</i>
5. Learn to say “no!”	<i>Without a personal vision, of knowing where you are going to (without becoming sentimentally attached to it) you cannot know what your “yes” is. And if you don’t know what you should say “yes” to you cannot know what to say “no” to!</i>
6. Give yourself permission to feel down!	<i>Remember, there is nothing wrong with feeling down sometimes. This is a normal human emotion and you don’t need to deny it in you as well. You don’t have to be a superhuman being in control of everything and everyone. When you lose it sometimes - that is fine. There are too many books being churned out these days and mostly having their origin from the United States telling us how to conquer negativism. As if feeling negative sometimes is something abnormal!!</i>

SOME SELF-DEVELOPMENT TIPS FOR EVERYDAY LIFE:

- Learn to live with risk – don’t try to avoid it.
- Acknowledge your fears – don’t deny it.
- Decide what you really desire to do – then do it!
- Develop yourself as a resource for others by networking.
- Volunteer your services whenever you can.
- Do not be afraid of failure – remember failure is success turned inside out!
- Maintain balance in your life – focus on the 4 dimensions, physical, mental, socio-emotional and spiritual.
- Eliminate one time waster a week from your life.
- Learn from your mistakes and avoid it in future.
- Try to learn something that is new every day.
- Remove your watch for one day and experience timelessness.
- Leave your cell-phone at home and try not to be contactable.
- Face your own fears and make them your ally and not your enemy. Don’t push your fears away by denying them.
- Try to do one good deed per day for yourself and somebody else. Learn to extend yourself and become bigger.
- Learn to travel more. Try to visit a new place from time to time. The road can be a great teacher!
- Pay others genuine compliments when they deserve it.

- Learn to smile and greet everybody.
- Visit old friends and make new ones.
- Stop cluttering and get rid of those things that have lost their value in your life.
- Learn to forgive and forget and move on with your life. Remember, you cannot face the future of opportunities if you are trapped in the past of revenge!
- Don't make the issues of other people your issues. Let them deal with it themselves. Give them a chance to grow.
- Compliment yourself on a job well done. Remember, happiness is an inside job.
- Stop waiting for others to compliment you. If they do, regard it as a bonus, but do not expect it.
- Learn to love what you are doing. And remember, if you love what you do, you never have to work again!
- Be hungry for what life has to offer and go for it!
- Read at least one new book a month.
- Take out some old books and re-read them. It is amazing how many new things you will learn from the same books.
- Learn to love and give unconditionally without expecting something in return.
- Spend time with the people that matters in your life.
- Raise your standards continuously. Try to improve what you are already doing.
- Try to achieve more by doing less. Focus on the quality of your work and not just the quantity.
- Break out of routine, stop behaving like a robot. Try taking different routes to work everyday.
- Make time to listen to your inner voice! Take time out to communicate with yourself.
- Learn to use three expressions everyday namely: "thank you", "please" and "I am sorry".
- Explore, be adventurous. Live dangerously sometimes!

ARE YOU PREPARED TO DIE BEFORE YOU ARE FULLY BORN?

Leo Buscali, an American psychologist was quoted as saying: "We all must die one day. No one will leave this life alive. And the day when you die you will have to meet your maker. And you will be asked a very simple question: "Why didn't you become fully you? When I have given you so much to live for, so many talents, so many strengths, so many opportunities, why did you settle for so little? Why were you prepared to give up before you tried? Why were you prepared to die before you were fully born?" What will you say on that day? Will you say: "Sorry, but I was poor and unemployed?" Or maybe that too many people put obstacles in your way! Or maybe you had no access to funding? And who will you blame?

The fact is that when that day arrives, it will be too late! You will have to account for your life now!

So, what are you going to do right now? And what will you stop doing?

There are normally three types of persons who I interact with as a development practitioner everyday. The first person come to my workshops, read books, commit themselves and complete tasks, are disciplined, proactive, take responsibility and **make things happen**. They are the agents of social change. The second type of person **wait for things to happen**. They are always uncertain, waver, and are generally undecided about their convictions. And the third person **does not even know that anything has happened!** The question is, where do you fit in? Who do you represent? Who do you want to be? The choice is yours!

SOME OBSERVATIONS FROM THE FIELD OF PRACTICE:

1. THE WEAKNESSES OF THE SECTOR:

In as much as the non-profit sector has strengths making it unique in relation to other sectors in society, it also has its own collective weaknesses. We cannot pretend that these weaknesses do not exist. There is no need to glorify and romanticise about the sector. If we live in denial about it then it will express itself as our shadow. Here are some of the weaknesses:

1.1 Lack of public accountability:

Many non-profits are not accountable to the masses in whose name they request funds. This lack of accountability creates a space for endless corruption, for writing one thing but doing the opposite. Projects are created all the time not to address human needs but to keep the money coffers full to maintain staff salaries. It is here where you find an elite developing elevating themselves above the masses whose needs they seemingly represent.

1.2 The limitations of the project/programme approach

The obsession with project work in the development sector can so easily lead to a fragmented way of dealing with human challenges. It develops a consciousness of seeing things as separate and parochial entities and not as indivisible wholes. The fact is that people grow and develop in communities and not projects. For some the project can become the be all and end all of our work without relating it to people's daily lives and experiences. It therefore unconsciously reinforces the belief that experts are required to solve people's problems and not the people themselves; that the solutions lay outside of people's daily experiences. It removes the focus on people's own inherent power to the power of consultants and experts. The project then becomes an external intervention and **does not grow organically** out of the struggles that people face. Remember, the word organization comes from the word organic. Organization is the organic or natural development of organs of society to address societal needs in an organised and planned manner.

The funding approach can also reinforce this dependency. That is why certain organizations cannot act on needs unless they first have adequate funding. Of course access to funding and resources in general can help to facilitate people's processes but should not become the ultimate criteria for people to learn to address their own needs. As a development practitioner observed: "We may have to admit that in fact many of us development practitioners, armed with our Projects, Deadlines and SMART objectives (his emphasis) may have served to inhibit rather than enable

the latent power of communities to learn from themselves and their neighbours, through horizontal processes, i.e. to tap into their own indigenous resources.”⁸⁷

This is how James Petras referring to NGO's in South America described this phenomenon: “The NGO's become the “community face” of neo-liberalism, intimately related to those at the top and complementing their destructive work with **local projects** (my emphasis). NGO's **depoliticized** sectors of the population, undermine their commitment to public employees, and co-opted potential leaders in small projects. ...Their programmes are not accountable to the local people but overseas donors. In that sense NGO's undermine democracy by **taking social programs out of the hands of local people** and their elected officials to create dependence on non-elected, overseas officials and their locally anointed officials.” (his emphasis) NGO's emphasise projects, not movements; they “mobilise” people to produce at the margins but not to struggle to control the basic means of production and wealth; they focus on technical financial assistance of projects, not structural conditions that shape the everyday lives of people.”⁸⁸

1.3 EMPOWERMENT IS A MYTH:

NPO's fixation on the project approach (and there are many methodologies invented by donors) also give rise to the false idea of **empowerment**, a neo-liberal concept to turn the attention away from people's **own inherent power**. The concept of empowerment flows from a deficit approach, i.e. the lack of something – power. So, if you lack something, you need to find it somewhere or from someone. This is where the idea comes from of consultants **empowering** people or people attending workshop after workshop to be empowered. This is wrong and fallacious. This approach creates a subtle dependency on outside agents to bring something to people that they need. Well, the fact is that people don't need power. They have power already. It just needs to be rediscovered. It is a power that has been suppressed through years of socialisation, abuse, exploitation, deprivation and the inculcation of a slave mentality. The role of the leader is to make people **rediscover** their **own power** by creating a conducive environment where this process can flourish. Wherever I discuss this approach with my clients, it makes sense to them and is a big boost for their self-confidence. But something else also happens. It makes them realise that there is a **dynamic link between what the leader brings and what they already have** and when they start to discover their own power **everybody becomes more powerful**. I cannot imagine how people could rid themselves of one of the most oppressive regimes in human history in South Africa if they had to be **empowered** first! What rubbish!

⁸⁷ Dough Reeler (2004) *CDRA paper*, p.2

⁸⁸ James Petras (2002) *The Monthly Review, Imperialism and NGO's*, December 1997, p. 42

1.4 Tendency towards bureaucracy and elitism:

This is the result of the lack of public accountability. And here I don't refer to audit reports that report on the financial accountability of the organization. I refer here to its social accountability, the accountability to its mission and vision. What it stands for in public and what it does in private. Auditors do not report on this. Instead of serving the needs of its target group, clique formation takes place and the organization start serving the needs of the clique.

1.5 Becoming tools in the hands of donors with their own agendas:

It is common knowledge that international aid (called Official Development Assistance – ODA)⁸⁹ by developed countries sometimes become extensions of their foreign policies. Needless to say, they will not present it in this way. But the aid they provide is mostly a tool to buy influence with governments in order to compete and negotiate for better trade agreements, etc. What many give in aid they simply take away in trade. If we do not understand this and acknowledge it, then we can so easily become tools in the hands of donor countries playing us off against each other and unconsciously promoting their agendas for control and manipulation. Petras again: “In many ways the hierarchical structures and the forms of transmission of “aid” and “training” resemble nineteenth-century charity, and the promoters are not very different from Christian missionaries. The NGO's emphasise “self-help” in attacking “paternalism and dependence” on the state. In this competition amongst NGO's to capture the victims of neo-liberals, they receive important subsidies from their counterparts in Europe and the United States. The basic philosophy of the NGO intellectual is to transform “solidarity” into collaboration and subordination to the macro-economy of neo-liberalism, by focusing attention *away from* state resources of the wealthy classes towards ***self-exploitation of the poor.***” (his emphasis – *ibid*)

Does this mean that there are no genuine donors interested in our people's development? Of course not! There are many well meaning donors and individuals working in many donor agencies in northern countries who are truly interested in sharing and distributing resources from the north to the south. But my focus here is not on the good intentions of individuals but the objective effect of their actions. We need to remind ourselves of what an Aboriginal woman in Australia once said something to the effect that: ***“If you come here to help me, please go home. But if you are here to identify yourself with my struggle then maybe we can work together.”*** We need northern donors who identify themselves with our struggle and engage in it on mutual terms and not just theirs. In any case, it is firstly about our life and our development.

⁸⁹ As prescribed by the United Nations and currently 0,7% of developed countries' Gross Domestic Product (GDP)

2. BEWARE OF THE BUSH-BLAIR-BIN LADEN DYNAMIC IN YOUR ORGANIZATION:

I was taught years ago by I. B. Tabata that when an organism has reached its zenith, i.e. when it has fulfilled its historical purpose, two processes can unfold. One, the organism can adapt itself to its changing environment and continue to grow and develop or secondly, it can **stagnate and grow backwards**.

The current global “war **on** terrorism” or as John Pilger calls it “the war **of** terrorism” is a sign of a historical movement backwards of human society. Instead of integration, of countries coming and working together in partnership, we witness a movement of separation, unilateralism and a project towards global domination advanced by the American ruling class and underpinned by its abandoning of the international rule of law. It is a movement towards barbarism and death, already responsible for millions of corpses strewn all over the globe.⁹⁰ The people of Iraq have become another victim of this movement with untrammelled power. It is this political energy that also gave birth to Osama Bin Laden. Many people do not know that Bin Laden was a monster created by the American Central Intelligence Agency (CIA) during the war against the Soviets in Afghanistan.⁹¹ It is a monster that has turned on its creator, a Frankenstein.

Underlying the noise and rhetoric between the two seemingly opposing sides, there is a unity of purpose between them, an unholy alliance, and a silent conspiracy. This unity of purpose is expressed in the following:

- They are both driven by a blind belief in absolutism and fundamentalism
- They both believe in the indiscriminate killing of civilians
- They both believe that they have discovered the absolute truth for all humanity
- They account to no one except themselves
- Their main mode of operation is unbridled violence and destruction
- Their interests are paramount and supersede all other interests
- They both believe in thinking for others
- They both employ the language of extremes (“axis of evil”) and no compromise (“you are either with us or against us”)

⁹⁰ For a full elaboration of the crimes of the United States regimes (both democratic and conservative), see Noam Chomsky (2003) *Hegemony or Survival, America's Quest for Global Dominance*

⁹¹ Mahmood Mamdani (2005) , *Good Muslim Bad Muslim: America, the Cold War, and the Roots of Terror*, p. 131

- Their main mode of operation is through constant lies, manipulation, deceit and conspiracies, controlling others through fear and terror.

This unity of purpose has been best summed up by the former director of Human Rights Watch Africa, when he addressed the International Council on Human Rights Policy in Geneva in January 2002. He stated that “I am unable to appreciate any moral, political or legal difference between this jihad by the United States against those it deems to be its enemies and the jihad by Islamic groups against those they deem to be their enemies.”⁹²

We have seen many people took to the streets to oppose Bush and Blair. And rightly so. But we must be careful that the very Bush-Blair-Bin Laden dynamic on a global scale is not playing itself out in our organizations. I have seen some organizations where the rule of law (organizational policies) are also abandoned or selectively employed to benefit some leaders financially. There are also those leaders who believe they must think for others and promote blind followers (“you are either with me or against me”), i.e. independent thought is not encouraged, etc. Then there are those who blatantly lie to their boards and the community by falsifying audit reports or by omitting facts. Others again lie about their work to donors in order to secure the next funding agreement. They do this cooking figures of non-existent participants attending workshops, etc. This destructive energy does not only operate at the level of governments and religious sects, but also within our organizations.

Be careful that you do not promote this dynamic or destructive energy in your own organization. Remember, many organizations also reach their zenith, their highest point in their development. If you don’t adapt to the environment to facilitate a new phase of growth, then you are going to **grow backwards**. And that movement backwards can only mean reversal and self-destruction. It is reflected in plotting against others, seeing everyone as your enemy, being afraid of change and organizational renewal, dark room discussions where your “enemies” are marginalised, where the plotters only listen to themselves and where there is a silent **agreement to agree on everything**. In this context, the emphasis is not on **what** is right and **what** is wrong but **who** is right and **who** is wrong!

3. TOWARDS ORGANIZATIONAL CONSCIOUS CONSCIOUSNESS:

I have worked with many organizations over the past 26 years in South Africa and other countries on the subcontinent. The NPO sector in some parts of Africa is actually fairly young compared to

⁹² Noam Chomsky (2003) *Hegemony or Survival, America’s Quest for Global Dominance*, p. 201

our counterparts in Europe and America. We still have so much to learn from both sides. But despite our challenges I think we have very good and great leaders who are emerging as a result of the struggles we face on a daily basis. People who are prepared to sit in the fire without getting burnt - the elders of tomorrow. Of course there will always be your confidence tricksters and troublemakers, those who view the sector as a means of job creation, your careerists. They will always be there and as Arnold Mindell reminds us, we have to learn from them as well.

I have seen many NPO's with lots of internal conflict, not because people working there are inherently bad but because they mostly lack the understanding of how organizations work. I know of some leaders who have been in my workshops where I trained part of the contents of this book who use to come to me and said: "If I only knew some of these lessons you trained then I would never have done certain things." Well, the enthusiasm and passion is there in abundance. Now we need to work on the organizational consciousness, on how things work. (And also accepting that we may have to admit sometimes that we do not know how things work!)

This is how a participant in one of my workshops put it in her feedback after the workshop:

*"Even though I failed my organization as chairperson, you had really let me see life from a different perspective. Now I can see the light at the end of the tunnel. I can now go back with full steam."*⁹³

Not only do we need more leaders to become conscious of how things work, but we also need more leaders who can admit more often that they don't know how things work. (See **"Effective leaders are also effective followers"**, chapter one) This is what I call **conscious consciousness**. The ability to know that you don't know. Instead of trying be smart and wanting to impress everybody, you need to sometimes be open and honest and admit that **"I don't know"**. In a world of complexity there is nothing wrong with such an admission. We have too many leaders who try to impress their members with how much they know. As a consultant, to practice **"I don't know"** is not easy. Clients/partners expect that you should know because you are paid to know. So, this is also a struggle for me.

4. WHY ORGANIZATIONAL PROBLEMS ARE ALWAYS PERSONALISED?

It is important for leaders to understand that the challenges and consequent frustrations are carried **through** people in organizations. When a human body gets sick, that sickness will be

⁹³ Mrs. Nadeema Alzaman, working for a civic organization in Ocean View on the Cape Flats.

expressed through exposing symptoms in certain body parts. This is the same with an organization. The body parts are the people in the organization and they will carry that sickness. The reason why organizational problems are always personalised is precisely because of this lack of understanding. Don't fall into the same trap. This is why we say that we need to separate the person from the problem. A friend of mine once stated (in the title of his book) that "People can never be the problem". People may have problems but they cannot be *the* problem.

5. DEVELOPMENT CONSULTANTS MUST BUILD LEADERSHIP CONFIDENCE:

I think largely, despite a very hostile and challenging environment for NPO's, good and sometimes great results are produced by many organizations. We may not always be able to measure those results but I have seen small organizations with passionate grassroots people doing sterling work fighting endemic poverty, women's and child abuse, structural unemployment, landlessness, HIV/Aids, etc. Marginalised people are getting renewed hope as we grapple with the challenges of a world in transition, of globalisation, privatisation and the endless race to the bottom.

But I have also seen many potential leaders who are afraid to step forward and let themselves become visible and to be counted. Strict criteria required and sometimes imposed blindly by donors (some borrowed from the private sector) can marginalise these potential leaders and break their self-confidence. This is why so many try to seek salvation in the use of professional consultants to do the work for them. This is dangerous. Consultants can play a useful role but it should be as facilitators to build the confidence of today's leaders in society. Not to substitute the leadership role that people should play themselves. I trust that this book will help in building that confidence that is sometimes lacking in the sector and help to forge and strengthen that new deep democratic order we all strive for and cherish.

6. TOWARDS DEEP DEMOCRACY:

As I said earlier, that democratic order is forged everyday in our organizations, in the laboratory of daily struggle. That democracy being forged is not of the superficial type we have got so used to these days. Democracy marked by crosses on pieces of paper now and then with government advisers and consultants determining the policy frameworks in advance that will govern our lives and for which the majority never voted. The limitations of this type of democracy are exposed daily. It is simply inadequate to manage or lubricate the tensions in a society becoming more and more complex.

What we need is a **deep democracy**⁹⁴ where all the voices are being heard and where everybody has to work to deliver results and must be prepared to make sacrifices when necessary; where everybody is prepared to experience the pain of real development and real transformation. In this deep democracy everyone is a participant. Nobody is a spectator waiting for someone else to act. Here people take control over their own lives and destinies. All the voices are heard and decisions are taken in the full awareness of its consequences for everyone; a democracy where both majorities and minorities are important and not used to play the one off against the other.

7. WHY NPO's MUST STOP BEHAVING LIKE BEGGARS:

It has taken the developmental sector many years to slough off its status as the *stepchild* of society. We are now demanding the respect and a more meaningful role in the affairs of society. Very few people for example know that in South Africa the NPO sector employs more people than the mining industry and agriculture!⁹⁵ According to a study by Mark Swilling and Bev Russel the non-profit sector generated and estimated income of R14 billion in 1998 and employed 645 316 full-time workers (made up of full-time, part-time, and volunteer workers). According to their study "Total employment in the non-profit sector in 1999 exceeded the number of employees in many major economic sectors."⁹⁶ It is this ignorance about the collective value we contribute to society that is causing us to devalue ourselves as a sector.

But this is not all. If you understand that economists categorise industries as growth-, mature- and declining industries, then very few people realise that the non-profit sector is one of the few growth industries albeit in the "developed" world. This is how Drucker puts it: "And in so far as we can predict, the growth sector in the 21st century in the developed countries will not be "business," that is, organised economic activity. It is likely to be the non-profit social sector."⁹⁷

This awareness of the role we can play is gradually being appreciated by everyone. But it is still a slow process if recent government declarations in South Africa and the rest of Africa are anything to go by. Our basic strength lies in our creativity, innovation, flexibility, adaptability and willingness to make sacrifices for the common good of our fellow human beings. Whilst others make huge profits out of our labour and command big budgets, sit in air-conditioned rooms framing misguided policies to protect vested interests, we work on the ground with those who are the victims of these policies.

⁹⁴ Arnold Mindell (1995) *Sitting in the Fire*, p. 176

⁹⁵ Mark Swilling and Bev Russel (2002) *The Size and Scope of the Non-profit Sector in South Africa*, p. 16

⁹⁶ Ibid

⁹⁷ Peter F. Drucker, (1999) *Management Challenges in the 21st Century*, p. 9

It is in the developmental sector where people work not because they get huge salary incentives, but because they are prepared to keep the hopes and dreams of millions alive. It is here where leaders spend an average of up to 14-16 hours a day working endlessly supporting the abused, the neglected and rejected in society. It is here where people grow because they allow others to grow. These are the leaders who are in fact the conscience of society. Without them our society will be poor and weak. Without them we can only have social chaos and social disintegration. It is here where people are learning to ***make a life*** and not just to ***make a living!***

8. FROM GLOBAL UNDERSTANDING TO LOCAL ACTION TO GLOBAL STANDARDS

There is a very famous slogan these days in the anti-globalisation movement. It says: “Global understanding but local action!” A very good slogan indeed. But action without standards is useless. And as non-profit organizations operating in the African context we have to learn to raise the standard of our work at all levels. We have to assume ***global standards*** in the quality of our work. This is not easy as many of us are under-resourced and will probably be so for a long time. But being under-resourced is not an excuse for not maintaining high standards. It is a question of attitude! The world is getting smaller and smaller. We are now in constant contact with our counterparts from all over the world. And therefore we know now what the global standards are.

My own background is that of working in an organization that was also very under-resourced. It was so under-resourced that when donors came to visit they had to sit on a bed! When they asked when we are going to the office I told them they are already in the office! That is how we started years ago. But that is not how we remained. Our attitude was to develop global standards. So in less than 5 years we used to host interns from Europe who were surprised at our standards. Coming to Africa they expected otherwise. I know of many organizations in East- and Southern Africa that believe in upholding high standards in their work. Some of them work with participants from all over the world. In Malawi I once met a youth development and counselling organization hosting a regional conference. I was surprised at the high level of organization and standards, especially since Malawi is portrayed as a basket case in Southern Africa.

As I said, developing high standards is a matter of personal and organizational attitude. The leader must set the example. What you do and how you do it reflects your own standard. Your standards are reflected in your office environment, your written reports, your meetings, conferences, logistical arrangements, interaction with other partners, funding proposals to donors, materials that you design, etc. Never compromise standards. It does not matter how small you are

or under-resourced, standards give your organization and its members self-respect and hence pride. And remember, standards can never be the same. For today's standards cannot be tomorrow's standards. Global standards are what you should aim for at all times. It does not happen overnight as I learnt. But you have to make it an objective. If not, your organization will be in trouble.

9. OUR WORLD TODAY:

THE THREE STRUGGLES PUTTING OUR SOCIETY ON TRIAL!

As leaders in the developmental sector we work in a global environment characterised by three struggles that are taking place before our very eyes. These three struggles are part and parcel of one BIG struggle that is currently putting our entire society on trial. Everything hitherto accepted and taken for granted is now being questioned. We cannot stand neutral in these struggles. We have to take a stand if we profess to work in the interest of the marginalized. All small struggles fought at the national level can be directly or indirectly linked to these three struggles. These struggles can be summarised as:

(A) The struggle for total political and economic transformation:

This is a struggle characterised by the struggles of ordinary people for active participation in the decisions taken by political and corporate leaders that determine their destinies; a struggle for more openness and transparency, more involvement, more consultation, more *deep* democracy. It is a struggle for more ownership over the tools of production. It is a struggle against endemic poverty, a struggle for more access to land, decent education, health care and decent housing. In short, it is a struggle for the necessities of life.

(B) The struggle for women's liberation:

This is the second struggle taking place, the struggle for equality between males and females and the destruction of the social relations based on patriarchy, of the political and economic domination of women by men. Women are today refusing to be defined by men. The work done by many women's groups to fight against women abuse is part of this struggle. The high divorce rate in society is a manifestation of more and more women asserting their independence and reclaiming their own space. They are demanding a redefinition of *relationship*. Unfortunately, many men are not yet ready for this drastic change and are resisting with all their might. The frightening increase in women and child abuse should be seen in this context. After centuries of socialization, this is to be expected but not acceptable. Men must learn to let go, however painful it might be.

(C) The struggle to stop environmental destruction:

This struggle is based on the realisation that when we destroy our natural environment we are also destroying our human environment. Human beings are part of and a product of nature and must therefore live in harmony with it. The world conference on sustainable development in Johannesburg in the year 2000 placed this struggle high on the global agenda.

These three struggles are raging around us everyday on a global scale. Every nation is affected by it. These struggles are playing themselves out in a world characterised by unilateralism, international trade blocs competing for emerging markets, a campaign for global re-colonisation, abandonment of the international rule of law and a free for all policy forcefully and unashamedly led by the American ruling class; a strategy of encirclement of China to prevent it from becoming a competing super power, increasing poverty of the have-nots and increasing wealth of the haves. We live in a world of extreme overdevelopment where European and American farmers are paid not to produce food and underdevelopment where people are dying of hunger every day. It is a world characterised by one-policy states where political parties argue about the emphasis of political and economic policies (normally drafted behind closed doors without popular participation) and not the policies themselves (this is clear in the United States between the Republicans and Democrats, in England between the Labour Party and Conservative Party and even in South Africa between the various parties in parliament); where the real opposition is not to be found in parliaments but outside of them.

10. BALANCING NATIONAL AND GLOBAL INTERESTS:

We live in world moving relentlessly towards more and more integration, to wholeness; not further separation, fragmentation and disintegration. We live in a world where a healthy balance is required between the interests of the nation state and the needs of global society. In fact, to a large extent the nation state (in its overdeveloped form i.e. the US, Western Europe, Japan) has become a historical impediment to the further development of humanity. The current environmental disasters (and recently avian flu) plaguing people all over the globe is a sign of this historical necessity. In fact, the best way to serve national interests is to ensure that there is a healthy balance between national and global interests and not an imposition of national interest on the rest of the globe. It is this tension between the two that is playing itself out in the world today.

Unfortunately, the leaders of today have been schooled to protect firstly the interest of the nation state. And with their foreign policies simply an extension of this national imperative they are unfit

to lead humanity during this new phase of human renewal. This is not difficult to understand since they are required to make huge sacrifices. They have to let go of their need for domination and control, to share their resources and wealth accumulated mostly through war, political and economic plunder, subjugation and sometimes open robbery. They have to learn to bring the underdeveloped countries to their levels as equal partners. The conflicts and disagreements in the various global forums indicate that these leaders are not ready and cannot be ready for this historical role. They have too much to lose. A new generation of leaders is required to assume this historical responsibility.

11. THE FOURTH STRUGGLE: THE STRUGGLE FOR MEANING AND TRUE SPIRITUALITY

There is actually a ***fourth struggle*** taking place. This is the struggle for new meaning. People globally are seeking more and more meaning in their lives. It is a collective search for our common purpose, for why we are and what we are doing on this planet earth. This movement towards the quest for new meaning in our lives is manifested in the huge number of people leaving the traditional church and shifting towards the charismatic ones that are mushrooming all over the world. It is manifested in the “New Age” movement (actually old age since most of the socio-cultural content originates from the eastern countries). This content was mostly destroyed by the colonialists during their wars of conquests. In any case, it was never in their interest to make it known to their countrymen and women that there were more superior forms of civilisations than theirs in other parts of the world. It would not have been consistent with their racist outlook. So whenever they “discovered” something it was always “new”. Like when they went to America they “discovered” the “New World”. Forget that there already were Native American Indians inhabiting that part of the world for centuries! When they “discovered” Great Zimbabwe, regarded by historians as one of the most highly developed civilisations of its time, they arrogantly and sneeringly dubbed it the Zimbabwe Ruins. It was during this time where they came up with that pernicious idea of a “Western Civilisation” and until today we still hear some irreconcilable racists who advocate that *“black people are very ungrateful for the “Western Civilisation” brought to them by the white man.”*

This is what I.B. Tabata wrote many years ago about this stupid idea. He stated that:

“In the first place, there is no such thing as “Western Civilisation”. It is a mischievous catchword, a shibboleth employed by the Herrenvolk to exclude all but themselves from the enjoying the fruits of civilisation. There is only human civilisation, which is the sum total of knowledge and techniques slowly acquired by man in the course of his development throughout the ages. Peoples in different parts of the world have come into contact with one another through

trade and conquest, and have communicated their techniques from one to the other. For example, the knowledge of astronomy came to Europe from Babylon; the invention of figures from Arabia, the art of writing from the Sumerians and the Egyptians, the alphabet from the Phoenicians.

The ancient civilisations of Asia, in China, India, Babylonia, Assyria, Persia and in North Africa, which flourished while the peoples of Europe were still sunk in barbarism, laid the foundations of modern civilisation. Each of them made their contribution to the sum total of techniques, science, art, religion. The civilisations of Greece, which owed a great deal to those of Mesopotamia and North Africa, later spread to Rome and thence to northern Europe, to the so-called “Western Nations” of Europe. Once the people of Europe became civilised, they in turn made their contribution to the body of knowledge accumulated through the ages.

Civilisation as we know it today is thus the property of mankind. It is the heritage of all men. We do not need to be grateful because modern civilisation found its way back to Africa through the agency of the White man. The Englishman would think it just as absurd if he was expected to bow down in gratitude to the Italians, whose forbears extended the Roman Empire northward to the land of the Teutonic tribes.

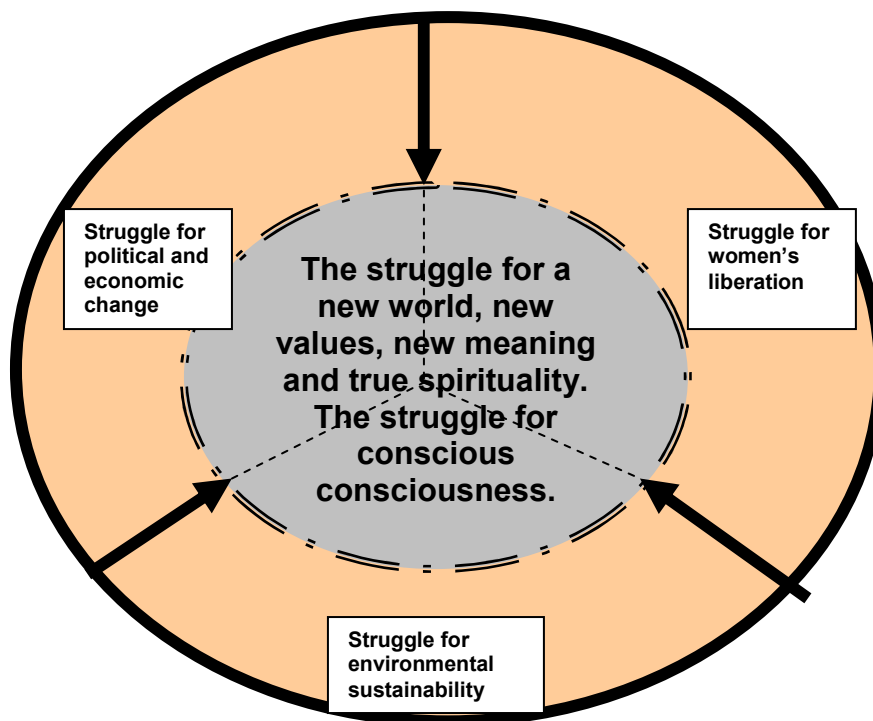
It is in the very nature of things that accumulated knowledge should be passed on, not only from generation to generation, but outwards to every corner of the earth wherever men live. Its very survival, as well as that of man himself, depends in this never-ceasing process of expansion and continuity. It is a natural law of man as a social being. Whoever seeks to arrest this process is guilty of doing an unnatural thing. He is breaking a moral law of humanity.”⁹⁸ From this point of view, the suggestion that the Africans should be grateful for “Western Civilisation” is absolutely absurd! Many whites still believe in this historical fiction, many of them occupying high positions in society.

The rise of different interest groups points to a new configuration of society. Society is being put on trial and our collective morality and value systems ***stand in judgement of the new society being forged***. Needless to say, there will be those who will resist with all their might the judgements being delivered on our collective morals and values as a human race and who will prefer to remain with the old order.

⁹⁸ I.B. Tabata (1952) *The Boycot as Weapon of Struggle*, p. 6

In my experience I have seen many people, mostly those with a white liberal background, (currently, joined more and more by a few black faces) who, having become seriously disillusioned with society, seeking refuge in bohemianism whereas others escape into “*spirituality*”. They learn to meditate and engage in all sorts of spiritual practices and rituals to renew themselves and find new meaning in their lives. This is fine. But when this quest for human renewal and a strong spirituality is not linked to the three struggles outlined above, then we are building a spirituality based on sand; a pseudo spirituality. True spirituality must be linked to the three struggles putting society on trial. Without that link we will only be reinforcing the old order. In fact, many of these whites, despite their seeming progressive appearance, still believe in the idea of a “Western Civilisation”.

Here is a graphic illustration of the three struggles: Look at the “*peace sign*” that emerges when the three struggles come together. By pursuing these struggles we promote a new *social order*.



12. SOUTH AFRICA TODAY: WAS IT HALF A LOAF AND A HALF A BABY?

Writing as a South African, this book will be incomplete unless I make some observations about the national situation facing us as leaders and development practitioners. This is necessary since I am required to act in this context everyday. You do not have to agree with this interpretation or analysis. Take from it what you find useful and forget the rest.

It is very obvious that at the moment our country is going through a very turbulent period with deepening divisions in the ruling party, mass protests against the lack of service delivery and

deepening poverty as constantly reported in the mainstream media.⁹⁹ The lack of meaningful transformation in all spheres of South African life litters the pages of newspapers and other media on a daily basis. Amid all the noise generated by certain self-appointed “analysts” in trying to clarify what is happening, one fundamental point is always missed. It was a point stressed by I.B. Tabata in his address to the Organization of African Unity (OAU) in November 1963.¹⁰⁰

This was how he put it:

*“It is a matter of great urgency that we should understand what is the key to the situation, namely **that there are two separate struggles going on at present in South Africa** (his emphasis). On the face of it they may seem one and the same struggle and they are often assumed to be the same by the outside world. But the fact is that they are totally different in aim, in dimension and in direction.”*

“The first is the National Liberation Movement of the Oppressed People’s of South Africa, in which the whole of the African peasantry in the “Reserves” is involved. This basic struggle is not one that the outside hears or reads about. Yet in the last decade it has grown in intensity throughout the country. It is a struggle far more grim than the one that is frequently published in the newspapers throughout the world.”

He continued:

“The second struggle is the conflict between the representatives of imperialism in South Africa and the Boer or Afrikaner fascist wing, the Nationalist Government that has been in power since 1948. It is this conflict with all its ramifications that receives publicity both in the home and the world press, though naturally it is not presented in those terms.”

“The first and true struggle for liberation has as its immediate objective, liberty and land. It leads to political freedom and freedom from want. The second struggle declares as its objective the removal of the Verwoerd Nationalist Government from power. But its ultimate aim though an unavowed one, is neo-colonialism, that is, the loosening of some of the more obvious bonds of political slavery while ensuring the economic stranglehold of imperialism on the soil of South Africa.”

⁹⁹ See the Human Sciences Research Council (HSRC) study as reported in the Sunday Times, 6 November 2005

¹⁰⁰ I.B. Tabata (1974) *Imperialist Conspiracy in Africa*, pp. 25, 26

It was this first struggle that was silently diverted at the Conference for a Democratic South Africa (CODESA) and led to the political compromise at the time. The limitations of this compromise and false reconciliation (no wonder racism is rearing its ugly head again!)¹⁰¹ that followed are now slowly coming loose at the seams. For what fundamentally happened at the negotiations was a choice for whites between super exploitation and super profits or just normal exploitation and normal profits or to put it in that old adage, ***“half a loaf is better than no bread at all”***.

At CODESA¹⁰² the offer put on the table for the oppressed blacks was ***“half a baby (the new South Africa) or no baby at all.”*** In the first case (with half a loaf) you can still have bread to eat but in the second case you inherit a corpse! After much trepidation, uncertainty and anxiety it is now party time for most white people (and a few privileged black faces), blissfully enjoying themselves at the expense of the black majority. With an economy booming for them (they got their full loaf back and some cake as well!) the smell of the corpse that the majority of blacks inherited is now permeating the body politic of South Africa. This is manifested in the lack of decent housing, access to clean drinking water, spiralling unemployment, deepening poverty (people are now reported to make loans to buy food!)¹⁰³, collapse of public education and health care, growing disease and government inertia around HIV/Aids, landlessness, etc. The list is endless. The growing social and economic crisis is further exacerbated by a government moving towards more centralisation, a self-imposed structural adjustment programme called the Growth Employment and Redistribution (GEAR) policy and endemic corruption by public officials on a horrific and frightening scale! Political cynicism and apathy amongst ordinary people is the order of the day. Slowly, the growing street protests for a really better life around the country is a public announcement to the world that the first struggle diverted at CODESA, is now back on the national agenda.

The regular practice of ***“crosstitution”*** (where parliamentarians cross the floor to join other political parties) is a sign that the real struggle and opposition is not between parties in parliament but between them and their allies and the economically oppressed masses outside of parliament. As development practitioners we cannot stand neutral in this struggle and pretend that everything is okay. We have to take a stand if we are serious about real transformation. Failure to do this will result in us being party to this mass deception.

¹⁰² This deal was actually negotiated long before CODESA during the secret meetings between members of the Broederbond and the leading black political figures starting in the late 1970's and the 1980's. It was only formalised at CODESA.

¹⁰³ See the Sunday Times, Business Section, 20 November 2005, p.1

This analysis was recently confirmed by Moeletsi Mbeki (the brother of the president, Thabo Mbeki) in a speech as deputy chairperson of the South African Institute of International Affairs. He was quite frank and scathing about the current status quo and how it evolved. He stated, referring to CODESA, “There were “public negotiations” between the political parties for the new democratic constitution (*Codesa 1*) (his emphasis) and there were “**secret negotiations**” (my emphasis) between the economic bosses and representatives of the black upper middle class (*Codesa 2*). ...the primary objective of the economic elite during the secret Codesa negotiations was to ensure the preservation of the sectors they controlled. He continued: “The quid pro quo for the black upper middle class representatives agreeing to the preservation of the minerals-energy complex was the creation of black economic empowerment.” According to Moeletsi Mbeki the effect of this voluntary wealth distribution on the country had been the emergence of a new class of “unproductive, rich black ex-politicians who have become key political allies of the economic oligarchy.” He added that the collaboration between these groups constituted the “transformation equation” that had brought stability and the rise in prosperity being seen in the country. But he warned: “in the longer term the transformation equation is creating a vast underclass.”¹⁰⁴ It is clear from the revelations of Moeletsi Mbeki that what we are confronting is transformation from the top down or to put it differently, assimilation dressed up as transformation, an agreement to share in the spoils of continued black exploitation and a shameless plunder of our country’s economic wealth under the guise of “black economic empowerment”.

13. REMOVING THE MASK: INTEGRATION AND TRANSFORMATION NOT ASSIMILATION AND REFORM

What we need urgently is **real integration** that will lead to **real transformation** and not **reform** that leads to **assimilation**, absorbing a few blacks in the power structures of the dominant group which is what largely happened over the past twelve years since the first democratic elections. Transformation is more painful and slow because it requires sacrifice. And sacrifice requires giving things up, letting go; letting go of past privileges and obscene comforts. Very little of this actually happened since 1994 because we tried to avoid this pain. The majority of whites for example became instant non-racialists and many companies adopted indigenous African names. This is like putting a mask on their face, pretending that they have changed.

With real transformation we will experience a **drastic change** in the **power relationships** to facilitate **free access to resources** for the black majority to change their lives. With reform we will

¹⁰⁴ Sunday Independent, Business Report, Sunday 30 April 2006, p.1

only experience a **reinforcement** of the **existing power relationships** with very little change for the majority.

S'bu Zikode, chairperson of the Abahlali base mJondolo (shack dwellers movement) based in Kwazulu-Natal summed up the need for **real** transformation when he stated:¹⁰⁵

“The night is supposed to be for relaxing and getting rest. But not in the jondolos. People stay awake worrying about their lives. You must see how big the rats are that run over small babies.” He continues: “The poor have been isolated from the middle class. We are becoming more poor and the rest are becoming more rich.”

Out of sheer desperation he describes how they are being ignored:

“Those in power are blind to our suffering, because they have not seen what we see, they have not felt what we feel every second, every day...Mbeki speaks politics. Our premiers and mayors speak politics. But who will speak about the issues that affect the people every day – water, electricity, education, land, housing? When you want to achieve what is legitimate through peaceful negotiations, through humility, by respecting those in authority, your plea becomes criminal. You will be deceived, you will be fooled and undermined. This is why we have resorted to the streets. When we stand there in our thousands, we are taken seriously.”

About voting he states:

“The community has realised that voting for parties has not brought any change for us – especially at the level of local government.”

IN CONCLUSION: SO WHAT WILL YOU DO TOMORROW MORNING?

Government and business have simple rituals developed over centuries. Governments get people to vote for them to stay in power every five years or so. What happens to the promises they make after the voting is of course a different matter. Then they will come back after five years or so and expect the same people to vote them into power again! Their entire behaviour is determined by this five year cycle. In business you have people who source needs, design products and sell them. Businesses can only stay relevant when customers or clients buy their products. When people don't buy their products or use their services then the business must close down, whether

¹⁰⁵ Max Du Pree, as quoted from The Star in the Cape Argus, November 17 2005, p.16

they like it or not. The discipline of the market is very harsh! But in the non-profit sector we don't have such blind rituals. Because in the non-profit sector:

*"We are creating tomorrow's society of citizens. And in that society everybody is a leader, everybody is responsible, everybody acts. Everybody focuses himself or herself. Everybody raises the vision, the competence, and performance of his or her organization. Therefore, mission and leadership are not just things to read about, to listen to. They are things to do something about. Things that you can, and should, convert from good intentions and from knowledge into effective action, not next year, but tomorrow morning."*¹⁰⁶ *In the non-profit sector we are building **deep democracy and community!***

Let me end off by saying that it is my firm belief that as the historical forces of human progress move relentlessly and inexorably towards a more interdependent phase in the organization of human life, a new woman and man are emerging. The painful birth of that new man and woman is largely taking place in the developmental sector where (unlike in other spheres of societal life) men and women are subjected to all the pain, vulnerabilities, uncertainties, challenges and complexities of a world in transition. It is here where the new leaders and elders of tomorrow are now being born, baptised in the laboratory of daily struggles for human survival; where the human values to sustain this form of interdependent life are now being forged. The fundamental task of today's leader and elder is to be the pioneer and nurturer of this new form of life, this new consciousness, this new awakening of the human spirit. There can be no more nobler task than this one, no bigger investment in the future of the next generation!

¹⁰⁶ Drucker (1990) *Managing the Non-profit Organization*, p. 49

**What you do today will determine who you become tomorrow! So,
what is your life plan?**

**Go to the people.
Eat and drink with them.
Learn from them and respect them.
Start with what they know and build on what they have!
But with the best leaders, when the work is done, the task
accomplished, the people will say:
“We have done this ourselves.”
Lao Tsu – China 700 B.C.**

**The worst thing that can happen to you is one morning when you
wake up you discovered that you lived the life of somebody else!**

***If you are afraid of something, become interested in it!*
- Wendy Palmer**

**Never doubt that a small group of thoughtful committed citizens can
change the world. Indeed, it is the only thing that ever has!
-Margaret Mead**

When you cease to dream you cease to live!

Happiness is an inside job!

Results speak louder than words!

**It is not the size of the dog in the fight - it's the size of the fight in the
dog!**

EXERCISE 5:

5.1 Where would you place yourself in terms of your own money management?

- I am always able to save some money every month _____
- I always just make it every month _____
- I always have to borrow money to make ends meet _____

5.2 Write down what you are currently doing to manage your own income.

5.3 Do you have a vision for the next 3-5 years? Write it down and describe the plans you have or will put in place to achieve your vision.

5.4 Now that you understand the four dimensions of human development, describe what you are doing to balance your life. Write down your response to each dimension.

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SOME INSPIRING POEMS:

YOUR CHILDREN ARE NOT YOUR CHILDREN¹⁰⁷

Your children are not your children.
They are the sons and daughters of life's longing for itself
They come through you but not from you,
And though they are with you yet they belong not to you

You may give them your love but not your thoughts.
For they have their own thoughts.
You may house their bodies but not their souls.
For their souls dwell in the house of tomorrow,
Which you cannot visit,
Not even in your dreams,
You may strive to be like them but seek not to make
Them like you

For life does not go backward
Nor tarries with yesterday
You are the bows from which your children as living
Arrows are sent forth.
The archer sees the mark upon the path of the infinite,
And he blends you with his might that his arrows may
Go swift and far.
Let your bending in the archer's hand be for gladness;
For even if he loves the arrow that flies, so he loves
Also the bow that provides the stability

By: Kahlil Gibran (The Prophet)



¹⁰⁷ A poem for parents who have difficulty in allowing their children to develop in their own right. Quoted from Scot Peck (1993) A World Waiting to be Born, pp. 162-163

LET THERE BE SPACES¹⁰⁸

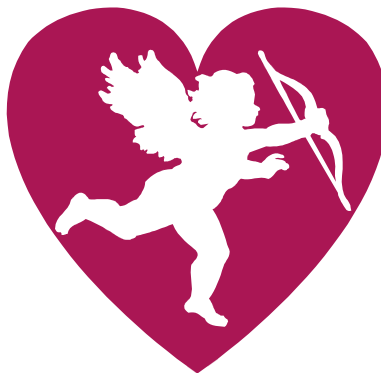
But let there be spaces in your togetherness,
And let the winds of heaven dance between you.
Love one another, but make not a bond of love:
Let it rather be a moving sea between the shores of your
Souls

Fill each other's cup but drink not from one cup.
Give one another of your bread but eat not from the same loaf.
Sing and dance together and be joyous, but each of you be alone,

Even if the strings of a flute are alone though they
Quiver with the same music.
Give your hearts, but not into each other's keeping
For only the one hand of life contain your hearts.

And stand together yet not too near:
For the pillars of the temple stand apart,
And the oak tree and the cypress grow not in each other's shadow

By: Kahlil Gibran, *The Prophet* (New York: Alfred, 1955 pp. 15-16)



¹⁰⁸ Kahlil Gibran, (1998) *The Prophet*, pp. 16-19– A poem for married couples who suffer from the illusion that marriage is **ALSO** about separateness; i.e. the interplay between interdependence and independence. When partners request some space in a relationship, then he/she is actually claiming some of their independence.

Justice for All¹⁰⁹

Oneness is a reality

Suppressed by evil mentality

We have been victims of odd circumstances

Sorrow has been our companion

Love is our foundation

Now desire is burning

And ambition is yearning

Because there is enough in the world

For everyone's need

But not enough for everyone's greed

So put your shoulder to the wheel

And don't you squeal

Because it is the beginning of an end

And it will never be this way again

For if we slip or go astray

Love will find the way

Because justice has come for all!

¹⁰⁹ Shared with me by Charles Adams more than 25 years ago.

If I can live my life all over again:¹¹⁰

If I can live my life all over again, I will not be afraid of making more mistakes

In fact I will relax more

I'd limbered up be a bit more sillier than I'd been on this trip

In fact I'd know a very few things I'd take so seriously

I'd take more chances, more trips – I'll climb more mountains and I'll swim more rivers

I'll visit more places I've never been before

I'll sit and watch more sunsets

I'll eat more ice creams and fewer beans

I'll have more actual troubles than imaginary ones

You see I was one of those people who lived sensibly, hour after hour, day after day

I was one of those people who would never go anywhere without a hot water bottle or a thermometer

If I had to do this all over again I will travel more lighter next time

I will play with more children and pick more daisies

Instead of living so many years ahead of my time I will have nothing but more and more of these wonderful moments side by side by side

**BUT YOU SEE I DON'T
BECAUSE YOU ONLY LIVE ONCE!**

¹¹⁰ I first heard this poem when watching a video by Leo Buscali

IMAGINE A WOMAN¹¹¹

Imagine a woman whom believes it is right and good she is a woman.
A woman who honours her experiences and tells her stories.
Who refuses to carry the sins of others within her body and life
Imagine a woman who believes she is good.
A woman who trusts and respects herself
Who listens to her needs and desires, and meets them with tenderness and grace
Imagine a woman who has acknowledged the past's influence on the present.
A woman who has walked through her past
Who has healed into the present
Imagine a woman who authors her own life.
A woman who exerts, initiates and moves on her own behalf.
Who refuses to surrender except to her truest self and to her wisest voice
Imagine a woman in love with her own body.
A woman who believes her body is enough, just as it is.
Who celebrates her body and rhythms and cycles as an exquisite resource
Imagine a woman who honours the face
Of the mother who honours her changing face.
A woman who celebrates the accumulation of her years and her wisdom
Who refuses to use her precious energy
Disguising the changes in her body and life
Imagine a woman who values the women in her life.
A woman who sits in the circles of women
Who is reminded of the truth about herself when she forgets.
Imagine yourself as this woman.

¹¹¹ I got this poem while visiting a client working with abused women in Mitchell's Plain. This is a great poem for women who have suffered mental and physical abuse as well for men who devalue the power of women. Author unknown

REFLECTIONS OF A MOTHER¹¹²

I gave you life, but cannot live it for you.

I can teach you things, but cannot make you learn

I can give you directions, but I cannot be there to lead you.

I can take you to church, but I cannot make you believe.

I can teach you right from wrong, but I cannot always decide for you.

I can buy you beautiful clothes, but I cannot make you beautiful inside.

I can offer you advice, but I cannot accept it for you.

I can give you love, but I cannot make you love me.

I can teach you to share, but I cannot make you unselfish.

I can teach you respect, but I cannot force you to show it

I can advise you about friends, but I cannot choose them for you.

I can advice you about sex, but I cannot keep you pure.

I can tell you about drinking, but I can't say 'no' for you.

I can warn you about drugs, but I can't prevent you from using them.

I can tell you about lofty goals, but I cannot choose them for you.

I can teach about kindness, but I can't force you to be gracious.

I can warn you about sins, but I cannot make you more

I can tell you about the gospel of salvation, but I cannot place you in God's family.

I can pray for you, but I cannot make you walk with God.

I can teach about Jesus, but I cannot make Jesus your Lord.

I can love you with unconditional love all of my life. . and I will!

Always, Mom



¹¹² This is a good poem for parents to share with their children showing the constant struggle to raise them and provide leadership. I received this one from the Western Cape Network on Violence Against Women in Cape Town.

Learning to Forgive and Forget¹¹³

Let bygones be bygones,
Forgive and forget.
We all do and say things,
We live to regret
We're none of us perfect,
So how can we judge,
The motives of others
Let go of that grudge.
A grievance will fester if harboured too long.

Perhaps you were right,
But perhaps you were wrong.
It's over and done with and life goes fast,
So live in the present and not in the past.

The injury may be deep and injury real,
But there are no wounds
That God cannot heal.
Cast right out of your mind and your heart,
Let bygones be bygones and make a new start.

¹¹³ Thanks to Renicia Titus at Nu Era Fund Administrators in Bellville for passing on this poem to me.

THE PARADOX OF OUR TIME!¹¹⁴

The paradox of our time in history is that we have
taller buildings but shorter tempers, wider
freeways, but narrower viewpoints.

We spend more, but have less, we buy more, but enjoy less. We have bigger houses and smaller
families, more conveniences, but less time.

We have more degrees but less sense, more knowledge,
but less judgment, more experts, yet more problems, more medicine, but less wellness.

We drink too much, smoke too much, spend too
recklessly, laugh too little, drive too fast, get
too angry, stay up too late, get up too tired,
read too little, watch TV too much, and pray too seldom

We have multiplied our possessions, but reduced
our values. We talk too much, love too seldom, and hate too often.

We've learned how to make a living, but not a life.
We've added years to life not life to years. We've
been all the way to the moon and back, but have
trouble crossing the street to meet a new neighbour.

We conquered outer space but not inner space.
We've done larger things, but not better things.
We've cleaned up the air, but polluted the soul.
We've conquered the atom, but not our prejudice.
We write more, but learn less. We plan more, but
accomplish less. We've learned to rush, but not to
wait. We build more computers to hold more
information, to produce more copies than ever, but

¹¹⁴ Thanks to my sister, Lana Maart, for passing this poem on to me. This poem was written by a Roman Catholic priest.

These are the times of fast foods and slow digestion, big men and small character, steep profits and shallow relationships.

These are the days of two incomes but more divorce, fancier houses, but broken homes. These are days of quick trips, disposable diapers, throwaway morality, one night stands, overweight bodies, and pills that do everything from cheer, to quiet, to kill.

It is a time when there is much in the showroom window and nothing in the stockroom. A time when technology can bring this letter to you, and a time when you can choose either to share this insight, or to just hit delete.

Remember, spend some time with your loved ones, because they are not going to be around forever.

Remember, say a kind word to someone who looks up to you in awe, because that little person soon will grow up and leave your side.

Remember, to give a warm hug to the one next to you, because that is the only treasure you can give with your heart and it doesn't cost a cent.

Remember, to say, "I love you" to your partner and your loved ones, but most of all mean it. A kiss and an embrace will mend hurt when it comes from deep inside of you.

Remember to hold hands and cherish the moment for someday that person will not be there again.

Give time to love, give time to speak, and give time to share the precious thoughts in your mind.

AND ALWAYS REMEMBER:

Life is not measured by the number of breaths we take but by the moments that take our breath away!

A person who has qualified yesterday and stopped studying today is uneducated tomorrow.

If you think education is expensive, try ignorance. – Eric Bok

***The great aim of education is not knowledge but action. –
Herbert Spencer***

***What is the most valuable is not WHAT you have in life but
WHOM you have in your life!***

***Do not marry a person that you know that you can live with.
Only marry someone you cannot live without!***

It takes years to build trust, and a few seconds to destroy it!

***It only takes a few seconds to hurt people you love, and it can
take years to heal.***

***We have come to love not by finding a perfect person, but by
learning to see an imperfect person perfectly!***

Be realistic – demand the impossible!- Che Chuevara