COMMUNITY-BASED ORGANISATION MANAGEMENT

Handbook series for community-based organisations

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MANAGEMENT

1. Introduction

Community-based organisations (CBOs) play an important and relevant role in providing services at the local level. They work in a variety of different fields, such as education, health, the rights of the disabled, gender issues, etc. Wise management of the organisation can contribute significantly to ensuring the effectiveness of the work that it does.

This notebook will provide basic and comprehensive definitions of what organisations are, what a CBO is and what management is. The definitions will help you to understand the concept of CBO management.

To fully understand the concept, the notebook will highlight management skills, different types of managers and the main functions of managers.

It also will examine different topics that need to be managed to ensure the effectiveness of the organisation, such as tasks, time, meetings, human resources, employee performance, etc.

This notebook aims to give an overview of CBO management. It should be considered only as a guideline. For a more detailed study of CBO management, it is recommended that you look at other sources, such as books, magazines, websites, and attend formal and informal courses.

You also could approach CBO managers to learn more about their practical experiences of managing their organisations.

2. What is an organisation?

An organisation is made up of a group of people who come together to accomplish a common goal or a set of goals. The size of an organisation can vary from two people to thousands of people.

Organisations can range from profit-driven companies, such as Shoprite/Checkers, to non-profit organisations, such as the Institute for Democracy in South Africa (IDASA), community youth clubs, church groups or even a book club.

The principles of management have been learnt and established over time and can be applied to all organisations, though there might be some circumstances that are specific to certain organisations. For example, the circumstances relating to management of a CBO might be quite different to those relating to management of a profit-driven company.

A key aspect that should be considered is the goal of the organisation. The goal can be explicit (recognised) or implicit (unrecognised). If you are clear about your organisation's goal, all management strategies, techniques and processes can work together to achieve that goal. Although covered in detail in another notebook in this series, it is important to note that strategic planning is useful because it can help to clarify your organisation's goals. We will highlight a few strategic planning aspects in this notebook.

It is critical that senior managers, as well as other members of the management team, understand the following aspects:

Vision
Is the image that members of the organisation have about how it should work.
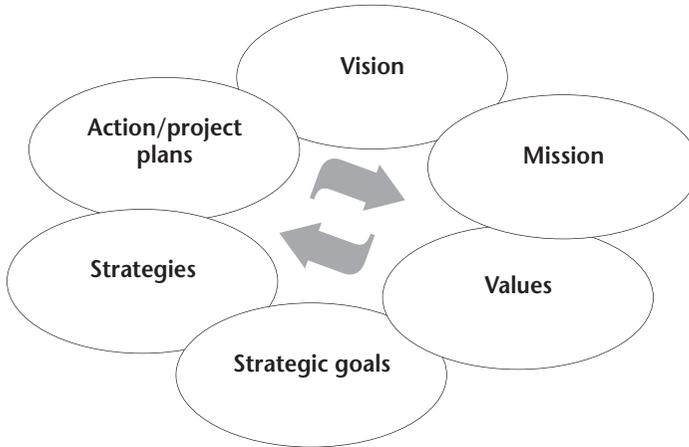
Mission
Is the overall purpose according to which an organisation operates.

Values
Are the priorities in the nature of how the organisation should carry out its activities. These values are the personality or culture of the organisation.

Strategic goals
The organisation's members must have strategic goals to work towards to achieve the overall accomplishment of the mission.

Strategies
Are the different approaches used by organisations to achieve their goals.

Action/project plans
Actions or project plans identify activities and assign responsibilities.

If managers are not clear about all the aspects of an organisation, they will not be able to lead its other members. The goals of the organisation will not be met and many people might become frustrated and disillusioned.

The focus of this notebook is management, specifically for CBOs. We will start with what CBOs are and how they differ from other types of organisations, such as government departments.

2.1. What is a community-based organisation (CBO)?

A CBO is an organisation that provides social services at the local level. It is a non-profit organisation whose activities are based primarily on volunteer efforts. This means that CBOs depend heavily on voluntary contributions for labour, material and financial support.

Characteristics of a CBO
  ✦ It is non-profit;
  ✦ It relies on voluntary contributions;
  ✦ It acts at the local level; and
  ✦ It is service-oriented.

3. What is management?

The term management has different interpretations. The most traditional is that management comprises a set of duties, such as planning, organising, leading and coordinating activities, and it also can include the group of people involved in these activities.

Management focuses on leadership skills, such as establishing the vision of the organisation and its goals, communicating these and guiding others to accomplish them. It asserts that leadership must be facilitative,

participative and empowering to ensure visions and goals are established and communicated.

Management also can be understood as the group of people responsible for making decisions in an organisation, such as executives and managers. In a non-profit organisation management can be identified as members of the board, the executive director and programme directors.

3.1. Types of managers

There are three basic types of managers:

✦ Top managers are those able to interpret the policy of the organisation;

✦ Middle managers are responsible for the implementation of policy; and

✦ First-line managers are those who conduct routine administration.
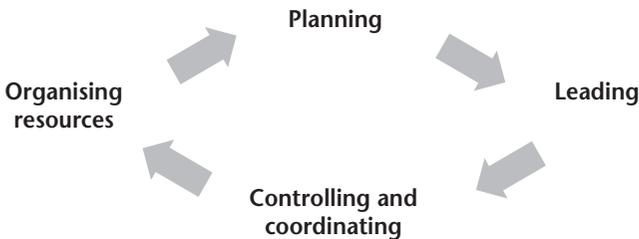
3.2. What are the functions of the manager?

The manager's functions include:

Planning

Includes identifying:

✦ Goals;

✦ Objectives;

✦ Methods;

✦ Resources needed to carry out methods;
✦ Responsibilities; and
✦ Dates for the completion of tasks.

Organising resources
This ensures that minimum resources are spent to achieve the maximum effect of the goals. This is a critical function, because all the other functions cannot take place without at least some resources being in place. Resources are not only financial, but also include people and materials.

Leading
A leader sets direction for individuals, groups and the organisation. A leader should be able to influence others and inspire them to achieve the goals of the organisation. Leadership is an aspect of management. However, you might find some good managers who might not be able to inspire others, but who are good at helping the members of their team to meet deadlines and achieve results. Some leaders also might not be good managers. It is important to find a balance between these two aspects when managing an organisation.

Controlling and coordinating
The manager needs to ensure that all the organisational systems, processes and structures are controlled so that goals and objectives can be met.

4. Management skills
We have mentioned already that management is a conscious process. Managers must always keep in mind 'the big picture' of the organisation: the needs of their departments, projects or programmes, as well as the practical day-to-day business of making sure goals are met.

To achieve this balance it is important for all managers to improve their skills constantly. Everyone – including managers – benefit from further training because it enables better performance throughout the organisation. Managers should consider the skills they have, if they need more skills, whether they are implementing the skills they have learnt and how they can improve their ability to manage even further.

We will provide a brief overview of the skills that are useful for managers. If you take management of your organisation seriously, you should read newspapers and magazines, surf websites and look at books for new information on management. Each year hundreds of new publications are brought out to guide the manager to improve his/her skills and abilities.

4.1. Problem-solving and decision-making

An important part of a manager's job is to solve problems and make decisions. Most, if not all, issues can be resolved in this way. The basic steps are:

Define the problem

You need to understand exactly what the problem is. If it seems complex, try to break down all the elements of the problem to get a clear definition of what it is and what the issues are that make up the problem.

Prioritise the problems

If there are several related problems, it is important to decide which one should be addressed first. List the problems to help you decide. Ask yourself:
- ✦ What is urgent?
- ✦ What is necessary?
- ✦ What is urgent and necessary?

The priority problems are those that are urgent and necessary.

Understand your role

The manager cannot solve all problems. Sometimes s/he needs to do only a small aspect of the work to solve the problem. A common mistake many managers make is to think that it is their job to get involved in all the steps in solving a problem. It is up to the manager to decide what can be done by others involved in the problem to help solve it.

Identify causes

Examine the potential causes of the problem. Start by describing the the problem. Ask yourself:

✦ What is happening?
✦ Where is it happening?
✦ When did it happen?
✦ How did it happen?
✦ Who was involved?
✦ Why did it happen?

Identify alternatives and select an approach

Usually there is more than one way to solve a problem. A useful approach is to brainstorm the problem, allowing input from all parties. This will enable you to choose the most effective option to solve the problem. However, do not get frustrated if you cannot solve the problem first time. Complicated issues sometimes take many attempts by all parties to be resolved.

Plan the implementation of your approach

It is not enough simply to identify an approach to resolve the problem. You must develop a plan of action and

evaluate it constantly to check you are doing all you need to do to solve the problem.

Monitor and verify

All plans need to be monitored. This is particularly important if other people are involved in solving the problem. If you do not actively monitor the implementation of the plan to solve the problem, it might not get resolved. Once the problem has been resolved, you will need to verify with others to establish that they also think the problem has been resolved.

Remember that for effective decision-making the objective should be clearly defined. The manager must ensure there is sufficient information and then identify the feasible options. Once the options have been evaluated, a decision can be made.

4.2. Planning

Planning is a process that involves decision-making on the organisation (ends), the objectives (means), on how they are conducted (policies) and on the results (outcomes). This is a major management process and involves defining the ends, means, conduct and results of every step of the plan.

During the planning process the aims and objectives of an organisation might have to be redefined to ensure they are successful. The manner in which the plans are conducted also is important.

The standard planning process includes:

✦ The establishment of overall goals;
✦ The establishment of smaller goals or objectives associated with the main goals;
✦ The design of strategies or methods to meet the goals and objectives; and

✦ Identification of what resources will be needed, including how and when the methods will be implemented.

The different kinds of planning that a manager should think about are:

Short-term planning	**Medium term planning**	**Long-term planning**
Short-term plans might last from six months to a year, depending on the size of the organisation and its operations.	Medium-term plans might last from about six months to three years, depending on the organisation's size and operations.	Long-term plans might last from five to 20 years, depending on the organisation's size and its operations.

4.3. Delegation

Delegation is the art of handing over responsibility and authority to other people – often subordinates – to complete a task and allowing them to figure out how best to accomplish that task. By delegating a task to a subordinate, you are giving them the opportunity to become more developed, fulfilled and productive people. For delegation of duties to be successful, consider the following:

✦ Delegate the whole task to the same person: it gives him/her responsibility and increases motivation;

✦ Select the right person: the task should be assigned to someone who has appropriate skills and capabilities;

✦ Clearly specify the expected results: all the relevant information – who, what, how, where, why – should be given to the subordinate;

✦ Delegate responsibility and authority: don't hang over the person's shoulder watching his/her every move. As long as s/he gets the expected results, let him/her choose how s/he wants to do it;

✦ Get constant feedback about the project's progress through regular meetings and written reports;

✦ Maintain good communication lines;

✦ If the project's progress is slower than expected, do not take the job away from the subordinate; rather work with him/her and encourage him/her to take responsibility for it; and

✦ Evaluate and reward performance.

Delegation and responsibility

It is important to emphasise that when a manager delegates responsibility and authority to a person to perform certain tasks, s/he still has the responsibility to ensure that the work is of the same standard that it would have been if the manager had been involved. Delegating responsibility and authority to another person does not remove accountability from the manager.

4.4. Task management

The first step in managing a task well is to define the activity clearly. If the task is done by the manager and the employees or volunteers, there can be a strong sense of ownership by all those involved. It is essential to identify the resources and people required to complete the activity. Drawing up a plan is important to ensure the task is achieved.

The objectives, responsibilities and accountability lines should be established by agreement and delegation. This can take place only after the manager has considered the resources and the people and has drawn up a plan to

complete the activity. Each activity in a plan comprises a number of tasks. More useful information on drawing up effective plans can be found in the *Project Management* notebook in this series.

The plan must have set standards and reporting boundaries to ensure the task's success.

Example

You need a team to organise a workshop. You need a budget limit. If you do not have a budget limit, team members might plan a workshop that is too expensive and they might waste time because they will have to start from scratch again. Once you have set the budget limit, explain it to team members so they know the bounds within which they are working.

Monitor the performance and progress of everyone in the team. If things are not going according to the plan, the methods and the targets, some aspects might have to be adjusted.

4.5. Managing the group

To manage the group it is necessary to establish, agree on and communicate standards of performance and behaviour. The roles within the group should be identified, developed and agreed on by its members. It is important to develop team work, cooperation, morale and team spirit.

The manager should motivate the group and establish a collective sense of purpose. It is the manager's responsibility to enable, facilitate and ensure effective internal and external group communications. And, if necessary, the manager needs to resolve group conflict, struggles or disagreements.

More details on how to manage groups effectively can be found in the *Project Management* notebook in this series.

4.6. Managing the individual

First it is important to understand that team members are individuals; they have different personalities, skills, strengths, aims, needs and fears. The manager must help and support different individuals in the team.

S/he needs to identify, develop and use each individual's capabilities and strengths and then identify and agree on appropriate individual responsibilities and objectives. Remember to recognise the effort and good work of individuals and, where appropriate, reward individuals with extra responsibilities, advancement and status.

As a manager, your job will be made easier if you can balance the needs of the team, the individuals and the task.

4.7. Communications management

Effective communication is essential in any organisation. Organisations that communicate tend to be more successful. Usually it is the job of managers to ensure successful communication. Like all other management functions it is important to think about communication in a deliberate and conscious way. The following guidelines will help you to ensure strong internal communication:

✦ All employees should write weekly reports to their supervisors to ensure they and their supervisors understand the tasks at hand and to help plan the processes effectively;

✦ Hold general monthly meetings to review recent successes and the overall condition of the organisation. The employees should describe their roles to the rest of the members, both staff and volunteers. This will help foster teamwork in your CBO; and

✦ Hold monthly one-on-one meetings with supervisors to ensure more efficient time management and supervision.

4.8. Time management

Time needs to be managed to guarantee personal effectiveness at work. To manage your time better, you need to:

✦ Use a form of record-keeping that suits you best. It might be a diary, electronic diary, notebook, a cellphone, etc;

✦ Categorise your tasks into: routine tasks, ongoing projects, planning and development;

✦ Analyse your tasks: list them in order – important and urgent, either important or urgent (but not both), neither important nor urgent;

✦ Prioritise your tasks, plan your time agenda and keep the process moving: time often seems to run out before the task is complete, so time management is important; and

✦ Be disciplined and committed to self-improvement. The best managers also are the best time managers usually. There are many practical techniques that can help you to become a more effective time

manager. There are several books on time management that you can read to get useful tips.

In CBOs time management is critical because, if is not managed properly, the community might lose faith in your organisation. It can be difficult to ensure effective time management among volunteers. People need to understand the importance of effective time management. This might mean helping people to develop time management skills themselves.

Saying:
'If you steal my time you are committing a crime!'
For many people time is money. If you do not respect their time they might think that you are 'stealing' their money. If you respect other people's time they will respect yours.

Remember that you often need to plan your time. For example, if you need to be at a council meeting at 11am and you have to use public transport, you need to plan to arrive at least half an hour before. Then, if your taxi is late, you will still arrive on time and, if your taxi is early, you can use the time to familiarise yourself with the council agenda.

4.9. Meeting procedures
Meetings can be informal or formal. They are ideal opportunities for individuals to get together to discuss issues of common concern and to make decisions. Meetings are necessary to discuss views and resolve issues.
Managers should plan meetings well, so that they are taken seriously.

Meetings are held for different reasons, such as:
✦ To give and/or obtain information in order to make decisions;
✦ To update members on the developments within and outside the organisation; and
✦ To evaluate the progress of the organisation's work.

If you are planning a meeting, consider the following:
✦ All staff members and/or volunteers should be informed about the meeting (by word-of-mouth, e-mails, notice board, etc);
✦ Provide details of the venue and time;
✦ Ensure that all necessary records and equipment are available at the meeting;
✦ Distribute the agenda of the meeting on time, so that everyone attending will know what to expect;
✦ Prepare an attendance register and other relevant documents before the meeting; and
✦ Evaluate the meeting venue and its conditions.

It is important to keep a record of the meeting in writing: this is called a minute. A minute might include only the decisions taken or it can register everything said by all participants. It will include:
✦ The date, time and place of the meeting;
✦ A list of people who attended the meeting and a list of the people who were absent;
✦ Adoption of previous minutes;
✦ Discussion on issues from the previous meeting;
✦ Discussion on new issues;
✦ Tabling of relevant mailing;
✦ Decisions taken on operational matters;
✦ The closure of the meeting; and
✦ The date, time and place of the next meeting.

Depending on the context and the reason for the meeting, the conduct of the meeting can range from formal to informal. A meeting between contracting parties is likely to be more formal; a meeting between team members might be informal.

For a meeting to be effective there are some key characters, such as:

The chairperson
S/he is responsible for leading and ensuring progress in the meeting.

The secretary
S/he is responsible for preparing the minute and other documents for the meeting.

The treasurer
S/he is responsible for reporting on the financial affairs (income and expenditure) of the organisation.

The members/participants
They will ensure that the meeting has a quorum and they can express their views and pass resolutions.

To sum up, good meetings are held when there is a specific need for them, the outcome of the meeting and the decisions taken are clear and the result is a plan of action. This means that clear targets and deadlines are established and the correct duties and responsibilities are allocated to appropriate staff members.

4.10. Human resources management
Human resources management deals with the recruitment, placement, training and development of staff members or volunteers in an organisation. Human

resources management never stops, because change is constant in the working environment and it affects all members of the working community. This process is an ongoing activity that should supply the organisations (including non-governmental groups) with the right people for the right position at the right time.

You might not think that the formal processes that apply to business organisation also apply to CBOs, but internationally it has been shown that often not enough thought is given to the management of volunteers. It is likely that many of the people who carry out the tasks and activities of your CBO will be volunteers. For volunteers to feel satisfied that they are making a contribution, you should apply some of the formal processes of human resource management and adapt them to your CBO environment.

Consider some of the following:

Human resource planning
The planning process is affected by internal and external factors. Internal factors include skills needs, vacancies, departmental expansions and/or reductions. External factors include salary levels, the labour market, technology, etc.

Recruitment
Refers to locating candidates for a specific job vacancy or volunteer position. This can be done through word of mouth, advertising in newspapers, engaging employment agencies, using bulletin boards and circulating vacancy notices, etc.

Selection
You can use standardised measures (such as application forms, résumés, interviews, skills tests and reference checks

etc) to assess and evaluate the candidates and to select the best one for the job.

Socialisation/induction

It is important to consider how the selected candidate will fit into the organisation. You need to familiarise the selected candidate with the work processes, procedures, co-workers and the organisation's mission, policies and culture etc.

Training and development

It is important that the organisation adopt training and education policies to ensure lifelong education and training of personnel and volunteers. This will guarantee that workers are able to contribute to the organisation's objectives.

Performance appraisal

This will ensure an ongoing assessment of the individual and how the person fits into an organisation and helps to achieve its mission.

Promotions, transfers, dismissals

An individual's value to the organisation needs to be assessed. High performers might be transferred to other sections or promoted and low performers might have to be dismissed after the necessary warnings.

It is important to remember that if your organisation has paid employees that *CBOs are subject to the country's labour legislation*. CBOs must provide written contracts of employment for each employee. These should indicate clearly the conditions of employment, including job description and salary. The benefits and obligations of staff should be included in the conditions of employment, which should be available to all employees before the

contract is signed. CBOs also have to comply with government regulations regarding payment for taxes and other levies on behalf of their employees.

Ongoing human resource planning, selection, training and appraisal will guarantee the success of an organisation.

4.11. Conflict management

Conflict can occur between individuals or groups of people; it is the expression of differences between them and it can be peaceful or violent. Generally conflict is about power and interests. One person or group might want more power than another.

Conflict management is useful, because it can prevent the conflict from getting worse, improves cooperation between the group members, motivates the group and builds trust and consensus.

Conflict can be managed in different ways:

Negotiation
Is used when individuals or parties involved in the conflict agree to seek to reach an agreement by adjusting their views and positions in a joint effort to achieve consensus, while still preserving their interests as much as possible.

Joint problem-solving
The parties involved seek to reach an agreement by identifying the causes of it, generating alternative solutions and jointly agreeing on viable solutions to the conflict.

Facilitation
Is a voluntary process in which a third party (not involved in the conflict) manages a discussion between the parties.

Mediation

Is also a voluntary process in which a third party helps the disputing parties to arrive at an agreed solution. The process of mediation is a more formal process. It is likely that mediation will be used only when other methods have failed.

The role of the mediator is:
- ✦ To stop the argument;
- ✦ To give each party involved in the conflict the chance to give his/her side without the interference of the other party;
- ✦ To ask the parties involved for possible solutions;
- ✦ To choose the best solution; and
- ✦ Get agreement on solution.

Arbitration

Is a formalised legal process. Two parties will present their cases to a third party – usually a lawyer or a judge or, if internal, to a panel of people appointed by the organisation. Once the positions of the two parties have been heard, a decision will be made on their behalf. This decision is binding and cannot be renegotiated.

5. Management in context

You might find that even though you apply all the skills consistently there is something that is not going right. It might not be something you can lay your finger on exactly, but you know it has something to do with people who approach things differently. Often this different approach can be explained by understanding their cultural contexts. New management thinking helps us to understand that management tools are not neutral and might be affected by culture or the different world views of people working within organisations.

One theory is that there are two different world views present in people in organisations, each of which will have an impact on behaviour in an organisation. One world view is called the high context world view. Often this is seen in operation in countries or cultures that are less industrialised than others. The low context world view is operational in highly industrialised societies. The table below illustrates how being high or low context will affect the people who work in organisations differently.

Value	High Context	Low Context
Time	Cyclical	Linear
Leadership	Skills	Roles
Decision-making	Consensus	Consultation
Task & Maintenance	Relational	Rational
Communication	Oral	Written
Concept of self	Community Organisation Individual	Individual Organisation Community
World view	Spiritual	Scientific

The different ways people work together are not better or worse, just different. You might find that in some circumstances you will need people who are more high-context oriented, while in others you will need people who are more low-context oriented. You will find that almost all people have a combination of the two contexts. As a manager, it would be useful to identify which world view is in operation. This could help to minimise frustration when managing people and processes.

6. Conclusion

This notebook has covered the basics of CBO management. It should be used as a guide to the daily management tasks of a CBO. If the concepts are used regularly they will become routine in time.

A CBO is a non-profit organisation that provides social services at the local level. Although management can be interpreted differently, most people acknowledge that it is a process of different activities: planning; organising; leading and coordinating. All these activities are equally important and should be carefully studied.

For management in CBOs to be effective it is important for the manager to be well prepared and aware of her/his functions. The main task of a manager is to coordinate all the different activities of the management process successfully.

Management is a difficult skill and might take years to master. It is never easy and can also be quite lonely sometimes. You might not be popular if you are a good manager, but you will ensure that your organisation meets its goals.

It is important in Africa that we have a vibrant, well-functioning civil society. CBOs have an important role to play when it comes to strengthening democracy. Effective management will ensure stronger CBOs and, therefore, stronger democracies.

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