Using the Internet to Increase the Understanding of Organizational Self-Reflection

This document also includes a final report prepared by Universalia at the end of this page.

Final Narrative Report prepared by Acceso

TABLE OF CONTENTS

I. Synthesis
   1.1 General aspects
   1.2 Context
   1.3 Partners
   1.4 Our long term vision
   1.5 Results (with reference to the original proposal)
   1.6 Other results
   1.7 Prospective second stage

II. Main activities and results
   2.1 Goals
   2.2 Summary of the main expected products and results for each project component.

III. Problems during implementation

IV. Learned lessons
   4.1 With respect to the concept and tools for self-reflection
   4.2 With respect to the relationship between Universalia's IOA and Acceso's MAPLI
   4.3 With respect to use of the Internet
   4.4 With respect to development of the partnerships

I. Synthesis

This is a summary of the proposal exactly as it was approved, with an emphasis on the formulation of objectives and components, reference context, partner organizations and long-range vision. These aspects (points 1.1 through 1.4) give an overview of the initial proposal, without implying that everything was implemented and complied with in this manner. At the end of this first part, a summary of the main results that were obtained is also provided, in addition to a list of the tasks and results that might be considered for a prospective second stage.

1.1 General aspects

The Organizational Self-Reflection (OSR) project aims to improve organizational learning by increasing access to self-reflection tools. The process of reflection implies
Using the Internet to Increase the Understanding of Organizational Self-Reflection: IDRC...

Page 2 of 13

an organizational diagnosis that will allow learning from experiences, styles of work and results in order to foster strategic visioning, decision-making, organizational change and capacity building. The organization maintains control over the orientation of the process and the use of the results.

The project links a direct service--based on the Internet--and a research agenda designed to create knowledge about self-reflection, its contribution to organizational learning, and the use of the Internet as a tool for strengthening organizational capacities. The implementation of this agenda was planned for a second stage of the project.

The OSR project seeks to engage diverse organizations in the use of self-reflection resources and, in the long run, also catalyze the development of a learning community that focuses on OSR, organizational learning, and the use of the Internet for institutional strengthening.

1.2 Context

Today, CSOs are experiencing great pressure to become more accountable to their various stakeholders. Donor agencies, governments, and their target populations are increasing demands for measurable results, organizational performance standards and a strategic allocation of resources.

At the same time, organizational self-reflection is limited by scarce access to available resources. A literature review indicates that existing tools are not being used widely by CSOs. On the other hand, in the interviews we conducted in Latin America, organizations expressed a desire to improve their performance and, at the same time, a need for comprehensive frameworks that could help them to reflect upon their work. Yet they have few criteria for selecting a reliable option for conducting a self-reflection process.

The OSR project offers these organizations a valuable service that not only compiles and organizes different approaches to self-reflection, but also offers guidance to the end user in the selection of appropriate tools.

In the future, this service will be complemented by a research component and learning community that creates knowledge and builds awareness about how organizations can learn and improve by reflecting on their work more effectively. The research agenda was developed around the following topics: the use of technology for creating and improving organizational capacities, the appropriateness of external tools and frameworks for supporting organizational self-reflection, and key factors to enhance partnerships among public/private/civil society organizations.

1.3 Partners

The OSR is a joint effort of three partner organizations: IDRC, a government agency; Fundación Acceso, a not-for-profit organization; and Universalia, a private firm, with complementary expertise and interests. The three organizations started the project by committing to developing this partnership in a way that capitalizes on the synergy among our institutional strategies.

1.4 Our long-term vision (1)
We envision civil society organizations systematically learning and improving their work. The Universalia / Acceso / IDRC initiative will help place tools and information about organizational self-reflection at their fingertips, in the languages and formats that suit their needs and interests. These organizations will regularly use and experiment with a combination of the methods or frameworks shared through this initiative. These organizations will engage in the improvement of these tools and the generation of new knowledge concerning frameworks for self-reflection and the use of the Internet for organizational learning.

1.5 Results (with reference to the original proposal):

Our work in this partnership has led to the following concrete results in the first stage, among others:

- the OSR service web site with a comparative feature for self-reflection tools
- a defined research agenda for the second stage of the project
- an analysis of the first stage of our partnership
- workshops and capacity building activities among partners.
- a prospectus to support a fundraising plan.

1.6 Other results: MAPLI and IOA

As a way of increasing synergies among participating organizations, Acceso proposed that IDRC should invest some of the project's resources in a revision of its Strategic Planning Methodology, using as a basis Universalia's IOA tool. Although this was not foreseen in the original proposal, it constitutes one of the main results when compared to the objective aimed at strengthening the capacities of the partner organizations through exchange of knowledge, methodologies and experiences. In addition, one of Acceso's strategic interests in participating in this project is to increase its capacity for monitoring and evaluating, areas in which IDRC and Universalia have recognized expertise.

1.7 Prospective second stage

In a prospective second stage of this project, we plan to develop the following activities:

- offer an active Organizational Self-Reflection service on the Internet, with feedback from user organizations.
- generate information though our research on Self-Reflection tools, organizational learning, and use of technology in institutional strengthening.
- develop alliances with related projects and organizations.
- compile information from our discussion about the establishment of a sustainable multi-stakeholder partnership.

II. Main activities and results (according to general goals and expected products)

Following is a description of the goals of the project, and then a table with the components of the project and their expected product, product manager, results, and the objective that they relate to.
2.1 GOALS (from proposal -July 2000-)

1. To design and promote a sustainable service to help organizations enhance their ability to assess how well they are doing, through the dissemination of tools and information through the Internet (Content and technical components)

2. To reflect upon and learn from a series of questions which the project will inevitably raise. In this regard, the project provides opportunity to deepen the understanding of the three organisations on new learning approaches, how to build capacities and how to create sustainable partnerships (Research and partnership component)

3. To create and expand the capacities of all parties involved, by transferring technical knowledge and experience amongst each other.

2.2 Summary of the main expected products

Table 1. Summary of the main expected products and results for each project component.

<table>
<thead>
<tr>
<th>Component</th>
<th>Expected Product</th>
<th>Product Manager</th>
<th>Results</th>
<th>Objective No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content</td>
<td>Compile list of IOA tools</td>
<td>Universalia</td>
<td>Done</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>General information on OSR</td>
<td>Universalia</td>
<td>Universalia provided several documents, included a FAQ, bibliographic references, articles, and a self-assessment guide.</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>OSA external expert contribution</td>
<td>Shared</td>
<td>Universalia and Acceso hired Peter Morgan to elaborate a template and to classify nine tools (one more will be ready soon). Acceso</td>
<td>1</td>
</tr>
</tbody>
</table>
Improvement of the Acceso Methodology for Institutional Planning (MAPLI)

Acceso worked with Peter to develop a new version of the criteria applied by him and to document the meaning of these criteria.

Based on IOA tool, Universalia's Acceso prepared a new version of MAPLI. This update incorporates elements that strengthen the relationship among planning, monitoring, and evaluation. These elements were incorporated mainly in the modules on organizational assessment and monitoring.

Additionally, gender and public policy related aspects were also included.
<table>
<thead>
<tr>
<th>Research Agenda</th>
<th>Research plan</th>
<th>Shared</th>
<th>Throughout the methodology. Acceso developed the plan, and wrote a publishable paper on the use of the Internet for research. 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preliminary research data</td>
<td></td>
<td>Shared</td>
<td>Not done. The partners decided that this task should be done as part of a second stage of the project. 2</td>
</tr>
<tr>
<td>Systematization of the IDRC-Universalia-Acceso partnership</td>
<td></td>
<td>Shared</td>
<td>Acceso set up an e-list and produced a summary of the discussion. Universalia prepared a publishable paper based on the summary and other inputs. 2</td>
</tr>
<tr>
<td>Technical design</td>
<td>Conceptual design</td>
<td>Acceso</td>
<td>Done. Two versions were prepared. The second version was based on the results of the May 25th meeting. 1</td>
</tr>
<tr>
<td>Prototype</td>
<td></td>
<td>Acceso</td>
<td>Done. See <a href="http://reflect-">http://reflect-</a> 1</td>
</tr>
</tbody>
</table>

http://idrinfo.idrc.ca/archive/corpdocs/118356/100405.htm 2003-06-06
<table>
<thead>
<tr>
<th>Activity</th>
<th>Responsible Party</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Launching</td>
<td>Acceso</td>
<td>Done</td>
<td></td>
</tr>
<tr>
<td>Growth and updating</td>
<td>Acceso</td>
<td>Not done.</td>
<td></td>
</tr>
<tr>
<td>Monitoring and adjustment</td>
<td>Acceso</td>
<td>Not done.</td>
<td></td>
</tr>
<tr>
<td>E-mail list facilitation</td>
<td>Acceso</td>
<td>Not done.</td>
<td></td>
</tr>
<tr>
<td>Development plan</td>
<td>Universalia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fundraising and partnership development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EFIs and major international NGOs</td>
<td>Universalia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research Centre</td>
<td>IDRC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Southern organizations</td>
<td>Acceso</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit to Universalia</td>
<td>Shared</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Acceso approached The Nature Conservancy and ALOP, a Latin American Network of NGOs. Acceso has set up a partnership with ALOP to develop an institutional-strengthening site for Latin American NGOs, where the OSR site may be included.

Acceso visited Universalia in...
## III. Problems during implementation

The project faced several situations that made it difficult to achieve results or limited its reach:

- **The pace of work and time dedicated to the project** by each of the partner organizations was unequal. This led to some key tasks not being completed when needed and gave rise to bottlenecks that affected the project's general development.

  Universalia, for example, took a long time in sending materials for the website.

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### Communications and awareness

<table>
<thead>
<tr>
<th>Task</th>
<th>Responsible</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>May workshop</td>
<td>Shared</td>
<td></td>
<td>General</td>
</tr>
<tr>
<td>Training on Universalia’s OSR methodology and related topics</td>
<td>Universalia</td>
<td>Universalia facilitated a two-day workshop for over ten staff at Acceso.</td>
<td></td>
</tr>
<tr>
<td>Training on the strategic uses of the Internet</td>
<td>Acceso</td>
<td>Not done</td>
<td></td>
</tr>
</tbody>
</table>

### Coordination amongst partners

<table>
<thead>
<tr>
<th>Task</th>
<th>Responsible</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications plan development</td>
<td>Acceso</td>
<td>Done</td>
<td>1</td>
</tr>
<tr>
<td>Registration of portal</td>
<td>Acceso</td>
<td>Done</td>
<td>1</td>
</tr>
<tr>
<td>Promotion</td>
<td>Shared</td>
<td>Not done</td>
<td>1</td>
</tr>
<tr>
<td>Ongoing communication</td>
<td>Shared</td>
<td>Done</td>
<td>3</td>
</tr>
</tbody>
</table>

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http://idrinfo.idrc.ca/archive/corpdocs/118356/100405.htm  2003-06-06
and providing the work of a metaevaluator, which were important elements for progressing to the construction of the website. As we understand it, this situation arose because Universalia did not have a large enough budget to dedicate the time needed to the project.

In the case of Acceso, it had been contemplated, from the planning stage, that two team members would be largely dedicated to the project.

The participation of IDRC was limited in almost all the project, when it would have been desirable for them to play a role in facilitating the partnership and contribute more to the discussions and communication dynamics in general.

We feel that the time dedicated to the project also has to do with the different degrees of importance it has for the institution’s objectives. We feel the degree of importance for Universalia and IDRC differed from the planning stage to the implementation stage, but that we lacked mechanisms for monitoring this type of change.

- **Personnel changes**, which occurred in the three organizations, but especially in Acceso and IDRC, generated confusion about roles and spokespeople, and this confusion was not discussed as soon as it occurred. This triggered a loss in the implementation stage of the initial "chemistry" established in the project’s planning stage, and there was then not enough space for personal communication to recover the "chemistry" between the actors. In addition, there were communication difficulties due to cultural factors such as language.

- **Aspects of communication**
  
  o For Acceso, the formulation of a research agenda and website construction raised the need for direct communication with the metaevaluator, which was mentioned at the time. For a long time, however, our communication with the metaevaluator was mediated by Universalia, a mechanism that proved to be inefficient. In addition, when we were given the references in order to make direct contact with the metaevaluator, we found that he lacked knowledge about several aspects of the OSR project and the final orientation of the work he was being asked to do.

  o Communication dynamics were not effective in spite of being vital to inter-institutional work. This was seen in unanswered e-mails (or very late responses to them) and confusion with respect to what working materials or products the other partner was requesting. The use of e-mail, conceived as a key part in the dynamics of this project (for daily communication and for discussion in the Alianzas e-list, for example), actually became a problem. On the one hand, for Universalia, the volume of messages became overwhelming with respect to the work time they could dedicate to the project, while for Acceso, there was some frustration with the slowness of the electronic communications.

  o There was insufficient initial reflection and follow-up on the conditions imposed by the cultural diversity of the participants. This generated language problems and misunderstandings with respect to how each organization would participate in the OSR project.

These difficulties especially limited the scope of the following items in the project:
• The research agenda did not achieve what had been planned. The component on adapting existing models and tools for fomenting self-reflection in different types of organizations and contexts was not developed.

• The website design was limited with respect to content and operativeness. In particular, it excluded the discussion forum and the e-list, which would have allowed us to interact with end users.

• No significant progress was made with respect to the fundraising strategy, which eliminated the possibility of providing immediate continuity for the project. "The discussion on the partnership was not as dynamic as expected, and thus it did not generate all of the analytical material that could have been hoped for. Also, some aspects were not developed because it was not possible to discuss some of the foreseen questions. A check probably should have been made to see if the pilot questions were sufficient and adequate.

• A long-term working partnership was not consolidated between Universalia and Acceso as expected at the time the project was set up.

IV. Learned lessons

4.1 With respect to the concept and tools for self-reflection:

From what our experience of working with civil society organizations in Central America indicates, the concept of self-reflection is little known or usually limited to specific exercises applied in formal education. Likewise, there is a lack of knowledge about the existing set of methodologies for organizational self-reflection. Nevertheless, in daily practice, these organizations do design and implement different processes and instruments for the self-reflection of dimensions (programs, activities, operative units, etc.) or the organization as a whole. Unfortunately, these processes tend to lack much systematization and strong theoretical backing. As well, the task of systematizing the experience and giving it shape in a document so that it can also be applied by other organizations is frequently not undertaken.

Paradoxically, the OSR project has shown us how difficult it is to find self-reflection methodologies in Spanish, and that when there are versions in this language, they are usually instruments that have not been constructed with the knowledge and experience of Latin American CSOs, with the exception of OSANGO. It would be interesting if the same exercise in methodological adaptation that Universalia has developed with its IOA in Africa and Asia could be widely applied in Latin America with this or other self-reflection methodologies. In addition, it would also be a significant contribution to the institutional strengthening of organizations to more deeply research and systematize this wealth of resources and tools that are used pragmatically on a daily basis, as indicated above.

4.2 With respect to the relationship between Universalia's IOA and Acceso's MAPLI:

In general, the project improved and/or developed tools that link planning, monitoring and evaluation in a virtuous circle of institutional strengthening. This contributed to the development of our Acceso Methodology of Institutional Planning (MAPLI), especially through the review and incorporation of elements based on concepts and resources of Universalia's IOA. The theoretical framework for evaluating the performance of an
organization, which is the basis of Universalia's proposal, is a proposition that strengthens our own perspective on planning, in as much as it offers us new elements and because it is very compatible with our own approach to institutional analysis.

In regards to the relationship between organizational self-reflection (OSR) and strategic planning (SP), this project has enabled us to make the following major assessments:

- An SP process should be preceded by an OSR exercise that gives the organization itself and the facilitating entity a global overview of the institution's reality.

- With respect to the above, elements produced in the OSR should be concrete inputs or should enter directly into forming part of the contents and decisions made in the SP.

- In particular, beginning with the OSR methodology, the way in which to incorporate key elements into the SP could be considered, to enable organizations to count on the resources and input for their monitoring and evaluation from the very moment of planning. The OSR itself should be a resource for evaluating progress and changes produced by the organization's strategic planning. For example, an organization should carry out an exercise in OSR before the SP and later repeat it (that is, with similar methodology) two or three years after the strategic plan has entered into effect, making comparisons and respective decisions.

This level of expressing theory and methodology is one of the deepest and most sustainable dimensions for building a relationship of trust and cooperative work among organizations working with different, though complementary, aspects of institutional strengthening.

4.3 With respect to use of the Internet:

- The Internet can be a good accessory tool for institutional development, but it cannot substitute face-to-face contact. Beyond presenting concepts and resources, face-to-face work provides a more agile and opportune way for organizations to capitalize on the value-added expertise, specialty and creativity of its members, as well as of the consultant that accompanies them in their process of planning, monitoring and evaluation (including self-reflection). Direct interaction and feedback among people and groups continues to provide a privileged space for constructing socially relevant knowledge, in the dynamics of which it is possible to appropriately incorporate the use of tools such as new technologies.

- Regarding the use of the Internet as a research tool, the project helped Acceso internally share the use of the Internet as a research tool. It allowed the Planning, Monitoring and Evaluation Program staff to see the potential of the Internet as a research tool, particularly the information that it can provide regarding the interests, expectations, etc. of the users. Just as important for the organization's strategic interests are the synergies that a project produces in its relationships with other organizations, as well as within its own organization. New conditions can be produced and progress can be achieved in exchanging and providing feedback on capabilities, knowledge and the criteria of its members, for the sake of surpassing isolated, and encouraging multidisciplinary, work.
4.4 With respect to development of the partnerships (3):

Frequently, the steps taken for building a partnership are instrumental and concrete; that is, they focus on precise activities and products designed to be accomplished in the short-term. This is not to say that we can't aspire to (and that in effect we are not progressing towards) the construction of long-term partnerships by this route, partnerships with more shared values and closer relationships among the actors. Well-defined work with specific goals can provide the right conditions for progressing towards mutual knowledge and the building of trust needed by partnerships for a greater strategic scope. For partner organizations, this means evaluating both the immediate products of a project as well as the way in which these make an important contribution (even though partial and progressive) to achieving the larger strategic interests that ultimately motivate them to engage in a partnership.

From our experience with OSR, we feel the following are key aspects for the successful development of a partnership:

- The rules, objectives and participation (profile, limitations and scope) of the partners must be clear from the beginning and frequently revised.

- It is important that each partner reviews the evolution of its own strategic objectives and the way the project contributes to reach them, throughout the project.

- Frequent face-to-face meetings are very important for developing trust between the partners. Joint activities allow for a better understanding of the work of each partner, especially when the organizations can offer their expertise and knowledge to improve the capacities of their partners.

- Although it is not desirable, in practice, changes in personnel can affect the working chemistry of the team, thus posing a challenge to create new conditions for restoring that chemistry. This is a subjective area that is difficult to monitor, evaluate and redefine, however.

- From the beginning, and throughout the development of the project, it is important to evaluate the needs, situations, scopes and limitations posed by the cultural diversity of the partner organizations, in order to establish the best conditions and procedures possible for their participation. That diversity refers to the macro level (different cultures of the countries of the participating partners) as well as the micro level, with respect to organizational cultures (work styles, ways of relating to the context, institutional practices, models of financing, identity features, etc.).

(1) Although what is proposed in this first stage certainly does not attempt to address all issues of this long-term vision, it is considered a contribution and step forward toward achieving it.

(2) The monitoring module was drafted from scratch.

(3) This section takes into account all the points developed in the paper on partnerships prepared by Universalia, but will not reiterate them.