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A Participatory organisational appraisal of ACORD

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• Introduction

ACORD (Agency for Co-operation and Research in Development) is a consortium of northern NGOs which seeks to facilitate the emergence of strong, autonomous and independent indigenous non-government structures which will improve the economic and social conditions of some of the poorest people in Africa. It is currently running 29 programmes, located in a range of countries. The majority entail an extended period of support, which in certain instances exceeds 10 years.

A small number of ACORD programmes started to experiment with PRA in 1990, and by 1992 it had become apparent that there was considerable potential for it to be used more extensively. The difficulty was that, with the exception of Chris Roche, nobody from the Secretariat in London had a very clear idea of what PRA was about. In order to increase awareness among staff and to place them in a position where they would be able to take informed decisions about how it could be used in other programmes, the idea emerged of running a two day workshop, where staff would be introduced to PRA through an appraisal of their own work and organisational relationships.

Thus at first, taking ACORD as a subject was merely a way to familiarise staff with various methods, and giving them a sense of what it would feel like to participate in a PRA process. We recognised that useful insights about the organisation were likely to be generated at the same time, but regarded these largely as by-products. However, when the idea was put to ACORD's director, he saw it as an opportunity not just to introduce PRA as a methodology, but also as something which could feed into the strategic planning process upon which the organisation was about to embark. We were therefore presented with a much more demanding task than we had originally envisaged but decided, with some trepidation, to go ahead.

What follows is an account of how we proceeded and of the successes and difficulties which we encountered along the way. We hope this will be of value to others interested in the use of PRA for the purposes of organisational assessment and planning.

• The workshop

A few weeks before the workshop took place, staff were invited to a preliminary meeting where the broad outline of the exercise was discussed. The workshop programme reflected the feedback received on that occasion. The workshop was held in September 1992, with 19 out of the 27 Secretariat staff taking part. Apart from a receptionist, who fielded phone calls, and a secretary, who provided back-up support, the normal functioning of the office was suspended to create the necessary space for group work and presentations.

Introductory and concluding sessions dealt with aspects of the strategic planning process which did not lend themselves to investigation by PRA methods and will not be discussed here. We shall focus only on the core of the workshop where a PRA type approach was followed.

• **Matrix ranking**

The first PRA exercise was a matrix ranking. Robert Chambers' note, which uses the example of sorghum varieties, provided the basis for a preliminary briefing. Three groups were then formed, each comprising a mix of people who knew about the topics to be explored, and those who did not. One ranked the quality of ACORD programmes in the Southern African and Horn Regions. Another carried out a similar exercise for East and West Africa. A third focused on the organisation's leading funders.

Overall this seemed to go quite well. People commented that it had given them a new perspective on important questions, bringing issues to the surface which had not previously been appreciated, sharpening perceptions and providing a good way of summarising key characteristics for those who were previously less well informed about particular aspects of ACORD's work. Others, however, felt that the method left no room for disagreements between group members to be expressed, and that there was sometimes a tendency for those who knew little about the subjects to be marginalised.

For most of the rest of the workshop, participants were divided into two working parties, one dealing with the internal workings of the Secretariat and the other with its external relationships.

• **Internal aspects**

The 'internal' group, comprising secretarial, clerical and some non-managerial professional staff, worked mainly with Mick Howes and focused on the aspects of the Secretariat with which they were familiar. At the outset, they were split into two groups and were offered a menu of methods with which to work.

• *Office Model.* Group One chose to start by producing a model of the office. This was intended to generate a discussion of the physical environment, and to provide a basis for the subsequent exploration of internal communication networks. The exercise was conducted with little difficulty and was useful for learning the method. It failed, however, to yield any important substantive insights. It was difficult to say exactly why this should have been so, given that this is normally a very fruitful exercise under rural conditions. The smallness of the area in question, its relative simplicity, and the apparently limited scope for change perhaps provide a partial explanation.

• *Informal Hierarchies Chart.* Group Two constructed charts comparing the formal hierarchy of the organisation with what they perceived as the 'real' or 'unofficial hierarchy', using this to generate a discussion of how decisions were taken and how information of different types flowed around the system. Initially, given the lack of any ready made method in the PRA 'tool kit', this proved problematic. But once suitable approaches had been devised, a lot of useful discussion was generated.

• *Individual Communications Charts.* Complementing the earlier efforts of Group Two, and using a similar approach, Group One now turned its attention to communications as viewed from the perspective of individual actors located at different points in the organisation. Once again this proved quite fruitful.

• *Time Use Charts.* Meanwhile Group 2 conducted a number of exercises on the time use of various members of staff. Some constructed seasonal calendars, while others sorted coffee beans into piles to represent different activities. They then summarised the results on pie charts. This led on to a discussion of the types of work which the individuals concerned either enjoyed or did not enjoy carrying out, and the drawing of further charts, which made it possible to compare individual satisfaction ratios.

This was not without its difficulties. Daily time charts work quite well, for example, with rural women, but less so in an office setting, where far fewer activities fall into a repetitive daily sequence, and the amount of time devoted to one activity, as opposed to another, is

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far more likely to vary through time. Again, alternatives could be devised, but in the limited time available we were only partially successful in innovating during the process.

• **External relations**

The other team, comprising the management and the remaining professionals, worked mainly with Chris Roche, and dealt with external relationships. As with the 'internal' team, once again here, participants were sub-divided into two groups.

- *Communications Charts and Problem Trees.* Group 3 was asked to look at external communications. Hampered, like the internal groups, by the lack of a purpose-built method in the 'tool kit', and confronted with quite complicated phenomena, members of this group struggled to find the right medium. They settled eventually for drawing network and communications charts, which explored relations within the East African and Horn regions and the connections between these and the Secretariat.

These revealed quite significant differences between the regions in terms of information flow, the number of visits from head office, and the number of new initiatives launched. The use of the visual medium of the network maps led to the quite rapid formulation of conclusions. It seems unlikely that this could have been achieved as quickly through purely verbal means.

The team then extended its analysis of the constraints on information flow by drawing a problem tree. A series of difficulties relating to resource availability, formal and informal systems of communication, and differing cultural expectations were identified and debated. This in turn helped to distinguish areas where remedial action could feasibly be taken from those where it could not.

- *Programmes and Client Groups* (using Venn Diagrams, Problem Trees and Timelines). Group 4 was asked to explore the strategic issues posed by choice of client group. Here again, some difficulties arose in getting going, but these were overcome more quickly and good progress was made thereafter.
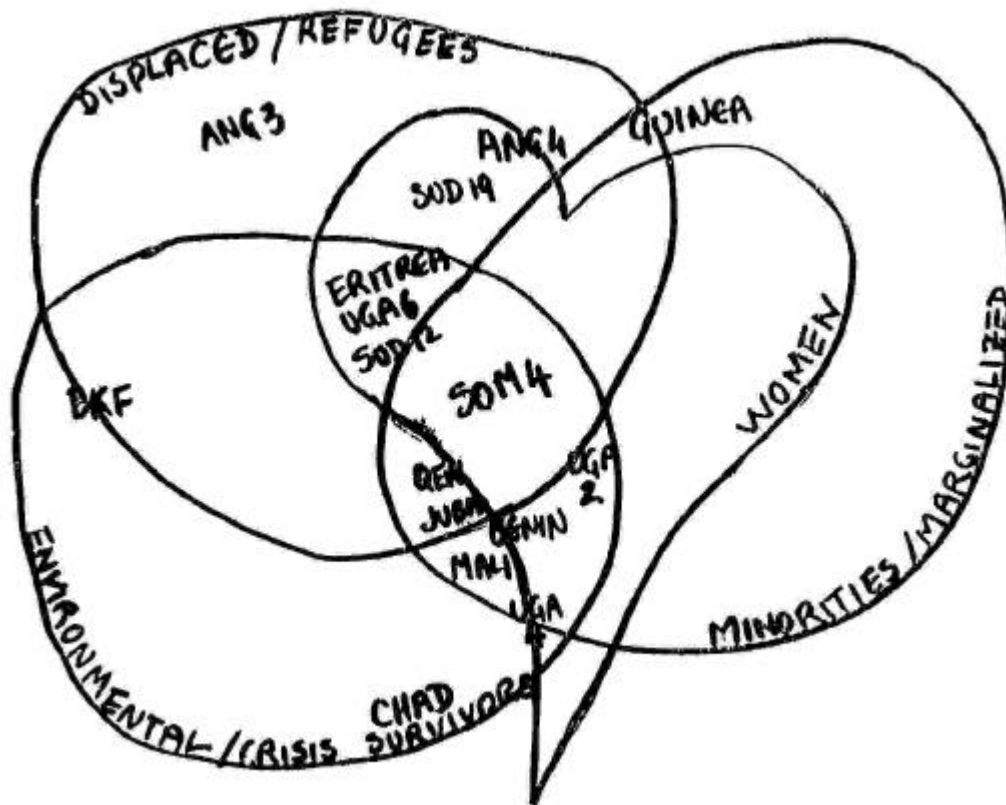
The group working on a Venn diagram, which located individual projects in relation to ACORD's priority target groups, stimulated a discussion of the discrepancy between those whom the organisation intended to support and those whom it actually ended up working with (Figure 1).

They then went on to construct a problem/option tree, which led to a more systematic analysis of the issue and contributing factors. The complexity of the relationships between donors, headquarters staff, field staff and client groups was clearly demonstrated. This analysis was then extended by focusing on some causes of the problems, establishing broad strategic options for future remedial action and thinking through their implications through the construction of impact flow charts.

The group then finished its work with a timeline reconstructing earlier developments in ACORD policy, which was helpful in defining the nature of the organisation's 'core business'.

Taken as a whole, this set of activities hung together rather well, providing the best example during the workshop of the effective sequencing of exercises to be achieved.

Figure 1. How programmes relate to gender and client groups

- **Assessment**

Did we achieve what we had intended? and would the exercise be worth repeating in different contexts? How important was the specific PRA component within the wider package of activities? Comments received in the various monitoring and evaluation exercises, together with our own observations of group and report back sessions identified a number of positive outcomes.

Firstly, the workshop helped to improve mutual understanding. The general level of awareness about internal problems and the issues about which various members of staff were concerned was raised. Non-programme staff welcomed the opportunity to learn more about what the operational people were doing, and people involved in different programmes were able to understand each other's work better. Those in non-managerial positions were provided with an opportunity for expressing their frustrations, which enabled management to arrive at a better understanding of their perspective. The need for the organisation to

pay more attention to the promotion of good internal communications was highlighted.

Secondly, those already involved on the operational side gained new insights into their individual programmes. At a more strategic level, the need for a greater clarity of vision was identified. A large amount of information was generated and a number of concrete ideas were produced which helped to define future strategic options.

Thirdly, many participants felt that they had gained a reasonably good impression of what PRA was about, that it was unlikely that as much information could have been generated by alternative means, and that visual representation had helped to move discussions forward which would otherwise have become blocked.

Despite the widespread perception that the workshop had been helpful, there were also problems.

Firstly, whilst certain PRA methods worked very well, others, such as the seasonal calendar

and the physical map, adapted less well to an organisational setting. There were also certain topics, most notably relationships between people and organisations, which needed to be explored, but for which no PRA method was available.

Secondly, whilst there appeared no reason, in principle, why PRA types of visualisation should not be used to address strategic planning issues, it was certainly too much to expect people to learn PRA and to apply it to quite complicated problems within such a short period. To some extent, therefore, it was inevitable that we should fall between two stools. It was probably also over-ambitious to try to involve all categories of staff in a single exercise of this type.

Despite the various difficulties encountered, and the obvious scope for improvement, the majority of those who took part felt by the end of the workshop that the effort and time expended had been worthwhile. A lot of important issues had been raised, and a start had been made to identify elements of a strategy based on the inclusion of all members of staff. At the same time, whilst nobody could be expected to 'master' PRA in a two day workshop held in a London office, key individuals within the organisation had at least been given a better feel for the approach and its possibilities

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NOTE

Chris Roche was formerly with ACORD.