

## **The Tango for Organisations**

### **40 Tools for Institutional Development and Organisational Strengthening**

#### **Selection**

**MDF Training & Consultancy**  
**[www.mdf.nl](http://www.mdf.nl)**

## Table of Contents

|   |  |
|---|--|
| <b>1 Introduction</b>                     | <b><i>INCLUDED IN THIS SELECTION</i></b> |
| <b>2 Approach</b>                         |  |
| <b>2.1 Question</b>                       |  |
| 2.1.1 Basic Question (BQ)                 | <b><i>INCLUDED IN THIS SELECTION</i></b> |
| 2.1.2 Criteria                            |  |
| <b>2.2 Client and mindset</b>             |  |
| 2.2.1 Client system                       |  |
| 2.2.2 Organisational Learning Cycle       |  |
| <b>2.2.3 Drama triangle</b>               |  |
| 2.2.4 Stakeholder analysis                |  |
| <b>2.3 Process</b>                        |  |
| 2.3.1 ID/OS process design                |  |
| <b>2.4 Adviser</b>                        |  |
| 2.4.1 Approach International Adviser      |  |
| <b>3 Models</b>                           |  |
| <b>3.1 Organisation</b>                   |  |
| 3.1.1 Integrated Organisation Model       | <b><i>INCLUDED IN THIS SELECTION</i></b> |
| 3.1.2 IOM checklist                       |  |
| 3.1.3 IOM gender checklist                |  |
| <b>3.2 Sector</b>                         |  |
| 3.2.1 Institutional Sector Analysis       |  |
| 3.2.2 ISA checklist                       |  |
| <b>4 External organisational analysis</b> |  |
| <b>4.1 Initial Impression</b>             |  |
| 4.1 Quick scan                            | <b><i>INCLUDED IN THIS SELECTION</i></b> |
| <b>4.2 Output</b>                         |  |
| 4.2.1 Quality definition chart            |  |
| <b>4.3 Mission</b>                        |  |
| 4.3.1 Envisioning                         |  |
| <b>4.4 Input</b>                          |  |
| 4.4.1 Evaluation grid                     |  |
| <b>5 Institutional context analysis</b>   |  |
| <b>5.1 Factors</b>                        |  |
| 5.1.1 Environmental scan                  |  |
| 5.1.2 Problem area matrix                 |  |
| <b>5.2 Actors</b>                         |  |
| 5.2.1 Institutiogramme                    | <b><i>INCLUDED IN THIS SELECTION</i></b> |
| 5.2.2 Interlinked organograms             |  |
| 5.2.3 Coverage matrix                     |  |
| 5.2.4 Collaboration matrix                |  |
| <b>5.3 Identifying Options</b>            |  |
| 5.3.1 Strategic Options (SOP)             |  |

## **6 Internal organisational analysis**

### **6.1 Strategy**

6.1.1 Strategy assessment

### **6.2 Structure**

6.2.1 Organogram

6.2.2 Mintzberg matrix

### **6.3 Systems**

6.3.1 Process flow chart

### **6.4 Management style**

6.4.1 Assessment model

6.4.2 Quinn roles

6.4.3 MacCoby styles

### **6.5 Staff**

6.5.1 Staff conditions algorithm

6.5.2 Competency profiling

6.5.3 Core quadrants

6.5.4 Functional team roles

### **6.6 Culture**

6.6.1 Archetypes

6.6.2 Checklist culture

6.6.3 Self-assessment

## **7 Strategy setting**

### **7.1 Strategic Orientation (SOR)**

7.1.1 SOR with SOP

7.1.2 SOR with OT

*INCLUDED IN THIS SELECTION*

## **8 Planning and change**

### **8.1 Operational planning**

8.1.1 SOR to Logical Framework

8.1.2 Participation matrix

8.1.3 Interest chart

8.1.4 Training Needs Assessment

### **8.2 Change management**

8.2.1 Organisational Change Cycle

## **9 Generic methods**

### **9.1 Participatory Strategy Development**

9.1.1 Participatory Organisation  
Diagnosis

### **9.2 Participatory Program Planning**

9.2.1 Problem analysis (OOPP)

## **10 Overview and sources**

### **10.1 Tools overview**

### **10.2 Glossary**

### **10.3 Abbreviations**

### **10.4 Literature and links**

### **10.5 About MDF**

## **11 The Quick Step**

# 1 The Tango for Organisations

What does it take to Tango? What does it take to make an organisation swing? To make organisations excel in their unique niche, managers and advisers need to assess the situation, develop plans and guide interventions to success. In all these stages of fact-finding, reflection, brainstorming, decision taking and change, tools and models can help to explore, present and communicate on the situation. The tools collected in this manual represent the collective wisdom of many development practitioners connected with MDF, who read about or developed, tested and refined dance movements and instructions.

Being a fast and energetic dance, the Tango requires that you master the steps, but then rewards the dancers with vigour and a clear sense of direction. This toolkit similarly portrays the necessary steps in Institutional Development and Organisational Strengthening (ID/OS), for organisations inspired to dance towards their mission. It presents a comprehensive variety of tools and angles to accurately diagnose the dance floor (the external facts and trends) and your tango skills (competence and capacity of the internal organisation). The purpose is to remove hindrances that may cause one to stumble or fall. At the same time the dance fosters commitment and motivation for change: The determination and flexibility that enables even elephants to dance the Tango (our organisation's name MDF is also explained as 'Management by Determination and Flexibility').

## Users of this toolkit

This toolkit contains diagnostic (and change) tools for managers, advisers and consultants who wish to engage in ID/OS processes for different purposes. These purposes differ in starting point and objective<sup>1</sup>:

- **Strategic orientation.** An organisation decides on priorities for *innovation* and plans the road ahead, including adjusting its own capacity in view of the planned change
- **Sector development.** Sector key players initiate a review and adjustment of *who does what* in an institutional sector, and plan *ways to enhance* sector performance
- **Programme development.** A programme implementing organisation or donor looks for partners to decide *who does what* and on *how to get every party ready* for his role
- **(Re-) positioning.** An organisation reviews and envisions *what to do*, and establishes a new vision, mission, norms, approach and guiding principles
- **Operational and technical development.** An organisation decides *how to improve* in what it does.
- **Change Tools.** How to plan interventions; how to enable support; how to monitor change processes

Professionals experienced in organisational analysis and consultation can select relevant tools and use the tool descriptions in this manual as recipes in their work. Sound and optimal application of these tools, however, presumes professional integrity and competence. Without these qualities, the random application of tools can become mechanical and inflated, leading to erroneous conclusions. However, the Tango helps less seasoned managers and advisers by providing an overview and idea of possible approaches to their issues. Should they employ consultants, the Tango helps them to

<sup>1</sup> See further the ID/OS process design tool in 2.3.1

identify their question clearer and maintain the lead in establishing Terms of Reference and receiving support. Knowing what you don't know makes you a better partner.

## Concepts and definitions<sup>2</sup>

An organisation can be defined in general as *a complex of people and/or groups that, according to commonly agreed rules and procedures, strives to realise one or more pre-set objectives*. In this toolkit we use the term 'organisation' for the actor(s) on who tools are applied.

Norman Uphoff defined institutions as: *Complexes of norms and behaviours that persist over time by serving collectively valued purposes*. In this toolkit the term 'institutions' points at the institutional environment or the context around the organisation(s) under analysis. This context comprises of factors (economic, technical, political-legal, socio-cultural influences) and actors (suppliers, financiers, competitors, partners, and target groups, and the networks between them).

Whereas 'organisation' stands for what is *internal*, the term 'institutional' stands for the *external* world and relations that is not under the control of the organisation(s) under analysis, but have effect on the organisation and its performance.

The organisation under scrutiny has reasons for applying tools, which need to be clear<sup>3</sup> and agreed upon. Analysis therefore starts with formulating a Basic Question (BQ). This question states the objective of analysis, and then asks *how* to achieve it. The BQ also helps to delineate the border between internal (organisation) and external (institutional context).

Having defined institutions and organisations, we come to the concepts of Institutional Development and Organisational Strengthening (ID/OS). As a working definition, ID stands for *the creation or reinforcement of a network of organisations to effectively generate, allocate and use human, material and financial resources to attain specific objectives on a sustainable basis*. And in this toolkit we define OS as *measures to improve the organisation's capability to execute selected activities while striving to achieve the objectives of that organisation*.

## Framework and approach

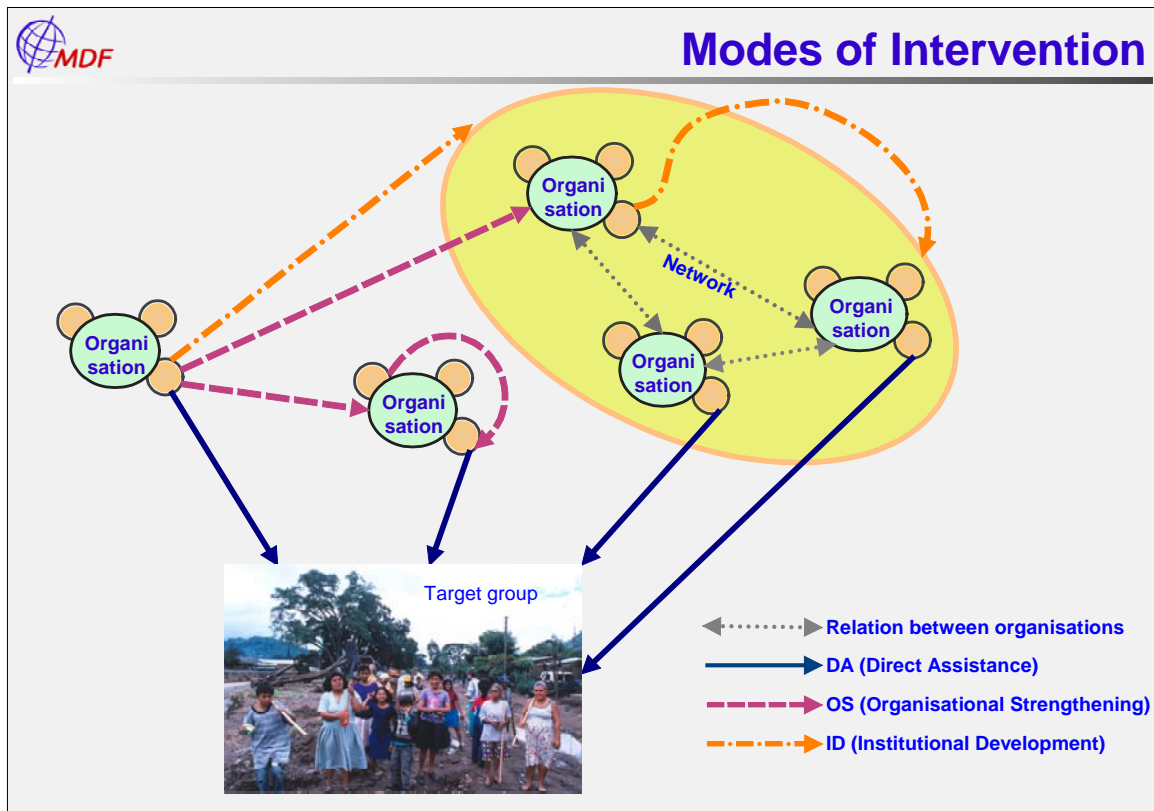
All development interventions, including ID/OS, are ultimately geared towards a target group: All development efforts should in the end benefit the beneficiaries. However, we distinguish three categories of development interventions:

1. Direct Assistance (DA)
2. Organisational Strengthening (OS)
3. Institutional Development (ID)

The below illustration shows the relation between ID, OS and DA interventions

<sup>2</sup> For more details see the Glossary in Chapter 1.1

<sup>3</sup> Initially this purpose is often broad, and may be refined or adjusted during the ID/OS process.



The three categories of interventions are complementary. Most development processes include two or more intervention categories. However, in each category different instruments and approaches can be applied.

What applies to interventions, also applies to diagnosis. Investigations can focus on the clients or target group (DA), on a single organisation with its products and services (OS), or on the wider institutional sector serving the target group, and surrounding the individual organisations (ID). This toolkit focuses on ID/OS, assuming that the target group organisation is sufficiently known. However, as reality is more intertwined than the above suggests, in reality some tools touch on target group analysis as well, or can be applied at that level (see e.g. Section 9.2 OOPP).

As for the order of ID/OS: We generally (advocate to) start diagnosis<sup>4</sup> from the outside (institutional context analysis). The reasons for this order relate to both content and process. We move from global to local<sup>5</sup> because the institutional context provides the reason for existence (target group) and the situation to fit to. External orientation prevents that capacity building efforts become internally focussed, without serving a clear external purpose. *'Only fiddle around with the internal organisation if there is a clear external (performance) problem'*. In terms of process the advantage of starting with an external analysis is that that is less threatening/intimidating, while recognising external problems provides a strong incentive for change.

<sup>4</sup> In implementing ID/OS interventions there is no preferred order: One should do what the situation demands

<sup>5</sup> The full cycle is also described as 'Think micro-macro, act macro-micro'. The ID/OS process is in line with this logic, because it presumes a good target group analysis at micro level (DA) as basis

## Steps in the Diagnostic Process

### Process and limitations

The ID/OS diagnostic and change process can involve (internal or external) advisers, or can be directed by the regular management of the organisation(s). If consultants are involved, they can be either experts (giving independent judgement and advice), or process consultants (facilitating self-assessment). In general MDF trainer/consultants (advocate to) combine both<sup>6</sup>: To know the sector, and to have stakeholders play an active role. The optimal impact ensures quality decisions (based on accurate diagnosis), supported by broad commitment.

The process starts with an 'Intake': Defining the purpose, designing the route and determining the responsibilities for the diagnostic process.

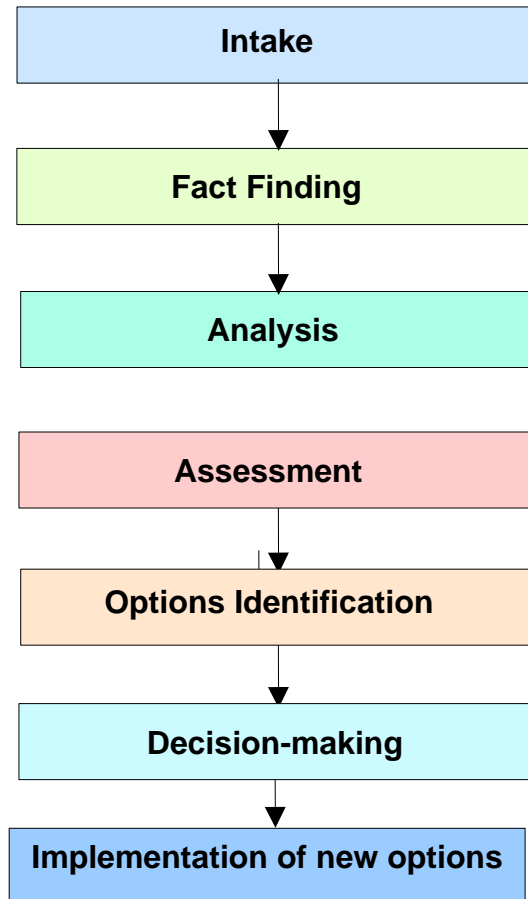
All the steps are

- Intake
- fact-finding
- reflection (analysis)
- assessment (judgement)
- identify invention options, and weighing options
- deciding the course of action
- implementation of change<sup>7</sup>.

It is important not to skip or rush any of the steps, and jump to premature conclusions.

In process<sup>8</sup>, the diagnosis first roughly scans output (performance), mission and input. Then the more thorough institutional analysis follows (focussing on factors and actors). Next the organisation analysis looks at strategy, structure, systems, -often roughly in this order. The diagnosis finally leads to strategic and operational planning– this is also the order of the chapters of this toolkit.

Parallel to this process in terms of diagnosis and content, runs a mental process of learning and readiness for change<sup>9</sup>. The tools in this toolkit are described at such a level that a person experienced in the application of various tools and instruments, can start working with it, preventing the most common mistakes. However, it does not teach you the inter-personal competence and skills required for success in consultancy and management (see Section 2.4 on the Adviser). To enable this experienced person to place the tools in the context of the Organisation Learning Process, chapter 2.2 provides a



<sup>6</sup> Although in varying proportions, tailored to the case

<sup>7</sup> Analytically change implementation is the last step, but in practice change (and especially the dynamics of awareness and commitment, or resistance to change) is embedded from the inception of the process

<sup>8</sup> This is the order of the Chapters and Sections of this toolkit, see the below paragraph 'Flow of the Tango'

<sup>9</sup> See for example the tool 'Organisation Learning Cycle' in Section 2.2

schematic overview. This overview gives an indication in the learning stage that an organisation needs to be in before the tool can be applied.<sup>10</sup>

The tools in this kit are action tools. They aim to provide pragmatic insights, enough to take informed decisions. They seek to get to the main point rather than striving for academic completeness. For this reasons they make ample use of visualisations, both to capture facts and views in a memorable manner and to facilitate communication.

## Tool descriptions

The descriptions of tools in this manual follow a standard layout:

|                                 |  |
|---------------------------------|--|
| <b>Chapter: Section: Tool</b>   | The header in the right top corner indicates the Chapter, Section and Tool. The numbering of the Chapter and Section is also repeated in the footer of each page   |
| <b>Tool</b>                     | Gives the title of the tool  |
| <b>What is it?</b>              | Gives a short description of the tool  |
| <b>What can you do with it?</b> | Describes in which situations this tool can be applied   |
| <b>Basic (sub)questions</b>     | Gives examples of questions that you may have, and for which situations this tool can be used. These questions can be a Basic Question (guiding the whole diagnosis and probably several tools) or sub-questions that define what you exactly want to get out this particular tool |
| <b>Results</b>                  | Lists possible concrete outcomes of applying this tool. These outcomes contribute to answering the above BQ's or sub-questions   |
| <b>How to use it?</b>           | Describes the use in three sub-headings:   |
| <b>Process</b>                  | Lists with whom and in how much time the tool can be applied. This section also gives points of attention for facilitators, in view of the fact that tools are both a means to improve content (quality) and communication (commitment)  |
| <b>Groundwork</b>               | Records what should already be clear as a starting point when applying this tool   |
| <b>Follow up</b>                | Suggests what next to do, often giving cross-references to other tools   |
| <b>Requirements/limitations</b> | Lists preconditions and restrictions of the tool, which are road blocks when not acknowledged for what they are  |
| <b>References</b>               | Provides some references to literature, organisations and internet sites   |

**Example** Gives one or more examples of applying this tool. Whereas the forgoing 'Description' and the 'Steps' can sound abstract, the examples should give you a better idea of the relevance of the tool (yet should not close your mind to possible different outcomes)

<sup>10</sup> Not all Tango Tools can be positioned at a particular learning stage. A number of them are models, e.g. IOM, and provides the opportunity to be used at various stages of the organisational learning process.

## Steps

Describes in detail a way of how to apply the tool. The readers are encouraged to test variations, which is also the route by which these tools were developed (Suggestions and experiences can always be send to the author).

## Notes

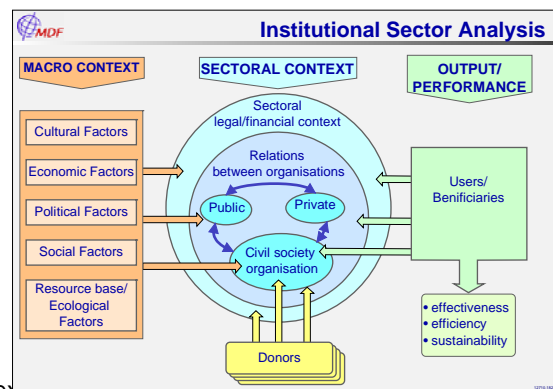
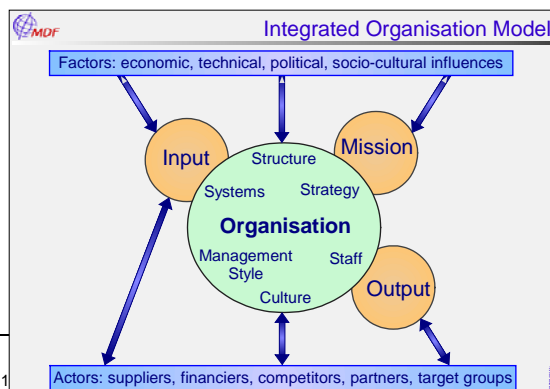
Some of the elements presented are actually concepts and models that are used in a later stage or are needed to understand the content.

A note of warning is needed for use of the toolkit. Tools are just tools. A tool creates/provides a model, and a model is not more than an extract of the reality. Tools can serve as means to understand reality and need to be seen and used that way. No more, no less. Selecting the right tool for the existing situation is most crucial and most difficult.

## Flow of the Tango

In dancing the Tango there are forward and backward steps, turns and sideways movements, intimate approaches and disengagement. But although there is ample freedom for improvisation, the order of the movements is by no means ad random. Similarly this toolkit follows a definite logic, and yet this represents only one possible dance, which is by no means prescribed for all occasions<sup>11</sup>. The graph below depicts this particular flow, which is closely related to the flow leading to Strategic Orientation (see the Section 'Users of this toolkit' and the 'ID/OS process design' tool in 2.3).

Chapter 2 discusses the **Approach to ID/OS**. The **Question** (Section 2.1) and the **Client** (2.2) determine which **Process** is appropriate (possible processes are therefore elaborated in 2.3). Note that finding the right research or 'Basic' Question is a key art in itself, closely related to the aspect (or criteria) in which the need for change is perceived. Understanding the Client entails identifying the different stakeholders, their interests and readiness for change (or even their readiness for analysis). This is the reason why the Client receives due attention (with four tools) even during the intake. Paying attention to the Client, however, makes it fair to look at the **Adviser** (consultant or manager) who guides the process; this is done in Section 2.4.



many tools can be applied in a different order or context than suggested by the sequence in this toolkit. A few examples:

- A Process flowchart or Management assessment can be used during Planning, rather than during Internal Organisational Analysis, which is before Strategy setting
- Core quadrants are presented in this toolkit in the first place as a means to analyse the staff in an organisation, but it can also be applied to describe organisational culture, or to make an institutional context analysis of possible collaboration between two organisations.

Next in the toolkit follow the main two **Models** underlying MDF's ID/OS approach (Chapter 3), represented in the picture by the glasses looking at the process. Section 3.1 presents the Model used to Analyse **Organisations** and 3.2 the Model that expresses how we look at institutional **Sectors**. Thinking macro to micro it would be logical to present the Sector Model first, but as this broader view is optional and the Organisational view key to ID/OS, we present the IOM (Integrated Organisation Model) first.

Chapter 4 provides tools to get a **first impression of organisations**. It looks at the organisational elements (and the inter-relations between those elements) that represent the link between an organisation and it's surrounding: **Output** (4.1), **Mission** (4.2), and **Input** (4.3). These three elements are presented in the above order, because this is the sequence to get an impression and judge the performance of an organisation. First look what they do (Output), then what they (officially) aim for (Mission), and finally with which Inputs this is done. These elements together (represented by the three orange circles around the green circle in the picture) are referred to as External Organisation, and the Chapter therefore **External organisational analysis**.

Whereas Chapter 4 is still in many ways an appetiser to get ready for in-depth analysis, Chapter 5 introduces the very important tools for **institutional context analysis**. In the 'Flow of the Tango' drawing this institutional context is represented by the two blue rectangles around the central organisation. They stand for **Factors** (5.1; more abstract forces, like the law or the economy) and **Actors** (5.2; other organisations, or even other Departments than the one under scrutiny) around the organisation. In most cases the findings are interpreted and assessed as Opportunities and Threats (OT). This Chapter already concludes with a tool on how to develop potential strategies (**Strategic Options**) that respond to the OT. Strategy identification is possible because what is relevant and desirable is quite independent from what is feasible given the internal functioning and capacity of an organisation.

Only in Chapter 6 we dive into the **Internal Organisational Analysis**: The large green central circle in the 'Tango Flow'. The elements under investigation here are firstly **Strategy** (6.1; determining *how* to achieve what was desired in the mission), **Structure** (6.2; which relates to hierarchy and chains of command, but equally to co-ordination mechanisms between units, and balance in attention and time expenditure), and **Systems** (6.3; the rules, procedures and processes that describe the actions of the organisation). These three are often referred to as the 'hard' internal elements, as they are often topic of discussion and their (official) functioning documented in plans and instructions. Three 'soft' elements relate to **Management Style**, Staff or **Staff performance** and **Organisational Culture**. While all organisational elements are related (therefore the word *Integrated* in the 'Integrated Organisation Model'), problems in the 'hard' and 'soft' elements are often diagnosed and addressed in the wrong area (e.g. system interventions attempting to control staff performance, or 'motivational talks' to resolve tasks and authority mismatches). An analysis considering all aspects therefore yields more comprehensive and reliable insights. The assessment of the internal organisation yields Strengths and Weaknesses (SW).

Chapter 7 integrates the foregoing analysis into **Strategy setting**. A major tool MDF applies for organisations that want to review their strategy<sup>12</sup>, called Strategic Orientation, matches what an organisation *wants* (opportunities, threats and strategic options derived from the institutional context analysis) with what it is *able* to do (looking at strengths and weaknesses in the internal organisation). This leads to strategy decisions and focussed capacity interventions (rather than an approach that indiscriminately attempts to remove all weaknesses).

Chapter 8 takes the final steps to operationalise and implement the (strategic) plans developed in response to all analysis. The **Operational planning** Section (8.1) contains tools to make a presentable comprehensive plan, to assign responsibilities, assess and deal with interests and resistance, and identify training needs in view of the change. The Section on **Change management** (8.2) explores how to analysis and manage change implementation.

All above tools had a focus on a particular step or element in the ID/OS analysis, which is the heart of this toolkit. However, there are also tools and approaches that cover a whole range of issues, often even including target group analysis and running through to strategy making and sometimes change implementation. Some of these **Generic methods** are listed briefly described in Chapter 9, and a few are worked out in more detail.

While Chapter 10 gives an **Overview and resources**, Chapter 11 provides '**The Quick Step**'. Just before you go on stage to perform a dance you studied, you need last minute battle instructions. At this point full-blown technical user manuals become a burden to you: Just before (or during) the exams you need scrip sheets. At the end of the Tango, and therefore easy to find, the Quick Step provides just that, collectively for all tools presented in this manual.

Then a jump to the first page in the Tango: The **Table of contents** is printed on an A3-size sheet, so that it can be unfolded. By opening it, you can keep the Table of contents next to you while going through the toolkit, thus providing overview of 'where you are'. A remark on page numbering is that the tools are loose-leafed and the pages not numbered through, to facilitate adding future tools or revise existing ones. As with computers: As soon as this manual is first published it starts getting outdated.

Throughout the toolkit we refer to facilitators of change as consultants, advisers, change agents, managers or leaders. These are generally interchangeable, but all terms can be used as appropriate for anyone responsible for change within organisations. (See glossary with some definitions).

We would like to make a final remark: where 'he' is mentioned in the text, this can also be meaning 'she' and the other way around.

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<sup>12</sup> Note that Strategic Orientation is not relevant for e.g. programme or operational development, which is nevertheless a more common purpose for organisational diagnosis.

## 2.1.1 Basic Question

### What is it?

A Basic Question (BQ) is a statement that defines the issue(s) the ID/OS analysis and planning process will address. It is a question (sometimes supported by sub-questions) to which the ID/OS diagnostic process should deliver an answer. The BQ represents a common agreement among the case-owners on the purpose, focus and results of the ID/OS process.

The initial BQ is formulated prior to co-ordinated in-depth investigations, and may therefore turn out to be too wide, too specific, or not focussed on the right issues. The BQ can therefore be adjusted during the analysis, provided that the involved stakeholders explicitly consider and agree on such adjustment.

### What can you do with it?

Making (and subsequently systematically referring) to a BQ helps to focus the ID/OS analysis and planning. It prevents or confronts differing expectations of different stakeholders. A good definition of the BQ also provides the basis to design a fitting ID/OS process (defining who, when, and how the fact finding, analysis, judgement, decision-making and planning will take place). In this respect the BQ helps the case-owners and advisers (if any) to estimate and agree on efforts (thoroughness of analysis and tentative interventions) that match with their (specific/modest or broad/profound) objectives.

#### Basic (sub-) questions

- Defines the purpose and issue(s) that the ID/OS analysis and planning will address
- Defines who is the primary case-owner (of the problem/opportunity), and which other stakeholders are involved
- Defines the internal and external components most pertinent to purpose and issue(s)
- Specifies criteria for the desired change

#### Results

Clarity what is included and what is excluded from the analysis and change process:

- Motivation among stakeholders to address their core problems/opportunities
- Commitment (or early confrontation) of stakeholders to the analysis and planning exercise
- Early identification of commitment or opposition to tentative interventions (identification of change drivers and resistance)
- Realistic expectations and agreements between case-owners and advisers, also expressed in agreement on the ID/OS process
- (Relative) relaxation among stakeholders as they also know what will *not* change

## How to use it?

### Process

A first tentative BQ may be formulated by the case-owner (assisted by the adviser, if any adviser is involved). Assuming that a participatory analysis and planning process is chosen, the wider group of stakeholders should be welcomed to sharpen and rephrase the initial BQ, as one of the first exercises. Throughout the subsequent analysis process, the BQ should be consistently kept in mind.

If during analysis the BQ seems beside the point it should be reviewed. Indicators of an erring BQ are:

- Interest of the participants drops, or
- Participants repeatedly bring in issues which are irrelevant to the standing BQ

Rephrasing of the BQ is possible at any time, but should meet two conditions:

- All stakeholders working with the BQ are involved in the reformulation
- The reformulation is done based on comprehensive considerations (rather than in response to an isolated deadlock)

It is worthwhile to invest between two hours to half a day in formulating and refining the BQ. If there is a strategic planning workshop, the definition of the basic question can take between one and three days.

### Ground work

The BQ is the starting point, and therefore requires no structured groundwork. However, if an external donor initiates the ID/OS process, development of the right 'mindset' is crucial (see under limitations). From the side of the adviser (if any) formulating the BQ may be preceded by a Quick Scan to become familiar with the organisation, and a Client System analysis to recognise the primary client and other stakeholders.

Following or parallel to the formulation of the (initial) BQ, the ID/OS process (steps, methods and tools) will be designed, and it will be decided whom to involve in the ID/OS process (stakeholder analysis). BQ formulation, ID/OS process design and stakeholder analysis is often an iterative process.

### Follow up

After a first BQ has been drafted, but before in-depth analysis starts, the IOM quick overview may be used to check the comprehensiveness of the BQ.

The entire analysis and planning process has the BQ as its official start. After the formulation of the BQ and the process design, in most cases an institutional analysis will follow as the first next step.

## Requirements and limitations

It is not always necessary to make the BQ explicit. Any assessment has a purpose and criteria, and thus answers a 'Basic Question' related to that particular purpose. If an organisation decides to make a quality definition chart, it implicitly works with a BQ that

reads something like 'How can the critical aspects of the quality of our product/service be improved?' In such obvious and uncontroversial cases the BQ can be left implicit.

Another important point is that the distinction between what is internal (organisation) and external (institution) should be very clear to all involved (see examples).

*Note: In institutional sector analysis the definition of inside and outside also follows who are under control of the case-owner(s), and not the wide definition of who has a stake in the sector. It is not useful to talk about sector strengths and weaknesses, if these are not in the hands of the case-owners that wish to improve the sector performance. The characteristics of actors (other than the characteristics of the case-owners) all represent opportunities and threats to the case-owner(s), regardless and indistinct of whether they relate to actors outside or inside the sector.*

If the BQ is reformulated, the border between internal and external is sometimes changed as well, and one should review whether the earlier findings are still categorised correctly. Throughout the analysis care should be given that no levels are doubled (findings listed both as internal and external) or skipped (aspects not listed at all).

If an ID/OS analysis and change process is initiated or promoted by a donor, great care should be given to the development of the 'mindset for ID/OS' at the level of the case-owner. (Formulated in terms of the client system: The BQ should be owned by the primary client, rather than only by e.g. the financing client). Crucial components to developing the mindset and ownership are time and an open dialogue. How the BQ is formulated also has a large impact. Compare the two questions below:

- How much money can the Department of Agriculture absorb in an effective and accountable manner?
- How can the Department of Agriculture best be supported to absorb €1,000,000 in an effective and accountable manner?

Why obviously the Department of Agriculture will be more inclined to play open cards and get the best out of the ID/OS analysis if the second BQ is chosen.

*Note: When ID/OS is embarked on to identify implementers for a Direct Assistance Intervention Plan (e.g. after OOPP), there is no need to formulate a BQ. Implicitly the BQ is in such cases is:*

- *Which actors can best carry out the intervention plan, and which supporting ID/OS measures should be planned? And/or:*
- *What should the organisation do (e.g. collaboration or ID/OS) to be a capable and competitive implementer for this project?*

## Examples of Basic Questions

### Problem owner

Network of environmental NGO's

### Proposed BQ

How can the NGO's co-operate better?

### Commentary

This is only an OS (internal) BQ (because the relations *within* the network belong to the internal analysis). The proposed question should be put in perspective of its external goals, and these goals may be specified. Then the question becomes an ID/OS BQ.

### Improved BQ

How can the NGO's co-operate more effectively to lobby for law change?

### Problem owner

Department of Agriculture

### Proposed BQ

How can the Department of Agriculture work better with contractors?

### Commentary

The criterion of what is 'better' work with contractors may be specified.

### Improved BQ

How can the Department of Agriculture improve the *timeliness* of its responses to tender proposals and invoices from contractors?

### Problem owner

Permanent working group of the Council of Local Government Authorities and the Civil Society Network

### Proposed BQ

How can local governments better co-operate with civil society?

### Commentary

To ensure active participation of all, the role of the working group may be included in the problem definition.

### Improved BQ

How can the working group enhance more timely, effective co-operation between local governments and the civil society?

**Problem owner**

A consultant observes that Union meetings start late, last very long and finally the Chairman dictates (unwise) decisions, which frustrates the staff and Union members

**Proposed BQ**

How can the meetings of the Union become business-oriented, efficient, action-oriented and participatory in a meaningful way?

**Commentary**

This is an OS or Internally oriented question. It is moreover obscure who is the client: The Chairman of the Union, and/or the staff of the Union, and/or the members of the Union? A problem is only a problem if somebody perceives it as such. Hopefully the parties agree that that the true reference point should be external, and they should only change something if that serves the members better. That would change the OS (internal) question to an ID/OS BQ.

**Improved BQ**

How can the Union make *better decisions* in a manner that motivates the staff to implement them? *Better decisions* are defined as decisions that clearly focus on the interest of the members, and evaluate different options in a transparent way.

**Proposed BQ**

How can the Samaritan Trust Foundation *teach* street children vocational skills?

**Commentary**

This is a good DA (Direct Assistance) question, and probably some OS (organisation capacity) issues will pop-up while addressing it. However, it may be worthwhile to look at the larger picture: Involving more actors and looking beyond output.

**Improved BQ**

How can the NGO's and government guide street children to well-paid vocational *jobs*?

**Proposed BQ**

What systems should the Programme Support Unit (PSU) put in place to be responsive, effective, efficient and transparent in delivery of services (money transfer, staff administration, computer and car maintenance) and products (equipment, cars) to the programmes and other partners?

**Commentary**

The question is very comprehensive. Should you focus on one or two key problems? On the other hand: Why focus on systems beforehand?

**Improved BQ**

How can the PSU provide equipment more timely, maintaining accountability to the donor?

### **Problem owner**

The Training Department of an organisation observing that the internal strife in the management team weakens the programmes and trust of the donors.

### **Proposed BQ**

How can the Training Department improve the management of the entire organisation, to maintain its services to the target group and ensure continued funding from donors?

### **Commentary**

A very relevant question, but very risky. Normally the case owner asks how to *best fit to* the external world (including higher levels of management) rather than *how to change* it. You can adopt the question to find options and assess the risk, or work with a BQ that focuses on options for the Training Department alone (with the risk of ignoring that management changes may be a pre-condition or 'killer assumption' that, if not resolved, make any other efforts futile).

### **Improved BQ**

How can the Training Department ensure effectiveness and sustainability of its activities?

### **Problem owner**

Maize Research Institute.

### **Proposed BQ**

How can the Maize Research Institute develop a maize variety that is high yielding, disease resistant and early maturing?

### **Commentary**

It is a Direct Assistance question. Apparently the needs of the farmers have already been identified, now the research methodology has to be designed. There could however, be an ID/OS question related to this technical DA question:

### **Improved BQ**

With which research institutes, government agencies and farmers associations should the Institute co-operate to develop an improved variety at least cost and in minimal time?

### **Proposed BQ**

How can the local government *install a generator* and train the technician in the village?

### **Commentary**

This seems a straightforward issue, not requiring ID/OS. However, it could be that alternatives have been ruled out too quickly, that are included in the following question.

### **Improved BQ**

How can the local government and other stakeholders bring *sustainable electricity* to the village?

**Problem owner**

Ministry of Education, in consultation with donors and sector stakeholders

**Proposed BQ**

How can the Education Sector improve its performance and capacity in addressing the education needs of ethnic minorities?

**Commentary**

Consultation is not the same as control. So take care to list only the characteristics of MoE

**Improved BQ**

How can the Ministry of Education improve the performance and capacity of the Education Sector in addressing the education needs of ethnic minorities?

**Problem Owner**

Ministry of Women and Youth

**Proposed BQ**

How can the Ministry of Women and Youth be a valuable participant in all national debates that affect women and youth?

**Commentary**

Although the line-Ministries and donors like to involve the Ministry of Women and Youth in many policy discussions, the Ministry may not have the capacity and know-how to realise concrete results through participation in all these debates. The BQ may be widened.

**Improved BQ**

How should the Ministry of Women and Youth position itself vis-à-vis the line Ministries, donors and target groups, to make a tangible contribution to its mission?

**Problem Owner**

MDF Training and Consultancy

**Proposed BQ**

How can MDF formulate an excellent tender proposal, spending minimal time?

**Commentary**

Especially if MDF wants to invest little time in writing a proposal, it should estimate how the good competitors will do, and only attempt to be slightly better than they would be.

**Improved BQ**

How can MDF become the most attractive bidder for this tender?

## Steps to formulating a Basic Question

1. **Identify entity** (the subject, problem and/or opportunity).  
Those who initiate the analysis and change process make a first sketch of the problems they wish to resolve or the opportunities they wish to seize.  
[Note that the case-owner(s) may involve external advisers from this point onwards]
2. **Identify case-owner = Distinguish Organisational and Institutional**  
Identify for the case-owner(s) for whom there is a problem (or opportunity). If you are involved as an adviser, looking for the case-owner(s) means looking for (and deciding who you identify as) the primary client(s) – see 'Identifying the client system'. It is the one **who knows, who cares** and **who can**. The client or case-owner can be:
  - An organisation
  - A part of an organisation (e.g. one department)
  - A network of organisationsWhen diagnosing the situation based on the BQ:
  - What is under the control of the case-owner(s) is internal (organisational), and will be categorised as strong and weak
  - What is *not* under the control of the case-owner(s) is external (institutional), and will be categorised as opportunity and threat
3. **Explore the entity = Formulate tentative BQ**
  - Let people express the core problems and opportunities and ask:
    - Forward: What's the effect of the problem (effect)?
    - Backward: What produces that problem (cause)?
  - Converge into one (or more) problems or opportunities
  - Transform the problem or opportunity into a positive, action-oriented question:
    - Define the goal/target you want to achieve (not just what you want to solve)
    - Ask what needs to be done to achieve the goal/target
4. **Verify the nature** of the question:
  - DA question: Direct Assistance: The case-owner(s) want to know the needs of the target group or technical options how to address these needs. For this type of question evaluate technological options or use OOPP; not ID/OS tools
  - ID/OS (strategic or sector capacity) question: The case-owner(s) want to perform better in the outside world, and see possibilities to take action
  - OS (internal or organisational capacity) question: The case-owner(s) want to improve the internal functioning of the organisation, not taking into account further concern about the external performance. Consider to change such a question:
    - The real pressure for change always comes from outside, therefore a technical question can better be reformulated as an ID/OS question. Ask: Why should the internal organisation change? Include the answer in the BQ
    - *After* strategic planning a technical question (about specific internal issues) may not be broadened into an ID/OS question
  - Risk analysis question: The case-owner(s) observes risks in the outside world, but see no possibility to influence or adapt to those risks. Distinguish two situations:
    - *Before* project approval. With the algorithm (see OOPP tool) assess whether the risk is a killer assumption

- During operation of a (project) organisation attempt to change the question into an ID/OS question. Organisations often overestimate the relevance of unfavourable circumstances (victim attitude), or underestimate their options of influencing (reactive attitude). To reformulate a risk analysis question into an ID/OS question ask: *What does the risk impede the case-owner to do and/or How can the case-owner adapt to (cope with) the risk?*

| Risk analysis question   | ID/OS question  |
|--|---|
| How big is the chance that the Ministry push 'Prosep' to accept a politically coloured Director? | How can 'Prosep' maintain its independence from the Ministry?               |
| How big is the chance that the rebels will enter the capital and nationalise public transport?   | How can the taxi-drivers function even if the rebels take over the capital? |

- Focus the criteria** for judgement (see Criteria):

  - Be as narrow and specific as possible (to be clear and manageable)
  - Be as broad and general as necessary (to be relevant and comprehensive)
  - An ID/OS question has at least one external criterion (related to *performance*, see [2.1.2 Criteria](#)), and possibly one or more internal criteria. This may be checked with the IOM: Which elements relate to the tentative BQ (for an ID/OS question output, mission and or input should be included)
  - Make the target/goal measurable (the target does not have to be SMART<sup>13</sup> in all respects)

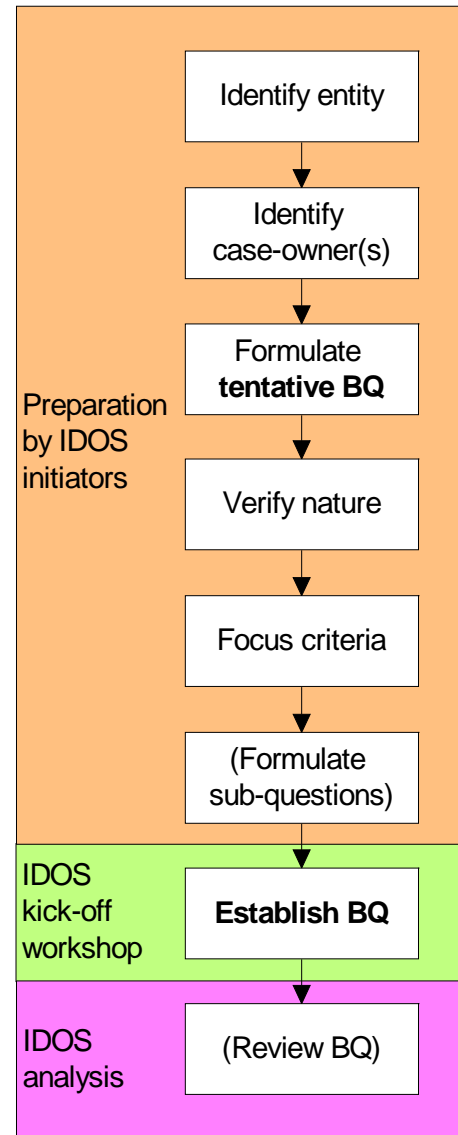
[Often the first proposed BQ is later replaced by a wider BQ, and the first question can become a sub-question].

- Optional: Formulate sub-questions**
- Present tentative BQ => Agree on BQ.** At the start of participatory analysis and planning events (e.g. workshops) present the tentative BQ and adjust it if the meeting agrees on adjustment
- Need based: Review BQ**  
Signs that indicate the need to adjust the BQ during analysis:

  - Interest of the participants drops, or
  - Participants repeatedly bring in issues which are irrelevant to the standing BQ

If you adjust the BQ:

  - Include all stakeholders involved
  - Check validity of earlier findings (what is inside-outside, positive-negative)

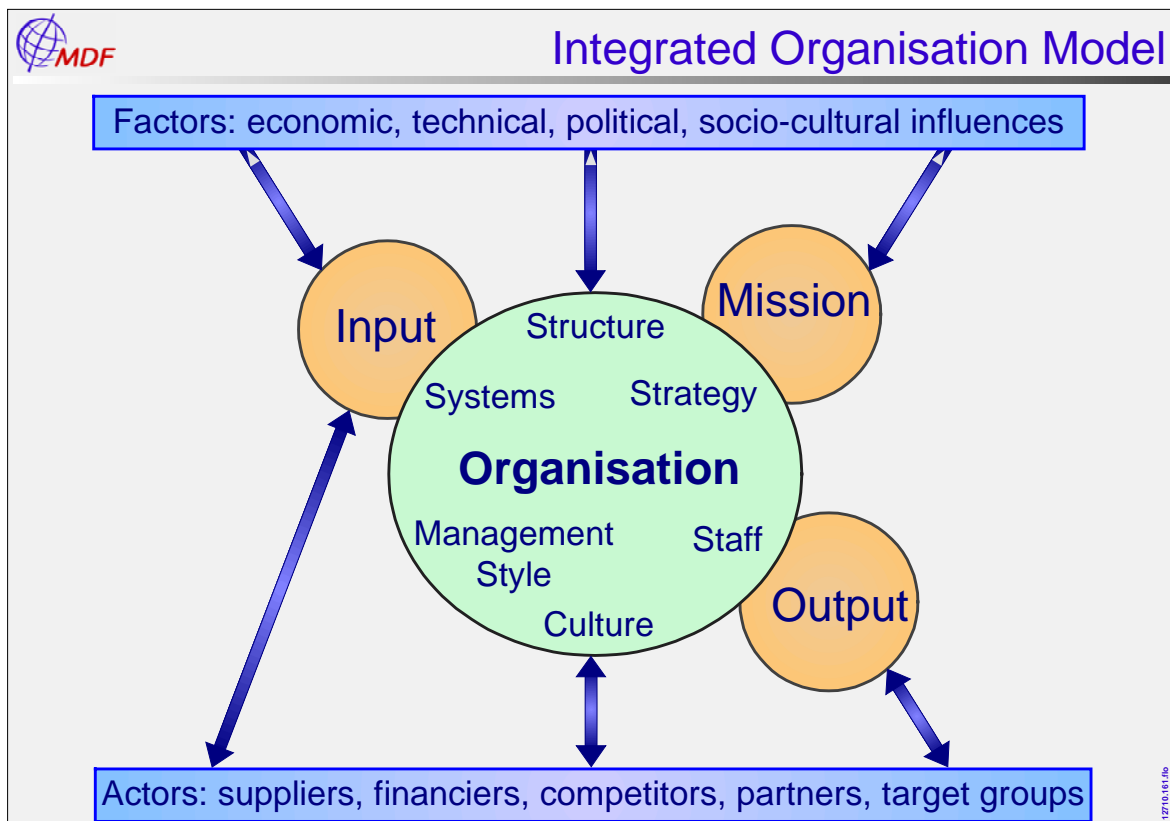


<sup>13</sup> SMART stands for Specific, Measurable, Achievable and Agreed-upon, Relevant and Realistic, and Time-bound. The (initial) BQ should be specific (and therefore measurable), agreed-upon and relevant. However, you do need not be sure that the purpose is realistic and time-bound: This can be established later.

### 3.1.1 Integrated Organisation Model (IOM)

#### What is it?

The Integrated Organisation Model (IOM) is a model that can be applied to describe, to analyse and to diagnose organisations. The IOM is an integrated (or integral) model to emphasise the interrelationships of the different elements of an organisation: although the elements can to a certain extent be treated separately, they are all connected to each other and - ideally - in balance. When there is no or no clear fit between the different elements within an organisation, the organisation will not function optimally and the need for organisational change will be (or become) apparent.



The IOM offers an overall tool to put the various elements of an organisation in their place, be it a government department, a non-government organisation, a local government, a people's organisation or a private enterprise wherever in the world. If you look at organisations using this model you wouldn't overlook the most important elements. However, it is an overall model, and instead of seeing it as a tool, one might rather refer to it as an organisational concept. To analyse an organisation in depth, you may need more specific tools, depending on the exact aim of the analysis.

## **Describing the model**

The IOM consists of 5 external components and 6 internal components. The **external components**, mission, outputs, inputs (together called the external organisation), factors and actors (together called the institutional elements) describe the environment of the organisation or have strong relations with this environment. The **internal components** describe the internal organisational choices.

### **External organisation elements**

#### **Mission**

The mission of an organisation is its 'raison d'être', or in other words, the overall objective(s) and main approach that explains why the organisation exists and what it wants to achieve with which means.

#### **Output**

The output of an organisation comprises all material and immaterial products and services delivered by the organisation to its various target groups (clients or customers).

#### **Input**

The inputs of the organisation include all the resources available for generating the products and services of the organisation. The following categories of inputs and resources can be distinguished: staff, means, infrastructure and source and level of income.

### **Institutional elements**

#### **Factors**

The factors or general environment is the complex set of political, economic, technical, social and cultural factors that influences this (type of) organisation.

#### **Actors**

The actors or the specific environment comprises of the relations with those actors that the organisation is directly dealing with. These relations may include: target group, suppliers, financiers, partners, competitors, etc.

### **Internal organisation elements**

#### **Strategy**

Strategy refers to the way the mission is translated into concrete objectives and approaches.

#### **Structure**

The structure of an organisation can be defined as the formal and informal division and co-ordination of activities and responsibilities.

## **Systems**

The systems determine the functioning of the organisation. It comprises internal processes that can be divided into flows of main activities, procedures, approaches and methodologies, formal and informal systems.

## **Staff**

The staff or personnel component refers to performance and motivation of the staff, utilisation and development of staff capacity. Some major elements staff policies are incentive systems, sanctions and bonuses, staff satisfaction and staff development.

## **Management style**

The style of management can be described as the characteristic pattern of behaviour of the management. Where does a manager put priorities? Which *aspects* does he/she feel are important and how does the manager spend his/her time: Internal or external relations, people or means, relations or performance, inputs or outputs, quality or quantity What is his/her attitude in making *decisions*: Participatory or directive/authoritarian, risk taking or risk avoiding, long or short term oriented, formal or informal, rational or intuitive

## **Culture**

The culture of an organisation is defined as the shared values and norms of people in the organisation.

## **What can you do with it?**

The IOM provides an integrated model to emphasise the interrelationships of the different elements of an organisation, internal and external relations and can be used as a framework for structuring fact-finding. After analysing the individual elements, their relations can be investigated to judge (im-) balances. Reviewing the most obvious facts concerning all elements can provide a first identification of strengths and weaknesses and the opportunities and threats of the organisation (SWOT). The model also shows the relations, between Mission-Input-Internal Organisation-Output (see also Quick Scan).

### **Basic (sub-) questions**

The IOM is an overview model and can be relevant to all ID/OS questions.

### **Results**

- What are facts that comprehensively describe the organisation in its context?
- What are positive and negative aspects of the organisation?
- What are major imbalances and relations between the organisational components?
- What are priorities for improvement?
- What are areas for further investigation?

## How to use it?

### Process

On an individual basis or in a group (not more than 20 people) an organisation can be assessed. Such an assessment can be organised as per the IOM. With group sessions it is recommended to have an external facilitator. The model can be used by an adviser/consultant at several moments in the consultancy process (e.g. preparing data collection). The IOM (as a general model, or as a means to group and order facts and judgements concerning a particular organisation) can be used in groups to reach consensus on the comprehensive picture and major priorities in the organisation.

### Groundwork

The IOM can be used as a reference point throughout the ID/OS analysis, planning and change implementation process. The IOM is a reference point to check that the BQ is neither too narrow, nor too broad and ambitious.

### Follow up

The IOM can be used to organise and depict facts, analytical conclusions and judgements (in terms of strengths, weaknesses, opportunities and threats), and to derive (and base) strategic choices on.

## Requirements and limitations

For assessing the organisation, indicators have to be developed to judge the validity of statements made (these indicators should relate to the BQ). Different other tools should be used to deepen the analysis of the individual elements. The model is not very specific on external influences (actors, factors). And it provides static description (disregarding change processes or developments), although trends can be included as facts.

There are many other models to describe organisations (e.g. EFQM<sup>14</sup>/INK<sup>15</sup>, McKinsey, etc.). In spite of their differences, they mostly yield fundamentally similar results, but their simultaneous application can lead to term confusion.

### Practical references

The IOM is developed and extensively spread and used by MDF, and widely adopted by actors in development co-operation. It is a crucial reference point in MDF training programmes like the ID/OS course. Various MDF syllabi describe the IOM in more detail. Michael I. Harrison, Arie Shirom (1998), Organisational Diagnosis and Assessment

<sup>14</sup> See [www.EFQM.org](http://www.EFQM.org) for the EFQM management model

<sup>15</sup> See [www.ink.nl](http://www.ink.nl) for the INK management model, based on EFQM

### Example IOM: Municipality IDP

**Problem owner**

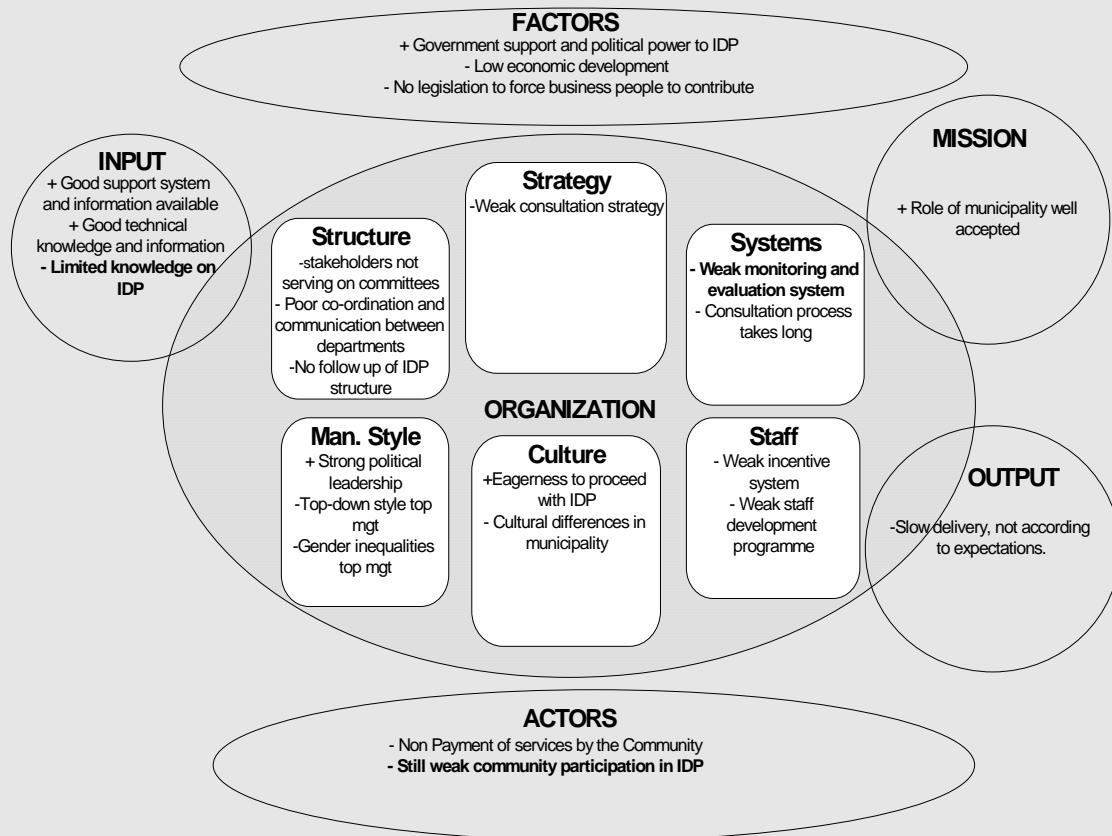
Municipality managing an Integrated Development Project (IDP)

**Basic question**

How can the Municipality increase the relevance, quality, quantity and timeliness of the services under the IDP?

**Sub-question**

What are strength and weaknesses in the current situation inside and around IDP?



**Conclusions**

- Weak participation of communities
- Limited knowledge Staff and Councillors on IDP
- Weak Monitoring and evaluation systems

## Steps in using the IOM

(As reference and overview tool in a strategic ID/OS process with participation of stakeholders)<sup>16</sup>

### 0. Formulate the Basic Question

#### 1. Present the IOM

#### 2. Relate the BQ to the IOM:

- On which elements should you focus (Is the BQ broad enough to be relevant and narrow enough to be manageable?)
- Which criteria for judgement should be used?
- To which (interrelated) elements do these criteria refer?

#### 3. Identify the facts and place them (on white cards) in the model, *using in-depth tools on the concerned IOM elements*. First scan the

- External organisation elements (see chapter 4) (or the full overall picture), then assess in depth the
- Institutional components (see chapter 5), and lastly the
- Internal organisation (see chapter 6)

#### 4. Analyse the facts

- Determine which facts are causes and which facts are effects
- Position causes and effects in the IOM

#### 5. Judge the facts in view of the

- BQ and in their
- Balance with other elements (specially the internal elements can seldom be judged in isolation from the other elements)
- Using criteria for judgement, like efficiency and effectiveness, see chapter 2.1.2

|                |  |
|----------------|--|
| S: Strength    | Write positive internal judgements on green cards  |
| W: Weakness    | Write negative internal judgements on red cards    |
| O: Opportunity | Write positive external judgements on yellow cards |
| T: Threat      | Write negative external judgements on blue cards   |

#### 6. Develop strategies and prioritise them by using other tools, and work out an operational ID/OS intervention plan, see chapter 7 and 8

<sup>16</sup> This is only one of multiple possible applications of the IOM.

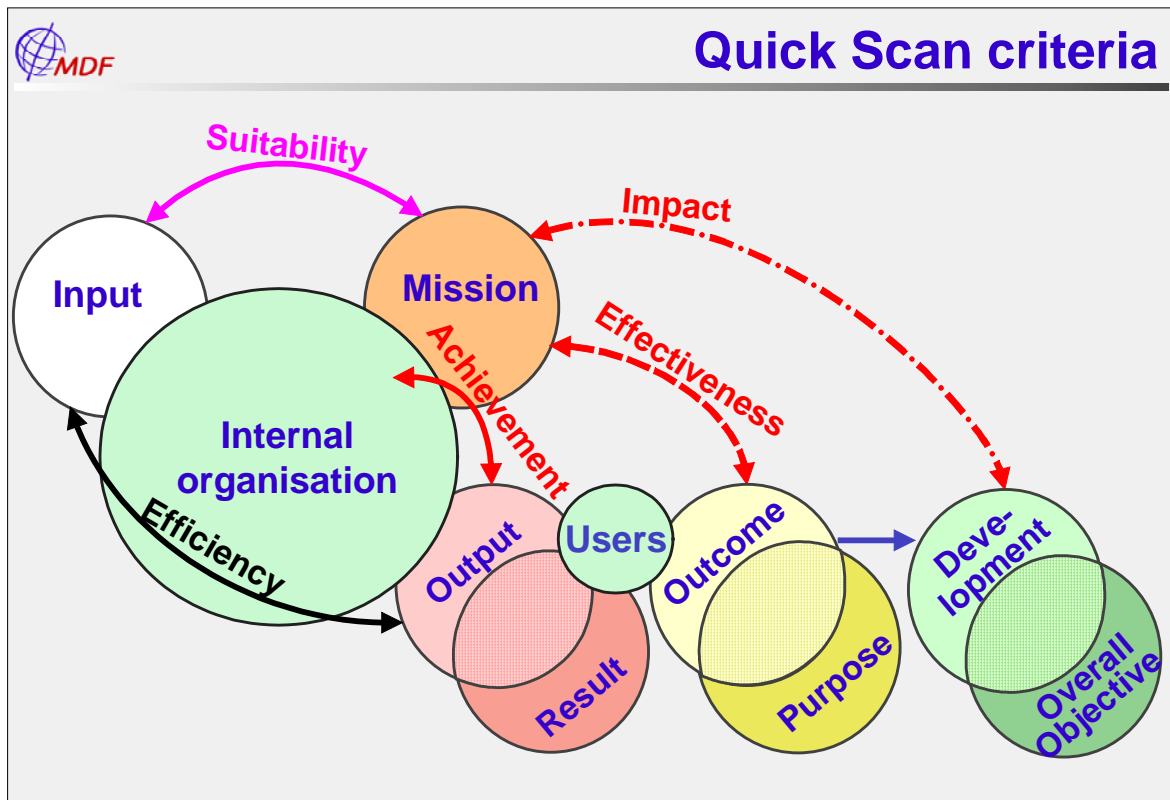
## 4.1 Quick Scan (QS)

### What is it?

A Quick Scan is a way of getting a quick impression of the most relevant features of an organisation. With minimal 'harassment' (ID/OS diagnosis and planning is time consuming and creates uncertainty) it provides the basis to decide whether (and if so in which aspects) further inquiry is required, while (at least equally important!) it also indicates in which aspects further investigation is *not* required.

The Quick Scan is also known as External Organisation Analysis (EOA) because it looks at the IOM elements at the borderlines of the organisation, and its link with the environment: Mission, input, output, users and outcome. Information on the internal elements or institutional context is deliberately ignored at this point, because what counts is in the first place the performance of an organisation, rather than curiosity for the external challenges and the internal functioning. After fact-finding, the QS judges the relations between the information on the elements, using criteria such as suitability, efficiency and effectiveness.

The QS particularly relies on written information or direct observations, rather than meetings and interviews. Merely seeing the building, computers or car park of an organisation already gives a first impression on the magnitude of the organisation and its problems.



### What can you do with it?

A client organisation may wish to start a change process with Quick Scan to get the content and spirit focussed on the right issues. Alternatively a consultant may propose to start with a Quick Scan, for the same purpose and to familiarise him- or herself with the organisation. Finally a donor may request and initiate a QS, to determine under which circumstances, and flanked by which change processes, funding of large (government) organisations is effective.

#### Sub-question

- (How) should the Basic Question be refined, to focus on the vital shortcomings/ opportunities of the organisation?

#### Results

- Priorities to select what and what *not* to diagnosis subsequently, and therefore limited expenditure and uncertainty for the organisation
- These priorities relate to external performance and are therefore more relevant and important than non planned improvements
- Arguments to further investigate elements of concern, and therefore an increased urgency and lessened resistance to change
- Refinement of the BQ

### How to use it?

#### Process

A Quick Scan can be carried out by a small team of a consultant and his/her direct counterpart(s) in the organisation, using secondary data (published information), observations, and occasionally other rapid appraisal methods (such as short interviews). Depending on the size of the organisation, the scan may take a few hours to a week.

#### Groundwork

An initial BQ should be formulated, and the client should be willing to 'undergo' the scan.

#### Follow up

As a follow up of the Quick Scan the BQ should be revised (or confirmed) and the ID/OS diagnosis and change process further defined.

### Requirements and limitations

Realise they are first impressions and hypothesis.

Watch out for term confusion:

- In this tool we use the word Quick Scan to indicate an analysis of the relation between mission, output and input of an organisation.
- The term also refers to a first analysis of all IOM elements, in order to choose the focus of subsequent in-depth analysis.
- In sector analysis the term Quick Scan is also applied for the sketch analysis of the performance of a full sector.

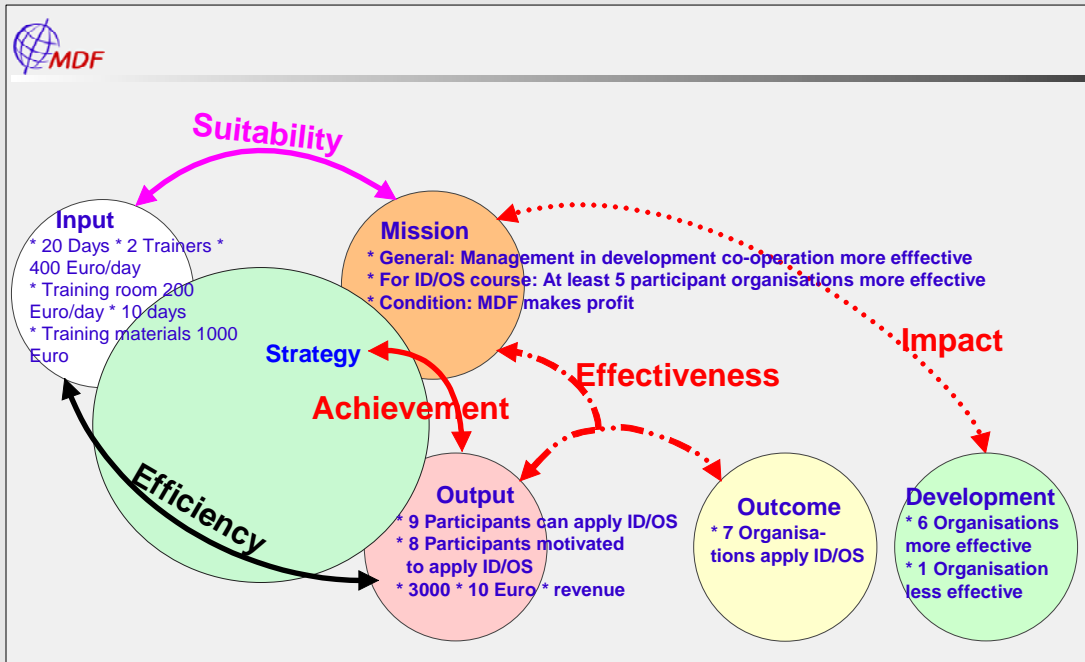
## Example Quick Scan MDF

### Problem owner

The ID/OS trainers at MDF

### Sub-question

Are the ID/OS trainers at MDF suitable, effective and efficient in their ID/OS training?



### Conclusions

**Suitability:** MDF is fit for its mission. MDF employs two trainers with sufficient preparation, implementation and follow-up time (and allocates some other inputs) to give training to a group of 10-18 participants.

**Efficiency:** Revenues (30,000 Euro) exceed costs (19,000 Euro). Compared to other Dutch training suppliers the daily rates are low, but the preparation time high. Compared to training organisations in developing countries Dutch salaries and the trainer/participant rate are high. Effectiveness of the training should be assessed to see whether MDF proves competitive

**Effectiveness:** The mission of making at least 5 participant organisations more effective is reached. In fact 6 become more effective, but the performance of 1 organisation actually drops after an ID/OS exercise. At output level the transfer of skills is good (90%), and most participants also leave the training motivated (80%) to apply ID/OS. Many external factors influence whether that output leads to the desired outcome and impact, such as whether participants are allowed by their organisations to use their new competencies. MDF cannot be held responsible for these factors, but can anticipate them.

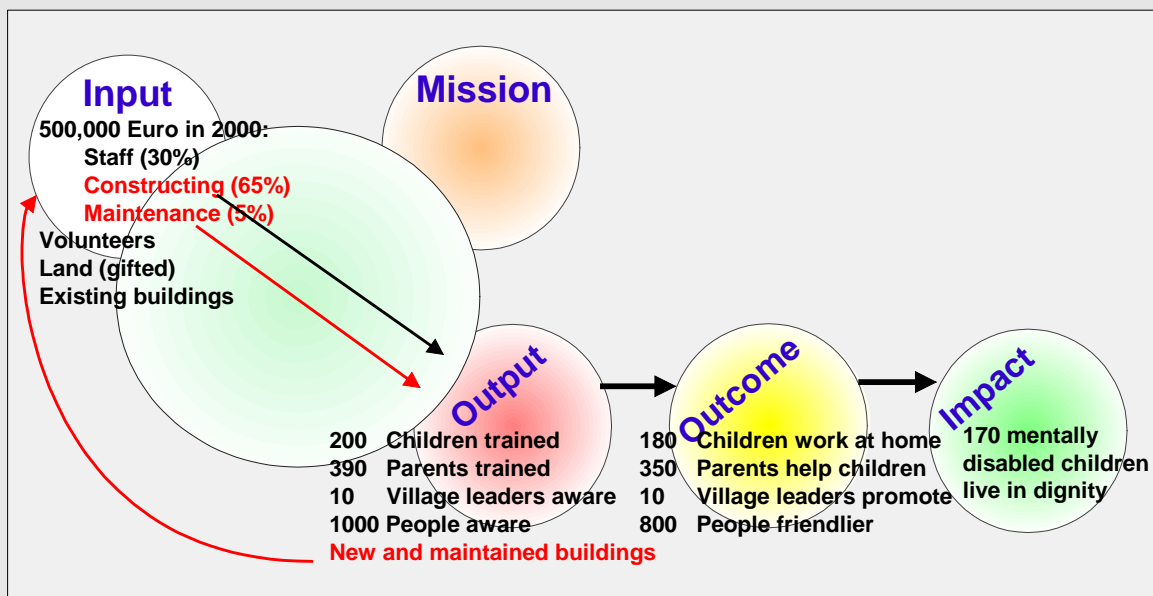
**Achievement:** every organisation has strategy definitions on what they need to produce in order to contribute to its mission. The achievement is measured by evaluating these strategies: the planned produce vis a vis the quality and quantity of the realised output.

## Example Quick Scan NGO

### Problem owner

NGO aiming to give mentally disabled children a dignified live, by:

- Identifying where the mentally disabled children live
- Motivating parents and village leaders to send the children for training
- Giving children and their parents three months in-house training
- Giving follow-up to trained parents and children
- Raising public awareness and social acceptance of mentally disabled children

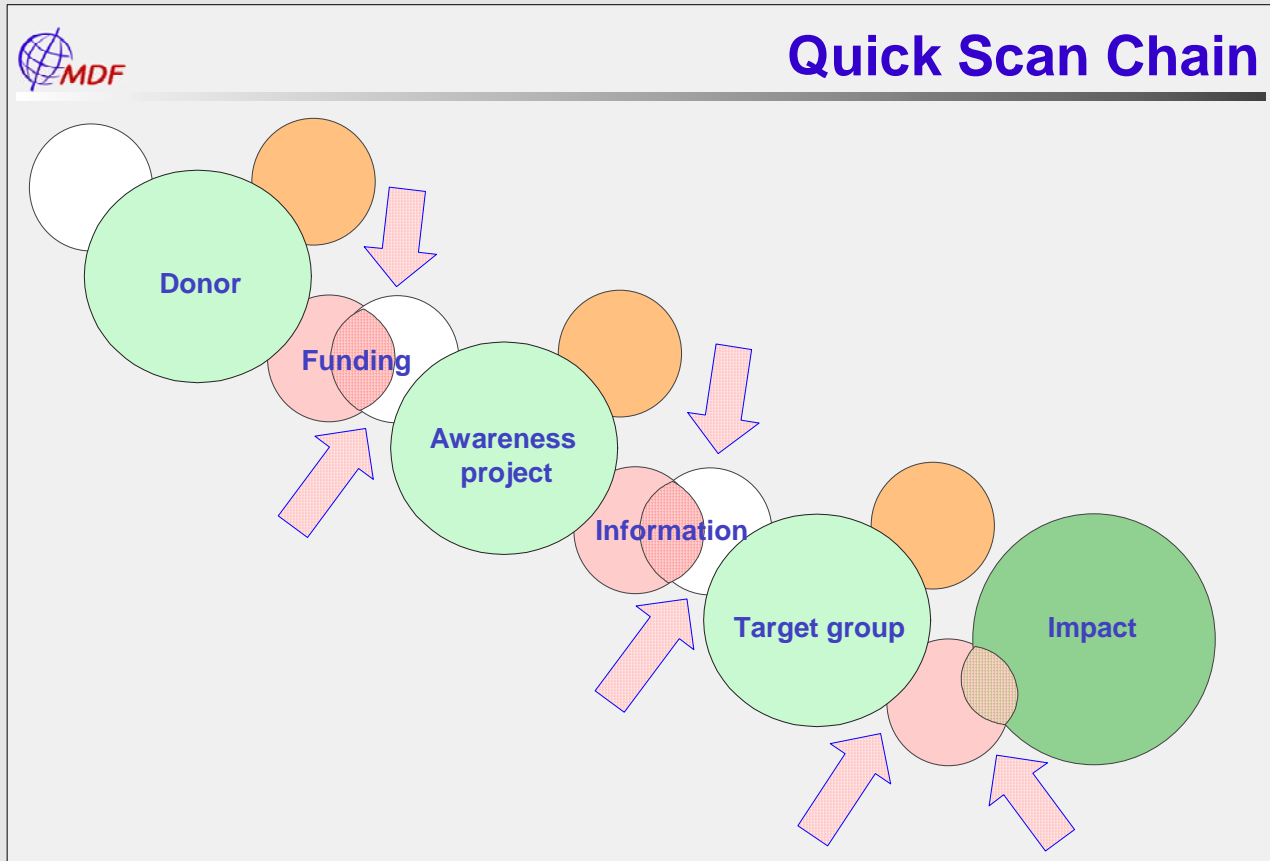


### Comments

In the QS we often neglect outputs that are only produced as an intermediate step or a means to produce the output that really serves the mission of the organisation. This might however lead to wrong (financial) conclusions. In the above case the monetary cost per trained child (efficiency) is not  $500,000 / 200 = 2500$  Euro per child, but approximately 850 Euro per child (depending on depreciation of buildings etc.).

## Example Quick Scan: Chain of Action

### Preventive Health Care



|                         |                   | Donor  | Project   | Target group   |
|-------------------------|-------------------|--|---|--|
| <b>Input</b>            | Means             | <ul style="list-style-type: none"> <li>Taxes</li> <li>Staff</li> </ul>     | <ul style="list-style-type: none"> <li>Funding</li> <li>Other inputs</li> </ul> | <ul style="list-style-type: none"> <li>Information</li> <li>Other inputs</li> </ul>            |
| <b>Primary Process</b>  | Activities        | <ul style="list-style-type: none"> <li>Assess projects</li> </ul>          | <ul style="list-style-type: none"> <li>Produce posters</li> </ul>               | <ul style="list-style-type: none"> <li>Change behaviour</li> </ul>                             |
| <b>Output</b>           | Results           | <ul style="list-style-type: none"> <li>Project funding</li> </ul>          | <ul style="list-style-type: none"> <li>Target group informed</li> </ul>         | <ul style="list-style-type: none"> <li>Infection rate reduced</li> <li>Other inputs</li> </ul> |
| <b>Outcome</b>          | Purpose           | <ul style="list-style-type: none"> <li>Project produces posters</li> </ul> | <ul style="list-style-type: none"> <li>Target group change behaviour</li> </ul> | <ul style="list-style-type: none"> <li>Can work more</li> <li>Can relax more</li> </ul>        |
| <b>Impact (Mission)</b> | Overall Objective | <ul style="list-style-type: none"> <li>Target group informed</li> </ul>    | <ul style="list-style-type: none"> <li>Infection rate reduced</li> </ul>        | <ul style="list-style-type: none"> <li>Happier</li> </ul>                                      |

The project funding for the donor is an output that at project level is considered as input, etc.

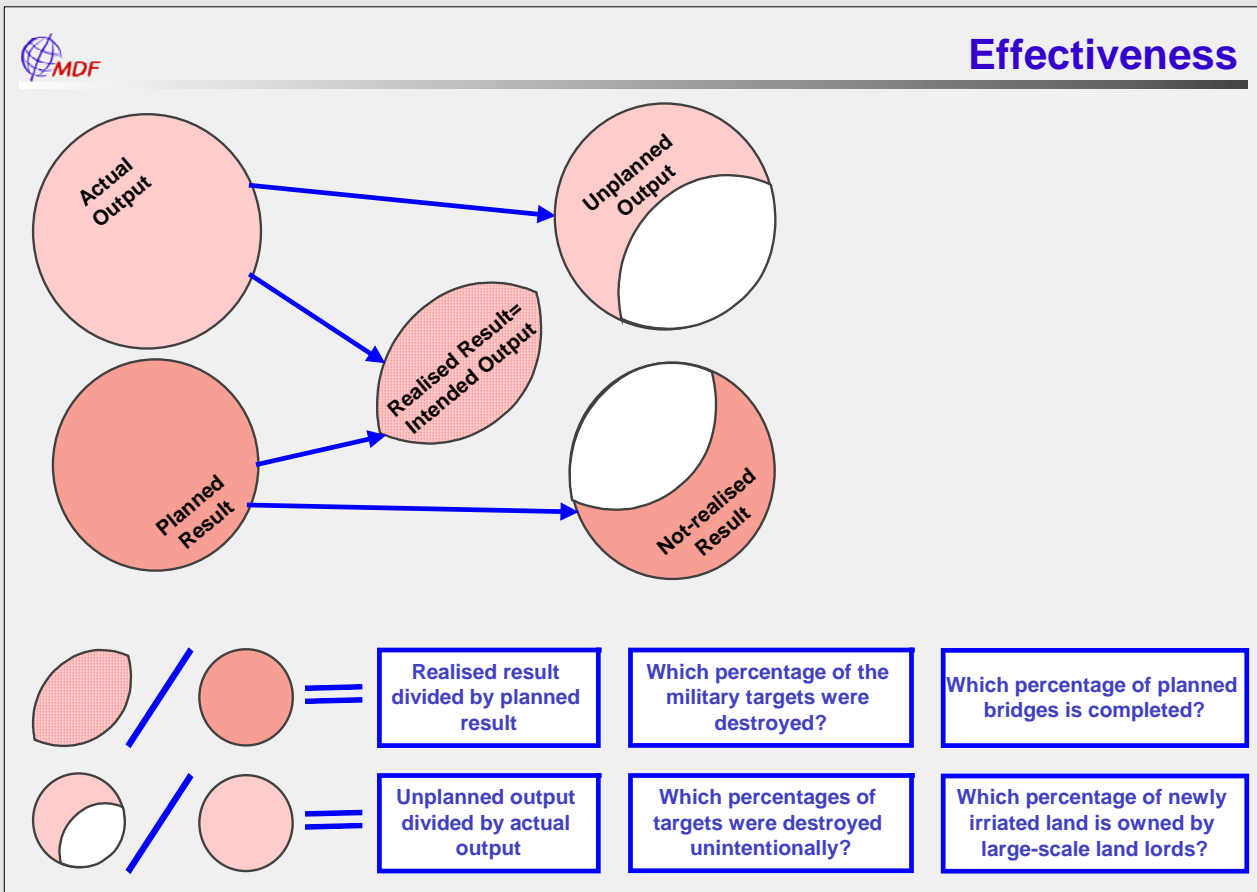
Apart from this flow there are influences from other sources that have effect on the impact; the colored arrows indicate these.

## Example Quick Scan criteria

### Notions of Effectiveness

Effectiveness can be considered at different levels, but even within one level one can look at different aspects: What was realised as planned, what was realised though not planned, or what was planned but not realised. For what was planned we use the terms used in the logical framework approach: Results, purpose and overall objectives. In terms of the IOM these three levels relate to the strategy (annual plans contain results, strategic plans the purpose) and mission (which states the overall objective). The corresponding levels of actual achievements are named output, outcome and impact. Note that the organisation only contributes to the impact/overall objective, but that many external factors are at play as well.

The illustration below indicates the relations between the different aspects of effectiveness, and gives examples what is compared with what in the assessment of the effectiveness of an organisation or intervention.



## Steps in conducting a Quick Scan

0. **Define the problem owner** who wants to intervene (more effectively)
0. **Identify the facts**, by reading, observing and occasionally rapid appraisal methods:
  - What is the mission/vision of the organisation?
  - What are the outputs (products/services, in quantity and quality) of the organisation?
  - Who are the intended users/target groups of the organisation's outputs?
  - What are the intended outcomes (and impact)?
  - What are the inputs of the organisation in terms of:
    - Human resources
    - Material resources
    - Natural resources
    - Financial resources
  - The nature of the organisational context (e.g. 'turbulent' rather than content, causes and effects of turbulence)
1. **Make preliminary judgement** on the performance of the organisation, using criteria (see also chapter 2.1.2):
  - External effectiveness (by relating outcome and impact with the mission)
  - Efficiency (by relating inputs to outputs)
  - Suitability (by relating the mission to inputs and outputs)
  - Relevance (by viewing the development over time of users, outputs and mission)
  - Sustainability (among others by comparing revenues and costs, and outputs with demand/need)
2. **Prioritise areas** for further diagnosis and change, and indicate areas that will *not* be touched (unless this decision is revised by all stakeholders)
3. **Refine the Basic Question**, and decide on the subsequent ID/OS process and focal IOM elements

## 5.2.1 Institutiogramme

### What is it?

An institutiogramme is a visualisation of the relations between actors active in a certain field of analysis (sector, geographical area, etc.). It helps to identify the relevant actors in the institutional environment, and depict their relations, leading to conclusions on good relations and forms of collaboration and co-ordination that require improvement or that need to be newly established.

### What can you do with it?

Making an institutiogramme results in identifying the actors and their relationships in the field of analysis. Advantages of making an institutiogramme are that it helps to:

- Reduce the chance of forgetting/excluding actors who can (help) achieve the programme/project purpose
- Take advantage of possibilities and limitations of competition and co-operation
- Identify and use actors who have key network positions and skills
- Create a common understanding of the institutional setting

Making an institutiogramme therefore reduces the tendency to design and create parallel structures.

#### Basic (sub-) questions

- Which actors can best implement (parts of) the programme/project? (positioning of a project/programme)
- Which actor(s) can best co-ordinate/supervise the programme/project? (positioning)
- Which relations and co-ordinations are most opportune to improve, and how? (ID intervention planning)
- What are opportunities and threats to the project or organisation objectives? (step to organisation/project strategy decisions)
- What are strength, weaknesses, opportunities and threats to the sector (programme) objectives? (step to sector strategy decisions)

#### Results

- Who are the actors in the field of analysis?
- What are the relationships between the actors?

### How to use it?

#### Process

An institutiogramme can be made on an individual basis (e.g. by an adviser, who afterwards verifies his/her understanding by asking feedback) or in a group (not more than 20 people) on a participatory basis. It is also a useful tool for presentation purposes, to show the position of an organisation in its environment or for discussing the relations between organisations in a network. Making an institutiogramme takes around one and a half hour.

## Ground work

The use of tools should be preceded by the decision to engage in an (ID/OS) analysis and planning process, and the formulation of a basic question for that process. The basic question may have been refined based on a quick external organisation analysis. The process design and a stakeholder analysis should have determined the flow and the participants, if a participatory approach was chosen.

An institutiogramme can be the first tool of the (in-depth) analysis.

## Follow up

Following the institutiogramme a coverage matrix, collaboration chart or environmental scan could be applied to complete the institutional analysis.

## Requirements and limitations

Making an institutiogramme is one of the most useful things to do both to draw out facts and to provoke discussions on formal, informal, actual and desired situations. It is important to focus on what is relevant given the basic questions – if you are too inclusive the institutiogramme will become a bowl of spaghetti that does not give obvious insights.

Application of the institutiogramme requires good knowledge of the existing actors and their relations. The qualification of the relations (adequacy, intensity) may be subjective. The tool itself does not guarantee that all relevant actors and relations are depicted. It shows only the basic nature of relationship (hierarchy, service etc.); it is not very specific on the relations. Often more concrete instruments (e.g. coverage matrix or interlinked organograms) will have to provide additional information.

Finally, an institutiogramme (like coverage matrix and many others, but unlike an environmental scan) provides a snapshot. It does not show the development of relations over time (it can be worthwhile to depict a current and future situation next to each other and compare them).

**Note:** The institutiogramme has similarities with the Approximation Model (A5/B8) of the RAAKS analysis system.

## Practical references

MDF Syllabus “Institutional setting” 2004.

Norman Uphoff: Local Institutional Development: an analytical sourcebook with cases (1986)

Wayne C. Baker: Networking Smart. How to develop relationships for personal and organisational success (1994)

Paul G.K. Engel et al: Facilitating Innovation for Development, a RAAKS Resource Book (1995)

## Example Institutiogramme: CM

### Problem owner

CM, an (international) NGO in Asia

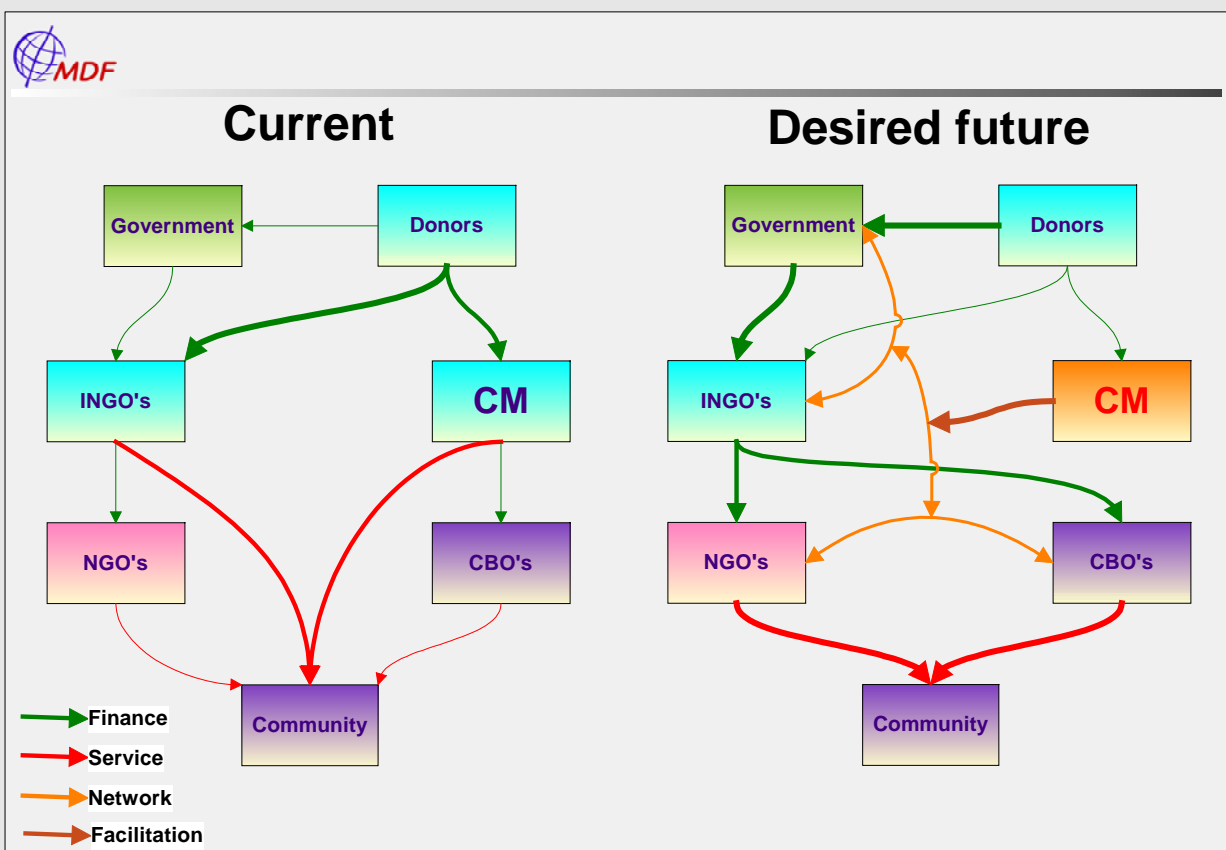
### Basic question

How can CM become an effective facilitator/consultant to and between government and INGO's on the one hand and NGO's and CBO's on the other hand, enhancing good and sustainable service delivery to the beneficiaries?

### Sub-question

What changes (need to) take place in the role and relations of CM?

To answer we depict the current and desired future (CM has already made strategic choices of the future it anticipates, and how it wants to fit in that future. The question now is about the changes CM needs to undergo).



### Assessment and further questions

- CM expects big changes in funding and implementation arrangements: A real challenge
- Will NGO's/CBO's be able to deliver the services so far delivered by INGO's and CM?
- Will the NGO's/CBO's desire the facilitation and consultancy services CM will offer?

## Example Institutiogramme: RICALDO

### Problem owner

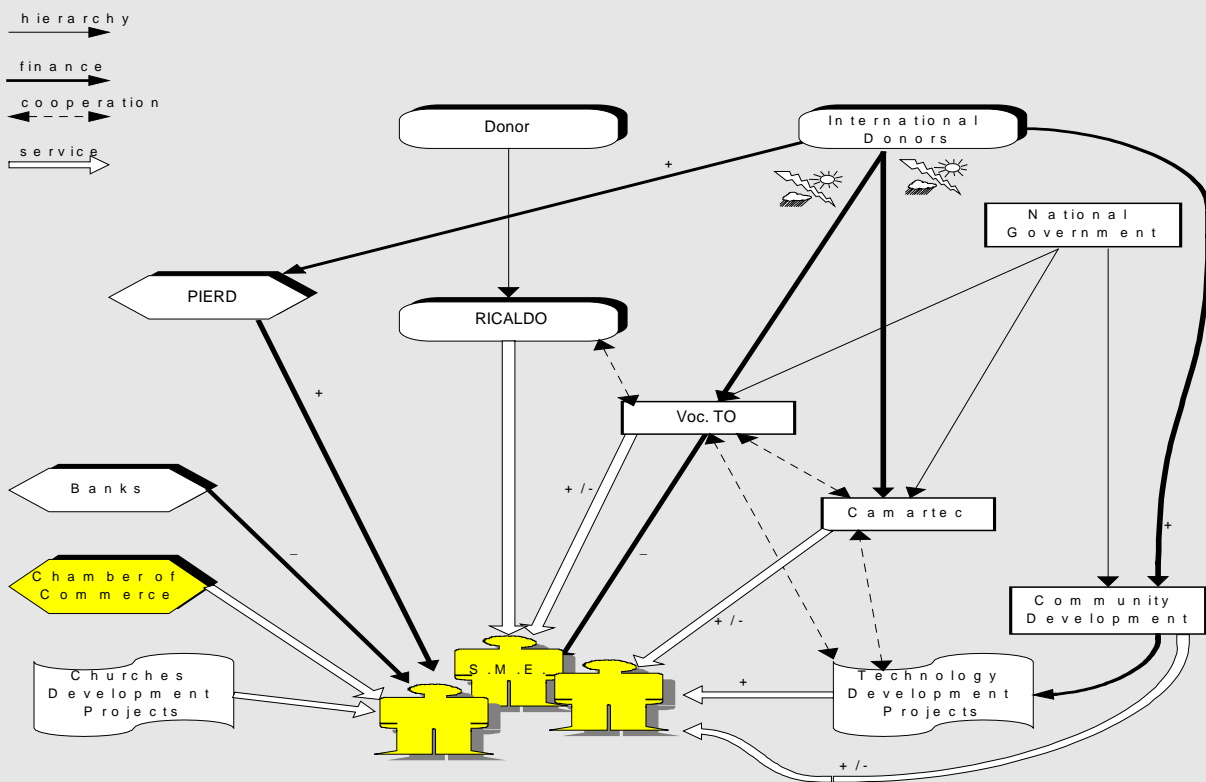
RICALDO management

### Basic question

What support to micro- and small finance enterprises should RICALDO offer to optimise the contribution of these organisations to economic growth of their target groups?

### Sub-question

What are opportunities and threats in the relations between the actors in micro and small finance?



### Observations

- International donors withdraw their support from parastatals.
- RICALDO has limited working relations with both government and private sector.
- Co-operation in technical services is better developed than in other sectors.
- There is limited co-ordination between government/parastatals on the one side and NGO/private sector on the other side.
- Services of parastatals and banks are not designed to fit the demand of the sector.

### Conclusions

- Opportunities for RICALDO to establish more intensive relations with banks & PIERD
- Space for developing an association of SME entrepreneurs.
- Possibilities for improved co-ordination between various actors.

## Steps in making an Institutiogramme

0. **Define the problem owner** who wants to intervene (more effectively)
0. **Formulate the (sub-) question** that you want to answer by making the institutiogramme. Suitable aims of using an institutiogramme are:
  - To position a project or programme (choosing who implements what and/or who co-ordinates/supervises)
  - To develop key relationships (identifying bottlenecks and designing ID interventions)
  - To prepare strategic choices (on what to produce and how to serve your mission)
0. **Define the field of analysis**
  - Define the sector or service/product
  - Define the geographical area
  - Decide whether you depict the current, expected (when?) or desired situation:
    - Clearly distinguish desired from current and/or expected
    - Analyse the desired situation only after the current and/or forecasted situation
    - Comparing current and expected or desired situations can be of added value
1. **Define the orientation.** This may be:
  - Radian (only depicting relations between the central actor and the others), or
  - Network (depicting the relationships between all actors)
2. **Define the type of actors** to include
  - Define the level: clusters of organisations (e.g. 'NGO's'), individual organisations, units within organisations, and/or individuals within units
  - Define the type: public, private, target group
3. **Identify and position the actors** in a map (if you identify more than 20 actors, split into more institutiogrammes)

*Note: If you analyse a sector or programme implemented by several actors, place the actors that are under the control of the problem owner in the middle and draw a line around them. This helps you to distinguish relations under control and outside the control of the problem owner. Observe that this demarcation is narrower than the entire sector. Also note that this border may shift depending on which actors you contract for implementation. Before strategic orientation, verify that in- and outside are distinguished unambiguously*

4. **Optional: Cluster and order** the actors as follows, to further a comprehensiveness:
  - (Potential) implementers in the centre
  - Suppliers to the left
  - Co-ordinators and supervisors above
  - Regulators and macro-actors on top of the co-ordinators
  - Stimulators (e.g. donors) below
  - Immediate/intermediate target groups or clients to the right
  - Ultimate target groups to the far right

5. **Define the type of relations** to look into (in relation to your question). Suggestions:
  - Hierarchy
  - Services/inputs
  - Communication
  - Co-operation
  - Financial flow
6. **Draw arrows** to show the relations in the map, using
  - Different types/colours of lines for different types of relations
  - An arrow at one end (or both ends) of all lines
  - Including also (actual) informal relations (may be with a different line than formal relations)
7. **Show the intensity** of relations (frequency and importance, e.g. with line thickness)
8. **Judge the adequacy** of the relations (in view of your question), and show your judgement in the map. Also look at relations that **do not** exist, and add your judgement on cards below the map. In your judgement refer to the BQ and/or assess relations in terms of:
  - Timeliness
  - Quantity
  - Quality of service delivery

*Note: Try to distinguish judgement of the internal and external situation. If your relationship with another actor is good/bad,*

- *To what extent does it characterise the other (opportunity/threat), and*
- *To what extent is this caused by you (strength/weaknesses – remember them for the internal analysis)*

*Note: Do not have lengthy debate about whether a relation is positive or negative. In case of uncertainty or disagreement:*

- *Check whether the judgement is based on the basic question. If the basic question seems pointless or vague, refine the question*
- *Split the relation into sub-relations that are positive and negative*
- *Give the relation both a positive and a negative judgement, or no judgement at all*

Note if there is insufficient information about certain facts, this can be noted for further research. 'Being uninformed' is in itself also a weakness or threat

9. **Analyse the institutiogramme**, resulting in observations and conclusions:
  - Who do you propose to give which (implementing or co-ordination) task?
  - Which (key) actor do you need to analyse further?
  - What ID interventions should be undertaken?
  - Where are (main) plusses (called opportunities – write them on yellow cards) and what are main negative relations (threats – write them on blue cards)?

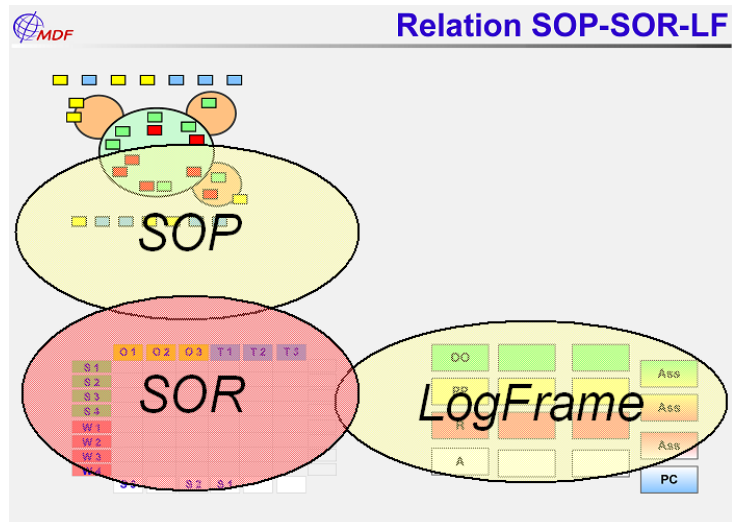
*Note: If you analyse relations between actors who are both under the control of the problem owner within a sector or programme, then classify the relations as strengths and weaknesses. Call plusses strengths (write them on green cards) and minuses weaknesses (write them on red cards)*

## 7.1.1 Strategic Orientation with SOP

### What is it?

Strategic ORientation (SOR) is a method to prioritise ID/OS strategies. This version of SOR is based on Strategic OPTions (SOP, which in turn are based on external Opportunities and Threats) and internal Strengths and Weaknesses that were identified earlier. The next tool presents the SOR in a way that directly matches Strength and Weaknesses with Opportunities and Threats (rather than SOP's that respond to the latter two).

The SOR matrix helps to identify which Strategic OPTions best match the internal strengths and weaknesses of an organisation or consortium of actors (e.g. in a sector programme). If done in a participatory manner involving relevant stakeholders, strategic orientation builds consensus about the priority strategies.



Strategic orientation often makes choices in what exactly to *deliver to the target groups* (operational interventions), and at the same time on *capacity support measures* (ID/OS interventions). The great strength of strategic orientation is that it clearly links diagnosis and assessment to strategic decisions and action planning while the connection between analysis and planning is often implicit and inimitable.

### What can you do with it?

Participatory strategic orientation is a powerful, systematic way to arrive at relevant, focussed, well-informed and well-supported strategic choices. Making a SOR matrix and prioritising through voting is not a substitute for common sense and logical arguments, but a quick method to get a picture of the possibilities and preferences as perceived by the participants. An asset of prioritising through voting is that it gives all participants a silent and equal say, in a short time span. By contrast, in debates not always all participants have and take the chance to express their views and usually only few people change their opinions based on heated deliberations.

In a participatory SOR workshop all participants express their insights and opinions on the best strategy for an organisation or programme. SOR is relevant for actors who want to focus their services/products, with an eye at the outside world, but considering internal strengths and weaknesses<sup>17</sup>.

<sup>17</sup> For those who have heard the term PODia, and wonder how it relates to SOR: Participatory Organisation Diagnosis (PODia) is a workshop methodology, in which strategic orientation is a key element. A PODia workshop of typically three days identifies strengths, weaknesses, opportunities and threats, chooses best

## What can you do with it?

### Basic (sub-) questions

- Which strategies optimally fit the basic question, the institutional options, and aspirations of the stakeholders? (Strategy development. This often involves the purpose and overall objective level, and less to the result and activity level) and/or
- What supportive (ID/OS) interventions are required to succeed in those strategies? (ID/OS intervention planning. This often translates primarily to result and activity level)

### Results

- Which options have the most attractive relevance/feasibility ratio?
- Which options have the most attractive effort/effect ration?
- Which options best match the institutional and organisation capacity?
- Which strategies have optimal stakeholder support?
- Which strengths to use and which weaknesses to improve to realise the respective strategic options?
- Which strengths should be consolidated anyway, and which weaknesses should be fought anyway (as a pre-condition) to succeed in any strategy?

## How to use it?

### Process

Strategic Orientation is an exercise taking from half a day to two days and can be done with groups of upto 25 stakeholders (these participants can be internal and external to the organisation).

Ideally relevant managers are present during the analysis as equal participants, so that at the end of the workshop they can immediately give their preliminary feedback. The management may immediately approve or comment positively upon some proposals, whereas for others they may express their reservations or need for further reflection.

It any case, it should be clear to all participants that the workshop outcome is (usually) not a *decision* but a set of recommendations and *proposals* to the management, who will decide later. On the other hand the management should commit to fully inform (and preferably invite feedback before taking a final decision) on the course of action they later choose. If the management gives such clarity, a SOR matrix is a participatory tool that simultaneously develops good plans and creates stakeholder commitment.

### Groundwork

Prior to SOR there should be an assessment, endorsed by the stakeholders in the SOR workshop, of the Strengths, Weaknesses, Opportunities and Threats (SWOT) of the organisation(s) that is the subject of strategic planning. This SWOT may be derived from using tools focussing on the various IOM elements, often supplemented by a brainstorm on IOM elements that were not scrutinised in detail. Strategic options (see the tool Strategic OPtions in 5.3.1.) should have been derived from the Opportunities and Threats (although this step is skipped in the SOR-with-OT method).

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*strategies using SOR, and translates the strategies into operation plans, positioned in a LogFrame (see Chapter 9.1.1. with a detailed description of PODia).*

## Follow up

Strategic planning should be followed (preferably immediately, to keep momentum and truly translate new ideas into practical action) by operational planning. This should address issues like: Who will do what when at what cost; in co-ordination with whom and under whose guidance and support? The logical framework provides an appropriate format for this step.

Planning the change process can also include more detailed tools to assess and manage the consequences of the chosen strategy (e.g. an interest chart). After strategic orientation you may use selected ID/OS tools (such as management assessment model) for very focussed and specific planning. This should not be a repetition of the diagnostic process geared at *choose your strategic course* of action, but to specify the *supportive interventions* (such as training or culture change).

## Requirements and limitations

The SOR depends heavily on the quality and clarity of the preceding SWOT analysis (the SWOT are usually written cryptically on flash cards, and the true meaning of these slogans should be clearly recalled). SOR requires understanding and committed participants. As mentioned under 'process' it is crucial that the participants get clarity beforehand on how the results will be interpreted (as 'suggestions' or as 'approved company policy'). Top management cannot sign blind to adopt any outcomes, but neither can disliked outcomes simply be ignored.

The interpretation of the outcomes (prioritising, possibly through voting) is crucial, and should not be done in a blind, mechanical way. The workshop requires a skilled facilitator who reminds the participants that people take decisions, not matrices. The SOR matrix focuses on feasibility, so you have to think back of relevance and assess which mix of strategies should be taken up simultaneously or sequentially. You should select enough strategic options to have impact, but few enough to manage. If one strategy scores a little lower than another, you cannot simply discard it. Other considerations are: Sequence and complementarity (building a house may be easier than laying the foundation, but the foundation should be first), and 'grip' (some options meet with few obstacles but also with few strengths, making their realisation out of reach of the organisation).

## Practical references

- MDF syllabus 'Strategic Orientation' 12716.003
- MDF syllabus 'PODia – Participatory Organisation Diagnosis' 2921888.006
- Mintzberg, Henri (1994): The pitfalls of strategic planning
- Mintzberg, Henri (1994): The rise and fall of strategic planning, Harvard business review
- Horn, Lutz (1994): SWOT analysis and strategic planning, GFA consulting group
- Morato, E.A. (1994): Manual on strategic planning process

## Example SOR (with SOP): District Health Department

### Problem owner

District Health Department

### Basic question

How can the District Health Department ascertain effective, affordable and sustainable delivery of adequate health services to the rural population in the province?

### Most relevant Strategic Options (SOP)

1. Make better use of private health services
2. Intensify preventive health services
3. Improve functioning and image of public health services

### Strengths

1. Employees motivated
2. Division of responsibilities clear and logical
3. Transparent budgeting procedures
4. Dedicated and trustworthy management

### Weaknesses

1. Operational strategies not available
2. Management inexperienced in policy setting
3. Weak monitoring systems
4. Civil servants prefer posting in capital

### SOR matrix

| Strengths                 | Strategic Options   |                      |                        |     |
|---------------------------|---------------------|----------------------|------------------------|-----|
|                           | 1. Private services | 2. Preventive health | 3. Image public health |     |
| 1. Motivation             | 2                   | 22                   | 15                     | 39  |
| 2. Responsibilities       | 18                  | 28                   | 8                      | 54  |
| 3. Budgeting              | 19                  | 26                   | 16                     | 61  |
| 4. Dedicated mgt.         | 8                   | 9                    | 11                     | 28  |
| <b>Total Strengths</b>    | <b>47</b>           | <b>85</b>            | <b>50</b>              |     |
| 1. No strategies          | -6                  | -29                  | -23                    | -58 |
| 2. Policy inexperience    | -6                  | -24                  | -18                    | -48 |
| 3. Weak monitoring        | -14                 | -11                  | -27                    | -52 |
| 4. Aspiration for capital | +2                  | -7                   | -19                    | -24 |
| <b>Total Weaknesses</b>   | <b>-24</b>          | <b>-71</b>           | <b>-87</b>             |     |
| <b>Balance</b>            | <b>23</b>           | <b>6</b>             | <b>-37</b>             |     |

## Interpretation

### Reading vertically

- SOP 1 is the easiest, but SOP 2 is much more manageable (building more on one's strengths)
- SOP 3 is hard to achieve, so take up SOP 2 and SOP 1 in first year. Another case against SOP 3 is that it is not clearly focussed to the clients and the BQ: The aspect of image only indirectly helps the organisation serve its mission

### Reading horizontally

- Typically motivation and dedicated management, often brought forward as key strengths of organisations, appear to be of relatively limited assistance in realising strategies (though they cannot be entirely neglected and actions may be needed to consolidate them). 'Budgeting' was initially given third priority, but now seems the most important asset of the organisation
- The weakness of civil servants preferring employment in the capital is confirmed to be of limited relevance (for realising the options), although in corridor discussions this was often posed as a key weakness. However, the low horizontal total in this case does not indicate that the strategies are completely indifferent to staff wishes. The relatively low total is among others the result of the strategic option of making better use of private health suppliers. To realise that option District health staff indeed needs to move to the capital, so that the 'weaknesses' of preferring the capital becomes a strength for this particular option. Yet to the third strategic options, staff preferences for the capital *is* a serious weakness.

## Example SOR (with SOP): Potato sector

### Basic question / Entity

How can the organisations involved in potato growing and marketing improve the profits, reliability and sustainability of services delivered to farmers?

### SOR matrix

|                                | Strategic Options  |                            |                           |   |
|--------------------------------|--------------------|----------------------------|---------------------------|---|
|                                | To merge companies | To improve debt collection | To protect infrastructure | To create awareness on policies and regulations |
| <b>Strengths</b>               |                    |                            |                           |   |
| Sufficient production capacity | XX                 | XX                         |                           |   |
| Trained technical staff        | XX                 | XX                         | XX                        | XX  |
| Clear task division            | XX                 | XXX                        | XX                        | XX  |
| Motivated Staff                | XX                 | XXX                        | XXX                       | XX  |
| <b>Total Strengths</b>         | <b>8</b>           | <b>10</b>                  | <b>9</b>                  | <b>6</b>  |
| <b>Weaknesses</b>              |                    |                            |                           |   |
| Old infrastructure             | XX                 | X                          | XX                        |   |
| Low quality of middle mgt      | XXX                | XXX                        | XX                        | XX  |
| Inadequate structure           | XXX                | X                          |                           | X   |
| Bad Public relations           | XX                 | XXX                        | XX                        | XXX   |
| Bad debt collection procedures |                    | XXX                        |                           | XXX   |
| <b>Total weaknesses</b>        | <b>10</b>          | <b>11</b>                  | <b>6</b>                  | <b>9</b>  |
| <b>Difference S-W</b>          | <b>-2</b>          | <b>-1</b>                  | <b>3</b>                  | <b>-3</b>                                       |

### Reflection

The participants extensively discussed, interpreted and reflected on what the matrix tells. Various responses were considered, and two strategies were chosen. Short-term and medium-term effects were important considerations. The fact that the chosen strategies have marginally higher scores was a coincidence: All scores are so close to each other that the matrix alone does not 'dictate' a response. As always it is people, not matrices, who decide! The main benefit of the voting was to make considerations explicit and open for debate.

### Plans

Strategy 1. To protect the infrastructure by:

- using motivated staff and;
- rehabilitating the old infrastructure;
- improving the quality of middle management, and
- improving the public relations.

Strategy 2. To improve the debt collection by:

- Using the clear task division and the motivated staff;
- while improving the quality of middle management;
- improving public relations;
- and improving the debt collection procedures.

## Steps in SOR (with SOP)

0. **Formulate the (sub-) question** that you want to answer by Strategic Orientation. This entails a clear delineation of the problem owner, his/her entity (subject), and the overall objective. A clear entity implies demarcation of SW inside (under command/control) and OT outside (not under command, though you may influence it)
  0. **Identify the SWOT** from earlier ID/OS tools or an IOM/ISA based brainstorm
  0. **Develop strategic options.** A core team of 1-5 people can best do this – a process facilitator should not do it alone in a short break:
    - Formulate concrete options that address at least one opportunity or threat
    - Strategic options translate OT into actions (or results) related to output, input, mission and/or relations
    - Until there is at least one option relating to each opportunity and threat
    - Stimulate innovation and creativity. Do not only consider doing more of the same (consider new solutions that respond to new trends, opportunities, and threats)
  0. **Prioritise 5-6 options** = Judge relevance of the option in terms of the criteria in the BQ. Possible methods:
    - Joint judgement
    - Individual anonymous voting (each participant about 5 votes)
    - Individual personalised voting (each participant votes with a different colour)
1. **Clarify the status.** Top management should explain to the participating stakeholders whether the workshop outcomes are binding or not. A fair deal is that the manager:
  - Adopts all outcomes unless she/he states reservations *immediately after the workshop*. In the latter case she/he
  - Commits to a timeframe to present her/his draft decisions, and
  - Invites (and will respond to) reactions before taking final decisions, or
  - Invites participants to convene once more to develop further proposals
2. **Prioritise 4-5 SW** (each):
  - Cluster related strengths, and cluster related weaknesses
  - Prioritise the most important ones (e.g. by debate followed by anonymous voting)
3. **Make the matrix**
  - The selected strengths and weaknesses in order priority (votes) vertically
  - Pre-selected strategic options also in order of priority (votes) horizontally
4. **Match options with S&W's** = Judge feasibility in SOR matrix. A match means:
  - This strength helps realising the strategic option
  - This weakness hinders realising the strategic option
  - Matching is the essential step in strategy development, and methods must encourage that participants grasp the ranking of the many matches. To enhance such overview:
    - Give each participant an A-4 or A-3 size version of the matrix
    - Participants cross out (shade) boxes that are definitely not applicable (no match)

See tool 'Strategic options' (5.3.1)

- Give votes (e.g. stickers) to the participants. As number of votes give approximately  $\frac{2}{3} * \# \text{ of boxes (S+W*SO*2/3)}$
  - Participants tentatively distribute votes (maximum 3 per box)
  - Allow some 'campaigning' time for participants to try convince each other
  - Check whether everybody has understood the voting by letting some participants explain their votes. If may participants misunderstood, allow re-voting
  - Participants decide their final votes and copy them unto a common score board
5. **Interpret and select 2-3 strategies**
- Vertically add voted strengths and subtract votes for weaknesses
  - The vertical totals indicate relative ease (and therefore chance) to succeed
  - Generally choose the most reachable options (quick wins), but also consider:
    - Synergy and chronology between options
    - Impact and risk of options
    - Ease of capitalising on strengths and removing weaknesses
    - You may tentatively plan to take up a fourth strategy a year later
5. **Management reaction** (or after step 6, if this is done in on ongoing workshop)
6. **Operationalise strategies**
- *Optional: Make a risk assessment and plan (see e.g. 'Interest chart')*
  - Describe the steps to realising the options
  - Use the relevant strengths and render weaknesses inoperative or harmless
  - Further use the tool 'SOR LogFrame'
7. **Follow-up**
- Assign time-bound tasks to responsible persons:
    - Further investigation (e.g. interest chart)
    - More detailed operational planning
    - Implementation, monitoring and supervision
  - Agree on reporting to and further involvement of others

## Order Information

### Booklet and CD-Rom

The price of the booklet and interactive CD-Rom is € 100,= (One hundred euro only).

Participants of MDF Training courses over the last two years (2002, 2003, 2004) get a 20% reduction on the full price of one booklet with CD, thus paying € 80,= (Eighty euro only) for the first Tango.

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The price of the CD-Rom alone (without booklet) is € 60,= (Sixty Euro only).

### Shipping cost

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|-------------------|-----------------|------------------|-----------------------|
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- If you are eligible for discount, please mention which course you attended, where and when (e.g. *IDOS, Ede, June 2004*).

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## Tango Toolkit

### Booklet and interactive CD-Rom

*What does it take to Tango? What does it take to make an Organisation swing? Being a fast and energetic dance, the Tango requires that you master the steps, but then rewards the dancers with vigour and a clear sense of direction.*

*For two decades MDF Training and Consultancy works on capacity development of organisations, active in International Co-operation. In the early nineties we developed the concept of Institutional Development and Organisational Strengthening (ID/OS). This has evolved into a large number of practical approaches and tools for professionals, who wish to enhance the performance of their (development) organisation.*

Over the years MDF and other professionals have applied these tools and concepts, based on participatory principles. The tools have been tested and adjusted in various organisations in all sectors. The toolkit provide a comprehensive package that allows organisations to critically examine themselves and prepare for the future.

*The Tango consists of a booklet and (included in the back of the booklet) an interactive CD-Rom. The CD-Rom tells you the complete and elaborate background, application, and critical points of the tools. In well over 300 pages, the CD-Rom presents the background of advisory and change dynamics, presents detailed steps and realistic examples of all tools from our own practice, describes the possible uses and linkages between tools (including hyperlinks), and indicates how to avoid common pitfalls. The 92-page booklet portrays a bird eye's view of the steps of diagnosis and change towards improved performance. In full colour it presents summaries of tools that can be applied at various stages of the life cycle of organisations. Whereas the CD-Rom is meant for in-depth study of tools and approaches prior to application, the booklet is made to serve as last-minute reference to be glanced at during meetings, workshops, training or consultancy. Note that the summary as presented in the booklet, is also available on the CD-Rom (in other words: The CD-Rom contains both the elaborate and the short version of the Tango).*

*The Tango of Organisations provides an appealing overview of tools, beneficial to all change professionals in the Development Sector. For more information or to order look at [www.mdf.nl](http://www.mdf.nl)*

