

Empowerment of the Blind

A Handbook for Organizations Of and
For the Blind and Visually Impaired

W. Aubrey Webson

Hilton/Perkins Program
Watertown, Massachusetts

This handbook has been developed as a project of the World Blind Union's Institutional Development Program, which is co-funded by the Hilton/Perkins Program, USA, Sight Savers International, UK, and the Canadian National Institute for the Blind.

Production of this publication has been jointly supported with funding from Charity Projects, UK, and the Conrad N. Hilton Program, Reno, Nevada, USA.

Empowerment of the Blind

A Handbook for Organizations Of and For
the Blind and Visually Impaired

W. Aubrey Webson
Hilton/Perkins Program

© 1997 by Hilton/Perkins Program, Perkins School for the Blind, Sight Savers International (UK), the Canadian National Institute for the Blind, and the World Blind Union

All rights reserved

Published by the World Blind Union Institutional Development Project,
Hilton/Perkins Program, 175 North Beacon Street, Watertown, Massachusetts,
USA 02172

For ordering information, telephone 617-972-7534 or fax 617-923-8076.

To ALAN JOHNS

Former Executive Director of Sight Savers International (UK)

*For his vision and belief in
and support for blind people throughout the world
during his many years of service in the field of blindness.*

TABLE OF CONTENTS

INTRODUCTION _____

Objectives	
The Concept of Institutional Development	
The Birth of the IDP Concept	
The Institutional Development Project	
The IDP Philosophy.....	
Four Levels of IDP Training.....	
Follow-Up Services and Activities	
Mentoring	
Who Will Benefit	
Additional Resources	

CHAPTER 1 THE CHALLENGES _____

A Success Story	
A New Era	
Challenges Faced by Blind People	
Meeting the Challenges	
Individual Empowerment	
IDP Training	
Mentoring	

CHAPTER 2 EMPOWERMENT _____

Definition of Empowerment	
Level 1 Training -- Empowerment	
Pre-Training Preparation	
Training Objectives.....	
Training Strategies	
Training Agenda Outline.....	
Training Agenda Details	
Follow-up Activities	
Networking	
Mentoring	

Employment of the Blind.....

 Four Approaches to Economic Empowerment.....

 Employment Opportunities

 Employment Inventory.....

 Typical Objections to Employment of Blind People

 Job Placement.....

 A Systematic Approach to a Job Search

Conclusion.....

CHAPTER 3 ORGANIZATIONS OF AND FOR THE BLIND _____

Historical Overview.....

The New Challenges

Issues and Solutions

Organizational Development.....

 The Grass-Roots Program

 Building a New Management Structure

 Development Tactics

 Building Cohesive Groups

 Components of Good Management

 New Role for the Board

Organizational Standards.....

Level 2 Training -- Leadership and Staff

 Leadership Pre-Training Preparation

 Leadership Training Objectives

 Leadership Training Strategies

 Leadership Training Agenda Outline

 Leadership Training Agenda Details

 Staff Pre-Training Preparation.....

 Staff Training Objectives

 Staff Training Strategies

 Staff Training Agenda Outline

 Staff Training Agenda Details.....

Networking.....

CHAPTER 4 VOLUNTEERS _____

- Effective Management of Volunteers**
- Issues and Solutions**
- Volunteer Recognition**
- Volunteer Assignments**
- Level 3 Training -- Volunteers**
 - Pre-Training Preparation
 - Training Objectives.....
 - Training Strategies
 - Training Agenda Outline.....
- Follow-up Activities**

CHAPTER 5 THE BOARD OF DIRECTORS _____

- Composition of the Board**
- The Challenges of Transition**
 - The Board as Managers
 - Role of the Board
- Developing A Mission Statement.....**
 - Mission Statement Examples
- Developing Organizational Goals and Objectives**
 - Example of Goals and Objectives
- Hiring the Executive Officer**
 - Developing the Job Profile
 - The Search Committee.....
- Developing Job Plans**
 - Annual Evaluations.....
- Cohesive Planning and Direction**
- Issues and Solutions**
- Qualities of Good Board Members**
- Job Descriptions**
- Level 3 Training -- Board of Directors**
 - Pre-Training Preparation
 - Training Objectives.....
 - Training Strategies
 - Training Agenda Outline.....
 - Training Agenda Details

Organizational Evaluation
 Guidelines for Organizational Self-Evaluation.....
Networking.....

CHAPTER 6 SENIOR MANAGEMENT _____

Understanding the Organizational System.....
 Customers
 Innovation.....
 Leadership.....
 People

Developing an Organizational System.....
 Management Sub-System
 Social Sub-System
 Task Sub-System

The Organizational Life Cycle.....

NGO Management Challenges.....
 Complex Organizational Structure.....
 Demand for Services Exceeds Supply
 Limited Funding Base.....
 Insufficient Trained Personnel.....
 Ambiguous Ownership
 Dependency on Volunteers
 Unpopular Decisions
 Leadership Vs Management
 Developing Work Teams

Level 4 -- Senior Management Training.....

Pre-Training Preparation
 Training Objectives.....
 Training Strategies
 Training Agenda Outline.....
 Training Agenda Details

CHAPTER 7 FUNDING _____

The Funding Challenge
Funding Development

The Funding Department
 Four Key Measurements

Donor Relationships

Fund Raising

Funding Responsibilities

Funding Methods

 Government Funding.....
 International Donor Funding.....
 Local Funding.....
 Cost Recovery

Level 4 Training -- Funding

 Pre-Training Preparation

 Training Objectives.....
 Training Strategies

 Training Agenda Outline.....
 Training Agenda Details

CONCLUSION _____

APPENDIX A INTERNATIONAL ORGANIZATIONS _____

APPENDIX B FINANCIAL POLICIES _____

 Preparing the Budget

 Cash Flow

 Banking

 Bank Transfers

 Cash and Payments

 Management of Expenses.....
 Bank Account Reconciliation

 Project Expenses

 Inventory and Stock.....
 Audited Statements

 Auditors

 Emergency Funding

APPENDIX C RUNNING EFFECTIVE MEETINGS _____

APPENDIX D REFLECTION FORM EXAMPLES _____

APPENDIX E HOW TO DEVELOP A PROJECT PROPOSAL _____

Writing the Proposal

Project Proposal Outline.....

APPENDIX F SPECIAL EVENTS PLANNING FORM _____

GLOSSARY _____

REFERENCE LIST _____

INDEX _____

TABLES

Table 1 IDP Training Levels.....

Table 2 Employer Objections and Responses.....

Table 3 Planning Hierarchy.....

Table 4 Fund Development Vs Fund Raising

FIGURES

Figure 1 NGO Organizational Chart.....

Figure 2 Holistic Management Lines of Communication.....

Acknowledgments

I wish to express my deepest gratitude to the Hilton/Perkins Program, Perkins School for the Blind, Sight Savers International (UK), and the Canadian National Institute for the Blind for funding the Institutional Development Project (IDP) and this handbook. I would also like to gratefully acknowledge Charity Projects for partial funding of this book and the World Blind Union for their sponsorship of the IDP. With their support, I have been able to advance my vision of empowerment of the blind.

For materials referred to in this handbook, I would like to thank Anthony Avril of the St. Lucia Blind Welfare Association for information about their *Value for Vision Coupon Book* project; Vanessa Bower, Director of Information and Fund-Raising for the South African National Council For the Blind, and Chris Friend, of Sight Savers International (UK), for guidelines concerning fund raising; the Canadian National Institute for the Blind, Ontario Division, for information about planning special events; the HireAbility Placement Campaign, Minnesota (USA) Division of Vocational Rehabilitation, for employer statistics and facts about workers with disabilities; and Bill Winkley, Suva, Fiji, for information about managing and recognizing volunteers.

The Ghana Association of the Blind (GAB) and the Uganda National Association of the Blind (UNAB) deserve special recognition for their commitment and untiring efforts to develop their organizations. Their accomplishments demonstrate what can be achieved with motivation, hard work, and self-belief.

I would also like to acknowledge the invaluable assistance of Lynda McElroy Pavlik, who assembled, organized, and edited five years of my writings and worked enthusiastically with me in writing this book.

Finally, although it is impossible to personally acknowledge everyone who has contributed to this book, I would like to thank the hundreds of people who have made valuable contributions to its concepts and to my vision of empowerment of blind people. These include my mentors, especially Kevin Carey, former Overseas Director of Sight Savers International (UK) for his vision in bringing me into the field of blindness services, all the blind and visually impaired participants in my training programs, and the managers and leaders of organizations of and for the blind in developing countries with whom I have spent countless hours discussing the issues confronting blind people.

About the Author

W. Aubrey Webson is a native of Antigua, West Indies. He holds an M.S. degree in The Management of Non-Profit Organizations and a post-graduate diploma in Organization Development from the New School of Social Research, New York City, New York.

He is currently employed at Perkins School for the Blind in the Hilton/Perkins Program. He is also the consultant to the World Blind Union Institutional Development Project. Since 1992, Mr. Webson has been the North American-Caribbean Region Chairman of the International Council for Education of People with Visual Impairment (ICEVI).

Mr. Webson has been involved in developing community-based organizations throughout his professional career. He was the Executive Director of the Caribbean Council for the Blind for six years. Prior to that, he was an activist for the rights of blind people in his native Antigua. He has also worked with organizations in Africa and the Pacific Islands, and has been associated with agencies of and for the blind in North America and the United Kingdom for the past fifteen years.

The Institutional Development Project (IDP) began in July 1990, at which time Mr. Webson was recruited as the IDP Coordinator to develop and implement the project. The IDP project office was located in St. Johns, Antigua, for two years and was managed by Sight Savers International (UK). Mr. Webson and the IDP project moved to the Hilton/Perkins offices in Watertown, Massachusetts, USA, in 1992, at which time administration of the project was assumed by the Hilton/Perkins Program.

Mr. Webson became blind at the age of 5 years. He now lives in Watertown, Massachusetts, with his wife, Rosemary, and their three children, Amber, Kamali and Kemba.

Introduction

This handbook is designed for people in developing countries who work with organizations of and for the blind and visually impaired.

It is a guide for organizational development initiatives with an emphasis on the inclusion of blind people in all aspects of their organizations. It is also a guide and reference for those who work on behalf of blind people.

Rather than being a “*how-to*” book, this handbook is a set of guidelines. Individuals and organizations must meet the challenges imposed by their own unique set of circumstances. Therefore, these guidelines are to be used and modified according to the specific needs of each individual and each organization.

These guidelines have evolved gradually based on the experiences of the Institutional Development Project (IDP) over a five-year period in Africa, the Caribbean, and the Pacific Islands.

Objectives

The six major objectives of this handbook are to:

- Provide information on new ways of training so that organizations can improve their delivery of services to people who are blind.
- Strengthen the management and operational capacity of organizations that provide services to blind people.
- Empower blind individuals to take an active role in their organizations and their communities at large.
- Introduce new ways of thinking about independent living and integration of blind people within the broader context of their society.
- Expand the role of blind people in organizations that currently exclude them.
- Contribute ideas for expanding services to reach blind people who are currently not being served.

The Concept of Institutional Development

Within the concept practiced by the IDP, the definition of *institution* is:

“The coming together of the organization, the clients served (that is, the blind and visually impaired), and the community in which the organization operates.”

Therefore, *institutional development* refers to the building of a system that responds to the needs of an organization, the clients served, and the community. The purpose of this system is to maximize the available resources for everyone’s benefit.

The Birth of the IDP Concept

The author of this handbook, who lost his sight when he was a child, has for years had a vision of placing control of the blind consumer movement and the delivery of services for the blind into the hands of the blind. To this end, he has concentrated his professional career and his energy into training blind people for leadership and independent living within their communities.

From his early efforts and personal experiences, the concept of the IDP was born.

From the beginning, the IDP concept promoted a comprehensive approach to drawing blind people into the process of developing organizations and delivering services. Rather than focusing on only a few leaders, the IDP concept encompasses *everybody* by building from the grass-roots level.

The IDP philosophy emphasizes the need to reach into the body of the blind movement and to touch individuals across the spectrum. This philosophy extends into the community at large so the community and its blind members can develop a better understanding of each other’s goals and needs.

To implement this philosophy, the IDP has developed four levels of training. This approach is designed to help blind people, their organizations, and their communities understand and develop with each other. Together, they are strengthened. Together, they can more effectively meet the challenges that face them.

The Institutional Development Project

In July 1990, the Institutional Development Project (IDP) was formally instituted by the World Blind Union, Sight Savers International (UK) formerly known as the Royal Commonwealth Society for the Blind (RCSB), the Hilton/Perkins Program (USA), and the Canadian National Institute for the Blind.

The IDP is dedicated to strengthening the management of national organizations of and for the blind. Its fundamental philosophy is to work towards the total involvement of blind people at *all* levels within *all* organizations.

After five years of practical experience in fourteen developing countries, the funding agencies decided to compile these experiences into this handbook.

Two of those countries, Ghana and Uganda, have received a full cycle of IDP training and follow-up activities described in this book. The success of the IDP program has been clearly demonstrated by individuals in both countries. They have shown significant improvement in their delivery of services to blind people and in the increased role of blind people in their organizations.

An independent evaluation of the IDP and its effect on the quality of life of blind people and their organizations was conducted in 1993. This evaluation showed a substantial improvement in the quality of life for blind people. It also provided concrete evidence of improvements in organizational structure and management. Three organizations reported a 70 - 100% increase in the number of blind persons served.

Advocacy efforts by and for the blind also improved as a result of the increased role of blind individuals within their organizations. Many of those who participated in the evaluation process recognized and cited a significant increase in their self-confidence. Their newly-found confidence enabled them to be more independent in their communities and eager to empower other blind and visually impaired persons.

IDP training for two national organizations of the blind in Uganda and Ghana launched these organizations into new and significant roles representing blind persons. Before their involvement with the IDP, neither of these organizations was directly involved in blind services nor taken seriously as advocates for the needs of the blind.

It is hoped this handbook will enable many more individuals and organizations to achieve the same—or even greater—success in their own countries.

The IDP Philosophy

The achievements to date in Uganda and Ghana substantiate the validity of the IDP philosophy that stresses the importance of the individual. It is a core conviction of the IDP that the power of the individual can shape organizational culture and bring about social change.

To implement this core conviction, the IDP places an emphasis on training programs that concentrate on the development of a positive self-image and empowerment.

The philosophy of empowerment recognizes that blind people need to develop a sense of their self-worth, enhance their personal skills for living with blindness, and improve their ability to access information. As training progresses, blind people are better prepared to take on more meaningful and effective roles within their community and their organizations.

Four Levels of IDP Training

There are four levels of IDP training. They are described in detail in the following chapters:

Level 1 -- Chapter 2, Empowerment training for the blind

Level 2 -- Chapter 3, Leadership training

Level 2 -- Chapter 3, Staff training

Level 3 -- Chapter 4, Training of volunteers

Level 3 -- Chapter 5, Board of Directors training

Level 4 -- Chapter 6, Senior management training

Level 4 -- Chapter 7, Training for fund raisers.

These chapters contain guidelines for pre-training preparation, training strategies, objectives, and agendas. These guidelines should be modified as necessary to accommodate local needs and cultural values.

Follow-Up Services and Activities

To support and reinforce formal training, follow-up services are available to organizational leaders from the IDP Coordinator. These services include:

Assessment of organizational structure and effectiveness

Assistance in development of project proposals

Guidance in setting up mechanisms to monitor and evaluate programs

Assistance in conducting additional training programs.

Examples of follow-up activities to be initiated by individuals and organizations are described in Chapters 2 and 4. These activities reinforce training concepts and should be integrated into the training programs.

Mentoring

A mentor is described as *“a wise and trusted counselor or teacher.”* The mentoring policy implemented by the IDP has been a cornerstone of its success during the past five years.

One feature of the IDP’s strong mentoring policy is the availability of support and guidance from the IDP Coordinator to leaders in the developing countries who are implementing change in their organizations.

An equally important feature of this policy is the development of local mentors. Because of its immeasurable value, the process of mentoring is described and encouraged throughout this handbook.

Who Will Benefit

The three primary groups of people who will benefit from this handbook are:

Blind and visually impaired people:

Who run organizations of and for the blind

Who are advocates of and for the blind

Who are community leaders.

Staff and directors:

Of organizations that provide services for the blind

Of organizations that provide services but currently exclude the blind.

IDP Trainers:

At the local level

At the regional level

At the national level.

Additional Resources

Technical terms, acronyms, abbreviations, and specialized terms relevant to this book, chiefly in the field of blindness, are included in the glossary.

Additional resources are listed in the reference list at the end of the book.

Chapter 1 The Challenges

Blind people face many challenges when seeking equal opportunity within the life of their communities. Without support and guidance, these challenges can appear overwhelming.

How can the loneliness of blindness that is brought about by the stigma associated with blindness in our culture and our community be defeated?

“Each of us must be the change we want to see in the world.”

Mahatma Gandhi

How can blind people become better integrated into a world that includes all people, both blind and sighted?

How can they get more involved in the organizations that provide services for their special needs?

Challenges also exist for leaders of organizations of and for the blind.

How can leaders of small organizations appropriately separate the roles of staff and volunteers?

What are the most important functions of the officers of these organizations?

What are some efficient ways to provide services, develop budgets, project proposals, reports, financial statements, and evaluation tools?

How can a committee become more effective?

How can an organization effectively respond to the needs of a national membership with dozens of branches but an operating staff of only two or three people?

These are all difficult—but not insurmountable—challenges, as proven by the success of the Institutional Development Project (IDP) during the past five years.

A Success Story

Since it became affiliated with the IDP in late 1990, the Uganda National Association of the Blind (UNAB) has metamorphosed from a disorganized group of enthusiastic blind people to an effective and well-managed organization that has achieved significant success. Their accomplishments have enabled the UNAB to gain credibility in the eyes of its members and the general public.

Blind people in Uganda, for the first time, are influencing the development and delivery of services through their own organizations.

Since 1990, the UNAB has been responsible for a sixty-seven percent (67%) increase in the number of its branches.

It now provides support to more than one thousand blind people, a forty percent (40%) increase.

It has established a national office in Kampala.

It provides training for its personnel at all levels.

The UNAB has established income-generating projects for several of its branches.

It supports a special family rehabilitation and counseling program for blind women.

It supports other advocates for the blind.

It has been instrumental in tripling the numbers of blind children attending school.

It works with a national support group for parents of blind children.

It supports the development of a deaf-blind association that provides services for deaf-blind persons.

It has increased by forty percent (40%) the number of blind people involved in programs for the blind.

It has reorganized its structure to include a cross section of blind people.

It has organized local and international fund raising campaigns.

It is developing local resources to help support many of its activities.

Another notable accomplishment occurred when the first parent development and awareness workshop was held in Uganda with the support of the IDP. UNAB believes the role of parents is critical in developing its programs and in building the nation's awareness of the needs of the blind.

The overall success of the IDP project in Uganda was summed up in an article¹ written by the late Nelson Isiko (then Secretary General of UNAB and later its first Executive Director):

“The role of the IDP in Uganda can be said at the personal level to mean empowerment and hope for those blind persons who have received direct benefit through the programme.

At the organizational level, the IDP has brought hope, direction, and information to UNAB. UNAB is undoubtedly a better and stronger organization because of intervention of the IDP.

Blind persons in Uganda have seen another way, and life once again has meaning. IDP in Uganda means to blind persons, through their organization, new thinking and approaches in running their organization, clear and realistic planning, proper management, effective meetings, and effective planning in the development of services. A new role for blind persons and their organizations in the nation has been opened through the efforts of blind persons themselves as a result of this project.

IDP means the regaining of credibility by blind persons in the eyes of the public.”

The success of the UNAB clearly demonstrates what blind and visually impaired people can achieve when they develop self-confidence and receive appropriate training to assume leadership roles within their community and organizations.

A New Era

The 1980s ushered in a new era of development and mobilization of disabled people. The United Nations (UN) Declaration of 1981 as the *International Year of Disabled People*—and the subsequent UN Declaration of 1983-1992 as the *International Decade of the Disabled*—gave legitimacy and status to the disabled people's movement.

This new concentration of disabled people, with an increased focus on our rights, was of great importance to organizations of the blind. It enabled us to bring attention to our needs and to assert our rights for self-determination.

The newfound attention given to disabled people was strengthened by the birth of Disabled People International (DPI), an international movement of disabled people that created a global linkage of cross-disability organizations and peoples.

During this same period, blindness organizations in developed countries reinforced their ranks at the international level. Two international blindness organizations, the International Federation of the Blind (IFB) and the World Council for the Welfare of the Blind (WCWB), pooled their resources. In 1987, these two organizations gave birth to the World Blind Union. This gave additional strength to the movement.

The growth of the movement outside of developed countries, however, was much slower. It was especially ineffective in Africa. Although the Uganda National Association of the Blind (UNAB) and the Ghana Association of the Blind (GAB)

¹ Nelson Isiko, “Uganda and the Institutional Development Project,” *The World Blind*, 36-38

were founded in the early 1970s, both remained almost entirely dependent on international, non-governmental organizations.

These organizations coddled and protected their blind consumer groups. In effect, they enabled them to continue operating primarily as social clubs for blind people. Although the intentions of these organizations were altruistic, their attitudes were, for the most part, patronizing.

These attitudes reinforced the existing paternalistic views of society towards blind people, as well as the views of the people who were providing services for blind and visually impaired people. Empowerment of the blind was not a goal.

Challenges Faced by Blind People

Despite decades of program development by many well-intentioned organizations and significant financial investments, *the majority of visually impaired people in the world today receive no services at all*. Many blind people will never have an opportunity to fully participate in their communities.

Most continue to wait and hope. Unless dramatic improvements are made, they will wait and hope forever.

For the sighted, the reality of blindness—and the desires and needs of blind people—is habitually shrouded in mystery. People who can see need to understand the physical and emotional challenges faced by those who cannot see. Sighted people need to develop a deeper appreciation of the difficulties faced by blind people who are disenfranchised but seeking to participate in their own progress.

Organizations for blind people all too often exclude them from decision making. Some organizations are even reluctant to include blind people on their management teams or as participants in their program development process.

Yet who can understand the challenges confronting blind people better than they themselves.

Isolation

Despite advances in technology and new approaches to health care and social services, most blind people continue to live on the fringe of society. They remain among those who are the most needy. This has been exacerbated by the fact that many organizations of and for the blind have historically worked in isolation. By working in isolation, blindness has remained a mystery to the community at large.

Therefore, one of the foremost challenges is to de-mystify blindness through greater understanding and integration.

Scarce Employment and Social Opportunities

Another major challenge is the scarcity of employment and social opportunities for blind people. Those who are totally blind suffer the most. They join the increasing numbers of severely disabled people who are either entirely left out, or, at best, receive only token attention.

The lack of employment opportunity is primarily found in rehabilitation services offered at the community level. Even with the assistance of technology, professionals have difficulty in placing severely impaired and sensory impaired people in appropriate employment. This can be traced, at least in part, to the lack of communication between employers and disabled people—most employers simply do not know how to teach or talk to disabled people.

Erroneous or incomplete information often distorts the initial perceptions of potential employers. For example, most employers have an ingrained expectation that all blind people have problems with mobility and performance.

Nonetheless, in many developing countries, blind people are among the best academically trained of the community of disabled people. Yet, in spite of this, few social or economic opportunities are available to them after leaving school due to the lack of understanding of and services for the adult blind population. In Ghana and Uganda, despite increased efforts and notable successes, a conservative figure shows that *less than three percent (3 %)* of the *employable* blind and visually impaired population is currently at work.

Cultural Attitudes

Negative attitudes and cultural taboos about blindness are another major challenge facing blind people. As a consequence, they are often denied participation in the social interactions required for the natural development of personal relationships and effective community involvement.

Blind people who have broken through these barriers have frequently assumed leadership roles in the cross-disability movement. Their success has generally been attributed to the support they received from their family and community network.

Because of the negative attitudes entrenched in their culture, many blind people have low self-esteem. Yet blind people have the capacity to become advocates and leaders. *Blind people lack sight, not intelligence.*

Low Self-Esteem

Once they have the opportunity to develop their self-esteem and self-confidence, it has been proven repeatedly that blind people have the capacity to become active and productive members of their community and organizations.

But first, blind people must meet the challenge of learning how to take pride in themselves. For the person who is congenitally blind, the path to self-pride may be new and uncharted territory. For those who have lost their sight, this may require that they regain the pride they lost along with their sight. They need to develop (or redevelop) confidence in their own abilities.

To accomplish this, blind people need to gain (or regain) their position within their society's culture. They need to be exposed to the dynamics of group behavior and learn how to work effectively within those dynamics. They need to understand the social and cultural barriers confronting them if they are to effectively break them down. And they need information about what resources and services are available to them.

IDP empowerment training gives them a resource by focusing on building their self-esteem and self-confidence. With increased self-confidence, blind people are able to actively—and more forcefully—participate in the life of their community and their organization. Indeed, the participation of empowered blind people has proven to be extremely effective in influencing services delivered to the blind.

Insufficient Rehabilitation Services

In most developing countries, however, resources and rehabilitation services for blind people are very limited. In many cases, services do not exist at all.

The largest number of blind people in developing countries lives in rural areas. Nevertheless, the rural blind in developing countries—especially the rural poor—frequently receive no services whatsoever. Schools and institutions for the blind are nearly always located in urban areas.

Even though the importance of community-based development programs is being increasingly recognized and emphasized, *much* more needs to be done to benefit rural blind people. The IDP attempts to address the issue of neglected rural areas by creating equal opportunities for blind people throughout an entire nation and by stressing the need to expand services into rural areas.

When rehabilitation services are lacking, blind people are challenged, on their own, to find new ways of continually combating negative attitudes and cultural taboos about their disability. If they are fortunate, they will be able to draw strength from their family, their community, or their organization to counteract these negative attitudes. If they are unfortunate and have no outside resources to give them strength and guidance, they will continue to live in isolation.

Inadequate Local Support

Currently, the majority of services for blind people in developing countries is funded by international sources. If services for the blind are to reach a nation's entire population, local and national organizations must accept the challenge of providing a greater share of funding. These organizations must also assume more responsibility for the expansion of services for their national population of blind people.

Limited Roles of Volunteers

Services for blind people can also be dramatically expanded by volunteers who share their skills within their organizations. Rather than limiting themselves to traditional forms of volunteer effort, volunteers can help meet the challenge of service expansion by sharing homemaking, childrearing, farming, musical, social, management, business, financial, and professional skills.

Insufficient Management Training

Although enthusiasm, hard work, and self-motivation are amply demonstrated by managers of organizations providing services of and for the blind throughout developing countries, these qualities need to be supplemented with solid management training.

Currently, management training is severely lacking. As a consequence, organizations of and for the blind are frequently less effectual than they could be. All too often, they are dependent upon the leadership of a single individual. The loss of that individual from the organization can have a devastating effect.

Small Leadership Pool

Consequently, there is an acute need to develop leaders, staff, and stable organizations. Until this challenge is met, organizations of the blind will remain fragile. So long as they depend on only a few leaders who, themselves, may require training, these organizations will be unable to achieve their full potential. Only then will they be able to develop stable organizations through which they can carry out their work. Only with sustainable organizations can services to communities of blind people be effectively and significantly expanded.

Lack of Schooling for Blind Children

The fragility of organizations of the blind in Africa is compounded by the fact that less than five percent (5%) of blind and visually impaired African children are currently in school. Yet blindness has *no* correlation to a child's capacity to learn. The ninety-five percent (95%) not in school represents an appalling wastage of talent and potential leadership for Africa's future.

It has recently been estimated that 7.1 million blind people² live in Africa, of which 3.5% (248,500), are children up to the age of 15 years. This estimate is based on the World Health Organization's definition of blindness as "*a best corrected visual acuity of less than 3/60*".³ With less than 5% of these children in school, it can be further extrapolated that fewer than 12,400 blind children in the whole of Africa are receiving a formal education. Conversely, that means more than 236,000 blind African children are receiving no formal education whatsoever!

Gender Inequality

² "Commentary," *British Journal of Ophthalmology*, Vol. 80 (April 1996) 276-277

³ From the World Development Report 1995

Much more training for blind women is also needed in developing countries. They, like their sighted counterparts, must support their families through child care, homemaking, and agriculture. Despite this, blind women receive the fewest training opportunities and the least opportunity for regional interaction. Therefore, the challenges of providing health care, rehabilitation, home management training, and employment for blind women in developing countries are immense.

Meeting the Challenges

The goal of the IDP and this handbook is to help blind people meet these challenges.

It has been clearly shown that the process of change begins by actively involving blind and visually impaired people. The IDP philosophy is to develop their capacity for self-esteem and self-reliance.

The goal of the IDP philosophy is to enable blind people to lead more meaningful and fulfilling lives. This, in turn, enables them to become an influential force within organizations of and for the blind.

One of the IDP's objectives is to help blind and visually impaired people learn how to fully participate in the development and decision making of their families, their communities, and their organizations. To be effective, however, it has also been proven that they must be trained and re-trained in preparation for their new roles.

The experiences of the IDP have repeatedly demonstrated that three activities create a powerful combination for successfully meeting these challenges:

- Individual empowerment
- Training
- Mentoring.

Individual Empowerment

If blind people are to change their roles and the roles of their organizations, they must first have confidence in themselves and their abilities. When few or no rehabilitation services are available, the IDP empowerment training process plays a dual role:

- It builds rehabilitation concepts.

- It provides information about organizations and resources.

The rehabilitation concept is of *critical* importance because it helps the blind person enter into a process of self-taught rehabilitation. During the process of empowerment training, blind people have the opportunity to share information about blindness and survival. They receive practical training, such as how to use the white cane, a symbol and tool of independence. They receive information that helps them function with more independence and self-confidence. They focus on their individual development and the building of their self-confidence.

The goal of IDP training is to *educate*. Whereas training is a reaction to a specific need, education instills long-term behavior and ways of thinking. Education has an impact on the way people function when confronted with a

situation. Education helps people analyze and creatively solve problems on their own. These skills are the long-term goals of empowerment training.

The empowerment training process focuses upon the following four areas that have proven to be those of greatest need:

- Skills specifically related to blindness

- Personal, self-development skills

- Social integration skills

- Confidence-building skills for blindness rehabilitation.

Once a blind individual has developed these skills, he or she can better understand and cope with the condition of blindness, as well as the complexities of community and organizational life.

IDP Training

The IDP philosophy is implemented through an educational process delivered through training workshops, follow-up activities, seminars, and conferences.

It begins with an individualized approach for reaching and empowering blind and visually impaired people—this is the core of the IDP. Without empowerment of blind people, the IDP philosophy cannot be achieved.

IDP training continues with progressive levels of training for blind leaders, volunteers, board members, senior managers, and fund-raisers. It also emphasizes organizational assessment and development, and the creation of networks and alliances between organizations. The four levels of IDP training are described in Table 1.

Table IDP Training Levels

Training Level	Description	Target Audience
Level 1	Empowerment Training	Blind and visually impaired people
Level 2	Leadership Training	Blind and visually impaired leaders of organizations
Level 2	Staff Training	Staff members
Level 3	Training for Volunteers	Volunteers
Level 3	Board of Directors Training	Board members
Level 4	Senior Management Training	Senior managers
Level 4	Funding Training	Senior managers and fund raisers

Mentoring

As people progress through training and change, questions and problems are bound to arise. The availability of counseling from an experienced mentor provides invaluable support and advice. Through a *network* of mentors, a community, an organization, or even a nation can exponentially expand its knowledge, support, and services of and for the blind.

Chapter 2 Empowerment

To be *empowered* means that our inner being—*our unique Self*— is invested with power and inner strength. When we *feel* empowered, we can meet challenges with confidence. When we fail, we do not feel defeated but ready to try again, learning from our mistakes.

Once we are empowered, we have personal power and control over our lives. We have positive self-images that are affirmed and sustained.

Empowerment of the blind individual is the primary focus—the *raison d'être*—of the Institutional Development Project (IDP). It is the belief of the IDP that we blind people cannot live our lives to the fullest nor can we be effective participants in our families, communities, or organizations unless we are confident of ourselves. Consequently, there must be an enormous concentration of effort on the development of a blind person's:

- Self-awareness

- Self-assurance with the overall issue of blindness

- Self-confidence for successfully coping with his or her environment

- Self-belief.

Service organizations and agencies have been unable to effectively use the grass-roots potential, that is, the potential of the blind population itself. The *enormous* importance of self-motivation has been ignored.

There is clearly an urgent need to improve and increase services for blind people, particularly those who currently receive no services at all. However, just throwing more resources at this problem will not solve it.

What is needed instead is a dramatic shift in thinking.

The enormous potential of empowerment of the individual must be recognized by organizational leaders and funders.

These leaders must incorporate individual empowerment as a program strategy within rehabilitation and development.

These leaders must focus on and utilize local human resources and self-help, including the family.

They must acknowledge and respond to the cultural nuances and needs of different regions.

They must develop a realistic 'menu' of strategies for economic empowerment, compensating for and recognizing the varying abilities of blind and visually impaired people.

They must change and improve their efforts to reach the unserved and the underserved.

They must undertake a complete review of their organizational structures, philosophy, attitudes, and methods of delivering services—and be prepared to completely change them if necessary.

If organizational leaders think they are already doing a good job and do not need to undertake self-examination or make changes, then they need only compare their results against the actual numbers of those in need.

A new way of thinking and a new strategy are clearly needed—a strategy that will help individuals meet the challenge of delivering services in new ways to much larger numbers of blind people.

As a blind individual myself growing up in my own small community in the West Indies, I was deeply influenced by role models. These role models had an effect upon what I thought I could be and could achieve. In my case, where there were no rehabilitation services available for blind people, I learned to use the white cane, I learned about personal grooming skills. Perhaps most importantly of all, I learned to be self-confident.

My role models also had a positive effect upon the attitude of the community towards blind people. A few empowered blind individuals made a profound difference in the lives of many people.

Respect of self and respect from others is critical if we, as blind people, are going to be socially integrated within our communities. Economic or social independence cannot come without self-confidence and self-belief. Skills cannot be developed and maintained unless we believe in ourselves.

Rehabilitation training, when available, generally concentrates on psychological adjustment and the development of coping skills, that is, techniques for daily living, orientation, and mobility. However, the vast majority of blind people in developing countries have no access to any rehabilitation training at all.

In the absence of rehabilitation, the IDP empowerment training described in this handbook fills a critical need. Even when rehabilitation *is* available, empowerment training can add a new dimension of self-confidence to the blind individual.

The three principal groups in which blind people participate are the family, the community, and the organization or agency providing services for blind people. If a blind person is unable to participate in a meaningful way or to make a contribution within the family, he or she will be unable to participate or contribute at any other level. Empowerment training seeks to enable blind people to learn how to participate and contribute in all three groups.

In this chapter, you will find an overview of empowerment training as practiced by the IDP. Also included are training objectives, strategies, and guidelines for a training agenda.

It's up to you and your organization to adopt and adapt the objectives, strategies, and agenda according to your own needs, your own resources, your own culture. Each individual and group will give its own personalized flavor to the training. Empowerment training cannot be a static program. It's neither designed nor intended to be followed rigidly.

The training program and its leaders also need to be flexible to be certain they meet the participants' needs. If participants have concerns that are not part of the formal training agenda, the agenda should be modified on the spot so these needs are addressed, not ignored. Spontaneity, warmth, acceptance, honesty, openness, and flexibility are all ingredients of successful empowerment training.

Definition of Empowerment

In an article about blind students, empowerment was defined by James Omvig⁴ as follows:

“A school may be said to empower the blind or visually impaired student to the extent that he or she is equipped with the tools—the knowledge, skills, motivation, and self-confidence—which are necessary to enable him or her to take charge and to make sound judgments and decisions based upon fact, skill, and ability so that the student can be the best adult which he or she is capable of becoming.”

The IDP embraces this definition. It focuses on providing the individual with factual information and exposure to the skills needed to function effectively with blindness. It also creates opportunities for blind people to share experiences, to develop their capacity to make rational decisions based on facts, and to fully use the skills and abilities they possess.

⁴ James H. Omvig, “Empowering The Blind Student,” *The Braille Monitor* (April 1994)

The four fundamentals of empowerment are:

Knowledge

Skills

Motivation

Self-confidence.

IDP empowerment training can be the key that opens the door to the empowerment fundamentals—indeed, to the *concept* of empowerment.

For many blind people, it may be their first exposure to these ideas. Opening that door may be the key to changing their lives forever.

The Story of Peter

Peter was a bright, young, well-trained university graduate, a leader in an organization of the blind in West Africa. He and his colleagues were always vocal about issues but never took action or control of the issues.

Then Peter attended an IDP empowerment training workshop. On the day the workshop was over, Peter had to go into the town on some business. As usual, he needed a guide and transport, so a relative picked him up and they went into town together. After Peter had taken care of his business, his guide told Peter to stand on the street corner and wait for him for about thirty minutes. And his guide went off, leaving Peter alone on the street corner.

As Peter stood there, he started thinking about what he'd learned in the workshop. "I'm *empowered*," he thought. "Why am I just standing here?" So, he took his cane, hailed a taxi cab, and went home by himself.

He realized at that point he didn't have to depend upon others to go where he wanted to go. He didn't need a guide. He was free to come and go as he pleased.

This is a true story that is simple but powerful.

Five days of empowerment training can only scratch the surface of all that needs to be taught and learned. But it can be a powerful catalyst—a catalyst for change and growth. With exposure to new knowledge and skills at the IDP empowerment workshop, the blind individual *can* develop the self-confidence and motivation to continue the process of growth.

Level 1 Training -- Empowerment

When blind and visually impaired people attend an empowerment training workshop, it is for many often the first time in their lives they have been part of an interactive group of blind people. In this group, they have the opportunity to share their experiences, to explore together the causes and conditions of blindness, and to talk about how others view them—and how they view themselves. This process of sharing can be liberating and exhilarating. It is a first—and very important—step towards self-awareness and self-confidence.

An empowerment training workshop reaches only a few people at a time. Consequently, it's important to continually repeat the workshop for new groups. It's equally important to provide follow-up training in specialized subjects (for example, how to seek employment) for those who have participated in previous workshops.

During the workshops, mentors need to take note of the natural leaders who stand out in the group. These people can—and *should*—be encouraged to become mentors for future empowerment training workshops. By increasing the number of mentors, you increase your ability to reach ever-increasing numbers of blind people.

Pre-Training Preparation

Select mentor.

Select time frame (for example, 5 days, one day per week for 5 weeks, or some other combination).

Select dates.

Determine workshop size (25 is considered the ideal maximum; however, up to 40 people have been accommodated when required).

Select location.

Estimate expenses.

Locate funding.

Arrange for housing and meals (if required).

Organize training agenda.

Prepare training materials, all of which must be in a format accessible to blind people.

Advertise workshop.

Register students.

Training Objectives

The following training objectives for an empowerment workshop are suggested, based upon prior experience by the IDP.

- Provide blind participants with an environment that allows them to easily share information with each other.
- Provide information to blind participants about areas of interest regarding conditions and causes of blindness and about skills and techniques for living with blindness.
- Share first-hand information with blind participants about successful strategies for functioning with blindness by overcoming psychological barriers and negative attitudes.
- Expose blind participants to practical information regarding techniques used in functioning with blindness.

Training Strategies

As you gain experience with empowerment workshops, you will discover what works and what does not work. Participants' feedback during the final session is an invaluable source for improving your strategies.

These guidelines have been tested over a five-year period by the IDP.

The mentor is *critical* to the success of the training workshop. An essential qualification of the mentor is that she or he *must* be blind or visually impaired.

The mentor should be flexible, spontaneous, a good listener, and possess good 'people' skills (that is, be able to easily talk to the participants, draw them out, help them relax, and push them to participate if necessary).

The mentor needs to demonstrate good blindness coping skills, be open-minded, and self-confident about the condition of being blind. The mentor fills the roles of teacher, role model, and facilitator.

Although mentors do not require formal training as teachers or facilitators, they do need previous exposure to empowerment workshops. They also need to work closely with their own mentor. They need some training about how to lead a group and how to challenge outside speakers. A broad knowledge of services for the blind and eye care is always useful; it may be *necessary*, depending on the group.

Work is done in small groups until everyone feels comfortable.

The mentor shares personal, first-hand information.

The mentor circulates among the small groups in order to share his or her experiences and to be seen as a participant.

The large group is brought together for general discussion. This should be focused around major issues expressed in the small groups.

Be flexible at all times; never follow a rigid agenda.

The workshop is tailored to local culture and participant requirements.

No question or concern expressed by any participant is ignored.

Answers to questions are always given when known—no one (including the mentor) is afraid to say “*I don’t know.*”

Participants are asked to help answer questions about which the mentor has no experience. The best lessons may be learned from someone with directly related experience.

The mentor neither dominates the group nor gives the impression that he or she knows it all.

Training Agenda Outline

The following empowerment training agenda is based upon IDP experience. However, you should modify it according to your requirements and resources. These recommendations are made because they have worked for the IDP. Your agenda may use parts or all of these suggestions. Evaluate each workshop you run. Recognize what works for you—and what doesn’t work. Build on your experiences. Modify your agenda accordingly.

Introduction

Share personal goals

Discuss causes of blindness

Discuss the condition of blindness

Discuss coping with blindness

View of blindness by outside speaker

Discuss ways to change the speaker’s views

Practical training

Resource information

Information about organizations of and for the blind

Evaluation (verbal and/or written)

Wrap-Up

Training Agenda Details

Following is a detailed description of the workshop and recommended approaches to empowerment training that have proven successful.

Days 1 and 2

Introduction. Open the workshop by introducing the blind mentor. After being introduced, the mentor sets the stage for the training. The mentor shares personal experiences related to blindness and attempts to put everyone at ease. He or she explains the empowerment workshop so participants know what to expect.

Share Personal Goals. Participants are then asked to openly discuss their personal reasons and goals for attending the workshop. This discussion may take place in the large group—or it may take place in small groups if the participants feel reticent about opening up in the large group setting. They are asked to share their reasons and goals (to the extent they feel comfortable doing so) with the large group.

Discussion About Causes of Blindness. An eye-care specialist leads a discussion about the causes of blindness. This specialist needs to be someone with technical knowledge about blindness and the eye; for example, it could be an ophthalmologist or an ophthalmic nurse or assistant. A ‘Question and Answer’(Q&A) period is an important part of this discussion. The mentor encourages the blind participants to ask questions. The mentor asks for clarification from the speaker if questions are ignored, answered incompletely or incorrectly, or deflected.

Discussion About the Condition of Blindness. The group discusses the condition of blindness. The mentor encourages the participants to speak freely about their personal experiences, their feelings, their fears, and their hopes. What things make them feel excluded by their families and communities? What makes them feel included?

Discussion About Coping With Blindness. Participants share experiences about how they cope with being blind. Coping skills are discussed in detail. What problems do they face? How do they handle them?

Sighted Speaker. A sighted speaker from the outside—one who does not work with blind people—is brought in to share his or her views about blindness and blind people. Good candidates for delivering this talk are people who are not directly connected with delivering services to the blind; for example, people from welfare or social service agencies, other non-government organizations (NGOs), educational institutions, or the Lion’s or Rotary Clubs.

An important part of this session is giving feedback to the speaker after the talk is finished. The feedback can be quite revealing for both the participants and the speaker. Depending upon the views expressed, it can also be difficult on the speaker! The mentor needs to be aware this is often a contentious session.

Discussion About Ways to Change the Speaker’s Views. Participants, in the absence of the speaker, discuss ways and means for changing the views expressed by the speaker, and, potentially, others with discriminatory, misguided, or misinformed attitudes and views.

Day 3

Practical Training. One of the primary goals of practical training is to expose participants to new possibilities—and to new ways of thinking about coping with

blindness. In this session, participants are shown ways in which they can remove barriers in order to have a more involved and fulfilling life. They are taught there are no boundaries to what they can achieve as long as they have sufficient motivation.

Practical training provides an opportunity to teach participants how to manipulate the white cane for safe travel. Many participants will have had no exposure to safe cane travel. Some may have never even seen a cane. By learning to properly manipulate the cane, they can increase their mobility and independence, and learn to get around without a guide.

Examples of other topics for this session could be discussions about how to dress appropriately for different situations, how to interact on different social occasions, and how to modify games so they can participate.

Day 4

Share Vital Information. Information is shared with participants about local and national resources available to them and to their families. This may include information about any subject of potential value. For example, it could be about housing, employment, services for the blind, services for low-income people, and so forth. The personal reasons and goals expressed on Day 1 are a guide to the participants' biggest concerns.

An outside speaker is valuable at this session. The speaker might be a local or national social welfare officer, a local agricultural officer, or an official from a development program that targets poor, underprivileged, or low-income groups. A Q&A (Question and Answer) period should be a part of this session.

Day 5

Information About Organizations Of and For the Blind. Explain the various local, national, and international organizations of and for the blind, what they do, and ways in which they may be of help to the participants. A list of some of these organizations is included in Appendix A.

Evaluation. The final session is an opportunity for participants to give feedback to the mentor and to evaluate the workshop. The evaluation may be verbal, written, or both.

Ask the participants how they feel about what they have heard and learned. Have their personal reasons for coming and their goals been met? What was most useful? What would they like to see changed in future workshops? How do they think the workshop could be improved? Feedback from the participants should be utilized for improvements to future workshops.

Has it encouraged them to set personal goals for the future? Ask them to share these goals with the group (if they feel comfortable doing so).

Wrap-Up. In the final wrap-up session, encourage follow-up activities by the participants. Invite them to give emotional support and to serve as mentors to each other. Encourage them to pursue the personal goals they have set for themselves and to actively participate in their communities through their organizations or on a personal basis.

Follow-up Activities

After training has been completed, follow-up activities are critical because they maintain—and accelerate—the momentum begun by empowerment. Follow-up by the blind participants embodies the core of the IDP philosophy. Blind people themselves are affected by what goes on in the community and by their exposure to it. Once they feel themselves empowered, they can bring about positive change in themselves and in their communities.

The Story of Kwame, Kwesi, Kojo, and Kwabena

During an IDP empowerment workshop, the mentor invited four of the blind participants to have lunch with him at a restaurant just across the street. But when they were ready to go, there were eight people, not four – each of the blind men had a guide, even though they were only going across the street. When they sat down and started to order, Kwame, Kwesi, Kojo, and Kwabena sat in silence while their guides told them what they should order.

The mentor was astonished. “Don’t you want to know what’s on the menu?” he asked. “Don’t you want to hear the waitress suggest something?” “Don’t you want to choose from the menu for yourself?”

The mentor then proceeded to talk to the waitress, asked her to read the menu to them, and made his selection. It was a revelation for the four blind men.

Today they go everywhere alone, order their own food, and function independently. They now often laugh about this luncheon. But it was a day that changed their lives.

Through training and follow-up activities by the blind participants, three of this handbook’s major objectives may be achieved:

Empower blind persons to take an active role in their organizations and in their communities at large.

Provide new ways of thinking about independent living and integration of blind people within the broader context of their society.

Expand the role of blind people in service organizations that currently exclude them.

There are many ways follow-up activities can occur. They may be by individuals or through an organization. They may be formal or informal. They may be spontaneous or planned. How they take place is less important than that they *do* take place. Once the attitudes of blind people have been changed, they can, in turn, help change the attitude of their broad community over time through their follow-up activities.

Examples of Follow-up Activities

Local blind individuals get together on a regular basis, possibly daily or weekly encounters.

By participating with organizations of the blind and at their meetings, blind people gain overall experience and also have an avenue for expressing their grievances and finding channels for solutions.

Organizations of the blind serve as a social community and as a forum for learning—a forum for both the leaders of the organization and for its members.

Formal training for specific needs is made available over time (for example, over a period of 1-3 years). Specific needs might include money management, finding a job, or accessing medical services. This may also lead to demands by blind people for improved services from their service organizations, for example, counseling.

Blind people come together in an organized manner to discuss their interest in employment. If they are interested in a particular industry or company, an invited speaker from that field or company can meet formally with them to help them analyze what is needed, how the jobs are done, what skills are required, what barriers they might have to overcome.

Parents, guardians, and family members receive information and/or training about the condition and causes of blindness. This can be of immense benefit to the blind child or blind adult family member. The dynamics of a family change when a blind person becomes part of the family. The changes may be positive or negative—but changes are inevitable. The condition of blindness introduces a new and unknown dimension into the family. Information and training about blindness helps the family learn to deal constructively with their changed situation.

Parents, guardians, and family members receive instruction about the kinds of support they should give to the blind person in their family.

Networking

Networking means to link together, to connect. When people network with each other, they become linked together and connected. Workshop participants should be encouraged to increase their personal network of friends, relatives, colleagues, and acquaintances. They should also be encouraged to maintain a network with each other.

Due to new-found confidence and newly discovered abilities due to their personal empowerment, blind people will start to expand their horizons. They will start connecting into other community groups; for example, parent groups, schools, churches, and formal or informal social groups and organizations. They may

become leaders in these groups as their confidence and experience grow. For those who lost their sight as adults, they may reconnect with groups in which they participated before they became blind.

The Story of Amadu

Amadu, an outstanding drafts player, lost his sight when he was 42 years-old. Before he became blind, he frequented the pub next door where he regularly played drafts with his friends. After becoming blind, he 'believed' he could no longer play drafts. He quit going to the pub except to buy a drink which he would take home and drink alone.

When he attended an empowerment workshop, he learned how to modify the drafts game so he could once again play. He had a drafts board made with indentations. Twenty-four soft-drink caps were used for the drafts. The inside cardboard was removed from 12 of the caps and turned upside down on the board. The other 12 were left intact and placed right-side up. Amadu is once again an outstanding drafts player and has regained something in common with his friends. He no longer drinks alone at home.

Mentoring

The importance of mentoring cannot be over stressed. Based on their personal experiences, mentors give advice, support, guidance, and encouragement. They fill the role of friend, mother, father, brother, and teacher.

The vital importance of the mentor's role in empowerment workshops was discussed earlier in this chapter. There are other ways that mentoring can occur.

- Development of a personal bond between blind individuals who meet at the empowerment workshop. They can mentor one another, giving each other emotional support and advice.

- Encouragement of the natural leaders (especially those who stand out among the workshop participants) to become empowerment training mentors in the future.

- Establishment of a local group of like-minded individuals who bond together and mentor each other on a regular basis, within their organization or on their own.

- Continuation of the mentoring relationship on a personal basis between the workshop mentor and workshop participants.

Employment of the Blind

A natural consequence of empowerment is the desire for increased independence. This frequently manifests itself as motivation to make a greater contribution within the family, to get a job, or to pursue a more rewarding job.

Adult blind people seek the same things their sighted friends and colleagues seek—they want a job, a spouse and children, to enjoy recreation, and to pursue their personal interests in whatever way they see fit. To fulfill these needs, they must overcome the hurdle of finding suitable and productive employment.

In all communities, regardless of social class, an individual's personal power is enhanced through personal economic empowerment. *The empowered blind person is no different than anyone else—she or he wants to be a productive member of society.*

Four Approaches to Economic Empowerment

From examining small village communities such as the one where I grew up, I have developed a theory that I believe enables blind people to gain respect and contribute to the economic well-being of their families.

My theory consists of four approaches to economic empowerment. Each of these approaches depends upon individual motivation, ability, and skills, as well as the individual's personal and family situation. I call these four approaches:

- Income substitution
- Income supplement
- Income support
- Income independence.

All four enable the blind person to assume a role as a family contributor rather than as someone who needs to be taken care of. They replace dependence with independence. (The degree of independence must be realistic and based upon individual potential.) Perhaps most importantly, they provide the means for the blind family member to gain self-respect and self-confidence.

In the case of those who have lost their sight, great attention must be given to the person's role in the family before the loss of sight—and to help them return to their former position in the family. For example, if the father of a family loses his sight, he may be suddenly relegated to the sidelines of the family. He may also feel he has lost his value to the family if he can no longer be the breadwinner. Yet he still has vital roles to play as father and husband. He and his family need to look for practical ways through which he can regain respect within the family even if he is not earning an income.

A recognition of the skills and potential of the blind person is very important. Unrealistic expectations should not be set by either the individual or the family. At the same time, no one should accept the *status quo* as inevitable. Once empowered, people can, in most cases, accomplish more than they previously ever imagined possible.

The four approaches to economic empowerment are described below.

Income Substitution

Income substitution is an approach that trains blind people to assume productive roles within their families. By becoming productive within the family, they can make direct contributions to the family. They can free family members who were previously their caretakers to seek outside employment or to work on their farms. By becoming his or her own caretaker, the blind individual thus enables other family members to generate additional income for the family.

Income Supplement

In those cases where blind people are unable to seek employment, they may learn to be partners with the family and provide an income supplement. For example, they can actively participate with work on the family farm, at a market stall, or in the daily activities of the family by taking care of the household and/or vegetable garden. A vegetable garden, for example, makes a direct contribution to family income by reducing the amount of money spent on food. The blind family member may not be earning a salary, but his or her contribution should be identifiable. This contribution adds to the family's financial resources.

Income Support

At the income support level, the blind individual has sufficient skills and mobility to allow him or her to hold down a regular job (full-time or part-time), or to operate a small business. These blind individuals earn an income and are full contributors to the family income, even if the earnings are small.

Income Independence

These blind people have sufficient skills and motivation to generate enough income to enable them to achieve income independence. They seldom require any additional training or support from institutions.

Employment Opportunities

There are few limitations on the types of employment opportunities to which blind and visually impaired people can aspire.

With training, blind people can do *anything* that does not legally require sight. The factors that make them employable are the same as for sighted employees—motivation, dependability, commitment, appropriate skills, and so forth.

Unfortunately, many employers are initially reluctant to hire blind people because it is perceived they will be unable to perform satisfactorily, will not be mobile, or will require special consideration.

A large American corporation conducted an 8-month study of 1,452 employees with physical disabilities.⁵ In this study, the job performance of ninety-one percent (91%) of their disabled employees was rated as average, or better-than-average. Clearly, the perceptions of employers need to be changed—and often the perceptions of blind people themselves need to be changed about their own potential.

Before starting a job search, blind people need the assistance of a knowledgeable person to help them analyze the requirements of specific jobs that interest them. They need to understand what skills are required. They need to identify potential hurdles they might have to overcome. And the blind person needs to be aware if he or she will be breaking new ground. Will they be the first blind person to work in that industry? Will they be the first blind person to work in that company?

When a blind person starts a new job, they have the same concerns as everyone else. 'Will I be able to perform satisfactorily on the job?' 'Will my boss be satisfied with my work?' 'Will I get along with my new colleagues?' 'Will I be able to *keep* the job?' Blind employees are people first, with the same rights, interests, needs, fears, and abilities as any other cross-section of the general public.

However, blind employees have additional pressures placed on them. They carry with them to the new job a set of expectations created by other people. There is the expectation by their organization that they will set a good example for *all* blind people. And there is the (probable) expectation by their company that they will not be able to perform up to standard on the job *because* they are blind. These expectations initially put tremendous pressure upon the new blind employee.

⁵ HireAbility Placement Campaign, Minnesota (USA) Division of Vocational Rehabilitation

Employment Inventory

Following is an employment inventory of types of work and jobs suggested as appropriate for blind or visually impaired people. It is *not* an exhaustive list. Many other jobs may be just as suitable.

The purpose of this inventory is to help overcome misconceptions about blind people and their capacity for productive employment.

Agriculturist
Animal husbandry
Carpenter
Computer operator
Computer programmer
Counselor
Craftsman
Crop farmer
Day care worker
Director
Disk Jockey (DJ)
Domestic worker
Factory worker (routine assembly line)
Football manager
Horticulturist
Insurance salesman
Koran teacher
Lawyer
Lecturer, University
Manager
Masseuse
Musician
Physiotherapist
Preacher
Politician
Radio announcer
Radiographer

Singer
Social worker
Solicitor
Stenographer
Supervisor
Teacher, rehabilitation
Teacher, regular schools
Teacher, special schools
Telemarketing
Telephonist
Typist
Word processor operator
Writer
X-ray technician

Typical Objections to Employment of Blind People

Finding a job can be a daunting task for anyone. It is especially arduous and intimidating for a blind person.

Employers give innumerable objections and reasons why they cannot employ blind people. Most objections are excuses based upon misinformation, ignorance, or fear. Typical employer objections—and suggested responses—are listed in the table below.⁶

Table Employer Objections and Responses

Typical Objection Suggested Response How will the blind person get to work? A blind individual exposed to good orientation and mobility training will get to work the same way as anyone else—by foot, by car, or by public transportation. How will the blind person be able to get to his or her office or place in the plant? On the first day at work, the blind person should be given a full orientation of the workplace—eating and toilet facilities, work station, and other important landmarks. (Experience has shown that employers provide this orientation without hesitation.) After the blind person has become oriented to the workplace, he or she may need the assistance of a partner or trainer to get to the office or work location. There's too much danger of a blind person falling down stairs, stumbling over things on the floor, or walking into the moving parts of machinery. Studies have shown that ninety-six percent (96%) of disabled workers were rated average or better-than-average on safety, both on and off the job. In one study of 100 large companies, fifty-seven percent (57%) of the companies reported lower accident rates for employees with disabilities, forty-one percent (41%) reported accident rates which were the same as those of able-bodied employees, and only two percent (2%) reported higher accident rates for disabled workers. We don't have instructors who have experience training blind workers. A specific teacher is not generally required to inform the blind person about the job requirements. However, if you identify parts of the job that do require specialized instruction relative to the condition of blindness, we will do it ourselves. Do you expect us to assume the additional costs involved in training a blind worker? If the individual lost his or her sight at your company, then, 'yes,' we do expect you will meet any additional cost to support his or her continued employment. However, if the individual's blindness has no connection with your company, then we do not expect you to meet the cost of specialized equipment. We don't have room to put in additional machines which we'd need to compensate for the reduced production we'd get with blind people employed as operators. First of all, it doesn't cost much money to make adjustments in the workplace. When modification is necessary, fifty-one percent (51%) cost nothing. However, most disabled workers require no special work arrangements according to studies. A number of studies have proven that workers with disabilities, properly and selectively placed, are very productive workers. How would I correct a blind person when she or he made a mistake? You should treat a blind employee the same as other employees. They need to have their mistakes pointed out to them and to be told how to correct them. If the blind person didn't perform satisfactorily, I wouldn't have the heart to fire him or her. Blind people are seeking a job, not sympathy or indulgence. If they don't perform satisfactorily, they expect to be fired. At the same time, if they perform up to standard (or better), they expect equal treatment, recognition, and promotion. I'll be glad to cooperate with you and, when we have an opening, I'll call you. We appreciate your cooperation. Since we know you're a busy person, we'll keep in

⁶ Statistics listed in these tables were taken from *Closing the Gap*, (August/September, 1985).

touch with you. We once had a blind person working for us whose work was fairly satisfactory. However, he didn't appreciate what we were trying to do for him. So, I won't have another. The employment of a blind person is not charity. Blind employees expect that you, the employer, get as much benefit from their employment as they get from working for you. Blind people would be absent from work too frequently. Absenteeism is not greater among disabled workers. A study shows that seventy-nine percent (79%) of disabled workers were rated average or better-than-average in attendance than other workers. We need people we can depend upon. A study has shown that eighty percent (80%) of disabled people are on the job for a year or more. This study showed that ninety-three percent (93%) of their disabled employees have average or better-than-average records of staying on the job. In a study of 100 companies, eighty-three percent (83%) reported lower turnover rates for disabled workers, sixteen percent (16%) reported the same turnover rate as for able-bodied workers, and only one percent (1%) reported a higher turnover rate. Our other employees would feel uncomfortable working with a blind person. Most employees with disabilities are accepted by their co-workers once they recognize the disabled worker as a person, not as a disability. People fear what they don't know. When they get to know a new person and become familiar with a new situation (such as blindness), they learn to accept it. I don't believe a blind person can be employed here. The limited employment opportunities for blind people are generally not caused by the task to be performed but by the preconceived ideas about the limited abilities of blind employees. Please identify the jobs in the company and the tasks they require. We can then identify whether or not the job truly requires sight. We're five miles from the nearest public transportation. Many blind people travel several miles on foot to get to their places of employment. For the blind individual to be able to do this, she or he must have exposure to mobility training, including cane travel and a sight guide. Our customers might discount the quality of our products if they knew we employed blind workers. It is a myth that blind or disabled workers have any negative effects upon the quality of products or services. On the contrary, customers are often curious or even excited when they find out that blind people are employed by a company. Since our work is of a heavy nature, blind persons would not be able to stand it. Blindness is the loss of sight, not strength. If the blind individual is certified as medically fit, he or she will be able to do the job. We don't hire people who have progressive conditions that will hasten retirement or increase days off or their need for hospitalization. The United States Bureau of Labor statistics indicate that employees with disabilities do not use more illness or accident benefits than other employees. Our unusually good safety record over the past years has given us the lowest compensation rate in the industry, and we wouldn't want to do anything that would raise it. Studies have shown that ninety-six percent (96%) of disabled workers were rated as average or better-than-average on safety, both on or off the job. In one study of 100 large companies, fifty-seven percent (57%) of the companies reported lower accident rates for employees with disabilities, forty-one percent (41%) reported accident rates which were the same as those of able-bodied employees, and only two percent (2) reported higher accident rates for disabled workers. We're planning to start production on a new item soon. I'm sure we'll have jobs then that one of your people can do. I'll get in touch with you when we get going. We appreciate your cooperation and positive attitude. (Then make regular visits or calls to make sure you're not forgotten.) We're changing our production methods and any jobs you would select now for blind people might be eliminated later. Like anyone else, a blind person would be eager to take whatever is available right now and would take his or her chances on the future. Once blind employees have an opportunity to perform on the job, you may want to find a new job for them in the future if the present one is eliminated. What would a

blind person do in case of fire or fire drills? *As part of the orientation to the new workplace, the blind person should be exposed to company procedures regarding fires and fire drills.* I have a marvelous, capable blind neighbor who has asked me about a job, but I've never been able to find anything for him. *It might be revealing—and certainly satisfying—if he were given the opportunity to identify the job he would like to do for your company.* I'm in favor of your proposal, but the decision would have to come from the boss. *Since you're in favor of the proposal, I suggest we identify an appropriate job and together approach your boss about it.* We have a blind worker who is the best producer in the shop. But the next one we hire might not be as good and the effect on the attitudes of other employees about blind people would be lost. *Blind employees are like anyone else—they should be judged on their own merit and not on the success or failure of someone else. A blind worker must perform to his or her own capability.*

Job Placement

A membership or service organization may decide to establish a job placement program to assist blind people in finding a job, beginning a job, and succeeding at the job. We have not attempted in this book to comprehensively cover the development of a job placement program which could be another book in its own right. However, we have included some guidelines.

When no organization is available to provide job placement assistance, blind people seeking employment should enlist the support of their family and friends. Blind job seekers should ask these people to help them analyze the job market, understand required job skills, and, in general, assist them as needed in finding suitable employment opportunities.

A job placement program is essentially a sales program for marketing good employees who happen to be blind.

The basic components of a job placement program are:

Motivation. Motivated blind people seeking employment.

Opportunities. A job market with employment opportunities.

Contacts. A person to contact potential employers—someone who has undertaken this role, a relative, a friend, or, ideally, the blind person who is seeking employment.

Commitment. Commitment from the blind person who wants a job, and, if applicable, from the organization running the job placement program.

A Systematic Approach to a Job Search

Networking (that is, using personal contacts) is one of the best ways for anyone—sighted or blind—to do a job search. Job-seeking blind people should let people know they are seeking employment. They should ask people to tell them about job openings in their companies. If appropriate, they should also ask that they recommend them for the job. In the absence of this support—or in addition to it—a systematic approach can be undertaken.

Identify potential employers. Make a list of ten potential employers, ranking them from largest to smallest. For networking purposes, list any friends or relatives who work at each company, or a friend or relative who knows someone at the company.

Network. Make personal contacts with the people listed as information sources at each company. Find out as much as possible about each company, its employment opportunities, and the names of managers who make decisions about hiring.

Prepare a résumé. Take the time to develop a good résumé. Edit and revise it as often as necessary. Have it reviewed by a friend or colleague. Ensure it is accurate, well laid out, and contains no typographical errors.

Arrange interviews. Set up interviews with hiring managers from selected companies.

Be prepared. Prepare for the interview. Understand the company, its products, and its needs. Be prepared to overcome objections to blind employees. “Sell” the manager on the benefits of hiring you or the blind person you represent. If you are an organizational representative for a job placement program, ask for a tour of the office or plant. Identify potential jobs for blind people during the tour. Ask questions about skills required for performing different jobs.

Follow up. Follow up after the interview. Don’t be timid about expressing your interest in a job. Keep yourself in the forefront. Be self-confident and assertive (but not aggressive).

Keep a Log. Keep a record of your contacts, successes, and significant actions. Learn from the experiences. Sustain your determination and self-confidence. Keep trying until you succeed. Expand your circle of contacts and companies if necessary. Never give up!

Conclusion

Empowerment is a powerful concept. It can change a life being lived at a survival level to one that is richly fulfilling and rewarding. Blind people all too often are disempowered because of negative attitudes and barriers. Too often they incorrectly believe they are not entitled or *able* to lead a fulfilling and productive life.

Empowerment can dramatically change perceptions—and lives.

Chapter 3 Organizations of and for the blind

Within the Institutional Development Project (IDP), two types of organizations provide services and/or support activities for the blind—membership organizations and service organizations. Membership organizations, owned and managed by blind and visually impaired people, are organizations “*of the blind.*” Service organizations, ordinarily managed by a cross-section of sighted members of the community and salaried employees, are organizations “*for the blind.*”

This chapter addresses issues faced by both types of organizations but focuses on membership organizations. However, the role of service organizations is also addressed because the operation and functions of both organizations have much in common. Additionally, the better these two organizations understand each other and the more closely they cooperate, the more effective each will be.

Historical Overview

Both types of organizations function with similar structures—each has a general membership, a volunteer Board of Directors, a secretariat or office, and a professional, salaried staff. (The membership organization, however, has its general members in several branches around the nation, whereas the service organization membership is usually composed of community members within its local or regional area.) Both support their operating expenses from gifts or grants from (international) donor agencies. Both have a commitment to serve blind and visually impaired people.

The pivotal *differences* between membership and service organizations are in their composition and the roles filled within their organizations by blind people. The membership organization is composed of blind people while, on the contrary, the service organization is composed of non-visually impaired people. In many cases, service organizations have no blind people on their boards or in their employment.

In the membership organization, its blind members take responsibility for all the tasks required to operate the organization. Conversely, the roles and responsibilities of blind people in service organizations all too often are negligible or entirely lacking. Indeed, the needs, desires, and hopes of the membership organization’s leaders and members are habitually neither solicited nor taken seriously by the service organization.

Traditionally, the service organization, not the membership organization, was regarded as the “*voice of the blind.*” As such, service organizations were able to

attract both internal (that is, local and national) and external (that is, international) funding and support.

These two types of organizations operated for many years with a close working relationship. However, in many instances this relationship suffered from an underlying antagonism similar to one between a rebellious teenage child (the membership organization) and its parents (the service organization).

Historically, membership organizations worked as advocacy groups or as social clubs. They shared many of the same facilities with service organizations but generally operated in their shadows.

A major shift for membership organizations came about in the early 1980s from the acknowledgment given to disabled people through the UN Declaration of 1983-1992 as the *International Decade of the Disabled*. A new era began for the involvement of disabled people in their own activities.

Membership organizations started to become more vocal, demanding a right to participate in matters that affect blind and visually impaired people. Nevertheless, breaking traditional barriers was difficult. Demanding respect and their rights within their organizations was not easy.

Many membership organizations were poorly organized and poorly led. Many of their leaders were untrained and had to depend on their service organization partner to even make contacts when raising issues or seeking support. Therefore, membership organizations faced four major problems as they struggled to redefine their role:

- They had to overcome negative attitudes that stereotyped blind people as unable to manage their own affairs.

- They had to disconnect themselves from the more established service organization.

- Although their leaders were strong on rhetoric, they were weak in management.

- Many of the leaders and the general membership were untrained, and, in many cases, leaders had to be replaced because they were too closely connected with the service organization.

In spite of these obstacles, the evolution of membership organizations gained momentum. The voice of blind people was heard more loudly. The demand for services for blind people increased. At the same time, competition for funding programs for the blind also increased.

During this evolutionary period, membership organizations shifted their focus from advocacy to the delivery of services. This shift was a financial as well as a philosophical transition. There were several motives that propelled this transition.

First of all, membership organizations were insufficiently trained to recognize that the role of advocates could be as important as that of a service provider. They did not believe advocacy could attract enough attention or financial support. Furthermore, the inferior quality of services for blind people in many developing countries led membership organizations to conclude they could do a better job.

Consequently, leaders of membership organizations seized the opportunity to develop and deliver services themselves.

This shift to development and delivery of services created three new avenues of opportunity for membership organizations. First, they became employers and were now able to employ their members. Secondly, their organizations were earning the respect of the community and agencies, enabling them to speak with authority at local and national debates concerned with the needs of the blind. Thirdly, they initiated a process that demonstrated the ability of blind people to speak for themselves and to manage their own affairs.

The New Challenges

Small organizations that shift from a fully volunteer-based organization to a position of operating with salaried staff face new challenges. These challenges confront both membership and service organizations. To successfully meet these challenges, the organization preparing for transition *must* redefine its role and identify its focus.

Many small non-government organizations (NGOs) lack focus and are unclear about their mission or purpose. Without a clearly defined mission, the organization is pulled and pushed in different directions. Pressure from outside agents (including donors) exacerbates this unclear situation. This often creates a moral dilemma for the leaders of the small NGO with limited resources who are guided by their need for funding: How can the organization meet local community needs, maintain its status quo so it can continue to benefit its members, and still respond satisfactorily to its donors?

To successfully meet these new challenges, the small NGO must be clear about its mission. It must define its role and identify its strengths and weaknesses.

Issues and Solutions

Below are some basic issues encountered by organizations of and for the blind—and solutions. Some issues are relevant only to a specific organizational type. Others apply to both membership and service organizations.

Poorly Defined Vision

Many organizations have no clearly defined purpose or mission.

Solution — Define the organization's mission and develop a written mission statement. The mission is the long-term purpose of the organization. The mission statement is a clear statement of that purpose. The importance of having a clearly understood mission and clearly stated mission statement cannot be overemphasized. Guidelines for defining the mission and writing the mission statement are in Chapter 5.

Unclear Goals and Direction

Many members of organizations of the blind are unemployed and unskilled and lack clear direction about how they can make effective contributions.

Solution — Once the organization has a clear mission, the next step is to develop goals. What programs will they implement to fulfill their mission? The goals must be realistic, based upon available resources and time requirements. Next, the organization defines short-term objectives. What specific things must they plan and execute for each program to make it succeed? Objectives are the specific steps required to achieve the goals. Individuals are assigned responsibility for accomplishing the goals. When the organization has a clear mission, goals, and objectives, its members can focus their energy and efforts. Their contributions are more effective once coordinated within the framework of specific goals and objectives. Guidelines for developing goals and objectives are in Chapter 5.

Absence of Community Recognition

Lack of recognition and pressure from the community force the membership organization's leaders to seek ways to strengthen their visibility within the community. It may appear easiest to achieve this by directly providing services.

Solution — A well-managed organization committed to a clear mission earns recognition and respect in its community, regardless of the role it has chosen. Its mission statement is also a valuable tool for enhancing the organization's visibility in the community.

Inadequate Services

Organizations of and for the blind feel forced to fill all gaps where services for blind people are lacking.

Solution — When the organization has a clear mission and realistic goals, it is not *forced* to take any direction unless it makes a deliberate choice to do so. It identifies alternatives and options from which it judiciously makes selections. In its vision and mission statement, the organization clearly identifies the social void it wishes to fill and the role it is to perform. Whether it chooses to be an advocacy group, or to provide direct services, its goals reflect the role it has chosen.

Excluded From Decision Making

Because blind people and their organizations have been kept on the sidelines of decision making, they feel they can only influence the delivery of services by doing it themselves.

Solution — As empowered individuals, blind people learn to assert their needs, whether through advocacy or service delivery. As members of a well-managed and empowered group, they become more effective in fulfilling their defined mission, whatever it may be. They learn how to make and how to influence decisions that affect them and their organization. By developing their network of contacts, blind people also increase their opportunities for being included in decision making processes.

Insufficient Management Skills

Members of the Board of Directors in NGOs frequently give an immense amount of time to developing their resources and guiding their organizations, but many lack management skills.

Solution — Organizational leaders develop their management skills by studying this handbook, attending IDP management training workshops, and enrolling in formal, academic, management training programs at universities, certified management seminars, or community colleges.

Do Not Operate With Sound Management Principles

Emotions guide the organization rather than a clear purpose.

Solution — Sound principles and practices are implemented by the organization. Along with developing a clear vision, mission statement, goals, and objectives, the leaders must carry out prudent financial policies.⁷ Reason rather than emotion must guide the organization.

Excluded From Program Planning

Service organizations customarily do not ask blind people to take an active part in decisions regarding services and programs for blind people.

Solution — Organizations working for and with blind people must solicit them to take an active role in program development and decision making. Moreover, blind people do not need to wait for an invitation to take an active role. They must assert their needs to the organization by being active advocates through direct requests, networking, proposals, and so forth.

⁷Appendix B contains guidelines for financial policies.

Aspirations of Blind People Are Not Considered

Organizational leaders unilaterally draw conclusions about the basic needs of blind people without taking into account their hopes and dreams.

Solution — When designing programs for blind people, program planners take into account not only basic needs but also the blind individual's hopes and dreams. Blind people are *asked* where they want their dreams to take them. The sky should be the limit for their aspirations.

Inadequate Collaboration

Collaboration is insufficient—or nonexistent—between blind people, their membership organization, their service organization(s), and their community.

Solution — A specific strategy for organization and community networking is developed by organizations of and for the blind. Networking at the organizational level expands the organization's options for expanding and integrating its services. Networking at the community level removes the mystique of blindness in the eyes of the community. By removing the mystique, a pathway is opened for integrating blind people into their community's social life.

Guidelines for defining a mission statement, developing organizational goals and objectives are discussed in Chapter 5. Management skills are discussed in Chapter 6.

Organizational Development

When organizations make decisive shifts in their mission, their operational methods and tools must change as well. Because of their limited resources, a major shift in focus is keenly felt by small organizations. In organizations of and for the blind, this situation is especially acute.

To successfully deal with the new era, small organizations must develop new organizational development strategies. These strategies must address the entire organization, from the grass-roots level to top management.

Because small organizations depend primarily on the good will and hard work of their members, officers, and volunteers, their human resources are often stretched to the limit as they attempt to respond to new demands. To be competitive—perhaps even to survive—small organizations must learn how to increase the involvement of their members and the community, and how to implement beneficial and effective management practices.

The Grassroots Program

The grassroots program can begin by focusing on leadership training for the organization's leaders at the village, branch, or community levels. The

leadership training may select branch and/or community leaders and work at building their skills related to running successful meetings, developing plans, identifying functions of officers, examining the constitution of the organization, and developing programs that respond to branch and community needs.

Organizations of and for the blind must face the heightened demand for good management and the development and delivery of quality services. These new challenges are forced by the increased attention given to the large numbers of NGOs working in the development field and attempting to meet the needs of blind people. To avoid being left out once again, organizations of blind people *must* strengthen their leadership. Membership organizations face the challenge of finding (or developing) leaders with management training and experience. When their organizations receive funding, their leaders must know how to responsibly manage it.

In the past, the organization may have operated effectively with only volunteers and a small budget. However, in this new operating climate, the organization may discover it requires new ways of working with volunteers. It may require new financial policies for managing large sums of money, new systems for managing staff, and new strategies for developing programs.

It is often painful to change an organization from one that was operated solely by volunteers to one that must respond to the supervisory needs of staff and volunteers. Changes such as this usually bring stress to the volunteers and to the salaried staff.

Building a New Management Structure

This new management structure must be given the full attention of the entire organization. The demand for good management will force the organization to develop clear lines of operation. Information must be shared by everyone throughout the organization. The management staff must now focus on its responsibilities to its members, the board, the volunteers in the field, the staff, the donors, and the general community.

It must also focus on developing sound management systems, including reliable financial policies and procedures. The organization may suddenly be required to handle large amounts of money, sometimes equivalent to millions in their own currency. This dramatic increase in funding may be unprecedented for the organization. In the past, the management staff may have handled only small amounts of money. In some cases, it may have handled no funds at all.

As an example, the Ghana Association of the Blind (GAB) in 1992 had a budget of 4,160,710 cedis⁸; its budget increased in 1993 to 12,169,320 cedis. By 1995, GAB was managing a budget of 91,104,371 cedis. In US dollars, this translates into a budget that increased from \$4,425 to \$96,920 in only three years.

An increase in funding requires not only responsible fiscal management but also additional staff and volunteers to be supervised, as well as the implementation of a new decision making process.

Development Tactics

A strategy for organizational development should focus on the following five tactics:

Develop the skills of the membership. For membership organizations, this means developing the self-confidence and skills of blind individuals at the grassroots level. This can be accomplished through empowerment and mentoring programs.

Train and prepare the Board of Directors.

Evaluate the organization's mission, programs, and activities. This should be done by the organization's leaders and members.

Provide management training to top-level management personnel.

Provide staff training and support to all staff members, including both existing and new staff.

At the first level, this strategy focuses on enabling blind people to actively participate in their organization by improving their self-confidence, skills, and knowledge. (*Refer to Chapter 2 -- Empowerment.*)

At the second level, board members must be trained to take on new management and leadership roles. (*Refer to Chapter 5 -- The Board of Directors.*)

At the third level, the organization's leaders and general membership must review the organization's mission and arrive at a consensus regarding the organization's role in fulfilling its mission. The leaders must also carefully evaluate their present structure and programs. For the organization's first evaluation, it is useful to employ the services of an independent person to help prepare the evaluation instruments. However, the organization may wish to carry out the evaluation internally. (*Refer to Chapter 5 -- The Board of Directors.*)

At the fourth level, the person (or persons) in charge of administration and management must be exposed to training in the management and operation of an NGO. Additionally, she or he must be trained in new techniques and ideas for the delivery of services for the blind. (*Refer to Chapter 6 -- Senior Management.*)

At the fifth level, staff training must provide an increased understanding of the organization and must develop heightened awareness of the needs of blind people. If necessary, training in relevant skills should also be provided, whether for new skills or refresher training in existing skills. (*Refer to Staff Training later in this chapter.*)

⁸ 940 Cedis = approximately US\$1.00

Building Cohesive Groups

Many small organizations have difficulty bringing their members together into a cohesive group. This difficulty often stems from a lack of motivation by members because their immediate needs are unmet. This situation can be remedied by innovative leadership. When designing programs for branch meetings, the organization must be clear about and respond to the needs of the members.

People join groups to satisfy their needs. If those needs are not met, the group will not function effectively. For example, members in rural communities may want the group to respond to their need for employment, social interaction, or self-development. These must be given immediate attention by the organization. If ignored, members will not be motivated to continue participation in the group.

In the experience of the IDP, organizations can effectively motivate their members with empowerment training programs. Through empowerment programs, members begin to develop positive interaction with other blind people in their organization and by networking with community groups.

Components of Good Management

The operation of any healthy organization essentially comes down to how it manages the four major components that constitute good management.

- Administration

- Ability to be innovative

- Willingness to integrate operations and services

- Quality of services it delivers.

Administration

Managers of small NGOs must continually strive to maintain an equilibrium in the administration of their organization. They must manage the balance between the long-term mission and short-term goals. They must create a balance that enables them to satisfy their clientele, operate an efficient office, manage the office staff with fairness, supervise volunteers, and assure donors. They have to balance major problems with minor problems, the organization's needs with an individual's needs, risks with opportunities.

Innovation

Good managers and administrators need to be creative, innovative, and flexible. Their ability to respond appropriately to the needs of their clientele depends on their understanding of the blind people they serve, their organization, their mission, and the environment in which they operate.

Integration

In NGOs, managers must successfully integrate conflicting demands. They need to satisfy donors whose agenda may differ from the organization's. They need to satisfy their blind clientele (who will always feel the organization is not doing enough). They need to satisfy their staff, their Board of Directors, and their

volunteers. To successfully meet these demands, the manager must recognize the validity of conflicting requirements but, at the same time, be able to merge them into a cohesive whole.

Delivery of Services

Like any business, organizations of and for the blind deliver a product—their product is services for blind and visually impaired people. The quality of the services they provide and their ability to market these services attract new clients and more donors. They also create new funding possibilities and heighten awareness of the abilities of blind and visually impaired people. If the quality of services is inferior or sub-standard, the organization cannot prosper and grow.

New Role for the Board

During the process of organizational development, a new management role must be created for the Board of Directors. The boards of these NGOs should now function as the senior management body of the organization. As such, the board is responsible for making major decisions that affect the organization, setting policies, supervising senior staff, and contributing in different ways to the financial viability of the organization.

The board and the membership should undertake an evaluation of the organization before it adds senior staff or makes a change in the senior management role. This evaluation must examine how closely the organization is working towards the fulfillment of its mission. It should examine the role of its members and the quality of services currently delivered to its membership.

Organizational Standards

If small organizations of and for the blind are to remain a major force in expanding and delivering services to blind people, they must strengthen their personnel and their organization's operations.

The following guidelines for organizational standards may be used to examine the qualities of a well-managed NGO. These were developed by the IDP based upon its experiences over the past five years.

General Assembly. The general assembly or general membership elects or appoints the Board of Directors.

Board of Directors. The board is elected or appointed to fill the needs of the organization. It meets regularly. Board members have no material conflict with the interest of the organization.

Mission. The NGO has a clear mission and statement of purpose.

Program. It runs a program (or programs) consistent with the organization's mission and statement of purpose.

Expenses. The NGO incurs reasonable expenses, especially for staffing and programs, and develops prudent financial systems to monitor its expenses.

Promotion. It develops a vigorous and honest marketing program to inform the public about the organization and its programs.

Fund Raising. It develops a sensible fund raising and fund development program for both the local market segment and the international market segment. It is honest and fair with all fund raising and fund development practices.

Level 2 Training -- Leadership and Staff

Leadership and staff training programs focus on building the grassroots level and supporting the board.

Participants for leadership training are drawn from existing leaders at the branch level and emerging leaders within the branches. These people must be trained at a level appropriate for them with a training program designed to respond to their specific needs. Leadership training for grassroots members should be an ongoing program.

Staff training should be designed to help staff members improve their skills, and understand the new direction of their organization. It should also help strengthen the relationship between staff members and blind and visually impaired people at all levels.

The Leadership Training Program is described below. It is followed by a description of the Staff Training Program.

Leadership Pre-Training Preparation

Identify participants to be trained.

Identify areas to be addressed.
Select dates and time frame.
Select venue.
Identify resources.
Arrange for housing and meals (if required).
Plan budget.
Organize agenda and design training program. Make modifications, as necessary, based upon responses from previous workshops.
Advertise training program.
Collate information.
Distribute information.
Prepare training materials.
Register students.

Leadership Training Objectives

Each of the following objectives for leadership training might have a separate program and focus. In that instance, each program would have its own distinct objectives and would be designed to meet those objectives.

Sensitize grassroots members to the work of the organization.
Provide grassroots members with information about areas of interest.
Work with the members on how to conduct effective meetings.
Identify potential program areas.
Build group cohesion.

Leadership Training Strategies

Each group has a facilitator who supports discussions and encourages full participation by everyone in the group.
Workshops feature brief presentations, a combination of small group and large group work, and open discussions.
Presentations run from ten to thirty minutes.
Allow time for individual questions at the end of each presentation, followed by an open group discussion.
Divide workshop into small groups, with each group ideally containing a maximum of six people.
At the end of each small group session, everyone returns to the large group to discuss group positions and to make recommendations for future action.
The trainer encourages as much open discussion as possible.

Leadership Training Agenda Outline

The agenda described below is for a training program that focuses on how to run effective meetings.⁹ A similar outline could be prepared on any subject addressed during a training program.

Introduction.

Review present situation.

Review current process for running meetings.

Discuss issues related to current process.

Review procedures.

Agree upon a new process for running meetings.

Discuss organization of agendas.

Discuss roles and responsibilities.

Agree upon implementation strategy.

Wrap-Up.

Leadership Training Agenda Details

Following are additional details about the training agenda.

Introduction

Review present situation.

How often are meetings held?

What are the reasons for holding meetings?

Who calls the meetings?

Review current process for running meetings.

Discuss issues related to current process.

What needs to be fixed?

How can it be done?

Review procedures.

Agree upon a new process for running meetings.

Discuss the organization of agendas.

Short-term agendas.

Long-term agendas.

Discuss roles and responsibilities.

Agree upon implementation strategy.

Wrap-Up.

⁹ Appendix C contains guidelines for running effective meetings.

This concludes the section on leadership training. The next section describes the Staff Training Program.

Staff Pre-Training Preparation

Identify issues to be addressed.

Invite staff to contribute suggestions for training agenda.

Collate issues and suggestions; evaluate, and prioritize.

Organize agenda and design training program, based upon the priority of issues and suggestions. Make modifications, as necessary, based upon comments from previous workshops.

Select and get commitment from trainer.

Select date and time frame.

Select venue.

Identify all required resources.

Plan budget.

Register participants.

Prepare training materials, including reflection forms.¹⁰

Distribute materials in advance if appropriate. All materials must be in a format accessible to blind participants.

¹⁰ Examples of *Reflection Forms* are in Appendix D.

Staff Training Objectives

Each of the following objectives for a staff training program might have a separate training program and focus. In that instance, each program would have its own distinct objectives and would be designed to meet those objectives.

Evaluate the organization's operations and service delivery programs.

Establish a framework for strengthening the management and program development systems.

Identify new methods for supporting staff.

Identify new methods for networking and collaborating with other NGOs.

Identify potential program areas.

Build group cohesion.

Staff Training Strategies

The trainer uses mini-lectures, Question and Answer (Q&A) sessions, individual participation, small group and large group discussion, and consensus for running the workshop.

The trainer prepares and distributes to the participants information guides (that is, reflection forms) that are used to review and reflect upon current tools, systems, policies, procedures, and so forth.

Each group has a facilitator who supports discussions and encourages full participation by everyone in the group.

Decision making during training is by group consensus.

Give ample time for individual questions at the end of a mini-lecture, followed by an open discussion by the group.

If the group is large (for example, eight or more), divide the workshop into small groups, with each group ideally containing no more than six people.

At the end of each small group session, everyone returns to the large group to discuss group positions, to make recommendations for future action, and to make decisions by consensus.

The trainer encourages as much open discussion as possible.

Staff Training Agenda Outline

Introduction.

Establish ground rules, goals, objectives, and a decision making process.

Review current organization.

Examine systems currently used for reporting, monitoring, and data collection.

Review current management and program systems.

Review policy on staff recruitment, satisfaction, and development.

Staff Training Agenda Details

Establish ground rules, goals and objectives, and a decision making process for the workshop. This is accomplished through individual work by participants, group discussion, and consensus.

Ground Rules. Participants work together to establish the rules for facilitating equal participation during the workshop. Use these rules to ensure open discussion and to keep the training process moving forward.

Goals and Objectives. Individually, and then in groups, each participant defines personal goals and objectives for the workshop and for each agenda item.

Decision making Process. Examine decision making models and select one for consensus building during the workshop.

Reflect upon and review the current organization, including its operations, services, leadership, membership, and new challenges it may be facing.

Commitment. Discuss individual commitments to the organization. This may be done by giving participants individual 'Reflection Forms' to be used to identify the reasons for their attachment to the organization and its work. These reasons are then shared with the general group.

Strengths and Weaknesses. Identify strengths and weaknesses of the organization's operations and the work it does. This may be done by giving each small group an organizational 'Reflection Form' on which strengths and weaknesses are identified. Describe reasons for successes, shortcomings, and failures on the form. Finally, the participants develop strategies for improvement.

New Tools, Systems, and Procedures. Describe tools, systems, and procedures that support new approaches to the work. The organizational 'Reflection Form' described above is used for this.

Input, Output, Resources, Structure. Considering the current systems used by the organization for delivering services, the group reflects on the organization's input, output, resources, and structure. Reflection and review are done in relationship to the organization's mission, goals, and objectives and its successes and failures over the past six months.

Examine the present systems used by the organization for reporting, monitoring, and data collection. If necessary, identify new approaches for

managing the organization's work. Work in small groups to review the systems and to design appropriate measures for improvement before moving to the large group discussion and consensus.

Review the present management and program systems within the organization in order to strengthen the systems to meet the needs of all activities in its new operation. Use small groups, mini-lectures, and consensus building.

Review management structure

Review development of budgets

Review program development.

Review policy on recruitment of staff and examine the organization's environment and how it contributes to staff satisfaction and development. Use small group and large group discussion.

Staff recruitment

Staff preparation for their jobs

Staff satisfaction

Staff development.

Networking

Once the organization has established a reasonable level of group cohesiveness, its leaders should work with the members to establish contacts with other community groups. As special activities, the organization can invite community leaders to address the members on specific topics of interest.

Networking with other community organizations can help remove the mystique of blindness. Additionally, it can introduce services, and expand services to the larger community. By doing this, the cost of the services can be shared. What is more important, new social and economic avenues can be created for the blind community.

Chapter 4 Volunteers

Volunteers are motivated to donate their time to organizations for a number of reasons. Most often, they are motivated to do something meaningful which gives them a sense of self-satisfaction. To fully accomplish this, they need to understand and believe in the mission of the organization and to feel they are contributing to the fulfillment of that mission. They need to feel they are investing their time in a worthwhile endeavor.

They may also be motivated by the recognition and respect they earn in their community through their volunteer work. For some people, volunteering is a social outlet, providing an opportunity for interaction with people.

In developing countries within the Institutional Development Project (IDP) area, the concept of volunteering has some additional connotations than do not exist in western or developed countries. In the IDP area, organizations of and for the blind receive an enormous contribution of time commitment and hard work from volunteers who work towards meeting the organization's mission. However, rewards for their contributions are not necessarily measured by the same values as they are in the culture of developed countries. Volunteering in the IDP project area, besides the rewards noted above, has the additional appeal of filling some basic needs of the individual.

Volunteering in a developing country must, therefore, be viewed within the context of high unemployment, the extended family, and the customary social behavior of helping others.

There are two types of volunteers who work with organizations of and for the blind in the IDP area. Motivation differs for these two different types of volunteers.

Blind and visually impaired people who volunteer to support and develop their organizations represent one type of volunteer. These individuals view their donations of time and effort as an opportunity to advance their own quality of life. Their volunteer work is also seen as a contribution to the "*brotherhood of blindness.*"

Non-visually impaired community members represent the second type of volunteer. They can be separated into three categories.

Family members and close friends of the organization's blind leaders.

People attracted by the organization's mission or their own self-motivation of "*helping others.*"

Individuals respected in the community through their position in its social structure.

All these volunteers can fill important roles in an organization as long as they are properly directed and managed.

To take full advantage of volunteers' contributions, a volunteer program must be developed and managed as an integral activity within the organizational operations. A coordinator should guide and monitor the volunteer program. Individual volunteers should be directed to make specific contributions to the organization's work.

The actual expense for volunteer support must be recorded and budgeted (for example, meals for volunteers, transportation costs, and so forth). Most small organizations depend on volunteers to help them in their daily operations and are an essential part of many community-based rehabilitation (CBR) programs. Many leaders of membership organizations use volunteers as guides. Consequently, all volunteer expenses must be included as genuine budget items in a specific program.

The financial capacity for supporting a volunteer program must also be recognized. An organization must not attempt to absorb more volunteers than its funding can support.

Volunteers in Papua, New Guinea

Approximately thirty men and women were recruited as volunteers in Papua and trained specifically to deliver community-based rehabilitation (CBR) services in the areas where they lived, areas that were often remote. The volunteers were all given one month of initial training on how to teach visually disabled people how to garden, to travel with a cane, and to perform other activities. Training was originally provided by Helen Keller International, both on an individual basis, and in groups of ten. Later, training was provided by Papua New Guineans who had learned the necessary skills.

There were numerous successes. Many blind people learned to develop and manage successful income-generating projects, others learned how to provide for the care and sustenance of their families. Yet others entered and successfully competed in schools in their areas. The motivation and commitment of the volunteers was outstanding.

Effective Management of Volunteers

An organization's staff and leaders must recognize that their attitudes towards and management of volunteers is critical to the success of their volunteer program. A well-managed volunteer program can make a substantial financial contribution to the organization's operation and programs.

Following are some suggestions for making better use of volunteers.

Set an annual goal to increase volunteer involvement and commitment.

Develop a volunteer recruitment program. The program should outline the organization's mission and its volunteer policies. It should describe the need for volunteer service and ways volunteer contributions may be matched to organizational programs and needs. The recruitment program must also recognize the needs of volunteers. The volunteers must receive some indication of the level of satisfaction they can attain from working with the organization.

Provide all possible assistance to volunteers to help them understand the challenges blind people face. Ensure volunteers understand how they can help the organization combat these challenges.

Make sure volunteers know you depend on them and appreciate their contributions.

All elected members of the Board of Directors are volunteers. These volunteers must be given special attention in any volunteer program. The board, through its own training programs, learns about the organization. Board members should also be given information about simple techniques for relating to blind people. In membership organizations, this aspect of training may be unnecessary for board members.

Volunteers are one of the most important resources that can be called upon in fund raising programs. Special fund raising events are nearly always managed by volunteers. The chair of a special event is ideally well-connected in the community or in business and enjoys the activity involved with the event. A detailed discussion about fund raising and special events is in Chapter 7.

Develop a clear policy for attracting volunteers, using an appropriate medium. For example, volunteers may be attracted by word-of-mouth, posters, flyers, or presentations to schools, churches, and so forth.

All volunteers joining the organization should go through an interview process. Interview information should be confidentially recorded and the skills or areas of work matched with the organization's needs. Volunteer character checks should also be done, especially if the volunteer is to provide support to a blind person who is in fund raising or who has financial accountability. A character check is also important if the volunteer will represent the organization to the public.

Volunteers who do not perform to the necessary standard should be asked to terminate their arrangements with the organization.

Issues and Solutions

Some of the most common issues that arise with volunteers are listed below. Suggested solutions are also given.

Inadequate Management

Volunteers lose direction and commitment if their assignments are not managed. If improperly managed, skilled volunteers can also create

difficulties for less skilled or unskilled staff. When volunteers are dissatisfied with the work or feel their contributions are unappreciated, they will probably leave the organization.

Solution — Good management techniques and procedures are as important for volunteer programs as they are for the rest of the organization. Management must clearly define the need for volunteers and their roles. When they join, volunteers must be given detailed information on the organization and its mission. They must also be given details of their tasks and the organization's operational lines of responsibility.

Poor Communication

Communication with volunteers may be sporadic, or difficult due to logistics. Either can cause problems and frustration for both the volunteers and the organization leaders.

Solution — Regular two-way communication between volunteers and their coordinator is very important. Both need to keep the other informed about what's happening, including periodic feedback. A simple reporting system may be used; for example, verbal or written monthly or quarterly reports. When logistical problems make frequent communication difficult, (for example, volunteers live at a distance or have no telephone), special attention must be given to ensure regular communication occurs.

Unclear Goals

Volunteers are given an assignment without understanding the purpose or value of the task.

Solution — Each volunteer has a coordinator who directs and explains assignments, evaluates performance, and gives feedback.

Insufficient Planning and Funding

Improper planning and budgeting for volunteer programs can result in chaos for the organization. Too many volunteers may be available for too few tasks. This can result in volunteer dissatisfaction and their loss to the organization.

Solution — The organization must recognize the use of volunteers as a specific program within its operation. A coordinator of volunteers must be assigned responsibility to support and manage their work. The actual expenses associated with volunteers must be forecast and included in the budget.

Unexpressed Appreciation and Recognition

Recognition and appreciation of volunteers is not expressed with the result that volunteers feel isolated and unappreciated.

Solution — A simple “*thank you*” should frequently be expressed. Additionally, the volunteer program must plan and budget for specific types of recognition. This is discussed in detail later in this chapter.

Mission is Not Understood

There is no clear understanding of the organization’s mission.

Solution — The mission statement is made accessible to everyone in the organization and given to the volunteer upon joining.

Under-Utilization of Skills

Skills of volunteers are not utilized to the fullest extent possible.

Solution — Volunteers bring skills to an organization based on their life experiences. These skills can be identified during an interview and used to benefit the organization. Some skills that could be tapped include accounting, farming, music, public speaking, writing, cooking, sewing, homemaking, child care, specific job skills, and so forth. All volunteers should also be taught simple skills to support a blind person. Volunteers may join the organization with the expectation of being only caregivers. However, they can be much more than that. By sharing their skills, they can assist in empowering the blind people with whom they work and, thus, immeasurably strengthen the organization.

Roles and Responsibilities are Unclear

Volunteers are unclear about their role on the organizational team.

Solution — Volunteers are treated the same as staff. They are invited to participate in staff meetings and in decision making on matters relating to their program. In general, they are accepted as an integral part of the organizational team.

Volunteer Recognition

There are many ways volunteers can be recognized. Stipends or small contributions of gifts may be given as recognition for volunteer contributions.

Another important form of recognition is the individual “*thank you*” and “*pat on the back*” by members of the organization including the coordinator, the leaders, and staff. A good manager of any organization motivates people by “*catching them doing something right*” and immediately commending them on it. Simple words of praise and thanks go a long way towards motivating people and making them feel appreciated.

Other forms of recognition include:

Special Recognition Event. Each volunteer is individually recognized for his or her contribution in the presence of local dignitaries, all other volunteers, staff members, and members of the press. Regional events may be held in widespread rural areas rather than one large event. This may take the form of a dinner, a luncheon, or some other form of appropriate social event. It may be formal or informal. Small, tangible tokens of appreciation may be given to each volunteer, for example, certificates or small monetary gifts. What’s most important is that an event of some type is given at least once a year with the distinct purpose of recognizing the volunteers.

Press Releases. Issuing press releases is another effective way to gain recognition for volunteers *and* for marketing the organization in general. Issuing press releases on a routine basis gives visibility to the work being done by the organization and its volunteers. Any special event or success story is an occasion to issue a press release. In those countries where there is an expense associated with press releases, they must be budgeted in the organization’s volunteer and public relations programs.

Media Coverage. In addition to issuing press releases, local and national newspapers, radio stations, and television stations are always interested in human interest stories. Invite members of the media to write or produce human interest stories about your organization’s work, your volunteers, and your blind clientele.

Awards for Outstanding Contributions. A rotating trophy or some other award for the annual “Outstanding Volunteer” may be made each year. Recognition may also be given to the “Volunteer of the Month”. or “of the Quarter,” whichever is most appropriate. The criteria for making this award must be made available to each volunteer and *scrupulously* followed. The volunteer of the period could have his or her picture and written description of the contribution prominently displayed at the office of the organization.

Volunteer Assignments

Each volunteer assignment should be described in detail. The volunteer and the volunteer program coordinator each keep a record or copy of the assignment. Each detail of the assignment or project should be discussed. Time commitments must be agreed. Roles and responsibilities must be clearly defined.

Volunteers may also be given written 'job' descriptions that describe general expectations for volunteers in the organization.

Level 3 Training -- Volunteers

A volunteer training program should be developed by the organizational leaders. Volunteers who are recruited should undergo special training in specific areas identified by the leaders. Training should be given as frequently as necessary to support new volunteers coming into the organization.

Pre-Training Preparation

- Define training needs.

- Select trainer.

- Establish date and time.

- Select venue.

- Identify volunteers to be trained.

- Organize training agenda.

- Forecast expenses and plan budget.

- Announce training program.

- Distribute pre-training information (if any).

- Prepare training materials (in a format accessible to blind people when needed).

Training Objectives

In addition to any special training objectives, a volunteer training program should have the following four specific objectives:

- Provide information on the mission, goals, and objectives of the organization.

- Share information about the operation and structure of the organization.

- Teach volunteers basic skills for supporting a blind individual.

- Introduce volunteers to basic information about coping with blindness.

Training Strategies

Design the training specifically for the type of volunteers in each training program.

Introduce the volunteers to each other and give each an opportunity to share their motivation for joining the organization. Initially, the sharing of individual reasons for joining should be done in groups of no more than two or three people. This allows volunteers to share any apprehensions they may have and to develop trust with a partner in the group.

Use small groups for dealing with issues to stimulate full participation (depending upon the number of volunteers in the training program).

Focus on the organization's mission, goals, and objectives during the first part of training. Help volunteers understand the mission and the "*big picture*" of the organization.

Focus on blindness and coping skills during the second part of training. Allow participants to satisfy their curiosity on the subject.

Give participants information and practical opportunities to address issues about blindness or blind people they do not understand.

Teach the volunteers practical skills for supporting blind people during the third part of the training. These may include sighted guide techniques, basic instructions about socializing with a blind person (for example, letting the person know when you are entering or leaving a conversation or the room, speaking directly to the individual and not through a third party).

The trainer works early in the program to develop an atmosphere of trust with the participants.

Establish effective communication between the trainer and the participants.

Training Agenda Outline

Introduction of trainer and volunteers.

Share reasons for joining the organization (in small groups).

Introduce the volunteer program.

Review organizational mission, goals, and objectives.

Review the role(s) of volunteers in the organization.

Examine the causes of blindness in the region or nation.

Discuss methods for coping with blindness.

Explain critical issues faced by blind people.

Explore sighted volunteers' curiosity about blindness and blind people in a Question and Answer (Q&A) session.

Introduce basic practical skills for working with blind people, such as sighted guide techniques for travel and socialization skills.

Training evaluation.

Wrap-Up.

Follow-up Activities

The volunteer training program does not necessarily need structured follow-up activities. Due to the time commitment required from volunteers, the turnover is often high. Volunteers, therefore, should be allowed to join other training activities if they feel they would be useful.

When the organization holds specific training programs (for example, leadership training) for its members, volunteers should be invited to participate.

The training of volunteers can satisfy two needs. Firstly, they will receive additional information for personal development. This can be seen as a reward for his or her association with the organization. Secondly, the information gained during training will strengthen the volunteer's understanding of the organization's aims in a particular subject area.

Chapter 5 The Board of Directors

Board members play a crucial role in the operation and development of their organizations. They are responsible for top-level management and for maintaining the organization's financial solvency.

Within the non-government organization (NGO) sector, it is recommended that board members contribute to the financial viability of the organization. While that may be the ideal role for board members, this practice has generally not occurred in self-help movements in areas served by the IDP. In many of these movements, board members are often without jobs and have no economic resources to bring to the organization.

In the early life of the organization, board members *do* bring:

- Skills

- Energy

- Raw talent

- A vision of hope.

It is upon this vision of hope for the membership that board members build and guide the organization. However, as the organization matures and its vision is refined, the role of the Board of Directors changes.

Composition of the Board

Within organizations of the blind, members are generally reluctant to bring non-members onto the board. This resistance is based on the perception that outsiders erode the respect blind members receive when managing their own organization.

This fear is understandable when viewed in the context of the negative attitudes blind people encounter every day from the larger community. These attitudes often reflect an erroneous judgment that blind people are not sufficiently responsible to handle their own affairs. This reluctance to elect non-members to the board must be recognized and closely monitored by the membership organization as it grows and matures.

Consequently, a major challenge for organizations today is to create a Board of Directors that is a collaboration of appropriate resources, both members and non-members, blind and sighted.

The board needs to include a sufficient number of blind or visually impaired members so the direction and mission of the organization remain under their control. Equally important, the board needs representation from the outside. A strong partnership between blind and sighted board members strengthens the voice of the movement and enhances the respect received from society.

This balance can be difficult to attain, especially due to the strong emphasis placed on self-help. However, when electing or selecting the board, some specific criteria must be developed to ensure the availability of all the resources needed to fulfill the organization's mission and goals. Board members must be selected based on the needs of the organization, not upon personal needs of individuals.

The Challenges of Transition

Another major challenge facing board members of small organizations is the necessity of making a transition from operating the organization as full-time volunteers to handing over day-to-day operations to paid staff. Whereas the staff will still require support and supervision by the board, staff members also need independence and authority if they are to effectively perform their jobs.

This shift of responsibility poses several dilemmas for the organization's leaders. On the one hand, the leaders may have the perception they will be forced to give up control and power of their organization. This is particularly difficult when it is an organization they helped create and to which they have strong emotional attachments. They may also perceive they will lose their high-profile position in society. Further, giving up responsibility may mean the loss of a channel of economic resources.

On the other hand, this shift of responsibility forces the leaders to respect and accept the needs of the membership even though the board may feel its position of power is threatened.

The challenges of making these transitions must be recognized and confronted in a positive way if the organization is to grow. Turmoil often results within an organization during this transitional period. It may create discontent within the overall organization. It may even lead to resignations.

Board members need reassurance they will continue to play a meaningful—indeed vital—role in the organization. They need to understand that, rather than losing control and power as they fear, they will continue to maintain control over the mission, the direction, and the top-level management of the organization. What *will* change is that they will now delegate many responsibilities for the fulfillment of organizational goals and objectives to the paid staff. They will now share management responsibilities with the staff, working with them as a team.

Another important challenge during a transitional period is to impartially balance executive staff responsibilities (to *represent* the organization) with the board's responsibilities (to *develop* the organization).

It is essential the board understands and solves the problems of transition. Ultimately, board members must recognize their status will be enhanced, not diminished, if they are successful in moving their organization to a new level of development and growth.

The Board as Managers

Whether elected or appointed, the Board of Directors is always the senior management body of the organization. It functions as the senior governing body in the absence of the general assembly (that is, the membership) and according to their expressed will.

In this senior position, the board manages and guides all major decisions taken at the general assembly. As senior management of the organization, the board sets management policy and gives the organization its vision or mission. The board recruits the most senior staff, and works with the salaried management to achieve the organizational mission and goals.

The major senior management responsibilities of the board are to:

- Define the organization's long-term vision (its purpose and mission)
- Set general policy
- Represent the vision
- Approve management decisions
- Approve budgets
- Support and develop the financial position of the organization.

Role of the Board

Of all their responsibilities, the role of the Board of Directors that has the greatest consequence is giving vision to the organization. This mutually agreed upon vision establishes the larger purpose which gives meaning to the work to be done.

A clear vision improves the coordination of effort throughout the organization. Unexciting but necessary tasks have more importance when they're done in the service of an important vision. People are more motivated to give extra effort when they know it's worthwhile.

Their vision is described in a written mission statement which is developed by a consensus of all members of the board. The board also has a responsibility to develop organizational goals jointly with the professional staff. These goals must be based upon the long-term vision and the mission statement. Goals are medium-term and realized through the organization's programs and activities. Guidelines for developing a mission statement and organizational goals are on the following pages.

The board is also responsible for hiring the organization's executive officer. To accomplish this, the board must first define a job profile for the executive officer and then establish a search committee. If the executive officer does not perform satisfactorily and does not respond to the board's guidance, direction, or disciplinary action, it is the board's responsibility to terminate the executive officer's employment.

Members of the board need to clearly understand the roles of the executive officer and senior staff officers. Annual job plans with measurable goals for these officers must be developed jointly by the officers and board members.

Another important duty of board members is to conduct annual evaluations of the organization's senior officers (that is, the executive officer and senior staff members). Job plans form the basis for these annual performance evaluations. The officers need to know the measurements by which they will be evaluated and who will perform the evaluation.

In summary, the major operational roles and responsibilities of the Board of Directors are to:

- Describe the long-term vision in a clearly written mission statement.
- Hire the executive officer of the organization.
- Develop organizational goals jointly with the professional staff.
- Develop job plans for and with the executive officer and senior officers.
- Conduct annual performance evaluations for the executive officer and senior officers.
- Participate in fund development and fund raising.

Developing A Mission Statement

The vision of the organization reflects the social void the organization is attempting to fill. The vision is altruistic and represents the values and aspirations of the organization's membership. It describes the organization's fundamental purpose and reason for being. It is the vision that propels the organization forward. It is the vision that is 'sold' to prospective donors. The vision may have multiple aims which are transformed into program goals and objectives.

A mission statement is a brief description of the organization's vision. The mission statement describes in only one or two sentences *what* the organization is and *how* it fulfills its vision.

The mission statement embodies the organization's moral conscience and its commitment to the public.

The mission statement can be thought of as the organization's spiritual constitution—it embodies the organization's moral conscience and its commitment to the public. Any organization without a clear vision and mission statement is like a ship without a rudder. No one in the organization can operate effectively and convincingly unless the vision and mission statement are clearly understood.

Development and reaffirmation of the vision and a mission statement should be one of the first orders of business for a Board of Directors. The mission of the organization does not easily change until the organization fulfills its vision. However, the mission statement does change over time according to changing needs, attitudes, opportunities, resources, and so forth. Therefore, the mission statement should be reviewed annually and, if necessary, revised to reflect changing needs.

The mission statement should be on display in the organization's office(s) and be available in accessible formats, that is, in Braille, large print, and audiotapes for *everyone* in the organization—including volunteers.

When members are considering new goals, they need to be certain these goals support the organization's mission statement. If they do not support it or are in conflict with it, this indicates the new goals should be revised or dropped, or the mission statement should be changed.

Although brief, a great deal of work is required to develop a strong mission statement. The entire Board of Directors needs to reach a consensus about the organization's real mission.

During the brainstorming that occurs in the development process, different ideas about the mission quickly become apparent. At the outset, it may appear everyone is in agreement about the mission *until* its definition is attempted. That is why a *written* mission statement is so vital. Without a jointly agreed written statement, board and staff members may be working towards different—and often conflicting—goals.

By working through these differing ideas and ultimately arriving at a consensus, a *team* working with a common mission will be developed.

The following steps are suggested as guidelines for defining the vision and writing a mission statement.

Initial Brainstorming. First, explain what a vision and a mission statement are and their importance. Then have everyone reflect on and submit their ideas for the vision. What do they consider to be the main purpose of the organization? Everyone contributes their ideas. These are submitted in an accessible format and read aloud to all members. At this point, every suggestion and idea is given equal importance—none is ignored or dismissed. Don't rephrase or rewrite any ideas at this point. Record them exactly as given.

Collectively Discuss Ideas. Read the list of ideas aloud. Ask the contributor of each idea if she or he would like to add clarification. Ask the others if they have any questions about each idea as it is discussed. Again, no one's ideas should be ignored, dismissed, or derided. Every idea has merit even though some will eventually be discarded as the group moves towards consensus.

Verbalize the Vision. From the collective ideas, start working together to verbalize the vision. Work on the vision until a consensus is reached.

Start Developing the Mission Statement. Once the vision has been agreed upon, the next step is to embody the vision in a written mission statement. The final mission statement should be a one or two sentence statement. Use active verbs, for example: administers, coordinates, creates, delivers, develops, evaluates, facilitates, helps, implements, improves, manages, measures, mobilizes, provides, resolves, serves, stimulates, and so forth. Keep discussing and refining the mission statement until everyone is agreed it encapsulates the vision.

This process may require several meetings, especially if there are conflicting views. It's crucial to arrive at a consensus with everyone in

agreement on the final version. Because of the critical importance of having a clearly defined mission statement, be certain to give ample time to its development. Don't consider time spent on it as wasted. Remember that a mission statement is the foundation for the organization and its marketing plan. It is the focus for 'selling' the organization to members, donors, volunteers, and the general public.

Evaluate the Mission Statement. After a draft has been developed that satisfies everyone on the board, evaluate it using the following ten criteria. If the mission statement does not meet these criteria, keep working on it.

It is clearly understandable to all personnel, including rank-and-file employees and volunteers.

It is brief enough for people to remember it.

It specifies the basic purpose of the organization.

It focuses on a single strategic direction.

It reflects the distinctive role of the organization.

It is broad enough to allow flexibility in implementation, but not so broad it lacks focus.

It serves as an organizational blueprint which guides managers and staff in decision making.

It reflects the values, beliefs, and philosophy of the organization.

It contains attainable and realistic goals.

It serves as an energy source and cohesive rallying point for the organization.

Write and Produce the Final Statement. When the wording of the mission statement has been agreed upon, write and produce it in its final form. Have it produced in accessible formats for blind and visually impaired people.

Display the Mission Statement. After the mission statement has been completed, have a meeting with staff and volunteers to explain the organization's mission statement. Be sure to have it in an accessible format so it is available to all blind and visually impaired persons. Distribute the written mission statement throughout the organization. It should also be included in project proposals¹¹ and fund raising materials.

Review the Mission Statement. Review and change the mission statement—but only by consensus—when the organization's needs or direction change. Go through the same process to change the mission statement as you used to initially develop it. Bear in mind, however, that the overall *vision* of the organization does not easily or frequently change. The vision usually changes only when it has been fulfilled, which seldom happens.

Mission Statement Examples

The Hilton/Perkins Program mission statement:

“To improve the quality of life for individuals with visual impairments and additional disabilities, as well as their families.”

The Canadian National Institute for the Blind (CNIB) mission statement:

“The CNIB is a private, non-profit, professional and voluntary agency committed to providing a wide range of rehabilitation services to blind and visually impaired persons, and helping them integrate into society and lead more independent and productive lives, to the fullest extent possible. In offering rehabilitation services, the CNIB seeks to improve the condition of blind and visually impaired persons, to prevent blindness, and to provide sight enhancement services.”

Developing Organizational Goals and Objectives

Upon completion of the mission statement, the board's next step is to develop organizational goals. These goals are the programs that implement the mission.

Unlike goals, the mission of the organization is theoretically not time limited—it is the long-term vision of the organization. Therefore, there is no strict time limitation on the fulfillment of the mission. Goals, however, are the medium-term programs that, collectively, form a planned strategy for accomplishing the mission. Goals are specific, practical, and measurable in terms of time. They attempt to answer the questions: *What? How? When? By whom?*

Goals are developed jointly by the Board of Directors and senior staff officers. Job descriptions should be clear as to who has responsibility for the achievement of each goal.

¹¹ Appendix E contains guidelines for writing project proposals.

Objectives are the specific, measurable activities required to achieve the goals. They are measurable over shorter periods of time. They constitute an action plan and map out in detail the steps required to attain the goals, and, ultimately, the mission. The professional staff *and* the board—or the staff on its own—develop objectives. Job descriptions define who is responsible for what.

Organizational goals and objectives need to be understood, desired, and accepted by all members of the group. When they are understood, desired, and accepted by everyone, they direct, motivate, coordinate, energize, and guide the behavior of the group members.

These are characteristics of well-written goals and objectives.

- Specific
- Understandable
- Realistic
- Measurable
- Achievable
- Appropriate
- Clearly defined
- Have time frames and deadlines
- Describe who is accountable for what.

Example of Goals and Objectives

Goal

To make rehabilitation services accessible to all blind and visually impaired persons in our nation by the year 2010.

Objective 1: Develop and implement six rehabilitation training centers to care for 1,000 blind and visually impaired people each year over the next three years. **Objective 2:** Design a national training program for rehabilitation workers and train 100 rehabilitation specialists, direct service personnel, rehabilitation managers, and support personnel by 1998. **Objective 3:** Train 100 Community-Based Rehabilitation (CBR) workers and 300 volunteers to support the outreach workers by 1999. **Objective 4:** Provide quality rehabilitation services to 5,000 blind and visually impaired people in remote and rural areas by the year 2000. **Objective 5:** Expand quality rehabilitation services to be accessible to all blind and visually impaired persons in our nation by 2010.

Hiring the Executive Officer

Recruiting the executive officer is another essential task of the board. The executive officer is the organization's life line for implementation of the board's policies and decisions. The executive officer is responsible for turning the dreams of the vision into reality.

Before hiring the executive officer, the board must answer a number of questions:

Where do we want to take the organization over the next five years? For example, do we want the organization to grow, or do we want it to stabilize and consolidate?

What is the organization's present operating condition?

Are we satisfied with the present condition?

What type of personality do we need at this time for the position of executive officer? Do we need a leader? Or do we need a manager or administrator?

What resources do we have to work with?

What kinds of personalities do we have in the organization?

What is the culture of the organization? Are we happy with it, or do we want it to change?

These are examples of questions the board must carefully consider before developing a job profile. The board must make decisions about the organization before it can determine the type of person it wants to hire.

If the decision is for the organization to grow, the job profile should describe an executive officer who is entrepreneurial, a person with leadership qualities and the ability to motivate and plan ahead, someone with the capability to expand the organization.

If the organization is to stabilize and consolidate, the job profile should describe an executive officer who is a good manager with administrative skills, someone with an eye for detail who can bring efficiency and order to the organization.

Developing the Job Profile

Having answered the above questions—with specific attention given to where the organization should be in five years—the board then develops a job profile that reflects its decisions. The profile should define the specific job requirements, with an emphasis on the skills and personality it wants to attract.

This written profile, signed by the President of the Board, is used by the search committee for recruiting purposes.

The Search Committee

Upon completion of the job profile, the board turns over the task of recruitment to a search committee. The search committee should be composed of selected board members, representatives from the general membership, and independent outsiders from the community. The board gives specific instructions to the search committee about its role and responsibilities.

The committee bases its search on the job profile developed by the Board of Directors. The search committee should avoid appointing a friend or relative; however, no qualified person should be ruled out. The goal is to hire the most qualified person for the job.

Developing Job Plans

The Board of Directors is responsible for developing a job plan for—and with—the executive officer and senior staff members after completion of the mission statement and organizational goals. After their job plans have been completed, the senior officers develop job plans with the rest of the staff and volunteers.

The job plan is the recommended method for implementing organizational goals. The use of job plans enables individuals and teams of individuals to take responsibility for clearly defined actions.

To be successful, however, people need to clearly understand what they are expected to achieve. Since they will be evaluated on how well they have performed, they need to understand what role they are to play and how their achievements will be measured. They also need to participate in the development of the job plan instead of just being *'told'* what to do.

Without a job plan, staff may stay occupied but their efforts may not be contributing to the achievement of organizational goals. A job plan gives clear direction and guidance. The job plan makes possible a fair annual evaluation.

Annual Evaluations

The Board of Directors conducts an annual evaluation of senior officers' performance based on their job plans.

Regular feedback throughout the year is also vitally important. A quarterly report on job plan performance by the senior officers to the Board of Directors is one way of keeping the board informed of progress and problems. Action can then be taken to correct problems on a timely basis. This is preferable to *'punishing'* the officers for problems during the annual evaluation. The goal is to achieve success, not to *'catch'* someone doing something wrong.

Cohesive Planning and Direction

It may seem like a great deal of work to develop a mission statement, organizational goals, objectives, and job plans. They are, nevertheless, well worth the effort. Without them, cohesive planning and direction for the organization are difficult if not impossible.

These are sound business practices that enable an organization to focus. They also dramatically increase the possibilities for an organization's success.

In Table 3, *Planning Hierarchy*, it is shown how each step of this development process builds upon those that precede it. Omitting any step will almost certainly lead to confusion and conflict.

Table Planning Hierarchy

Planning Level Development Activity **Top-Level** Mission Statement
(**Second-Level** Organizational Goals
(**Third-Level** Organizational Objectives
(**Fourth-Level** Job Plans
(**Fifth-Level** Annual Evaluations

Issues and Solutions

Good business practices, planning, and communication usually resolve the majority of issues that commonly afflict boards of directors. Some issues that frequently arise—and recommended solutions—are described below.

Conflict Between Board Members and Professional Staff

There are frequent conflicts between the members of the Board of Directors and the professional staff. These conflicts are non-productive. They occur most frequently in highly enthusiastic membership organizations.

Solution — Have clearly defined roles and responsibilities for both groups. Define the roles and responsibilities for everyone in written job descriptions. Make sure everyone has a copy of his or her job description.

Inactive Board of Directors

The Board hands over all responsibilities to the professional staff and abdicates its responsibilities after selecting the executive officer. (This is more likely to occur in community service organizations.)

Solution — The Board and the professional staff are clear about their roles and responsibilities and function as a team. The groups have good communication with each other. Everyone is committed to fulfilling their defined responsibilities.

Organizational Goals are Unclear

Neither members of the Board nor staff members have a clear understanding of what they want to achieve or how they want to achieve it. They lack the ability to measure their success because of this lack of clarity.

Solution — Develop and use a mission statement, goals, objectives, and job plans. Use these as the basis for planning, marketing, regular reporting, resolving problems, and measuring success.

Staff Officers Take Over the Board's Responsibility.

Staff officers assume they know more about the organization than anyone else. Therefore, they attempt to lead the Board of Directors rather than carrying out the mission and goals of the board.

Solution — The Board of Directors clearly understands its responsibilities and fulfills them. Board members and senior staff officers work together as a team towards meeting jointly agreed goals and plans.

Lines of Responsibility Between Board Members and Senior Officers Are Unclear.

Misunderstandings and conflicts arise when board members and senior officers both assume the same responsibilities and roles.

Solution — Clearly defined job descriptions and job plans resolve this issue. These need to make clear:

Who represents the organization to the public?

Who is responsible for setting organizational policies?

Who has the responsibility to set operational policies?

Who has the authority to hire and fire personnel?

Who determines the organizational mission and goals?

Who plans and implements programs?

Who sets and approves budgets?

Qualities of Good Board Members

Some qualities that constitute a good board member are described below.

Demonstrates commitment to the success and best interest of the organization.

Supports and understands the organization's mission.

Shows dedication to the organization's causes and is modest about responsibilities.

Promotes the organization and its best interest to the general public.

Shows loyalty to the organization, other board members, and staff.

Encourages unity within the organization by working as a partner with other board members, volunteers, and staff members.

Fulfills defined responsibilities without interfering with day-to-day administration.

Participates in board meetings, asking questions when things are unclear, and making contributions based upon his or her own thoughtful judgment.

Respects the rights of staff and other board members to disagree and ensures everyone's views have a fair and open hearing.

Gives constructive criticism when necessary.

Acknowledges the importance of time and energy and avoids over-commitment that may be self-defeating or of no benefit to the individual or the organization.

Keeps disagreements and controversies impersonal.

Job Descriptions

To be sure board members clearly understand their roles, they require job descriptions that define their roles and the contributions expected of them by the organization.

The job description for each member of the Board of Directors should include the following:

Demonstrates commitment to the organization.

Contributes time and skills willingly to the benefit of the organization.

Participates in developing and maintaining the organization's financial solvency. If unable to make financial contributions, attracts others who can provide financial support to the organization.

Distinguishes between his or her role and responsibilities and the roles and responsibilities of the staff. Willingly operates within the boundaries of the defined roles.

Brings a specific skill to the organization that is measurable as a contribution towards fulfilling the organization's mission. This contribution may be giving support to the operation or filling a need within a specific program.

Balances the needs of the organization and its members with the interest of the public.

Makes firm and appropriate decisions.

Participates in the development and annual review of the organization's mission statement.

Participates in the development and annual review of organizational goals.

When called upon, helps develop the necessary criteria for succession of the organization's leadership and management.

Participates in annual job plan development for senior officers.

Participates in the annual evaluation of senior officers.

Level 3 Training -- Board of Directors

Training programs for the Board of Directors vary according to the needs and maturity of the organization. The training may be primarily to inform the board of the history, culture, and new direction of the organization. It may be to address specific issues confronting the board. Or it may be used as a means to evaluate the overall structure and effectiveness of the organization. It is the responsibility of board members to determine where and when training is needed.

There is no prescribed length for training as that depends upon the aims of the individual training program. There is also no predetermined number of training sessions—they should be given as needed.

It is generally easier to develop a training program for the board of a membership organization than it is for a service organization. Membership organizations, upon which this handbook focuses, have a smaller leadership pool and fewer trained people. In the experience of the Institutional Development Project (IDP), membership organizations are eager to learn and develop new ideas for supporting their organization. As more and more blind and visually impaired people become empowered and, as a consequence, increase their involvement in their organizations and communities, the demand for training will escalate.

Service organizations, on the other hand, are usually composed of business leaders and staff trained and experienced in operating a business. Consequently, service organization boards are often reluctant to give their time to a training program related to their role in the small, voluntary organization.

It is frequently useful to use the first training program as an opportunity to reflect upon the organization. In this instance, the training leader can use the agenda suggested below to guide the discussion by maintaining the focus on the organization and the role of the board.

Pre-Training Preparation

Board members suggest a range of training topics as suitable choices for a training agenda.

Make all suggested topics accessible to all board members.

Each board member assigns a priority to each topic.

Top priority topics become the training agenda. The number of topics depends on time available for training and complexity of the topics.

Develop overall training objectives—What is to be accomplished?

An independent outsider may be requested to participate as a facilitator or in a support role to bring impartiality to the training process.

Choose a leader for the training program.

Determine date, location, and length of training.

Distribute the training agenda in an accessible format before the training.

Training Objectives

Examples of objectives appropriate for Board of Directors training are:

Strengthen the board.
Motivate board members to work towards the mission.
Provide information about the organization and its work with others.
Provide information about selected topics.
Help board members objectively view or evaluate the organization and its role within the context of the larger community of services for the blind.
Clarify organizational roles and responsibilities.
Identify procedures for resolving issues when roles overlap.
Motivate board members to meet present strategies and goals.

Training Strategies

Base training agenda on organizational needs identified by board members and selected from prioritized topics submitted during pre-training preparation.
Several small group activities in the beginning enable board members to become more comfortable with the training process and with each other.
Move between small and large groups, depending upon the size of the board, their rapport, and the general atmosphere of the group.

Training Agenda Outline

The following agenda guidelines are suggested but should be modified according to organizational requirements.

Introduction.
Share personal goals.
Discuss individual understanding of the organization and mission.
Discuss personal motivation and expectations.
Explore roles of the board and the staff.
Identify skills.
Discuss personal commitments.
Special topics.
Evaluation.
Wrap-Up.

Training Agenda Details

The following is a more detailed discussion of the workshop and suggested approaches.

Phase I

Introduction and Information Sharing. Training begins with an introduction of the members and perhaps an “*ice-breaking*” exercise. Next, the agenda and overall training goals are introduced. Board members then individually share their personal goals for the training. Finally, they discuss their understanding of the organization and its mission.

Individual Purpose and Expectation. Members discuss their individual purpose and motivation for being on the Board of Directors. They also discuss their expectations of what service on the Board means to them. It may be appropriate at this point to have people discuss the roles of the Board and the staff, and the boundaries between these roles.

Skills and Commitment. The next discussion revolves around skills and time commitments. Each member identifies at least one specific skill that he or she brings to the Board and to the larger organization. Board members are then asked to make a realistic commitment of time during which they will use those skills to the benefit of the organization. Finally, they identify the best and most useful ways they believe they could use their skills, time, and commitment.

Phase II

Specific Topics. The second phase of training addresses specific areas in which the Board needs strengthening. These will have been identified in the prioritized topics. They might include:

- Fund development and fund raising
- Running effective meetings
- Conflict resolution
- Strategic planning
- Management of organizational and individual time
- Budgeting
- Financial management
- Effective decision making
- Division of roles and responsibilities between the Board and staff.

Organizational Evaluation

Halfway through the Board’s term of office, Board members, the executive officer, and senior staff members should collectively undertake a careful evaluation of the organization’s structure and effectiveness. This organizational evaluation is an important part of the Board’s management role.

The evaluation should focus on the organization’s strategy and its performance towards achieving its mission. If such an evaluation has never been undertaken

during the life of the organization, the initial evaluation may be done internally. However, before the evaluation is carried out, both Board Members and staff should agree about how the evaluation information will be used.

If a previous internal evaluation has been done, another evaluation may be done externally to examine results over a specific period of time. It is especially useful to have an external evaluation at the end of each long-term strategic planning period, for example, every five or ten years.

Guidelines for Organizational Self-Evaluation

Some of the major points to consider when conducting an internal evaluation are listed below.

Focus on the mission of the organization.

Examine the organizational structure, its composition, and performance in helping to achieve the mission.

Evaluate organizational goals and how well they met their targets.

Examine the roles of members and volunteers.

Review the internal environment and the tools used to support the functioning of the organization.

Review the external environment and the organization's performance and public image in the present operating climate.

Networking

Small non-government organizations (NGOs)—such as many of the organizations of and for the blind—do not have, and will never have, sufficient financial or human resources to fulfill the demand for their services. The Boards of these organizations must, therefore, take a proactive approach to networking. This requires the Board of Directors to work towards developing links within other similar organizations within its community or nation. Links developed by networking can be extremely beneficial in providing the board with assistance and support in achieving its organizational mission and goals.

To achieve these linkages through networking, the Board must first work with its senior staff to undertake thorough analyses of organizations and agencies that have an impact on their services and operations. External organizations with no direct link to their organization should also be carefully studied.

Having done the analyses, every effort must be taken to establish links and forge alliances. These links and alliances must be done in the interest of the membership and the people being served by the organization. The purpose of this networking is to help the organization fulfill its mission by extending its reach throughout the community and the nation.

Chapter 6 senior management

Management of non-government organizations (NGOs) has become of such great importance it is now a sub-discipline within management. Universities have begun offering graduate degrees in the *Management of Non-Profit Organizations*. There are also numerous courses, seminars, and workshops offered periodically on the subject. Because the management of NGOs has become so complex, leaders and managers of organizations of and for the blind must learn more about their formal operation if they expect to run effective organizations.

There has always been an awareness of the need for good management within the NGO sector. However, good management and NGOs have not always been seen as synonymous. Organizations of and for the blind have for years gotten away with poor management structures and little or no formal management policies to guide their operation. Within these organizations, inflexibility, inadequate financial accountability, lack of planning, and insufficient attention to the clients' needs have more often been the norm than have good management structures and practices. In fact, when one equated management with business practices in the NGO sector, this was perceived as improper—or even bad—for an NGO.

Organizations of and for the blind, not unlike many organizations in the social services community, have objected vehemently and claimed that the demand for good management practices was unfair based on their available resources. Many organizations of and for the blind questioned the need for financial accountability. They protested that funders expected more of them than was required in the business world. To some extent, however, the funders may have been justified in their expectations. Organizations of and for the blind, like other NGOs, are accountable to several sources and, therefore, responsible to a broad cross section of owners and stakeholders (that is, people with a vested interest in the organization).

This chapter addresses some of the issues faced by managers of organizations of and for the blind in the Institutional Development Project (IDP) area. It does not attempt to address or answer *all* the questions but looks at some of the most important issues for managers.

There is good reason for concern. NGOs that fail to strengthen their management systems will be unable to compete in the current environment. The needs to be met by organizations in developing countries are escalating—but resources are increasingly scarce. Well-managed organizations will be forced to widen their sphere of influence and to absorb the activities of smaller, ineffective, poorly managed organizations.

The needs of disabled people are particularly challenged in this respect. Services are driven to integrate in order to achieve economies of scales. Consequently, the well-managed organization will provide services to a broader constituency. Conversely, the poorly managed organization will struggle and perhaps cease to exist.

Understanding the Organizational System

An understanding of the organizational system—the life cycle and culture of the organization—is indispensable to good management. Some vital qualities a manager must apply to organizations of and for the blind include the ability to:

Appreciate leadership and the qualities of leaders.

Develop harmonious teams in the work place.

Possess broad and comprehensive knowledge of services being provided to blind people.

If an organization is to be well managed, the theories and principles behind organizations and management concepts must be understood and applied. The Peters and Waterman¹² landmark study on management and excellence is a valuable guide to successful management. Although this study refers specifically to business organizations, its four components of successful management are relevant to the operation of successful NGOs. The four components of *customers, innovation, leadership, and people* should form the management foundation for organizations of and for the blind.

According to Peters and Waterman, “management is a process of coordination with the goal of making a planned activity take place. Everyone in the system is part of that process.”

In the process of managing an institution, the power of coordination and managing may be invested in one individual or in a group of people. In organizations of and for the blind, management power is generally entrusted to the Board of Directors and the executive leadership. In some cases, management power is held exclusively in the hands of the executive leaders. Regardless of the way in which it is organized, the managers who are running the organization must coordinate all its varied components.

Let’s now examine the Peters and Waterman components in more detail.

Customers

¹² Thomas J. Peters and Robert H. Waterman, Jr., *In Search of Excellence - Lessons from America’s Best-Run Companies*, (New York, Warner Books, Inc., published in arrangement with Harper & Row, Publishers, Inc., 1982)

In organizations of and for the blind, the customers are those receiving services from the organization. The management of these organizations is challenged to deliver a service that satisfies the needs of the customer. In small organizations of and for the blind, there may be unique challenges in meeting those needs.

Since organizations of the blind are owned and managed by blind people themselves, the owners of the organization are, in essence, also the customers. Therefore, they are directly involved in ensuring the services delivered are appropriate and relevant.

However, a potential conflict of interest can exist in these organizations. The leadership must be sufficiently open-minded to ensure their services are suitable for a broad cross-section of the community, not just for the leadership group's needs. As an example, there is no doubt that blind people need to immediately join the race for "high-tech" training. Despite this need, the organization may have to make a decision to fund rural services rather than expensive high-tech training when there is a large rural and agricultural-based clientele and limited resources.

This conflict frequently occurs when the self-help organization is fully managed by a group that has a long history of experience together (for example, groups coming from the same residential schools), or when the organization is managed only by people who live in urban areas. This potential conflict between the customers/owners must be carefully managed to avoid over-dominance by small interest groups.

Innovation

Innovative management is strategic to the development of organizations of and for the blind. NGOs are called upon to manage structures that are accountable to several owners or stakeholders, each with specific interests.

Moreover, NGO management is responsible for its leaders, clients, staff, volunteers, and the general public. The importance of managing these different constituents requires innovative leadership guided by judicious management principles.

Leadership

The consequence of good leadership within the NGO is vitally important to the organization. NGO leaders must be visionaries. They must be motivated *and* have the ability to motivate others. They must have a clear direction and strategy for the organization's mission while satisfying its diverse constituents.

Good leaders must also possess the skills to set an agenda that will guide the organization's influence in the field. In today's organizational climate where good management is necessary for organizational development, the members must be confident their leaders are steering the organization in a direction that will meet the members' needs.

People

The *people* component of an NGO is indeed complex. However, it is people that give the organization life and keep it alive. Consequently, the inherent complexity of people must be both well understood and well managed.

In organizations of and for the blind, services are designed and offered to people. Furthermore, the organization depends on the goodwill of people for all its accomplishments—volunteers, the board, the customers, the staff, and the general public. The organization must manage this diverse group of people. It must build teams and partnerships with all of them.

Developing an Organizational System

Good managers must, therefore, develop an organizational system within which the four components of customers, innovation, leadership, and people can successfully function. There are several models of organizational systems that may be applied to the operation and functioning of any NGO. The leaders may deliberately design a specific system to guide their organizational management and operations. On the other hand, the leaders may determine the system should evolve with the organization as it grows.

This decision is generally made according to the type of leader in charge of the organization at any given time. It is important, however, that a conscious decision is made one way or the other. The organizational system is much too crucial to be left to chance or whimsy.

It is critical that managers of organizations of and for the blind understand the environment in which their organizations operate. To practice good and prudent management, they must understand both their internal and external environments in relationship to three sub-systems: management, social, and tasks. These three specific areas of the organization must be described in the organizational operation.

Management Sub-System

This is the part of the organizational system mandated with the responsibility of establishing the mission, goals, objectives, strategies, policies, practices, procedures, and measurements for the organization. This part of the organizational operating system is also concerned with the “*big picture*” of the organization itself. It must ask and seek answers to how the organization interacts with its environment and how the other parts of the organization are integrated.

Social Sub-System

As noted earlier, people are the key factor in organizations. Every organization needs people if it is to function. Every organization must do something to attract people, to hold onto them once they have joined, to inspire them to perform in a reliable and consistent manner, and to help them adapt to changing conditions and circumstances.

Task Sub-System

The third element within the organizational operating system is the task sub-system. This system transforms the basic resources consumed by the organization into a product or service to be absorbed by someone or some other organization.

The Organizational Life Cycle

An organization is like a social system. It has a life of its own guided by a distinct culture, expectations, and norms. An appreciation of the organizational life cycle helps managers plan strategies appropriate to the climate and culture of the organization.

NGOs have lives that can be patterned according to a human being's development process. The cycle begins with conception and ends with death. In organizational language, the organizational life cycle begins at the idea stage and evolves to the stage of extreme bureaucracy, or dissolution.

Conception

The life cycle of the organization starts from the moment someone (the owner) has an idea for an organization that could meet a particular need. That beginning period can be described as the conception or idea stage.

Birth

The second stage is the formation of the organization, the period when ideas are shared thus building enthusiasm for launching a formal organization. The launching of the formal organization is the stage equivalent to birth.

Childhood

During the next stage in an organization's life cycle, the organization is growing exuberantly with little or no structure. It is essentially a group of enthusiastic individuals carrying out activities in the absence of specific structures, plans, and programs.

The organization operates solely on the zealous energy of its founders and friends. The organization impulsively seizes anything passing its way that appears to be within the mission of the founders. This aspect of the organizational life cycle can be equated to the childhood stage of human development.

Adolescence

The next step of organizational life is still exciting and vibrant but is also a period when the organization starts evolving into a more structured group. This stage is referred to as the stage of adolescence. During this stage, the organization continues to enthusiastically identify projects. At the same time, it is now developing more formal structures for the functioning of its projects and operations.

Maturity

From this point on, the organization enters its stage of maturity. It becomes increasingly formal and structured.

Many aspects of maturity are advantageous for an organization. However, this period of organizational development can be taken to a point where the organization turns into a bureaucracy. When this occurs, its structure and function become more important than its programs and services. In other words, the organization starts to exist only to sustain itself.

A highly bureaucratic organization may become so inward looking it loses its direction. This type of organization spends more time and money on formalizing its structure than it does on fulfilling its mission. Indeed, it may have lost sight of its mission. Symptoms of bureaucratic organizations are evident when its leaders spend most of their time on meetings about operations instead of programs, on developing policies and procedures, on obtaining and maintaining equipment, and so forth.

Death

When taken too far, formality and structure in a mature organization can breed rigidity and inflexibility. Skepticism of new ideas replaces enthusiasm. Intractability replaces innovation. The qualities that gave birth to the organization in the first place are now missing. Rigid and inflexible organizations that no longer meet the needs of their customers wither away and eventually die.

NGO managers must be aware of the stage their organization presently occupies in this life cycle. Moreover, the organization should always strive to be a blend of several stages in the life cycle. Managers must always be working on new programs and ideas in order to bring youth into the life of the organization. At the same time, managers must provide guidance through a formal structure that enables the organization to operate with sound management principles and practices.

NGO Management Challenges

NGO leaders and managers must be prepared to meet some—if not all—of the following management challenges.

Complex Organizational Structure

An NGO has a complex structure in which lines of responsibilities can be easily blurred. However, this confusion can be avoided by competent managers and leaders who have a thorough knowledge of how organizations of and for the blind function.

A major factor contributing to this complexity is the requirement that NGO management must direct and supervise an organizational structure with multiple stakeholders. The differing elements in the structure probably include a board, a secretariat (that is, the management staff), the professional service delivery staff, volunteers, and customers, as shown in Figure 1.

All the elements within that structure have major roles to play in the operation of the organization. However, the very nature of their roles often creates conflicts.

For example, the board may consist of people who are both owners and customers of the organization. Their dual role may lead to conflicts of interest during decision making. The professional staff are, in general, sincere and committed to their work. Nevertheless, they may have conflicts with management decisions made for reasons of fiscal control. Volunteers are open and committed, but more concerned for the blind people they are serving than they are for organizational and management issues.

Figure NGO Organizational Chart

The executive staff, executive officers, and program managers collectively and separately are challenged to work with and lead this diverse group. The total organization, led by the board and very often guided by the executive staff, also has an overall responsibility to the general public.

Managing this type of complex organizational structure poses the biggest challenge confronting NGO leaders and managers. Nonetheless, these unique challenges can be met successfully by implementing perceptive management principles.

Demand for Services Exceeds Supply

The most important features of any organization are its people and its products. For organizations of and for the blind, both people and products can present enormous challenges to management because the demand for services always outstrips the supply. With limited personnel to implement their projects and programs, these organizations are always stretched to produce the services needed by their customers.

In the business world, an economic law governs supply and demand. Market forces dictate this law. However, in the field of blindness in developing countries, the demand for services has never come close to being met.

This frustrating situation requires competent and decisive management decision making. Such decisions can only be taken with a deep understanding of the organization's capacity and of the community of organizations that provide related services. Such an understanding requires the manager to fully comprehend the internal and external environment in which his or her organization is operating.

Limited Funding Base

All organizations of and for the blind in the IDP project area are dependent on funding from external donors. Dependency on these external funding sources is made more difficult for managers and leaders because all the organizations of and for the blind are seeking funding from the same small pool of external agencies. Moreover, this small pool of agencies has limited funding. Once funding is received, organizations must work within the limits set by the donor's agenda.

Insufficient Trained Personnel

There are limited numbers of trained personnel available to organizations of and for the blind in the IDP project area. Most of these organizations ordinarily operate with a trained staff of only two or three and several volunteers, many of whom are untrained and unskilled. Yet, in spite of such limited resources, these organizations must provide services for hundreds—and, in some cases, thousands—of blind and visually impaired people.

Furthermore, these organizations must operate on the goodwill of friends and well-wishers *and* on a shoestring budget. Managers of these organizations must be sufficiently innovative to integrate the organization's services to meet the needs of their customers within these constraints. The managers and leaders must also fill multiple roles within the operating structure of the organization.

Ambiguous Ownership

In a business, it is obvious who are the owners and who are the customers. In an NGO, this distinction is not so readily apparent.

Because organizations of the blind have become more directly involved in the delivery of services, it has become even more difficult to differentiate between owners and customers. Because an NGO has a responsibility to meet its mission in the interest of the general public, the ownership question is further complicated since the organization is continually reaching out to the public for support and funding.

Dependency on Volunteers

Due to their extremely heavy dependence on volunteers, the organization's management must develop specific strategies to recruit and work with volunteers. This dependence on volunteers creates another major management challenge. That challenge is to find, keep, and satisfy volunteers in order to maintain the viability of its many programs.

Unpopular Decisions

NGOs are blessed with strongly motivated staff. Organizations of and for the blind are particularly endowed with such devoted personnel. Many who work in the field display a special calling to the job. However, this sincere devotion by the staff always gives rise to discontent when management is forced to make decisions based on the realities of limited and undependable resources.

Leadership Vs Management

The terms *leaders* and *managers* have both been used throughout this chapter when discussing the role of the organization's top officers. The distinction between the two is especially important when choosing the executive officer. At that time, a choice must be made to either *appoint* the top officer from an external search or to *choose* the best volunteer from within the organization. Before making this choice, the organization must know if it needs a leader or a manager.

Leadership qualities are essential skills for top officers in the NGO. The NGO needs effective leaders and capable managers; in the current climate,

organizations of and for the blind need *both!* If their organizations are to effectively respond to the demands of the NGO community and the public regarding the need to operate with prudent management principles and policies, they must be guided by strong leaders *and* good managers.

Leadership is a difficult subject to define. Many people confuse leadership and management when trying to define a problem within an organization. There is clearly a difference between leaders and managers. An organization needs both. However, rarely does one individual possess both skills.

Therefore, a clear understanding of the differences between leadership and management is imperative. It is especially important when an organization is determining at which stage of the organizational life cycle it is operating and deciding where the organization is to go in the future. It is crucial when the organization is making changes in its top management position.

A leader, whose primary strength is generally his or her vision, can take the organization to a level that a manager cannot. On the other hand, a manager can provide stability to the organization that a leader cannot. When selecting the top officer of the organization, it is important to thoroughly assess the organization's needs. Before electing or appointing top officers, the decision makers must understand the organization's present position and also have a clear sense of where they want it to go in the future.

Warren Bennis and Burt Nanus, in their book *Leaders -- The Strategy For Taking Charge*, speak to this point. They suggest the problem with many organizations—and especially ones that are failing—is their tendency to be “*over-managed but under-led*.”¹³

They describe the differences between managing and leading in terms of tasks. “Managing,” they suggest, “means to bring about, to accomplish, to be in charge of, or to be responsible for. Leading, on the other hand, is influencing, guiding, directing action, shaping opinion.”

Managers solve problems. They specifically deal with issues by developing a set of steps or methods which result in solving these problems. Managers establish control based on details. They are particularly strong on developing analytical strategies for problem-solving.

Leaders, conversely, usually do not have the innate skills to handle details. As visionaries, their skills focus on the future and the “*big picture*.” They do not necessarily develop methods of problem-solving with the same type of strategic approaches as managers do. Instead, leaders use power, communication, and vision as the key elements for moving the organization.

Today, with the increasing demand for responsible management, organizations are seeking new and innovative strategies to deliver services and reach more customers. Consequently, understanding the differences between leadership skills and management skills is of great importance to the NGO. The decision must be made to choose the right people to run the organization. People must be chosen who have the right kinds of knowledge and skills to meet the specific challenges facing the organization in a given period of time.

¹³ Warren Bennis and Burt Nanus, *Leaders -- The Strategy For Taking Charge*, (New York, Harper & Row, 1991)

Developing Work Teams

Throughout this chapter, there have been numerous references to the organizational requirement to coordinate all the diverse elements in an NGO. Therefore, the final challenge for organizational leaders and managers is the development of work teams.

An organization that includes a combination of people must have the capacity to pull this diverse structure into a working team. The capability to coordinate and support effective work teams requires a management philosophy that respects contributions from *all* members of the team. Work teams are created from people in management, on boards, volunteers, professional staff, and customers, who in some cases are also owners of the organization.

It must be recognized that the concept of work teams has an impact on leadership styles, organizational culture, and the overall strategies and practices of how the organization is managed. For example, working in teams impacts leadership because it takes brave and confident leaders to entrust responsibility to members of a team. It has an impact on organizational culture because the concept of work teams conflicts with bureaucracy. Many organizations providing client services, especially those providing services for blind people, can be so specialized and compartmentalized that work teams cannot—and will not—be allowed to function. Working in teams affects the managing of an organization because it demands open management and the removal of closed systems.

The theory of work teams is not new but has been perfected in business by the Japanese. The concept refers to working in such a way that all workers are involved fully in the operation of the organization.

Work teams suggest partnership and shared responsibilities. In the work team concept, workers have a mandate to establish their own parameters. They are informed of the organization's strengths and weaknesses. They are aware of what is expected of them and what their role should be—and what it should not be.

In some companies, work teams are divided into several levels, from the lowest-ranking to the top-ranking personnel. In NGOs, this means organizing teams of both volunteers and paid workers. This combination of teams can be very helpful and beneficial to NGOs, especially organizations of and for the blind with a small staff.

In work teams, the role of the manager is not to direct every aspect of the organization but rather to coordinate and facilitate. Support for each team comes from a specific program or group. As a consequence, a strong spirit of comradeship is developed within the team. Congratulations and reprimands come from within the team. The entire team feels it is an integral part of the organization's success when group goals are achieved.

Level 4 -- Senior Management Training

Level 4 IDP training is divided into two separate training programs. One program, Senior Management Training, focuses on developing the management skills of organizational leaders and managers. Senior management training is a five- to six-week program.

The second program, Introduction to the Foundation of Fund Raising, is designed for fund-raisers within the organization. It is a two-week program, and is described in Chapter 7.

Pre-Training Preparation

- Select training coordinator.
- Select trainers.
- Determine number of participants.
- Select participants based on their roles in their local organizations.
- Organize training agenda.
- Obtain funding.
- Locate office and classroom space.
- Arrange housing and meals (if applicable).
- Enlist technical support for practical and theoretical aspects of training.

Training Objectives

- Provide new information on organizational development, with specific attention devoted to the growth and roles of NGOs.
- Introduce and review management concepts and leadership styles; identify the impact of various styles on the management of an NGO.
- Introduce new concepts in fund raising.
- Provide information to be used to strengthen the organization and program operations and financial management procedures,¹⁴ including the use of budgets and financial reporting as tools of planning and evaluation.
- Introduce and review specific areas of development and management of services for the blind and visually impaired and the development of blindness prevention services.
- Provide an opportunity for a field assignment to expose participants to practical experiences regarding concepts developed during the earlier phase of the program.
- Have participants develop a short-term program, to be implemented within twelve months of their return to their home office. The short-term program will be evaluated at the end of that period by the training coordinator.

Training Strategies

- The program is implemented through a series of mini lectures, small and large group discussions, the production of written materials, field trips, and a field assignment.

¹⁴ Suggestions for NGO financial policies are in Appendix B.

Each participant is required to bring to the training program a written document providing information on the history and operation of his or her organization. This information is made available to all participants.

The participants are required to bring written factual cases for use as practical examples of organizations and management, or of issues related to the development or delivery of services.

Factual cases, as presented and discussed by the individuals who wrote them, are used as group case work.

At the end of the training program, all participants are required to produce a project document, with the project to be implemented within twelve months of the training.

Participants are required to write a comprehensive report on their field assignment. The report must be an evaluation of the office to which the participant was attached. It must demonstrate what knowledge was gained from the exposure throughout the program to services and ideas about organization and management.

Training Agenda Outline

Course introduction and logistics.

Review objectives.

Introduction to development and management of NGOs.

Examine the role of boards in NGOs.

Development of organizational missions; prepare mission statements.

Effective planning in NGOs.

Financial management and accountability in NGOs.

Project development and project implementation.

Team building; working with work teams.

Technical field-site visit (half day).

Communication skills for managers and leaders of NGOs.

Introduction to fund raising concepts and marketing of the organization.

Development and maintenance of services in uncertain funding climates.

Introduction to concepts of blindness prevention services.

 Introduction to the structure and anatomy of the eye

 Common causes of blindness in developing countries

 Review blindness prevention programs operated by organizations of and for the blind

Social and cross-cultural development of rehabilitation services for the blind and visually impaired.

Development of early intervention services.

Development of services for low incidence population groups.

Introduction to concepts of education services and models for the blind and visually impaired.

Advocacy:

Role of Parents

Role of Consumer Groups

Development of low vision services.

Panel discussion on international services for visually impaired people.

Program evaluation.

Second technical field-site visit (before the program moves into field assignments).

Field assignments.

Field assignment report and review; deliver proposed project.

Training Agenda Details

Week 1 and First Half of Week 2. Address issues of organization and management for an NGO. This includes identifying issues and strengthening organizational development, NGO composition, administration and operation of the NGO, as well as office management and operation.

Second Half of Week 2 and Week 3. Focus on the development of specific services for the blind and visually impaired and the development of blindness prevention services.

Weeks 4 and 5. Field assignments, sharing experiences, gaining information about program operations and office management. The last few days are spent developing and writing reports about what has been learned and plans for the future. Each participant is expected at this point to hand in a project which is to be implemented over the next twelve months.

Chapter 7 Funding

Funding is the most fundamental issue facing organizations of and for the blind in developing countries today. Their need for sustainable funding is not simply an issue of acquiring operating funds. What is more important is the issue of securing sufficient funds to support and sustain the on-going activities necessary to meet the needs of their clientele and members.

Organizations of and for the blind do not require funds just to maintain their activities. They need a funding base that gives them long-term security to support their organization's mission. They require funds for operating expenses as well as project development.

Fund raising is the term most commonly used to describe funding contributions. However, long-term funding is not fund raising—it is fund development. Managers and leaders of organizations of and for the blind must differentiate between the two and develop a strategy of long-term fund development supplemented by short-term fund raising. Table 4 describes the major differences between these two approaches to funding.

Table Fund Development Vs Fund Raising

Fund Development Fund Raising Fund development is long-term organizational investment. Fund raising is organized for short-term relief. Fund development is built on a base of sensible investment planning and woven into the complete operation of the organization. Fund raising is normally built around meeting immediate needs. Fund development is guided by the organizational leadership. Fund raising is usually left up to committees and lower-ranking personnel. Fund development is based upon a marketing plan which identifies appropriate market segments. Fund raising is aimed at a distinct market segment.

Rather than using *fund raising* as a generic term in this book, the term *funding* is used instead to refer to both long-term fund development and short-term fund raising. This has been done purposefully to underscore the need for strategic planning for funding.

The Funding Challenge

Obtaining sustainable funding is a new challenge for organizations of and for the blind. It is one that must be taken seriously and integrated into the total operation. This must be done in spite of the fact that neither fund development nor fund raising are traditional concepts for organizations of and for the blind in the Institutional Development Project (IDP) project area.

Only a few of these organizations before the 1990s had any fund development or fund raising programs. None had a department within their secretariat responsible for generating funding. Many had fund raising committees, but the committees worked at levels far removed from day-to-day operations.

The western tradition of philanthropic contributions to organizations is a foreign concept in the IDP project area. However, now that it is being introduced and accepted, leaders of organizations of and for the blind must themselves internalize the concept. Then they must sell the idea throughout their own organizations. Fund development and fund raising, like *democracy*, are concepts that must be nurtured and practiced.

If fund development and fund raising are to be meaningful, they cannot be half-hearted. A funding program must be holistically¹⁵ embraced within the organization's planning and implementation strategies. As a consequence of including fund development and fund raising at the strategic level, management can then make decisions based on its capacity to attract or raise funds.

Management must be aware of the sources from which funds are being attracted and the reliability of those sources. The budget must also be based on reliable funders, as well as the organization's capacity to raise funds to meet expenses not covered by committed funding sources.

Therefore, when planning the organization's operations and activities, both management and the funding department must be able to identify all the organization's funders. For example, reliable sources for a given year might be: the government, international agencies, local private donors. However, these may account for only eighty percent of the annual budget. The leadership of the organization must then decide whether or not the funding department realistically has the capacity to raise the remaining twenty percent of the budget.

¹⁵ In management terms, holistic refers to the theory that the *whole* is greater than the sum of the individual parts.

These decisions must be based on the organization's previous success in raising annual funds. Other factors that the management and funding department (or committee) must consider are:

- The present economic forecasts for the financial position of the community or region.

- Current social trends in the region.

- The impact and visibility of the organization's services.

If the organization's operating base is small—for example, only two or three staff members—its funding department must include the paid staff as well as the top volunteers. They must guide the funding department relative to the needs of the organization.

They must also convey information about the limitations and realities of the department to the management team responsible for planning. The funding department's input must also reach all staff members and all levels of the organization.

The lines of communications in an organization that embraces holistic management are shown in Figure 2.

Figure Holistic Management Lines of Communication

Funding Development

Trying to raise money simply on the strength of an organization's needs will work just about as well as seeking a bank loan by pleading poverty. The organization's needs are not the responsibility of the public—they are the responsibility of the organization. Its leaders, accordingly, have an obligation to market the organization to the public as a good investment.

Begging for donations is no longer acceptable to either the public or to blind people. Indeed, blind people see begging for donations as a major stumbling block in their efforts to change the publicly held image of the blind. The public has had just about enough of beggars as well. Begging for funds, therefore, has become ineffective with the general public.

“The purpose of a strategy for raising money is precisely to enable the non-profit institution to carry out its mission without subordinating that mission to fund raising. This is why non-profit people have now changed the term they use from ‘fund raising’ to ‘fund development.’

“Fund raising is going around with a begging bowl, asking for money because the *need* is so great. Fund development is creating a constituency which supports the organization because it *deserves* it. It means developing what I call a membership that participates through giving.”

Peter F. Drucker¹⁶

Successful organizations must seek funding as an investment, not as charity. They must find and invite prospective donors to make an investment in their organization. Pouring pity on the helpless blind will not bring the desired results nor will it attract more than minimal contributions. Solicitations based on sympathy alone cannot sustain an organization.

Consequently, the days of begging for organizational support are over. The organization's services are an investment and should be presented as such to the donors. People must be invited to invest in a worthy enterprise. Rather than begging for handouts, the organization must seek investments to fill a market gap. The organization's work—its mission—is that market gap.

Moreover, the organization's mission statement gives the funding department an essential tool for selling its services to donors. Without a clear vision and mission, the people responsible for fund development and fund raising cannot operate effectively.

¹⁶ Peter F. Drucker, *Managing the Nonprofit Organization, Principles and Practices*, (HarperCollins Publishers, 1990), 56

The transition from begging for donations to an investment strategy based upon marketing and public relations is one of the most profound changes in the field of non-governmental organizations (NGOs) in recent years. Many people say there is not enough money to go around. But that's not true. Money is available. However, it is only given to those who work hard for it, and to those prepared to manage the money and invest it to the satisfaction of the giver. To put funding in the perspective of marketing, the organization must be favorably positioned relative to its competition.

To capitalize on an investment strategy for funding, the potential investors (donors) have to be aware of the marketplace. The marketplace is the community in which the organization operates and its community of donors. The investment offered is the services and programs being delivered. To make a successful match with an investor, the organizational leaders must package (that is, market) their organization, their services, and their programs so they meet the needs of the community as well as of the organization. Everyone is a prospect. Every prospect is a potential donor.

The best managed and best organized group is the one that knows how to successfully market itself and how to deliver. This is the organization that succeeds in today's economic climate. It is also the organization that best meets the needs of its clientele.

The most attractive organizations stand out from the crowd. They are the ones that know how to distinguish themselves when opportunities arise. They develop positions that differentiate them from their competition. They understand the political and economic dynamics of situations. They develop innovative approaches to accomplish their mission. These are some of the things that set one organization apart from the others.

Therefore, the organization must be so organized that it earns confidence and attracts investment. Successful ones have a clear mission and appropriate management structures. These are the organizations in which people choose to invest. It must be remembered that people give meaningfully in order to get something back. They do not want to feel they are giving away their money for nothing. They want to feel confident they are investing it—and getting something in return. Large amounts of funding can never be attracted by negatively portraying blind people.

When people are asked to invest in rehabilitation programs, the benefits of those rehabilitation services must be clearly stated. If they are asked to invest in programs, they must feel those programs enable blind people to become more independent, or that there will be fewer blind beggars and more blind workers in the work force. If they are asked to invest in eye care programs, they must believe they are investing in a service that can save the sight of the nation. If they are asked to invest in education for blind children, they must understand the benefits to the children and the community.

People should be asked to invest in something specific, not just to help pay the bills—that is too broad to be meaningful. Something more tangible must be in it for the investor. It is often said that *'People give to people, not to projects.'*

The more difficult the economy, the harder it is to get funding. In contracting economies, people are only going to give if they feel they are going to get something back. An organization must address people's wants. It must address

the community's potential and society's aspirations. It must respond to opportunities, and show how the organization is poised to respond to those opportunities on behalf of all those it serves.

Appeals for investment funds that are based solely on the internal needs of the organization will be ineffective. An appeal must be based on matching the internal need with the needs of the external environment. The internal environment represents the dynamics within the organization—the external environment represents the outside pressures to which the organization must respond. Organizational leaders must be in touch with their community and flexible enough to recognize opportunities, even in the face of disaster.

Once embarked upon a comprehensive fund development program, much of an organization's financial support may come from a few private donors. However, the organization must be wary of relying too heavily on a single source of funding. If this happens, the funding strategy must be revised to increase the number of donors.

The Funding Department

When developing the funding department, an organization must give careful attention to several issues as it prepares a marketing plan to sell the organization and its mission to the community.

The Image Projected By A Name

An organizational name change is sometimes helpful to change the organization's image in the eyes of the public. For example, the Antigua and Barbuda Society For the Blind changed the name of its training workshop from "*Workshop For the Blind*" to "*The Industrial Workshop for Blind People*." As a result of this name change, a more powerful and positive image was projected to the public.

Appointing Key People

Similar creative considerations need to be given to the appointment of the heads of the funding department or special fund raising events. When making such appointments, an organization must carefully assess the attitude of the community toward funding projects in the field of blindness. People who understand the community culture should be appointed to run the events.

Assessing People, The Organization, The Culture

An organization must also pay careful attention to the personalities likely to attract funds and to the skills needed by personnel in the funding department. At an embryonic stage in the development of a funding department, it is particularly important that the organization pay careful attention to the environment in which it is setting up the department.

Following are some issues to be considered.

What is the culture within your community, region, or country towards fund raising and fund development?

What is your organization's commitment to raising funds?

Is your organizational leadership (that is, the board and the executive director) prepared to consider fund development as a strategic component at the top management level of the organization?

What is your organization's image in the eyes of the public?

What kinds of personalities can your organization attract?

What types of personalities could best break ground in your potential donor community—in your district, region, or nation?

Four Key Measurements

In the raising of funds, as in the providing of services, four key components should be continually and objectively measured: Achievement, accomplishment, performance, and success.

Achievement. What are your organization's stature and image in the community?

Accomplishment. How good is your organization's track record? Does it consistently accomplish its goals?

Performance. Do your organization and its members conduct themselves professionally? Do they demonstrate the capacity to successfully meet challenges?

Success. Has your organization proven it has the ability to fulfill its mission and programs?

Donor Relationships

Regardless of the number of donors, it is critical that loyal donor relationships are developed with all of them. Small donors may become large donors in the future, especially if they become emotionally involved with the organization. Everyone is conceivably a donor.

Following are some guidelines for developing donor relationships.

Communication -- Communicate on a systematic basis with your donors. Let them know about your progress, not just your problems. Don't contact them only when you need their help (that is, a donation). Assign people in your organization, including volunteers and staff, a list of donors for whom they are responsible. Don't leave it to chance. Follow up on their contacts. Regularly ask, 'What is the quality of our communication with our donors?'

Professionalism -- Be sure everyone conducts himself or herself professionally when representing your organization. Adhere to deadlines. Pay attention to detail. Keep commitments. Be responsive and creative. Show appreciation. By all means, no one should ever discuss organizational problems or personal conflicts with donors.

Accountability -- Be accountable for your actions. Take responsibility. Don't blame others when problems develop—find solutions instead.

Enthusiasm -- Be enthusiastic about what you're doing. Enthusiasm is infectious. Your enthusiasm is likely to make your donor feel enthusiastic, too. When doors are closed and people reject your requests, don't take it personally.

Planning -- Write out your goals. Make action plans—and implement them. Keep records of what you have done and what you plan to do.

Appreciation -- Donors are human beings and, like everyone, they don't like to be taken for granted. Periodically express your appreciation. Give them public recognition. Publish lists of donors in your newsletters or other public relations tools, at your annual event, or as a letter to the editor in your local paper.

Fund Raising

As discussed earlier in this chapter, fund raising is a short-term strategy for meeting immediate needs. It is a legitimate method for supplementing funding but should not be exclusively relied upon for an organization's entire budget.

Fund raising projects must be linked to distinct organizational programs, activities, and goals. A fund raising event should not be held simply to raise money. The event must be aimed at supporting one aspect of a specific program, or at fulfilling a particular need within the organization's overall development strategy.

Funding Responsibilities

Because of its strategic importance, it must be reiterated that *all* members of management are to be involved in developing and raising funds. The board has direct responsibilities for some components of the funding strategy. Most common is the funding department (or committee), which should be represented on the Board of Directors. The executive officer (or director) has a major responsibility to work closely with the funding department in its work with donors. The funding department must rely on the programs department for information about the organization's services and activities. No development plan within an organization should ever exclude the funding department.

The funding department cannot be asked to raise funds without knowing what they are raising funds for. Neither can the planning department design programs without knowing the capability of the funding department to finance those programs. Therefore, when developing organizational objectives and goals, departments must work together as a team on a coordinated strategy.

Funding Methods

There are several methods of generating funds to support projects and activities for organizations of and for the blind. The four funding methods most often used by organizations in the IDP project area are:

- Government funding
- International donor funding
- Local fund development and fund raising
- Cost recovery.

Government Funding

In most developing countries, this is a very difficult area for raising funds. Many governments give a small subsidy to organizations but find it difficult to designate specific funds for organizations of and for the blind.

When directed towards government agencies, a funding strategy must emphasize the development of services for citizens who are blind rather than accentuating “*blind people*” and their organization. The emphasis must be on the positive—not the negative—image of “*the blind*.”

It is important that relationships with decision makers in relevant government departments are cultivated and nurtured.

International Donor Funding

International donors are by far the most reliable source of funding for programs for blind people in developing countries. However, total dependency on this source can lead to problems. In many cases, support from the international community depends on the current fund raising climate in the donor country.

To successfully work with international funding sources, an organization must be able to provide regular reporting and accurate, efficient accounting. These are vital prerequisites for sustained funding from international donors.

Local Funding

Local funding is the key to sustained financial support and independence. Nevertheless, local fund development and fund raising are some of the most challenging tasks for an organization. It may take years for a local fund development program to mature and become a dependable source of funding.

There are countless proven methods for effectively raising funds on a local level. A few of these methods are described below.

Direct Mail. Direct mail is the mailing of an appeal directly to selected individuals who are potential donors. In developing countries where there are unlikely to be readily available mailing lists, such lists must be created. A good starting point can be the local telephone directory. Running raffles and collecting names and addresses from raffle tickets is another way to create a mailing list. Bear in mind that direct mail can be costly due to the expense of producing and printing the materials to be mailed and the postage.

Bequests. Many people leave money to charitable organizations in their wills. Raise the visibility of your needs and educate your community about the possibility of charitable bequests to your organization. Wills and bequests may be a new form of giving within some developing countries. The expatriate community is a good starting-point for such funding. The use of direct mail can also lead to bequests.

Corporate Sponsorships. Cultivate a relationship with a corporate decision maker. Then sell him or her on the mission of your organization. Write a draft proposal, highlighting different aspects of your organization's work. Describe what your organization has already accomplished on its own and its goals for the future. Share the draft document with this corporate decision maker. Ask him or her for specific information about the corporation or company that would be relevant to your project proposal and would help it succeed. Enlist the support of this individual. Once completed, formally meet with the appropriate person in the corporation and present the proposal. Give private and public recognition to the companies and corporations that support your organization through corporate sponsorships.

Annual Events. Special events¹⁷ can be labor-intensive and time-consuming. Therefore, good up-front planning is essential. A well-organized annual event is better than several poorly organized special events throughout the year. Special events may appear to be attractive but often require a great deal of time with relatively small returns for the effort.

An annual event can generate community awareness in addition to income. Invite the press. Find ways to advertise your event at no cost through your local radio or television station—call the stations or use your personal network of contacts and ask if they can help you. Keep a record of people who are helpful so you can call them again in the future.

Some examples of annual events are:

Competitions. Have a *Cents for Sight* competition in the local schools and universities to see which school donates the most. Give a prize to the school with the most donations. Have a blind person from your organization visit each school to announce the competition. Use this as an opportunity for her or him to talk to the pupils about the realities of blindness and blindness prevention.

Value for Money. Offer the community a product or service. Do some market research to find out what products or services are needed in your community. Talk to wholesale distributors to find out what products they have that you could sell as a fund raiser. This could be an annual fund raiser that might be part of your annual event. Look for opportunities within the tourist industry.

¹⁷ Guidelines for planning special events are in Appendix F.

Value for Vision Coupon Books.¹⁸ The St. Lucia Blind Welfare Association embarked upon a unique fund raising project when they found they were unable to generate needed resources through traditional fund raising activities.

They enlisted the support of thirty business students from a local community college to ensure sufficient personnel to carry out the project. These student volunteers were recruited, trained, and given the responsibility of securing the participation of companies in the private sector. After obtaining signed agreements from 150 companies, a special promotional package was developed. One thousand coupon books were printed and sold at \$50 EC¹⁹ per book. The books included special promotions and discounts from the participating companies.

The success of the project was measured not only in revenue but also in the level of interest, knowledge, and awareness generated in the community at large. Users of the Coupon Book were not only made aware of the services offered to blind and visually impaired people but also of the value of their own eyesight.

Lotteries. Contact representatives of lotteries and ask for a portion of their profits. Be brave. It's for a good cause.

Raffles. Most people welcome a chance to win something. Obtain raffle prizes from donors or use part of the raffle money itself as the prize. Have raffle tickets printed, and arrange for volunteers to sell the raffle tickets. Raffles are relatively easy to organize and inexpensive to run. Collect names and addresses from the raffle tickets for a mailing list to use in direct mail programs.

Annual Formal Cocktail Party. The Antigua and Barbuda Society for the Blind instituted a highly successful formal cocktail party which is held annually. Local merchants donate the food. A local hotel school donates the servers and venue. Attendance is by invitation only. The event quickly evolved into an annual tradition anticipated by the community.

Cost Recovery

Cost recovery describes a businesslike approach to funding. Cost recovery means charging for services rendered or products provided on either a temporary or permanent basis. It should form a part of every funding program.

Products or services can be offered on a permanent basis. For example, eye screening services could be provided for a reasonable charge. Local opticians, optometrists, or eye doctors should be enlisted to donate their services for which the organization would charge a fee.

¹⁸ Anthony Avril, St. Lucia Blind Welfare Association

¹⁹ EC\$2.60 is equivalent to approximately US\$1.00.

Alternately, other business ventures might include a coffee shop, a bakery, a fax service, or a gift shop—which should include products made by the blind people in the organization. These are only a few examples of businesses that an organization could operate. Market research for the local area will furnish ideas of what businesses could be successful in the community.

Be certain blind people are employed in the business to increase public awareness of their capacity to perform on the job. Whatever business is operated, sound business principles with effective marketing and management must be followed.

Level 4 Training -- Funding

The training described in this section is an introduction to the foundation of fund raising for people who are—or will be—responsible for raising funds for the organization. This foundation course is divided into three sections.

Pre-Training Preparation

Identify training needs.

Select trainer.

Establish date, location, and length of training.

Identify participants.

Identify all required resources, including speakers, trainers for special topics, and facilitators, as needed.

Arrange off-site visits.

Organize training agenda.

Forecast expenses and plan budget.

Announce training program.

Prepare and distribute pre-training information (if any).

Prepare training materials.

Training Objectives

Help participants develop a personal commitment to the discipline and profession of fund development and fund raising.

Enable the organization to develop a fund development strategy within its overall program.

Provide the basic skills and tools for establishing fund raising activities within the local organization.

Training Strategies

The course is held from 9:00 AM until 5:00 PM each day for six intensive working days.

The course is implemented through a mixture of mini-lectures, group discussions, and writing assignments. Emphasis is placed on the writing

All training materials must be in an accessible format for blind participants.

Section One focuses on fund development as an integral component of the organization's management strategy.

Section Two focuses on sources of funding and the preparation of information for accessing specific sources; a considerable amount of practical work is done during Section Two.

Section Three focuses on public relations and the marketing of the organization.

During Section Three, participants are exposed to the preparation of press releases and on-site visits to public relations facilities, for example, newspaper offices and radio or television studios.

The training is equally divided between theory and practical work.

Participants prepare proposals and plans for special events.

Participants hold discussions with editors of news agencies.

Training Agenda Outline

Introduction to the course.

Introduction to general concepts of fund development, fund raising, organizational marketing, and public relations.

The funding department and management of an organization.

The organization's structure, mission, goals, and objectives.

The role of fund development and fund raising in the organization.

Sources of funding: Government funding, international funding sources, special events, corporate sponsorships, cost recovery.

Proposal writing.

Marketing the organization.

Public relations.

Off-site visits.

Practical assignments: Preparing press releases, writing proposals, developing special events.

Training Agenda Details

Section One. Focus on the development of a holistic approach to management (as shown in Figure 2 earlier in this chapter). Emphasize the organizational

structure, mission, role, and team approach to management. Pay special attention to the role of fund development in supporting the budget of the organization and the overall organizational strategy.

Section Two. Focus on specific fund development and fund raising approaches. Pay attention to special events, proposal writing for foundations and for government and non-government sources. Challenge participants to prepare specific practical exercises both individually and in groups. Give participants the experience of writing proposals and presenting them to a potential donor. Ask them to plan a special event and present the details for the development of the activity to the class.

Section Three. Focus on public relations and marketing. Have off-site visits to newspapers and radio or television stations. Have participants prepare a press release on the course. Study the importance of public relations within the organization's fund development strategy. Conclude the program with three clinical sessions to review the program content and to assist participants in areas in which they feel they need further information.

conclusion

In an ideal world, I would hope this book would be obsolete in five or ten years. If most of this information—or even a large portion of it— has become standard practice in developing countries during that time, the vision that gave birth to this book will have been fulfilled.

Attitudes—and behavior—are *difficult* to change. It takes work to change. Hard work. It takes commitment. And belief—especially belief. Personal development and organizational development require all of these over a long period of time.

We must never forget that blind people are *people* first. Blindness is only a qualifier of the human condition, not a definition. People *define* themselves in the way they live and the ways in which they conduct their lives and their relationships. By believing in ourselves, by empowering ourselves, we have the capacity to direct and control our lives. We have the capacity to lead fulfilling and satisfying lives. We have the ability to influence and lead our organizations.

Whether on an individual level or an organizational level, the following quote summarizes the need for action.

*“Good intentions, good policies, good decisions must turn into effective actions. The statement, ‘This is what we are here for,’ must eventually become the statement, ‘This is how we do it. This is the time span in which we do it. This is who is accountable. This is, in other words, the work for which we are responsible.’ Effective organizations take it for granted that work isn’t being done by having a lovely plan. Work isn’t being done by a magnificent statement of policy. Work is only done when it’s done. Done by people. By people with a deadline. By people who are trained. By people who are monitored and evaluated. By people who hold themselves responsible for results.”*²⁰

Blind people and leaders of organizations of and for the blind should take these words to heart. You will become empowered when you take action, when you feel accountable for yourself. Your work will be done, not when it is considered, but only when you do it.

²⁰ Peter F. Drucker, *Managing the Nonprofit Organization, Principles and Practices*, (HarperCollins Publishers, 1990) 142

Appendix A International Organizations

The following is a list of international organizations involved in education and rehabilitation for blind and visually impaired people. Some also have publications of interest to those who are developing new rehabilitation services.

African Union of the Blind (AFUB)

North Airport Road
P. O. Box 72872
Nairobi, Kenya
Contact: Mr. Chomba Wa Munyi

Associates for World Action in Rehabilitation and Education (AWARE)

3383 Lake Shore Drive
Mohegan Lake, NY, USA 10547
Contact: Mrs. Anne Yeadon

Canadian National Institute for the Blind (CNIB)

320 McLeod Street
Ottawa, Ontario K2P 1A3, Canada
Contact: Dr. Euclid Herie

Christoffel Blindenmission

Niebelungenstrasse 124
D-6140, Bensheim 4, Germany
Contact: Mr. Christian Garms

Danish Association of the Blind

Thoravej 35
DK-2400 Copenhagen NV, Denmark
Contact: Mr. John Heilbrunn

Dark and Light Foundation

P. O. Box 269
3700 AG Zeist, The Netherlands
Contact: Mr. Dirk Verrpote

Fédération Internationale des Association Catholiques d'Aveugles (FIDACA)

Avenue Dailly, 90
1030 Brussels, Belgium
Contact: Mr. Dirk van Litsenborgh

Finnish Federation of the Visually Handicapped

Makelankatu 50
FIN-00510 Helsinki, Finland
Contact: Mr. Arvo Karvinen

Helen Keller International

90 Washington Street
15th Floor
New York, NY 10006, USA
Contact: Mr. John M. Palmer III

International Association for Education of the Deafblind

c/o SENSE
11-13 Clifton Terrace
Finsbury Park
London N4 3SR, England
Contact: Mr. Rodney Clark

**International Council for Education of People with Visual Impairment
(ICEVI)**

37 Jesselton Crescent
10450 Penang, Malaysia
Contact: Mr. William G. Brohier

International Labour Office (ILO)

Vocational Rehabilitation Branch
4, Route de Morillons
CH-1211 Geneva 22, Switzerland
Contact: Mr. Willi Momm

The Lighthouse

111 East 59th Street
New York, NY 10022, USA
Contact: Dr. Mary Ann Lang

Lions Clubs International

SightFirst Department
300 22nd Street
Oak Brook, IL 60521-8842, USA
Contact: Mr. Michael Pajonk

Norwegian Association of the Blind and Partially Sighted

Sporveisgt. 10
Oslo 3, Norway
Contact: Mr. Arne J. Husveg

Organizaçion Naçional de Ciegos de España (ONCE)

International Department
Jose Ortega y Gasset, 18
28006 Madrid, Spain
Contact: Mr. Rafael Mondaca

Overbrook School for the Blind

International Program
6333 Malvern Avenue
Philadelphia, PA 19151-2597, USA
Contact: Mr. Lawrence F. Campbell

Perkins School for the Blind

175 North Beacon Street
Watertown, MA 02172, USA
Contact: Mr. Kevin J. Lessard

SENSE

11-13 Clifton Terrace
Finsbury Park
London N4 3SR, England
Contact: Mr. Rodney Clark

Sight Savers International

Grovesnor Hall
Bolnore Road
Haywards Heath
West Sussex RH16 4BX, United Kingdom
Contact: Mr. Richard Porter

Swedish Federation of the Visually Impaired

Sandsborgsv. 52
S-122 33 Enskede, Sweden
Contact: Mr. Leonard Nolte

Swedish Organization of Handicapped International Aid Foundation (SHIA)

Box 4060
S-102 61
Stockholm, Sweden
Contact: Mr. Barbro Carlsson

UNESCO

Special Education Programme
ED/SOI/SPE
7, Place de Fontenoy
78700 Paris, France
Contact: Ms. Lena Saleh

United Nations Centre for Social and Humanitarian Affairs (UNCSHA)

Headquarters: Disabled Persons' Unit
P.O. Box 500
A-1400 Vienna, Austria

Note: The UNCSHA maintains a special office on disability and has been the focal point of UN activities related to the UN Decade of Disabled Persons. It is also responsible for the administration of the Voluntary Trust Fund for the UN Decade of Disabled Persons which provides small project funding to promote activities related to the World Programme of Action Concerning Disabled Persons. Its publication *Disabled Persons Bulletin* contains useful information on its activities and those of other UN Agencies and non-governmental organization.

World Blind Union (WBU)

c/o CPB ONCE
La Coruna, 18
28020 Madrid, Spain
Contact: Mr. Pedro A. Zurita

World Health Organization (WHO)

Rehabilitation Programme
CH-1211 Geneva 27, Switzerland
Contact: Dr. Enrico Pupulin

Appendix B Financial policies

The following financial policies are based upon solid business principles. They have been developed by the Institutional Development Project (IDP) and its project partners for use by organizations of and for the blind.

These policies may be modified to meet your organization's requirements so long as they maintain the financial integrity of your organization. Once your organizational leaders have agreed upon the financial policies that will govern your organization, the policies should be written and made available in an accessible format for blind members. They should be dated and signed by the President of the Board of Directors, the Executive Officer, the Secretary, and the Treasurer.

Preparing the Budget

The Executive Officer, working in collaboration with the Treasurer and the Financial Committee, shall prepare an annual budget for the organization. It shall be presented to the Board of Directors at its last meeting of each financial (fiscal or calendar) year. The budget must be approved by the Board of Directors before it is implemented. The Board of Directors may decrease, increase, delete, merge, or otherwise change any item in the budget. A draft of the budget must be made available in an accessible format to all board members at least two weeks prior to the budget approval meeting.

The budget must be a clear statement of the organization's projected income and expenditures for the coming year. It must be based upon reasonable forecasts of annual income and expenses. The budget must identify all sources of projected funding in support of the organization's programs and activities.

Cash Flow

At the end-of-year budget approval meeting, the Executive Officer and the Treasurer shall provide an estimate of the organization's monthly cash flow for the coming year. This forecast shall clearly show the estimated movement of cash in and out of the organization's accounts on a monthly basis. Accounting procedures shall be in place to monitor and compare the monthly forecast with the actual cash flow.

When the monthly actual budget exceeds the forecasted budget, the Executive Officer shall notify the Finance Committee. The Finance Committee shall then notify the Board of Directors. Action may be required to increase income or decrease expenses.

Banking

The organization shall establish any number of accounts as deemed necessary and appropriate by the Board of Directors. Such accounts may include a General Account to facilitate the movement of cash for operational purposes. Specific project accounts shall be opened to monitor large project funds. Each large project shall have its own checking account to manage the project's cash flow.

The Board of Directors shall approve the opening and closing of all bank accounts. All new accounts shall bear the signature of the authorized signatories as stated in the organization's constitution. If accounts are opened where it is difficult to facilitate the efficient use of authorized signatories, every attempt shall be made to address this problem in accordance with the constitution. If an effective solution cannot be found, the Board of Directors shall authorize a policy change to ensure efficiency in managing the organization's business. Any such change shall be supported by a two-thirds majority of the members of the board present and voting. Such a decision shall be recorded in the minutes of the meeting and reported to the general membership. However, any such account bearing the name of the organization shall require the signature of one officer of the board who has been approved by the Board of Directors at one of its regular meetings.

The organization's annual audited statements shall record the debt or credit status of all active bank accounts, regardless of location or status of such accounts. The Executive Officer and the Treasurer shall provide the board with an up-to-date financial statement of the organization's financial position at its quarterly meetings.

Bank Transfers

All bank transfers shall be recorded by the Executive Officer and the Treasurer. Such transfers must be appropriately recorded in the organization's official accounting journals. The Executive Officer shall submit an official receipt following normal accounting procedures to the individual or organization making such payments.

All funds received by the organization shall be deposited by the Executive Officer into the organization's bank account within twenty-four (24) hours of receipt of the funds.

Cash and Payments

The Board of Directors shall vote an amount of cash to be held monthly by the Executive Officer. The Executive Officer shall be fully responsible for these funds. If such funds become misappropriated, missing, or unaccounted for, the Board of Directors shall take appropriate action. If such funds are unaccounted for within the operation of the office, the Executive Officer shall reprimand the individual in question and make recommendations to the board for action if necessary.

Management of Expenses

All expenses from the organization's accounts shall be administered through the organization's accounting instrument voucher. The payment vouchers shall be formatted as follows:

All vouchers shall be in duplicate. The original shall be removed from the voucher book once the ledger has been balanced and filed in the appropriate accounting file.

All payments from the organization's funds, especially when such funds are paid in cash, shall adhere to the following procedure:

Such payments shall be based on an approved invoice, receipt, claim, or requisition signed by the claimant, provided such invoice, claim, receipt, or requisition has been duly approved by the Executive Officer and the Treasurer. The Executive Officer or the Treasurer cannot approve such claims if they are personally involved in the transaction. In such cases, the claim shall be approved by one or the other in the presence of another officer of the organization. All parties receiving payments from the organization shall sign the required section of the cash payment voucher. In such cases where the individual cannot sign, a thumb print is acceptable.

The organization's office shall have a proper ledger laid out according to proper accounting standards. The cash ledger shall have the following headings:

- Office Supplies
- Transportation
- Stationery
- Postage
- Faxes and Telephone (National)
- Faxes and Telephone (International)
- Miscellaneous

The ledger shall be used for all cash voucher transactions. Such records shall be made at least once weekly and shall be submitted and balanced with the financial records of the organization. The ledger shall be submitted on a monthly basis for the report to the Board of Directors.

In addition to the cash voucher payment book and journal, the organization shall keep a ledger for recording and summarizing all income and expenditure transactions. Such a ledger shall be updated at least once each week.

The organization's accounting records shall be held in three forms: Clerical; Financial; Reporting. All or any of these accounting records shall be under the direct control of the Executive Officer and the Treasurer and held at the organization's head office. Such records shall be further defined as New, Current, and Retired.

Clerical records shall include:

- Vouchers
- Checks
- Invoices
- Receipts
- Claims
- Requisitions.

Financial records shall include:

- Receipt books
- Lodgment books
- Checkbooks
- Passbooks for savings accounts
- Account books
- Bank statements
- Retired checks
- Debit notes
- Credit notes.

Reporting records shall include:

- Ledger(s)
- Cash books
- General ledger purchases
- Journals
- General Journal(s)
- Financial statements
- Accounting reports
- Minutes of Financial Committee meetings
- Any additional records or journals used by the Executive Officer, Treasurer, and Financial Committee.

When these financial policies are introduced into the operations of the Secretariat, the officers shall make every effort to set up the accounting system as mandated by the policy. In the event that some of these accounting records and other documentation are unnecessary or inapplicable to the organization's current operations, these shall be ignored. Those that are ignored shall be clearly identified by the Board of Directors and the decision shall be recorded.

As the organization matures and additional records become necessary, the board, on advisement of the Executive Officer and the Treasurer, shall take the necessary steps to introduce these records into the organization's official operations. The record introduced shall then be removed from the list of unused records.

When the organization receives payments, whether in the form of cash, checks, or direct bank transfers, these funds shall be discharged in the following manner. A receipt shall be drawn on the organization's official receipt book and submitted to the appropriate organization or individual. All such receipts shall be signed by the Executive Officer and the Treasurer or another officer with signatory authority.

Bank Account Reconciliation

Within three (3) working days of each month, the Executive Officer shall ensure the organization's bankers provide the Secretariat with the organization's bank statement(s) and canceled checks for the previous month. The Executive Officer, working in collaboration with the Treasurer, shall reconcile all withdrawals and deposits for the month with the check books and passbooks. The Executive Officer shall then ensure the reconciliation of all accounts in preparation for the monthly financial statement which shall then be submitted to the Treasurer and the Financial Committee for further scrutiny.

The Executive Officer and the Treasurer shall prepare a comprehensive quarterly financial report for presentation to the Board of Directors for approval at its quarterly meeting. The quarterly financial statement must be prepared by the tenth (10th) day of the month following the end of the quarter. The financial statement shall be circulated to the board members at least one week prior to the board meeting.

The quarterly financial statement shall include: Budgeted (forecast) income and expenditure for the quarter under review; actual income and expenditure for the same period; balances of all bank accounts; report and outstanding balances on liabilities; notes on any extraordinary transaction(s) for the period. Extraordinary transactions may include emergencies or unusually high expenses.

Project Expenses

All project expenses shall be approved in the original annual budget for the organization. Before the implementation of any project (or event), a line-item budget shall be prepared by the Executive Officer and presented to the Board of Directors for approval.

At the conclusion of the project, a financial report stating the actual project expenses shall be submitted by the Executive Officer to the Board of Directors for approval. Once approved by the board, the financial report shall be forwarded to relevant donors.

Inventory and Stock

The Executive Officer shall ensure that a complete inventory of the organization's equipment, furnishings, movable fixtures, other appliances, and materials is maintained at the organization's Secretariat. A register of the inventory and stock shall be kept in appropriate files. The inventory shall be inspected by the officers at least twice each year, whereupon a written certification of their findings shall be presented to the board.

Audited Statements

At its discretion, the Board of Directors may require the Executive Officer, acting in consultation with the Treasurer, to invite the organization's auditors to review the organization's books for any reason and for any period required.

Notwithstanding the order of the board, the Executive Officer, working in collaboration with the Treasurer, shall keep the organization's books current at all times.

The books shall be closed within ten (10) days of each financial year, and the auditors invited in to carry out their annual audit of the organization's current financial status. The Treasurer shall be responsible for coordinating the audit and for submitting the auditor's report and financial statement to the Board of Directors for review. This review shall take place at the first quarterly meeting of the new financial year.

Auditors

The organization's auditors shall be approved by the General Assembly and be confirmed annually by the Board of Directors. In the year of the general assembly, the auditors shall be invited to present the audited and financial statements to the general body. The Executive Officer and the Treasurer, with support from a professional finance officer shall prepare a summarized financial statement of the five-year period to be presented to the assembly for general information.

Emergency Funding

The finances of the organization shall not be used by any member or officer for personal purposes except in an extreme emergency and with appropriate approvals. In the event of an extreme personal emergency, such funds shall be approved by more than two-thirds of the Board of Directors and at least fifty percent (50) of the organization's members. The use of such funds shall be clearly stated in writing and circulated to the board and the voting members and recorded in appropriate financial records and statements.

Appendix C Running Effective meetings

Different cultures have distinctly different views about how to effectively run meetings and how decisions are made by a group or organization. Consequently, the guidelines given here should be modified as necessary.

Nevertheless, every meeting should have a basic objective of resolving at least one important issue.

There are basically three different types of meeting styles:

Information Gathering. The person who runs the meeting (for example, a leader or President of the Board) is there to gather information from the other people at the meeting. This information will be used by the leader who will autonomously make the final decision.

Consulting. The leader states the problem or issue to the others at the meeting and asks for their ideas and suggestions. There may be an attempt to have everyone agree on the solution; however, the leader ultimately makes the final decision.

Joint Decision Making. The leader discusses the problems or issues with the others at the meeting. Together, they seek solutions. The leader does not attempt to impose his or her decision or will on the group. The decision is made by a consensus or majority vote.

Good leaders or board presidents recognize that different styles are needed for different kinds of decisions. Meetings take a great deal of time and effort and should be scheduled judiciously.

Following are some suggestions that can help improve the effectiveness of meetings.

Have An Agenda. Have a formal, written agenda of what is to be discussed at the meeting. If possible, distribute the agenda in advance to everyone who will be attending the meeting. Try to keep to the agenda. If other important subjects come up, list and record them in the meeting minutes. Schedule another meeting to discuss or address those issues.

Have a Specific Time Frame. Give the meeting a specific time frame in which to complete business. Remember, time is valuable to the individual staff members and volunteers, as well as to the organization. The judicious use of time is a characteristic of good management. If necessary, give agenda items a specific discussion time limit. The meeting leader can place restrictions on how often one person can speak to the same issue.

Have a Clear Objective. The meeting participants should reach a consensus regarding the objective(s) to be achieved at the meeting. Keep the meeting focused on the objective. When the discussion starts to wander off the subject, bring the subject back into focus.

Encourage Open Discussion. Disagreements will be voiced during discussions; they should not be discouraged since different ideas and viewpoints can help strengthen an organization. The chairperson should assume the role of mediator by drawing a line on a flip chart and listing the pros and cons of the discussion. Consider ending the discussion if the issue being debated is a minor issue. If others do not think it is minor, attempt to resolve the debate.

Be a Good Listener. Listen for ideas, not just facts. Avoid jumping to conclusions when someone is speaking. Do not anticipate what they are trying to say—let them say what they want to say, even if they are boring or wordy. Do not rush or interrupt the speaker. Do not let others interrupt them either. Do not change the subject until the speaker has finished, unless the time frame for that agenda item is being exceeded. Ask questions to clarify points. Remember that every speaker is important enough to be listened to. Pay attention to what is being said. Do not allow people to make personal attacks when they express their disagreements.

Conclusion. Be certain a conclusion is reached for each agenda item during the course of the meeting. Be certain it is clear who has responsibility for future action. Have someone record the conclusions so they are not forgotten or incorrectly remembered at a later time. Check the conclusions and action items for a full consensus by verbally summarizing them before closing the meeting. Ensure core issues have been resolved and that the meeting has achieved its objective. Record the conclusions and actions items agreed upon by consensus before ending the meeting.

Appendix d reflection form examples

A *Reflection Form* is a tool used at training workshops to help participants systematically reflect upon, review, and evaluate subjects addressed during the training process. These forms may be used by individuals or small groups to organize information. The questions in the left-hand column should reflect questions directly relevant to your training agenda. Be certain to allow ample space for answers.

The information on the reflection form should be provided in an accessible format to all blind participants. For example, a facilitator could read the questions to the blind person and transcribe his or her answers, or a tape recorder could be used.

Following are examples of two reflection forms. One could be used for staff training and the second for leadership training.

Staff Development Workshop -- Reflection Form

1. Service Delivery Questions:*Answer* To whom are the organization's services targeted?

How is the target reached?

Do the services reflect the needs of the target group?

How are their needs identified?

Is the target group involved in the identification of problems and needs?

What resources does the organization have to do its work?

What was the major program success of the organization in the past three years?

What were the major reasons for that success?

What were the organization's major problems with service delivery in the past three years?

What caused those problems?

How could those problems be resolved in the future?

2. *Questions about the Organization Answer* What is the organization's mission?

How does the organization fulfill its mission?

Who are the owners of the organization?

What is the major role of the board?

Do board and staff members work together in planning and developing programs?

Is the staffing structure capable of responding to the organization's needs? Describe.

Is the staff aware of the organization's mission?

Is the staff aware of the organization's strategy for fulfilling its mission? Describe.

Is the board aware of the activities and programs of the organization?

3. *Secretariat Questions Answer* Is the Secretariat responsible to the board?

Describe.

Is the relationship between the Secretariat and the board an effective one?

Are all board members aware of decisions by the Secretariat?

What resources are available to the Secretariat to do its job?

Is the staff satisfied with the way the resources are used?

What are some of the key issues facing the Secretariat?

What is being done to deal with these issues?

Does the Secretariat operate on sound management principles? Describe.

Does the staff understand the organization's mission?

4. Program Questions Answer Do the organization's programs reflect its mission?

Are the board members and general membership involved with developing programs?

Are any programs developed by the Secretariat? Are management and the board involved in any way with these programs? Describe.

5. Fund Raising Questions Answer Are the organization's fund raising activities directly linked to its programs?

Is the board involved in the organization's fund raising programs? Describe.

Is there an annual fund raising target? Is it realistic? Is it usually met? Describe.

Are the people responsible for programs aware of fund raising goals?

6. Questions about the General Public Answer Is the general public aware of the organization's mission?

How does the general public view the organization?

Is the organization reaching out (networking) to other agencies in the field of blindness? Describe.

Leadership Development Workshop -- Reflection Form

1. Questions about the Organization Answer What is your organization's mission?

How does your organization fulfill its mission?

Who are the owners of your organization?

How are the owners involved in the planning of program activities?

What is the role of the Board of Directors?

What is the role of the Secretariat?

What is expected of the member branches?

2. Service Delivery Questions Answer What types of services does the organization provide?

To whom are these services targeted?

How were needs assessed and services identified?

What has been the organization's biggest success in the past two years?

What were the major reasons for that success?

What has been the organization's biggest failure in the past two years?

What were the major reasons for that failure?

What steps is the organization taking to correct past problems?

What is the biggest challenge facing your organization in the next twelve months?

What steps do you think the organization should take to successfully meet that challenge?

3. Personal Questions Answer Why did you join your organization?

Is your organization meeting your needs?

How could the organization better meet your needs?

Is the organization meeting the needs of your branch? Describe.

How could the organization provide better assistance to your branch?

Appendix E How to develop a project proposal

A project is defined in very specific terms. It has a time limitation rather than being ongoing. For example, the operation of your office or organization is not a project—but you could develop a project proposal to *establish* an office or organization. A project has a beginning and end, with a clearly defined end result as a goal.

Projects are born from ideas, needs, and dreams. But they must be carefully considered, planned, funded, and managed to become reality. Writing a project proposal helps you turn your ideas into reality.

There are several types of proposals. Some agencies require lengthy documents. Others have standard forms you must use. The proposal may even take the form of a letter. Governments, non-government organizations, foundations, and corporations all have different requirements for funding proposals. As the author of the proposal, you need to do the research so you'll know how to prepare and package your proposal so it meets the requirements of your potential funder.

Regardless of the format in which it's presented, the proposal must be well-written, accurate, and comprehensive.

To begin planning a project, you need to answer the following questions:

Why? Why is it needed? — This is the *Introduction and Rationale*.

How? How will it be done? — This is the *Project Description*.

How long? How long will it take? — This is the *Schedule*.

How much? How much will it cost? — This is the *Budget*.

Who? Who will do the work? — This is the *Personnel*.

What? What will the end result be? — This is the *Anticipated Result*.

Writing the Proposal

Once you've answered the above questions, you're ready to write the proposal. When complete, have someone else review it for clarity and accuracy. Welcome their comments rather than viewing them as criticisms. They may find things you've missed.

Thorough planning of the project at this stage will help ensure your success in getting the project funded. When you're satisfied with the proposal, write a cover letter to accompany it.

Now, let's examine the details for each section of your proposal.

Introduction and Rationale

State the objective of the project. Define the need in concrete and meaningful terms. You must describe the objective and need well enough to convince others it is worthy of their support and truly needed. Sometimes people are so committed to their own cause they don't have a realistic perspective. Unless you're clear in your definitions and descriptions, what you want may seem obscure and irrelevant to your potential funder.

The key to writing a convincing rationale is to put your issue in perspective with other social issues. Show why and how it affects many people.

Explain why your group is best-suited to do the project. Outline your previous interests and accomplishments in this field.

This section of your proposal is vital. If it's not convincing, funders won't read any further. Try to excite their interest. Be positive. Avoid jargon. Don't make assumptions.

Project Description

How do you intend to accomplish your objective? How will you fill the need you've defined? How are you going to provide the needed information or service?

Be specific. Include as many details as necessary. Prove you know what you're talking about. For example, if you've proposed to deliver eye care services, this section would include details about how many units would be delivered per year, how many doctors would be required, what type of and how much equipment would be needed, and so forth. Details inspire confidence.

Schedule

Break the project down into phases, and indicate how long each phase will take. You might include a time schedule showing how long each component of the project will take. Show the schedule in number of weeks or months, for example, *Research: Three months*. Don't say *January to March*. You don't know when the project will begin, so you can't know when the schedule will go into effect.

On the other hand, if you know your funder well and know exact times, you might add those to put some pressure on the funder to meet your deadlines.

Budget

One of the challenges of proposal writing is to budget accurately. This requires research on current prices and a good understanding of the anticipated size of the project. To have a credible budget, you need to clearly understand the project requirements and current pricing.

Some people play a game of asking for twice as much as they need because they think they'll only get half of what they want. Don't underestimate the intelligence of the person evaluating your proposal. Experienced people can spot a padded budget at a glance. You'll lose credibility and respect if you pad your budget — as well as losing your chances of funding.

It's important that the cost of the project be realistic and reasonable. Step back and take a long, hard look at the cost in relation to the project and the need. That is exactly what the potential funder is going to do. Unless it looks sensible, you won't receive funding. For some projects, you can gauge this by calculating a real cost. That is, calculate the number of people you're going to serve by the budgeted figure. See if your service bears a reasonable ratio to the budgeted figure.

Be certain you include all project costs in the budget. Budgets can take a great deal of time to prepare if they're done properly because they must be accurate. If you're not certain about your figures, do some more research. It's better to spend the additional time on research in order to get the budget right than it is to lose credibility with your potential funder.

Items to include in your budget include:

- Staff salaries

- Overhead

- Postage

- Faxes and telephone calls (including long distance)

- Bookkeeping or auditing fees

- Contingency

- Specific costs related to the project (for example, equipment).

Staff Salaries

You will need to include staff profiles in order to determine required staff qualifications. The salaries you include should reflect those qualifications. Assign a figure that is the market value for the required type and level of skill. Don't give unrealistic figures.

Overhead

Your overhead cost is the core cost you require to run your organization and it should be linked to projects whenever you're seeking funding. All too often, proposal writers neglect to include overhead as a legitimate project expense. It can be one of the most difficult parts of your organization to present to a funder.

Be realistic in determining what percentage of your overhead expense will be allocated to managing the project.

Postage

Postage is a legitimate expense that should be estimated and included in the proposal.

Faxes and Telephone Calls

Faxes and telephone calls, especially long distance calls, are often forgotten in proposal writing. These are legitimate expenses that can be quite costly and should be included in your proposal.

Bookkeeping or Auditing Fees

If your proposal has a relatively high budget, it should include a bookkeeping or auditing fee. The figure to use for auditing fees should be accurately judged by you, with possibly some advice from your existing donors.

Some agencies require audits on almost everything. Government agencies and many foundations require detailed accounting for grants. Find out what the auditing requirements are for your potential funder and include them as a legitimate expense.

Contingency

Contingency funds are used for unforeseen and unavoidable expenses. Generally they should be no more than ten percent (10%) of your total budget. A five percent (5%) contingency is preferable.

Specific Costs

Specific costs are directly related to the nature of your proposal. For example, if your project requires the purchase of equipment, you need to determine the exact cost of the equipment, shipping and handling fees, transit insurance, and so forth. Perhaps you'll need special training on use of the equipment, or a technician trained to operate it. All of these items should be included here.

Personnel

Include a staff profile of the persons who will carry out the project. Give their name, age, education, and relevant experience. You need to convince prospective funders that you have the personnel to successfully complete the project. Only list those people who will be directly involved in the project.

If you have an annual report, this will indicate your group's previous experience and interest in the field. If you have no annual report, you should keep records, and get letters of support from other agencies to support your case. Make sure the letters are directly relevant to the specific project.

When approaching a government source, a letter from your local counselor or appropriate village leader can be helpful. Letters from government officials, church leaders, and so forth, may also provide support.

If your group or project is controversial, a letter of endorsement from a respected authority in the field will help lend credibility.

Anticipated Results

This section should answer the most difficult question a funder can ask: “So *what?*”

When the project has been completed, what will you have to show for the time and money invested? How many people will benefit from it, and how? What changes can be expected? For example, are changes in public awareness expected? What will be the impact on blind persons or services for them? Be as specific as possible. Quantify your results.

In this section, you're explaining how you're going to evaluate the project upon completion. Funders have no way to evaluate their contribution or your success unless you provide a self-evaluation. By doing this, you are setting a goal and making a commitment to your sponsors.

That commitment is critical. It's a measure by which the funders will judge the impact of their contribution. Remember that funders have to report to their constituency as well. Your goal must be realistic and achievable. It must also be significant enough to justify the financial investment.

Project Proposal Outline

Following is a sample outline of a project proposal.

Identifying Data. Include project title, project location, length of time required, sponsoring agency, contact person, and total required funding.

Executive Summary. This is a brief description of the entire proposal, including the budget. It should not exceed two pages. This summary should include all of the major points. The details will be in the body of the proposal.

Background. State the problem you're going to solve. This information will come from your Introduction and Rationale.

Organizational Capacity. Prove that your organization is capable of managing and completing the project. This will come from your section on Personnel.

Purpose and Objectives. What do you expect to achieve from this project and why are you doing it? The purpose will come from your Introduction and Rationale. The objectives will come from your Anticipated Results.

Project Design. Describe the project in detail. For some agencies, this is the most important part of the proposal. This will come from your Project Description.

Evaluation Plans. How will you evaluate progress and completion?

Documentation and Additional Outcomes.

Budget and Financial Management. All project costs should be listed by expense category and project year. Explanatory notes for each expense category should be added here. This will come from your Budget section.

Financial Procedures. Give a brief explanation of the financial procedures you will use.

Appendix F Special Events Planning Form

This form is included as a guide to some of the details that must be identified when planning a special event. It is based upon a form developed by the Canadian National Institute for the Blind, Ontario Division.

Organization _____

Responsible Staff Person _____ Tel. _____

Responsible Volunteer _____ Tel. _____

Type of Event _____

Event Details

Number Expected to Attend _____ Actual Attendance _____

Suggested Cost Per Person _____ Actual Cost _____

Goal(s) of Event

Program/Activities Supported by Event

Date _____ Time _____

Location _____

Total Estimated Cost _____ Total Actual Cost _____

Total Estimated Income _____ Total Actual Income _____

Total Estimated Profit _____ Total Actual Profit _____

Total Actual (Loss) _____ (_____)_____

Estimated Cost Per Person _____

Estimated Number of People _____

Number of People to Break Even
(Total Cost Divided by Cost Per Person) _____

Budget Details

Invitations

Total Number Required _____

Elements Required:

Invitations # _____
Invitation envelopes # _____
Reply cards # _____
Other # _____

Expenses:

Design _____
Printing _____
Mailing List _____
Processing _____
Postage _____
Total _____

SUB-TOTAL _____

Publicity and Promotion

Elements Required:

Promotional Items _____
Advertising _____
Press Releases _____
Media Coverage _____
Printing _____
Postage _____
Processing _____
Other _____

Expenses:

Total _____

SUB-TOTAL _____

The Event

Elements Required:

Site rental _____
Other rentals _____
(tables, chairs, etc.) _____
Serving staff _____
Food _____
Beverages _____
Favors _____
Music/Entertainment _____
Decorations _____
Program _____
Awards _____
Other _____

Expenses:

Total _____

SUB-TOTAL _____

TOTAL COST _____

(Grand total of all sub-totals)

Income Projections

Ticket sales	_____	
Sponsorships	_____	
Donations	_____	
Other	_____	
Total	_____	TOTAL INCOME _____

Volunteer Resources

<i>Activity</i>	<i># Volunteers Needed</i>
Address and send invitations	_____
Ticketing	_____
Organize event	_____
Set up and decorate venue	_____
Work at event	_____
Clean up after event	_____
Other	_____
Total Volunteers	_____

Ticket Sales

Tickets to special events must be sold. Determine the strategy to be used for selling tickets.

<i>Who</i>	<i># Tickets</i>
Each board member has promised to sell	_____
Each staff member will try to sell	_____
Members will try to sell	_____
Volunteers will try to sell	_____
Total	_____

Sponsors

Sponsorship budgets are generally kept separate from donations budgets. Obtaining a corporate sponsor is a good way to keep costs down and ensure a profit for the event.

What potential sponsors could be approached for this event?

1. _____
2. _____
3. _____
4. _____

Non-Monetary Benefits of This Event

Post-Event Evaluation

After the event is over, reflect upon the reasons for its success, or lack of success. Use this feedback as a guide when planning future events to repeat successes or avoid failures.

What was most successful? Why?

What was unsuccessful? Why?

Glossary

Acronyms, abbreviations, and specialized terms used in this handbook, chiefly in the fields of blindness and management, are included in this glossary.

Term Definition Accessible format Refers to materials that can be accessed by blind and visually impaired people, including large type, Braille, audiotapes, and verbal communication; for example, readers. **CBR** Abbreviation for Community-Based Rehabilitation **CNIB** Abbreviation for the Canadian National Institute for the Blind. **DPI** Abbreviation for Disabled People International, an international movement of disabled people. **Economic empowerment** The empowerment and satisfaction gained by blind people from their ability to contribute to the financial well-being of their families. **Economy of scale** A management term that refers to the lowering of costs by increasing volume. **Empowerment** The sense of personal power that comes from knowledge, skill, motivation, and self-confidence. Empowerment enables people to consciously direct and take control of their lives. **Executive Officer** The top-level manager of an organization. May also be called Director or Executive Director. **Funding** In this book, funding refers to methods for generating funds to sustain an organization and its activities. Funding methods include both long-term fund development and short-term fund raising. Replaces the generic term *fund raising* which is commonly used in the NGO field to describe all methods of raising funds. **Fund development** Development of long-term funding identified as organizational investment. **Fund raising** Short-term activities that generate funding for immediate needs and specific projects. **GAB** Abbreviation for Ghana Association of the Blind. **Goals** A planned strategy for fulfilling the organization's vision or mission. Goals are specific, practical, and measurable. **General Assembly** A meeting of a broad representation of the membership of an entire organization, including all branches. **Hilton/Perkins Program** A program established by the Perkins School for the Blind through a generous grant from the Conrad N. Hilton Foundation. The purpose of the program is to improve the quality of life for children with visual impairments and additional disabilities, and their families, by working closely with other organizations to improve services through community oriented efforts in the Asia/Pacific, African, Eastern European, Latin American, and Caribbean regions. **Holistic** Based on the theory that emphasizes the unified parts of the whole are greater than the simple sum of its parts. **IDP** Abbreviation for Institutional Development Project. **IDP project area** The areas where the IDP has provided training and support, that is, the Caribbean, Africa, and some Pacific islands. **Income Independence** The condition of economic empowerment in which a blind person has the skills and motivation to be economically independent. **Income Substitution** The condition of economic empowerment in which blind people assume productive roles in their families. **Income Supplement** The condition of economic empowerment in which blind people are partners with their families. Their active participation makes an identifiable contribution to the family's financial resources. **Income Support** The condition of economic empowerment in which blind people are able to earn an income, even if the earnings are small. **Institution** As used in this handbook, institution means the coming together of the organization, its blind and visually impaired clients, and the community in which the organization operates. **Institutional Development Project** A project dedicated to strengthening the management of national organizations of and for the blind. Its goal is the total involvement of blind people at *all* levels within *all* organizations working with or for them. The experiences of this project form the foundation for this handbook. **International Decade of the Disabled** The United Nations declared 1983-1992 as the International Decade of the Disabled. **International Year of Disabled People** The United Nations declared 1981 as the International Year of Disabled People. **Job description** Written (or audiotaped) document that describes the role and responsibilities of a specific job. **Job plan** Written (or audiotaped) document that is

based upon a job description. Defines specific goals, objectives, and accomplishments expected during a given time period. **Job profile** A written (or audiotaped) job description that reflects specific job requirements. Used during the hiring process. Similar to a job description, but specifically used during a job search. **Membership organization** Organization owned and managed by blind and visually impaired people. An organization “*of the blind.*” **Mentor** A mentor gives advice, support, guidance, and encouragement to a less experienced person. Mentors fill a combined role as both friend and teacher. **Mission** Describes an organization’s fundamental purpose and reason for existing. It reflects the social void to be filled. The mission propels the organization forward and gives it focus. Mission and vision are used synonymously. **Mission statement** A brief description of the organization’s vision or mission. **Networking** Individuals informally linking together and connecting with each other. Establishment of personal relationships. **NGO** Abbreviation for non-government organization. **Non-government organization** An organization with no connection to a government or business. Does not operate to make a profit. Also referred to as a non-profit organization. **Objectives** Specific, detailed activities that map out the steps required to achieve goals. Objectives constitute an action plan. **Q&A** Abbreviation for Question and Answer. A technique used in training sessions, lectures, or presentations to encourage people to ask questions and enable them to receive immediate answers. **Reflection form** A tool to help training participants systematically reflect upon, review, and evaluate subjects addressed during the training process. These forms may be used by individuals or small groups to organize information. **Rehabilitation training** Training for blind and visually impaired people that concentrates on psychological adjustment and the development of coping skills, including techniques for daily living, orientation, and mobility. **Search committee** A committee established for the sole purpose of hiring a person for a specific job, most often the Executive Officer. **Secretariat** Management staff **Service organization** An organization generally managed by a cross-section of non-visually impaired members of the community and salaried employees that provides services for blind and visually impaired people. An organization “*for the blind.*” **Sight Savers International (UK)** An organization formerly known as the Royal Commonwealth Society for the Blind (RCSB). **Stakeholder** Person with a vested interest, for example, a member or funder of an NGO. **UNAB** Abbreviation for Uganda National Association of the Blind. **Vision** The vision describes an organization’s fundamental purpose and reason for existing. It reflects the social void to be filled. The vision propels the organization forward and gives it focus. Vision and mission are used interchangeably. **WBU** Abbreviation for World Blind Union.

Reference List

Assertiveness

Cawood, Diana. *Assertiveness for Managers: Learning Effective Skills for Managing People*. Vancouver: International Self-Counsel Press, 1992.

Smith, Manual J. *When I Say No, I Feel Guilty*. New York: Bantam Books, 1985.

Communication Skills

- McCallister, Linda. *I Wish I'd Said That: How To Talk Your Way Out of Trouble and Into Success*. New York: John Wiley and Sons, 1992.
- McKay, Matthew, M. Davis, and P. Fanning. *Messages: The Communication Skills Book*. Oakland, California: New Harbinger Publications, 1983.

Decision Making and Problem Solving

- Kepner, Charles H., and Benjamin B. Tregoe. *The New Rational Manager*. Princeton, New Jersey: Kepner-Tregoe, Inc., 1981.
- O'Dell, William F. *Effective Business Decision Making: And the Educated Guess*. Lincolnwood, Illinois: NTC Publishing Group, 1993.

Empowerment

- Vaughan, C. Edwin. *The Struggle of Blind People for Self-Determination, The Dependency-Rehabilitation Conflict: Empowerment in the Blindness Community*. Springfield, Illinois: Charles C. Thomas Publisher, 1993.

Leadership Skills

- Bennis, Warren G., and Burt Nanus. *Leaders: The Strategies for Taking Charge*. New York: HarperCollins, 1986.
- Covey, Stephen R. *Principle-Centered Leadership: Strategies for Personal and Professional Effectiveness*. New York: Simon and Schuster, 1992.
- Bennis, Warren. *Why Leaders Can't Lead: The Unconscious Conspiracy Continues*. San Francisco: Jossey-Bass, Inc., 1990.
- Josefowitz, Natasha. *You're the Boss*. New York: Warner Books, Inc., 1985.

Management

- Peters, Thomas J., and Robert H. Waterman, Jr. *In Search of Excellence, Lessons from America's Best-Run Companies*. New York: Warner Books, Inc. (published by arrangement with Harper and Row Publishers, Inc.), 1982.
- Bell, Arthur. *The Complete Manager's Guide to Interviewing*. Burr Ridge, Illinois: Irwin Professional Publishing, 1989.
- Drucker, Peter F. *Managing for the Future: The 1990s and Beyond*. New York: NAL-Dutton, Division of Penguin, USA, 1993.
- Peters, Tom. *Thriving on Chaos: Handbook for a Management Revolution*. New York: Alfred A. Knopf, Inc., 1987.
- Popcorn, Faith. *The Popcorn Report: Faith Popcorn on the Future of Your Company, Your World, Your Life*. New York: Harper Business, Division of HarperCollins, 1992.
- Tyssen, Theodore G. *The First-Time Manager: A Survival Guide*. Vancouver: International Self-Counsel Press, 1992.
- Drucker, Peter F. *Managing the Non-Profit Organization: Principles and Practices*. New York: HarperCollins, 1992.

Meetings

- Mosvich, Roger K., and Roger B. Nelson. *We've Got to Start Meeting Like This*. Glenview, Illinois: Scott, Foresman, and Co., 1987.

Motivation

- Covey, Stephen R. *The Seven Habits of Highly Effective People*. New York: Simon and Schuster, 1990.
- Matejka, Ken. *Why This Horse Won't Drink: How to Win—And Keep—Employee Commitment*. New York: AMACOM, 1990.

Team Building

- Katzenbach, Jon R., and Douglas K. Smith. *The Wisdom of Teams: Creating the High Performance Organization*. New York: Harper Business, Division of HarperCollins, 1994.
- Shonk, James. *Team Based Organizations: Developing A Successful Team Environment*. Burr Ridge, Illinois: Irwin Professional Publishing, 1992.

INDEX

A

administration, 47
annual evaluation, 76
annual events, 108
Antigua and Barbuda Society For the Blind, 104, 109

B

bequests, 108
board member, desired qualities, 79
Board of Directors, 67
Board of Directors training, 81
Board of Directors, role of, 69

C

communication, 60
corporate sponsorships, 108
cost recovery, 109
customers, 87

D

direct mail, 107
donor relationships, 105

E

economic empowerment, 29
effective meetings, how to run, 125
employment, 29
employment inventory, 32
employment opportunities, 31
empowerment, 3, 14, 15, 17, 20, 38
empowerment training, 21, 23, 47

F

financial policies, 119
follow-up activities, 26

- follow-up services, 4
- fund development, 99
- fund raising, 99, 106
- funding as an investment, 102
- funding department, development of, 104
- funding methods, 107
- funding training, 110
- funding, definition of, 100
- funding, responsibility of, 106

G

- Ghana Association of the Blind, xi, 46
- goals, definition, 69
- goals, development of, 73
- good management, components of, 47

I

- IDP concept, 2
- IDP philosophy, 15
- IDP training, 4, 15
- income independence, 30
- Income substitution, 30
- income supplement, 30
- income support, 30
- institutional development, 2
- Institutional Development Project, 1, 2
- international organizations, list of, 115
- isolation, 10
- issues, Board of Directors, 77
- issues, organizations of and for the blind, 41
- issues, senior management, 85
- issues, volunteers, 60

J

- job descriptions, board members, 80
- job placement, 37
- job plan, developing, 76
- job search, 38

L

- leadership, 87, 93
- leadership training, 45, 49, 50

M

- management challenges, 90
- management training, 13, 45, 95

membership organizations, 39
mentor, 5, 16
mentoring, 28
mission, 41, 46
mission statement, 69, 76
mission statement, definition, 70

N

Networking, 27, 84
NGO, 41, 47
NGO, management of, 85
NGO, the well-managed, 49

O

objections to employing blind people, 33
objectives, 1, 14
objectives, definition, 74
objectives, development of, 74
organizational development, 1, 44, 46, 48
organizational evaluation, 83
organizational life cycle, 89
organizational standards, 49
organizational system, development of, 88

P

project proposal, 108, 137

R

reflection form, 127
rehabilitation concept, 14
rehabilitation services, 12
rehabilitation training, 18
rural blind, 12

S

search committee, 75
self-esteem, 11, 14
senior management training, 95
service organizations, 39
special events, planning, 143
staff training, 49, 53

T

transition, challenges of, 68

U

Uganda National Association of the Blind, xi, 8

UN Declaration of 1983-1992, 9

United Nations (UN) Declaration of 1981, 9

V

volunteer training, 63

volunteers, 45, 57

volunteers, effective utilization of, 59

volunteers, recognition of, 62

W

work teams, 94

