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An integrated Toolkit for institutional development

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SUMMARY

An integrated Toolkit for institutional development is presented. It is intended to be used by the non-profits themselves to address current shortcomings in the field of institutional development of non-profit organizations, including: inadequate measures of institutional capacity, difficulty diagnosing priority areas within an organization for improvement; lack of simple mechanisms to improve understanding by non-profit staff of the interrelated components of their organization; and inadequate mechanisms to compare institutional development across organizations. The Toolkit emphasizes participation, use of management systems, and the independence of the organization. The Toolkit provides both an analytic (table) and visual (graphic) presentation of results. The system is now fully automated. Utilization of the Toolkit can address many of the shortcomings listed above as well as help provide a useful way to develop consensus and unite energies among the board, staff, beneficiaries, and donors.

A. Toolkit for what?

The tools presented in this article may be used to help an organization, particularly a non-profit organization, increase its productivity, enhance its impact, improve the organization as a place of work, and increase the likelihood that the organization will survive long enough to have a lasting effect on society. In short, the Toolkit can help improve the efficiency of a non-profit's 'engine' to make it more effective—what we call institutional development.

Properly used, the Toolkit can help an organization consider factors that make organizations successful, assess its own strengths and weaknesses in light of those factors, map out a prioritized plan for sustaining its strengths and addressing its weaknesses, and measure its progress against the goals it sets for itself. The Toolkit will have greatest impact where it is used in a participatory manner, although more restricted applications can be useful, such as for external evaluations.

Figure 1 provides a glimpse of the power of the Toolkit. It can portray, on a single page, the component parts of the institutional development of an organization. And it can display how the organization has progressed over time. It can present the information in detailed tables, or it can immediately graph the information in a way

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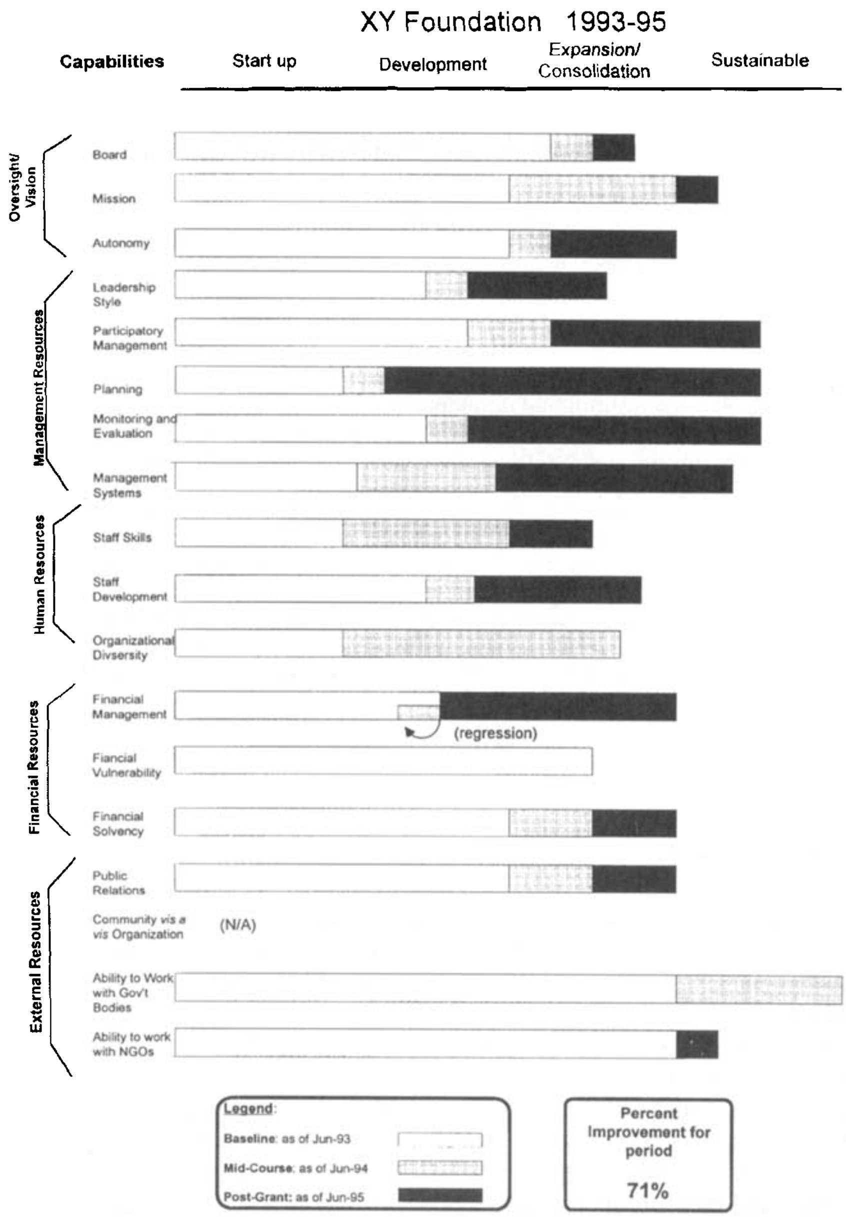

Figure 1

that can be intuitively understood by all staff. This same presentation can serve as a clarifying 'rallying poster' for setting—and meeting—institutional development objectives. The graph provides a visual image that can unite the energies of the group.

The tools are intended for use either by the organizations themselves, or with assistance from a professional well-versed in organizational development or other aspects of management. We have tried to keep everything simple—and jargon-free—

enough that a committed organization should be able to make good progress on its own, but many would benefit from the objective and experienced perspective a professional can bring to the process.

B. How the Toolkit came to be

Our work as management consultants to many non-profit organizations throughout the Americas, Africa and Asia revealed a need expressed by client organizations that the Toolkit attempts to meet. Throughout these diverse geographic regions, for both rural- and urban-based groups, in sectors as diverse as conservation, philanthropy, micro-enterprise lending and support, maternal and child health, AIDS, agricultural extension, and applied research, a common gap emerged. While a number of approaches to institutional strengthening have been attempted, relatively little seems to have been widely disseminated in the form of a simple and consistent approach to measuring progress in insitutional strengthening that non-profits could tailor to their specific requirements.

Non-profits frequently receive 'institutional strengthening' grants—indeed, the entire thrust of some 'PVO/NGO[1] Umbrella Support Projects' is to bolster the management capacity of a number of organizations. Since the target of such assistance is the institution itself, it would be useful to be able to 'pop open the hood', and look at the organization's machinery and see how well it is working. Almost invariably the donor will seek a simple set of measures to encompass several non-profits, while the non-profits will declare that each is unique and a single yardstick will not work. After several frustrating hours of back and forth discussion, both sides will often throw up their hands and seek another approach.

They often settle for a focus on *outputs* (number of teachers trained, number of loans provided, number of condoms distributed), or on ultimate *impact* (improved test scores of students, more profitable and viable businesses, reduced rate of sexually transmitted diseases). Examining outputs makes sense since an 'organization is what it does'—if the organization is improving, we should see 'more/better' products. Ultimately, the mission of staff in a non-profit (and the reason people invest their hard-earned money in philanthropic contributions to the organization) is the actual *impact* the organization will have on peoples' lives or on the environment.

We need to continue to seek information on outputs and impact (the closest we can come to a 'bottom-line' for non-profits), but by the time we see changes in those measures, we may have lost valuable time in rectifying problems or opportunities to improve quality. The engine could seize without oil if we do not monitor the gauges on the dashboard. Why wait until the end of a 3-year institutional-strengthening project to learn that something is still wrong? Worse still, even though measures of output and impact may indicate that something is wrong, by themselves they can not tell us *what* went wrong, *when* or *where*. We do not know if the oil pan is leaking, or if the valves are busted, or if the gauge is malfunctioning.

[1]PVO = Private Voluntary Organization; NGO = Non-Governmental Organization. In this article we will use the term non-profit to encompass both these terms. We find PVO restrictive since it may imply to some readers that staff are not paid professionals. NGO, taken literally, is too broad, and should include the profit sector as well, although, typically it does not.

The Toolkit has evolved to provide an approach that will help an organization to identify which parts of its internal operations are keys to success, to help them develop a strategy for addressing those issues, and to continuously monitor progress towards achieving the goals the group has set for itself. It should be created not just for measurement's sake, nor to meet the requirements of an external donor, nor for the sake of a few targeted improvements, but as a holistic approach to improving the non-profit's chance for success.

In working with groups, we realized that the same tool developed to measure success during a period of organizational improvement could also be used up-front to build consensus within the organization around possible routes to improvement, help them develop a plan to help themselves, and set in motion a process that can foster the kind of participatory process that is essential to improvement. At the same time, the process followed in applying the Toolkit can build *esprit* in the organization and contribute to development of the Board.

C. Where is the Toolkit 'coming from'?

Casual review of the Toolkit will reveal a pervasive bias towards participatory approaches to management. Forty years of theory and research indicate that participatory management leads to setting more ambitious goals, greater likelihood of achieving these goals, a more motivated work force, and an environment conducive to continuous improvement and creative innovation (Argyris, 1957; Lewin, 1958; Likert, 1967). In short, participation increases productivity and employee health and welfare (Marrow *et al.*, 1967). To have maximum impact, participation should infect all sectors of an organization. For this reason participatory bias pervades the Toolkit. As with a stereo system, the ultimate fidelity is only as good as its weakest component, whether it is the amplifier, speakers, the CD player, or the recording quality of the CD itself.

In the case of the non-profit sector, where lack of conventional economic-worth measurements, such as employee salaries (which tend to be lower than the profit sector) and the all-encompassing bottom-line (which is absent), could leave non-profit staff rudderless, participation is even more essential to foster a common mission and shared sense of worth among employees (Gallaro *et al.*, 1993; Jackson, 1983). We are confident that participation will lead to more effective non-profits. We are equally convinced that non-profits are under an ethical obligation to make the workplace as conducive to human development as possible. Increasing workers' participation in the workplace can do just that (Shashkin, 1984).

So, no apologies about the participatory bent of the Toolkit. We recognize, however, that participatory management can take many forms and must be tailored to the situation (Lawrence *et al.*, 1969). Some organizations may require relatively more or less participatory styles, and the Toolkit can be fine-tuned to meet those needs, as will be demonstrated in Section E, below.

The conceptual and theoretical background of the Toolkit is a *jiu jitsu* of management approaches. That effective mongrel of martial arts is proud to take its front kick from *tai kwon do*, its throw from judo, and front punch from karate. The point is to succeed: stylistic pedigrees are irrelevant in a street fight. Similarly, to develop a synthesized approach to institutional development, we have referred to management texts, organizational development literature, project papers, project evaluations, monitoring and evaluation manuals, non-profit organizations' manuals and hundreds of hours of working with non-profits themselves.

The selection of priorities of which aspects of management were most crucial for consideration came from the non-profits themselves. These have chiefly emerged from workshops in the regions and sectors mentioned above. We have also tapped efforts by larger non-profits to wrestle with this issue so we could get a head start conceptualizing how to think about progress in each priority area (Nature Conservancy, 1994). Much of the theoretical underpinnings of the Toolkit come from organizational development theorists and practitioners.[2] The Toolkit also has a bias towards the use of total quality management (TQM) practices, such as client orientation, an emphasis on continuous improvement, and continuous monitoring and innovation (Crosby, 1979; Demming, 1986; Drucker, 1989; Drucker, 1990). Finally, some of the 'rules of thumb' for financial management and management systems come from our own experience in the field and various 'lessons learned' from sector field evaluations.

In examining the logic implied in the Institutional Development Framework (IDF), described in more detail below, the reader will note the basic philosophies espoused in the previous paragraph, as follows:

- Maximum emphasis on fully integrating participatory management practices
- Utilization of management systems that are as transparent as possible to promote participation
- Continuous emphasis on client (or beneficiary) orientation
- An outward orientation that enables the non-profit to take advantage of external resources (such as government initiatives, networks and broad-based movements), and dodge potential threats (such as changes in tax laws, potentially damaging construction projects, and shifting donor priorities)
- An emphasis on the importance of management systems over *ad hoc* approaches
- The importance of the autonomy of the organization.

Professionals who have worked in this field may find relatively few new ideas. This is not particularly surprising since the field is well-trod: the innovation is a framework that is comprehensive, intuitive, graphic and easily accessible to all literate staff of a non-profit.

D. The basic tool: the Institutional Development Framework

The Toolkit comprises three main tools and some supporting tables:

- Institutional Development Framework (IDF)
- Institutional Development Calculation Sheet (IDC)
- Institutional Development Profile (IDP)

[2]Readers familiar with the literature will particularly recognize a strong alliance with the tenets of Rensis Likert in his emphasis on a Model IV organization as an ideal. While many similarities exist to his typology, this construct was developed apart from his writings.

The heart and *ego* of the system is the IDF, its conscience and *superego* is the IDC, and its beauty, figure and *id* is the IDP.

Due to its length, the full IDF is not presented in this article. A short excerpt is presented as Figure 3. However, prior to considering the details of the framework, it may be useful to review its overall structure. It is presented schematically below:

In the left column are the various organizational characteristics that non-profits identified as crucial to success. They are sorted by major resources at the organization's disposal: oversight/vision, management resources, human resources, financial resources, and external resources. Each of those categories represents a potential resource to support the organization. If the resources are not fully realized, success will be impeded. Each major resource includes key components as shown.

The Framework is constructed with a number of 'Progress Cells', which are designed to track natural development from left to right, according to the 'Development Continuum' shown at the top of Figure 2. The Framework describes four stages in an organization's development: Start-up, Development, Expansion/Consolidation, and, finally, Sustainability. These distinctions are somewhat arbitrary, and one might quibble with any particular entry. Taken as a whole, however, it paints a reasonable portrait of an organization's development. Although it is described as a continuum, an organization can regress, and the Expansion/Consolidation phase could also represent a restructuring.

The challenge of the Framework is first to fill in the 'Progress Cells' with descriptions that help an organization consider where it may be located along the continuum at any given time. The 'X marks the spot' and arrows in Figure 1 convey

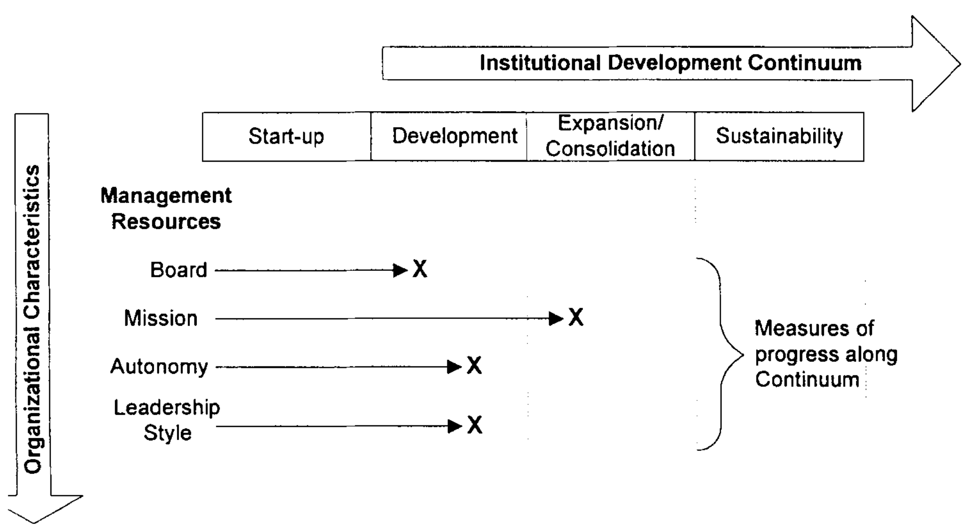

Figure 2. Schematic View of Institutional Development Framework

Resources	Criteria for Each Progressive Stage			
	Start up	Development	Expansion/ Consolidation	Sustainability
Management Resources				
Leadership Style	Leadership emanates from the founder.	Leadership comes from founder and one or two Board members.	Vision increasingly comes from Board as Board members improve involvement.	All Board members contribute to leadership and development of the organization
	Staff provide technical input only.	One or two staff provide organizational impetus, in addition to Director.	Staff increasingly provide vital drive to organization.	Organization would survive without current Director
Management Systems	No formal file system exists	Files are maintained, but are not comprehensive or systematic.	Files are systematic, and accessible, but significant gaps remain.	Files are comprehensive, systematic, and accessible.
	Few administrative procedures formalized	Administrative procedures increasingly formalized but no operating manual	Administrative manual in place, although not up-to-date or considered "the Bible"	Administrative manual updated, as needed. Considered the arbiter of procedures.

Figure 3. Excerpt from Institutional Development Framework

that concept. We have made a first effort at this for the Framework, several rows of which are excerpted above.[3]

E. Adaptability of the Toolkit

The text in each progress cell guides organizations in placing themselves along a continuum. Considerable research, field tests, and trial and error have gone into making the cells as broadly useful as possible. But, we are certain that these descriptions will not be acceptable to all organizations. Nor should they be.

While certain commonalities exist among organizations, which make construction of a Framework feasible, each organization has its own characteristics, personality, and sense of where it is and wants to be. Accordingly, the Framework here must be modified to suit the organization, or organizations, it seeks to serve. The IDF presented here is only intended as a starting point. Organizations are free to change the text in any cell, re-sort the rows, add new rows that they think are important, or even eliminate entire rows that are inappropriate to their

[3]Due to space limitations, only a portion of the IDF is shown here. The remaining rows include Management Resources: leadership style, participatory management; management systems, planning, community participation, monitoring and evaluation; Human Resources: staff skills, staff development, organizational diversity; Financial Resources: financial management, financial vulnerability, financial solvency; and External Resources: public relations, ability to work with local communities, ability to work with government bodies, ability to access local resources, ability to work with local NGOs.

circumstances. For example, non-profits without a board would naturally need to adjust the text in the first row of 'Leadership Style'.

F. Non-profit self-assessment process

Once the organization has had an opportunity to review the IDF in detail, and modify it to suit its needs, the Framework will describe, in a just few pages, many options in pursuing institutional development, where each row describes a potential route for improvement. The next step is for the organization to examine the IDF, row-by-row and determine where along the continuum it is situated.[4] The simplest approach is to mark an 'x' in the spot that describes the organization at a given moment. As shown in Figure 2, this can be at the beginning or end of a Progress Cell, or somewhere in between. For ease of analysis, we recommend each Progress Cell be divided into quarters.

There are several processes an organization can employ in its self-assessment:

- If it is a small organization, involve all employees in the process. This approach is the most time consuming. However, it is likely to yield the most accurate results and is likely to produce the most broad-based commitment to improvement as all parts of the organization will have a stake in the programme for change.
- If it is a larger organization, involve as many employees as feasible, possibly breaking down into smaller groups. This provides a way to achieve the benefits of the preceding option, but with manageable decision units. The units could be divided into functional units, by top management and workers, between board and staff or any other combination that seems useful. Splitting the groups can reveal interesting divergence in perceptions of the organization's position. Conversely, uniting the disparate interests into heterogeneous groups can foster learning and more balanced perspective. It all depends on what is wanted from the experience.
- A few key informants. This is the least powerful approach to using the tool, but sometimes is necessary if an organization is preoccupied, if time is limited, or if the objectives of the use of the tool are more modest (such as for a project evaluation).

Once an organization has taken the time to scrutinize each row of the IDF and determined where along the continuum it is placed for each row, it is a simple matter to generate the Institutional Development Profile (shown in Figure 1). In reviewing its IDP at the outset of this exercise (as of June 1993—represented by the clear bars in the composite graph), the XY Foundation was able to understand which parts of its organization were holding it back: its authoritarian and inefficient management systems, its inadequately integrated and trained staff, and its financial systems. This was immediately evident by the fact that each of these factors was in the 'Development' stage (represented in this composite graph by the clear white portion of the bars). On the other hand, they had a sound foundation in vision, autonomy, and ability to interact with the outside environment. This, too, was

[4]In cases where the organization has already begun an institutional development programme it may be worthwhile to examine two points: look back retrospectively to where they were prior to the improvement effort, and today, to see how far they have progressed.

reflected in the bars for these areas extending into the third and fourth columns. For them, the institutional development priorities were clear:

- Improve management systems, particularly with respect to participation;
- Develop staff training plans, and implement them; and
- Fix the financial management system.

The non-profit rigidly followed this course, and their progress is evident by examining the degree of improvement, both in the dark bars and in the 71% improvement noted below (we will demonstrate how that figure was determined in Section L, below.)

G. Setting institutional development priorities

The next step is for the organization to determine which among the organizational characteristics are the most important ones to its future. A number of approaches can be used to facilitate this process. One that has proven useful is to draw up 'flip cards' for each of the organizational characteristics included in the IDF, such as board, planning, staff development, public relations, etc. Then list on a wall or floor a scale of 1–4, as illustrated in Figure 4.

In a relatively short time, a group can place all the organizational characteristics on the wall and determine their relative importance to the organization. Using phrases such as 'Make or break the organization', and 'Not important to us in the near future' (left column in Figure 4), may be useful to help the group decide where to place each characteristic. Once again, the cards may be precisely on an integer spot, or in between

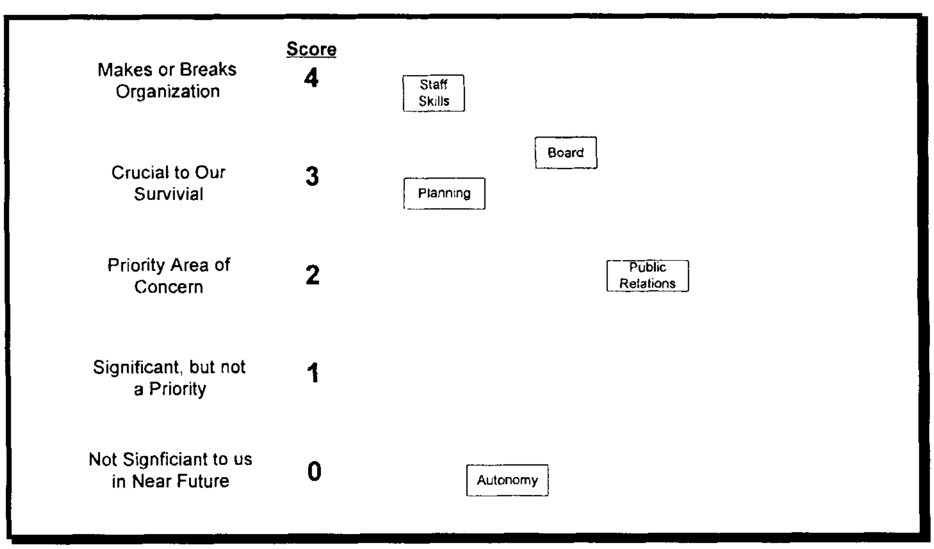

Figure 4. Group Prioritization of Organizational Characteristics

(that is, scores such as 1, 4, 3.5, or 2.25 are acceptable). These priorities should be established *regardless of whether or not there are currently problems in these areas.*

H. Setting priorities for institutional improvement

At this point, the organization has noted for each organizational characteristic on the IDF where it is relatively stronger (further to the right on the continuum) and weaker (further to the left). It has also determined which of the characteristics are most important to the success of the organization.

There are two approaches that can be pursued to turn lessons learned thus far into a plan for improvement.

1. Use this information as the basis for a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis upon which to build a plan of action (Bryson, 1988). The exercise just completed will provide thorough information for the Internal Scanning portion of this exercise (the Strengths and Weaknesses). Taking some time to review the external environment (Opportunities, Threats) can provide additional useful insights *en route* to developing an improvement plan. Once completed, the organization would follow instructions from the next paragraph.
2. Go ahead and list the cards in order of priority and progress. The simplest approach, shown in Figure 5, would be to list on each show card the score received on the IDF (the Development on the Continuum Score) and the priority score, just determined with flip cards (as described in Section G). Those cards that

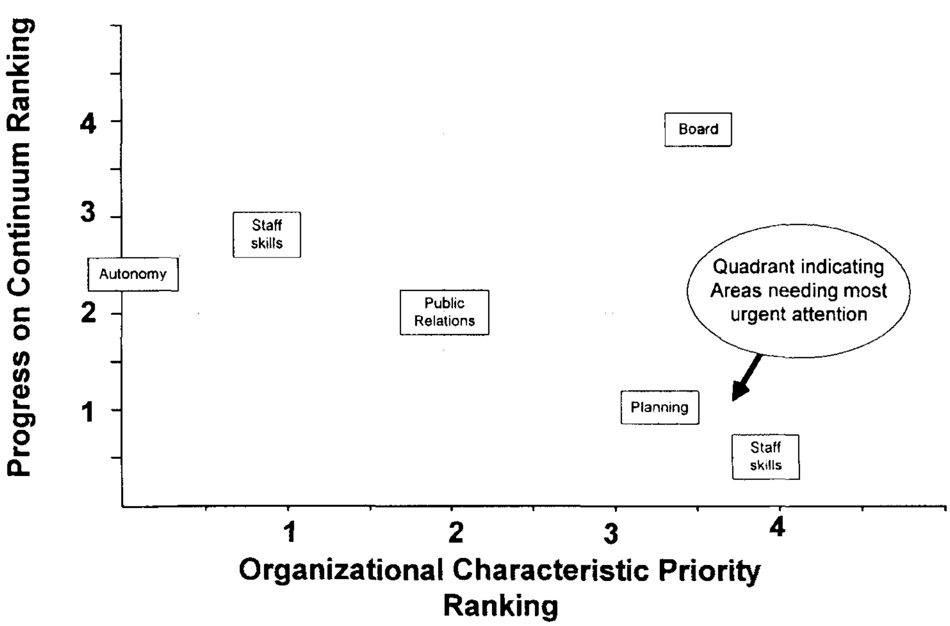

Figure 5. Selection of most urgent targets for institutional strengthening

end up in the lower-right-hand corner represent the characteristics that are both most important to the organization and are the least developed.

I. Setting goals and planning an improvement strategy

Having identified the areas that need improvement, the organization can set goals for itself about how it would like to be in the future, such as in six months, a year, and two years. For example, it might want to focus on planning, advancing from a state where it is *ad hoc* and top-down (scoring 1 on the IDF) to a process that develops annual plans that fit into an overall plan and includes beneficiaries in the planning process (scoring 3 on the IDF). Figure 6 presents ways in which an organization might use the IDP to visually indicate targets. Please note how this organization (a crafts and cultural association in rural Africa) changed the four development categories to better suit local vernacular.

To achieve this the organization will need to assign responsibilites to individuals and teams to develop the planning process and solicit participation from grantees.

J. Measuring progress against goals

Goals can be set for each row, or for selected rows, depending on the enthusiasm of the group. In many cases, the organization will not strive to achieve progress on each and every row, but maintain the status quo on some characteristics while hoping to improve others. The simplest way to accomplish this would be to set numeric targets for each of the rows, and then repeat the IDF review process at the deadlines set to see if progress is matching expectations.

A useful way to record the results of an IDF evaluation session is to use the Institutional Development Calculation Sheet (IDC). An excerpt from the sheet is presented in Figure 7.

Figure 7 permits the organization to record progress during the span of 1 year (or whatever interval is chosen) by recording the Development Continuum Score at any point. It also provides a column for comments so that when any member of the

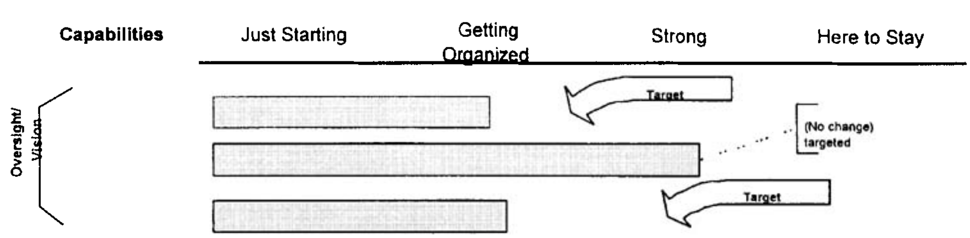

Figure 6

Resource	Sub-title	Score		Comments
		8/93	6/94	
Mission		2	3	6/94 Technical Assistance has permitted staff to collaboratively modify the existing "Aim", "Objective", and "Strategies" of XY Foundation (XYF). Outsiders do not necessarily identify XYF with these statements
	Subtotal:	2	3	
Autonomy		2	2.25	XYF has greater autonomy with having gained a number of new clients, a chief one being the Project. However, it is still very much dependent on government (including partially with respect to the Project).
	Sub-total:	2.	2.25	
Average of sub-totals for Oversight/Vision:		2.1	2.6	
Leadership Style	Charismatic Leader	2	2.25	As part of the institutional strengthening period, a participatory management style is planned. The staff participated in strategy setting, as described above.
	Staff Participation	1	1.25	With expansion of staffing, both the program officer and new hires are beginning to generate added energy in XYF.
	Sub-total/2:	1.5	1.75	

Figure 7. Excerpt from Institutional Development Calculation Sheet. *Note*: One should not imagine incredible precision by the decimals used. Groups generally do not attempt to locate themselves within a progress cell with any more accuracy than by dividing it into fourths (such as 1.0, 1.25, 1.5, 1.75, 2). Initial entries are in those increments and averages are rounded to the nearest tenth

group reviews the form (such as for the next periodic review) he or she will recall the logic that was expressed by the group. Naturally, additional columns could be added to track progress (and regressions) during subsequent periods.

K. The Institutional Development Profile (IDP)

One of the most appealing aspects of the IDP is its ability to track progress over time and illustrate graphically to all concerned how the organization is faring. A completed IDP was presented at the outset of this article and has been referenced repeatedly since. That figure demonstrates how one organization fared during the period of an institutional strengthening grant. We have now automated the system so that the graph springs readily from the Calculation Sheet once the data are entered into a spreadsheet.

L. Two steps forward and one back: measuring overall health

Up to this point we have focused on particular characteristics to help organizations identify needs, set targets, plan interventions and track progress. Clearly, they could make progress in a targeted area, but fall behind in other areas. How can we get a sense of net progress, or regression?

From Section G we have provided an opportunity for an NGO to indicate which characteristics are relatively more important to them. Progress in a 'make or break' characteristic should not be counted equally against regression in a characteristic that was dubbed 'insignificant'.

We have tried to integrate this concept into an overall scoring scheme that weights each row score according to the priority assigned to it by the organization in Section G. Figure 8 provides a sense of how this can function.

M. Comparisons across organizations

We have demonstrated how an organization can measure its progress against its own targets and criteria. We have also emphasized that an organization should be able to modify the IDF to suit its needs. However, it is also possible to apply the Toolkit systematically to a number of organizations. This could have several applications:

- As a sector assessment. As part of planning assistance, one could review the relative strengths of organizations in a country, region or sector. Based on the analysis one might identify certain recurring problems (such as poor financial

Example of how Weighting Is Used in Compiling Composite Score at two points in time:

Resource	T_1 Raw Score	Weight	Adjusted T_1 Score	T_2 Raw Score	Adjusted T_2 Score
Board	2.25	4	9	2.75	11
Mission	2	3	6	3.25	9.75
Autonomy	2	2	4	3	6
Leadership	1.5	4	6	2.5	10
etc.					
etc.					
Total			125		214

Percent Improvement during period: 71%

Figure 8. Weighting Progress Scores for an Overall Score

systems, or weak planning) and target assistance to the target community to meet those needs.

- To monitor a 'PVO/NGO Umbrella Support Project'. Section B noted that such projects are often designed to serve a number of non-profits. The Toolkit could be used to help the client organizations establish needs, obtain assistance, and monitor progress. At the macro level, the donor could have an up-to-date sense of how its clients are faring.
- To evaluate 'PVO/NGO Umbrella Support Projects'. The Toolkit would provide a quick, simple and rigorous approach to measuring project impact.

N. The Toolkit as the backbone of institutional training

Much has been written lately about the importance of 'customer orientation' and workers who can look beyond their 'job description' to find work that needs to be done and do it (Bridges, 1994). Employees need to have a sense of 'ownership' of the future of the organization and commitment to achieving the impacts arising from its mission.

The Toolkit can help provide workers with the global understanding of the organization that is needed to adopt such an attitude. It can train staff in the essentials of an effective organization. Participation of an organization's board, its staff, and its beneficiaries are essential to success. With participation comes commitment and innovations. But, to translate this creativity and drive into correct decisions and taking initiative to fill in and identify problems wherever they arise, employees must have an understanding of how the whole place fits together. Those who focus their hours on raising funds must understand what those funds are used for; those who train staff must be cognizant of how they fit into the organization's future. Only in this way can someone assigned to work with communities in a remote rain forest in Sumatra appreciate how their work might translate into an effective fund-raising plea to reach suburban families in the United States.

An organization can use a workshop format to raise each of the issues of the IDF with as broad a spectrum of the group as possible. The group can consider each of the rows and understand its relation to their daily work and to the rest of the organization. The process of adjusting the rows and the progress cells will force each person to ask questions of the others. The group will learn the organization's strengths and weaknesses and the importance of building on the former and addressing the latter.

With this clarity and proper support, tremendous initiative can occur. In the words of my High School football coach: 'A confused ballplayer is never an aggressive ballplayer'.

O. Conclusion

We have presented a framework for examining the engine of a non-profit organization. It is an essential diagnostic tool. It can identify problems; it can help board, staff and beneficiaries to be aware of where to look for improvement; and it can recognize progress. It can help motivate organizations by showing them the way ahead, both graphically and analytically. It can help coordination within an organization by promoting understanding of how each of the many pieces of the organization fit together—how the carburettor is related to the piston. As importantly, the process of applying the tool can help bring an organization together and focus its energies while at the same time spurring individual initiative.

As they say at the beginning of the Indianapolis 500 car race. 'Gentlemen [and ladies], start your engines'.

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