The Use of Problem Structuring Methods to explore the functioning and management of a selected NGO

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DECLARATION

This work has not been previously submitted in whole, or in part, for the award of any degree. I declare to the best of my knowledge that this report is my own work. All the material in this report is based on interviews with the staff and student volunteers of Student Health and Welfare Centers Organization (SHAWCO), library research, and from materials taught on the Operations Research for Development program, 2005, at the University of Cape Town (UCT). Each significant contribution to, and quotation in this dissertation from the work, or works of other people has been recognized, and has been cited and referenced.

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To God be the Glory

ABSTRACT

Poverty eradication is one of the major challenges facing South Africa and the rest of the continent. Concern around poverty alleviation in South Africa encompasses lack of capacity as well as inefficiency in the management and administration of poverty alleviation projects. Therefore, poverty alleviation agencies ought to be mindful of the issues that could affect their organizational efficiency, especially issues around organizational management. Addressing issues of management amongst the poverty alleviation agencies is necessary to assist role players in the implementation of efficient and effective poverty alleviation programs. The research explored issues around the management structure of a selected non-government organisation (SHAWCO). The objective was to develop a shared understanding of the organizational structure, amongst the members of the management team, and identify (if any) inefficiencies within the structure of the organisation.

Problem Structuring Methods have been identified as a collection of tools that assist decision makers in addressing complex societal problems, and seek to alleviate or improve situations characterized by uncertainty, conflict and complexity. The study used Problem Structuring Methods to investigate the possible difficulties SHAWCO is facing as a result of management inefficiency. Interviews were used to uncover issues around the functioning and management of the organization, and an interactive problem structuring workshop was later conducted to develop a shared understanding of the identified issues.

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GLOSSARY

ASGISA	Accelerated and Shared Growth Initiative for South Africa
CSIR	Centre for Scientific and Industrial Research
EPWP	Expanded Public Works Programme
GDP	Gross Domestic Product
GEAR	Growth, Employment, and Redistribution
IFORMS	the Institute for Operations Research and the Management Sciences
MDGs	Millennium Development Goals
MIT	Massachusetts Institute of Technology
NGO	Non Governmental Organization
NPAS	National Poverty Alleviation System
OMT	Oval Mapping Techniques
OR	Operations Research/ Operational Research
PPA	Participatory Poverty Assessment
PSMs	Problem Structuring Methods
PWP	Public Works Programme
RAG	Remember And Give
RDP	Reconstruction and Development Program
SCA	Strategic Choice Approach
SHAWCO	Student Health and Welfare Centers Organization
SODA	Strategic Options Development and Analysis
SSM	Soft Systems Methodology
STEP	SHAWCO Tutoring Education Programme
UBE	Universal Basic Education
UCT	University of Cape Town
UN	United Nations
UNDP	United Nations Development Programme

CHAPTER ONE: INTRODUCTION

1.1 Introduction

Breaking the grip of poverty on a substantial portion of its citizens is one of the most important challenges facing the new democratic government of South Africa. A major concern around poverty alleviation in South Africa is that of lack of capacity as well as lack of co-ordination amongst the multitude of anti-poverty role players, which may result in waste of limited resources (Turpin et al, 2005). Inefficient management and improper administration of poverty alleviation projects by anti-poverty role players will further aggravate the poverty situation.

The reason for initiating this research was to contribute to the work undertaken by the Centre for Scientific and Industrial Research (CSIR) on poverty alleviation processes in South Africa. In this respect, the thesis aims to explore the functioning and management of a selected anti-poverty role player, through the use of Problem Structuring Methods (PSMs).

The discipline of Operations Research (OR) provides appropriate research techniques and methods for tackling such complex societal problems. PSMs have been identified as a collection of tools that assist decision makers in addressing complex problems, and seek to alleviate or improve situations characterized by uncertainty, conflict and complexity (Mingers and Rosenhead, 2002). The aim of the research is to use PSMs to explore management issues around a selected health and welfare non-government organisation and assist the organization to function more effectively.

The study explores issues around the current management structure of the Student Health and Welfare Centers Organization (SHAWCO) by using the knowledge and wisdom of the people within the system to create a shared understanding of the organizational structure, and identify inefficiencies and gaps within the organizational structure. Strategic Options Development and Analysis (SODA) is a PSM, developed for methodological support for working on complex problems (Eden and Ackermann,

2001a). SODA was utilized to provide the management team of the organisation with techniques that could assist the team uncover issues affecting the organization and further help the team to develop a shared understanding of the identified issues.

1.2 Background

Defining poverty is not easy, the word poverty has acquired a non-economic connotation. Poverty has attendant features such as poor health, low levels of education or skills, inability or unwillingness to work, high rates of disruptive or disorderly behavior, and improvidence. While these attributes have often been found to exist with poverty, their inclusion in a definition of poverty would tend to obscure the relationship between them and the inability to provide for one's basic needs. Whatever definition one uses, authorities and laypersons alike commonly assume that the effects of poverty are harmful to both individuals and society.

South Africa is an upper-middle-income economy (World Bank, 2006), but despite this relative wealth, the country is characterized by sharp dual class economy, where the experience of most South African households is outright poverty or of continuing vulnerability to being poor (May, 1998; African Economic Outlook, 2006). According to the United Nation's Millennium Development Goal Report of 2005, over 11% (34%) of South Africans live below the international poverty standards of $1 per day ($2 per day) and at least 50% of South Africans are living under the national poverty line of R354 per month (African Economic Outlook, 2006).

Furthermore, the distribution of income and wealth in South Africa is one of the most unequal in the world with a Gini coefficient of 0.59 (African Economic Outlook, 2006), thus destitution, hunger and overcrowding continue to live side-by-side with affluence.

Four years ago Landman (2003) stated that ' the single most important issue facing South Africa twelve years after the transition to democracy is breaking the grip of poverty on the substantial portion of its citizens.' (Landman et al, 2003:2). In line with the Millennium Development Goals (MDGs) and the expectations of the post apartheid era, a

prioritized objective of the South African government is to eradicate extreme poverty and hunger; the war on poverty is South Africa's most important task and its greatest challenge. Eradication of extreme poverty is an important part of consolidating the gains of the new democracy. At the world summit for Social Development in Copenhagen in March 1995, President Mandela made a commitment to eradicating absolute poverty in South Africa by 2015 (UNDP, 1995). Since 1995, government has introduced polices and programs that will enable government to achieve its poverty reduction objectives. These policies include; the Reconstruction and Development Program (RDP) of 1994, the Growth, Employment, and Redistribution (GEAR) program of 1996 and the Accelerated and Shared Growth Initiative for South Africa (ASGISA) introduced in 2006.

Poverty is a social problem that is both complex and multi-dimensional and the issues within these social contexts can be unclear. A large part of the South African population live in poverty, the situation is getting worse rather than improving. That makes the burden of poverty alleviation even bigger. The urgency and importance of the need for the national capacity to be efficient in its attempts to alleviate poverty needs no debates.

As with most problems, if a problem is not well understood, there is the danger of solving the wrong problem. Thus the inability to define the problem can result in proffering the wrong solution. In an attempt to find a competent and useful solution to a problem, it is important to define and structure the problem appropriately, get relevant information, which will provide the knowledge, insight and understanding in proffering the right solution to the problem. The history of a problem is also important in formulating the solution as it aids in structuring the dynamics of a given system. Appendix A provides various definitions of poverty as well as brief history of poverty alleviation processes in South Africa.

It is assumed that a system exists by which poverty alleviation takes place in South Africa. It is a system that has evolved over time and is still evolving and it includes various role players that have as objectives to alleviate poverty and those that are beneficiaries to the poverty alleviation projects. The system has not purposefully been

designed, but has rather evolved by the independent establishment of various entities that have a role to play with respect to poverty alleviation.

Poverty alleviation in South Africa is delivered through a variety of independent mechanisms. Various entities are engaged in the task of poverty alleviation, each of these entities has their specific objectives and area of focus. Because the evolution of the system of delivery mechanisms is organic rather than designed, and also because of the desire for each entity (role player) to focus on delivering on their own objectives, therefore, the system of delivery might translates to some extent into the optimization of the behavior of individual entities as opposed to the optimization of the system as a whole.

The phenomenon of poverty is complex and multifaceted, and no single solution would address the problem. However, while the current means in which the problem is addressed does make an impact, the fragmented and uncoordinated nature thereof creates its own dynamic with its own inherent inefficiencies.

Efficiency of poverty alleviation could be improved if, for example, poverty alleviation initiatives in a specific geographic area are integrated. However, to identify inefficiencies that result from the interaction (or lack thereof) between different organizations, the delivery system as a whole needs to be studied, and an appropriate approach needs to be employed to do so.

This work arose out of the work undertaken by the team from CSIR. The team aimed to analyze and model poverty alleviation processes and structure in South Africa. The CSIR team viewed the national process of poverty alleviation as a system, which can be represented by a model or suitable framework within which to begin to describe and understand the processes. This project will not be directly linked to the CSIR model, but many of the issues they identify and their rationale for modeling poverty alleviation have relevance.

The CSIR project considered the current poverty alleviation initiatives in South Africa as a system termed the National Poverty Alleviation System (NPAS). The project team aimed to use systems methodologies that were developed in the natural sciences and engineering environments, and apply these towards a better understanding of the NPAS. By regarding all current poverty alleviation initiatives as a system, it is possible to investigate ways of making the total system more effective. According to Turpin et al (2005), one approach that could be used to analyze and evaluate the efficiency and effectiveness of a system is systems engineering. Systems engineering is meant to be used to design and manage technical systems. Turpin et al (2005) further argued that, a systems engineering perspective towards the poverty alleviation system might add some insights into the functionality of the system in addition to those achieved by traditional methods of social, economic and developmental research (Turpin et al, 2005).

The NPAS system comprises of a number of role players, with interfaces between them. The role players execute specific functions, and employ various mechanisms through which poverty is alleviated. The role players within the system were examined as well as their objectives, the functional mechanisms employed by these role players and the interfaces between them. The diagram in Figure 1.1 displayed the NPAS role players and the interface model.

As stated by Turpin et al (2005), NPAS is a social and economic system with limited technical aspects. Yet, the systemic problems that it faces, leave the possibility for systems engineering principles, and the application of a systems engineering process, to add insight into the system. Though the approach employed assisted Turpin et al in understanding the dynamics of the system, they observed some difficulties in applying the method to national poverty alleviation. The team identified that the system engineering method is not sufficient or appropriate in a social system and could not be straightforwardly applied to a system categorized as messy. The team agreed ' that the Systems Engineering approach would possibly have to be supplemented by taking into account "softer" systems approaches in order to provide a suitable framework for analysis of a socio-economic system such as NPAS' (Turpin et al, 2005:1). They suggested the

use of Soft Systems Methodology (SSM) or Critical Systems framework as an add-on to the Systems Engineering framework. (Turpin et al, 2005).

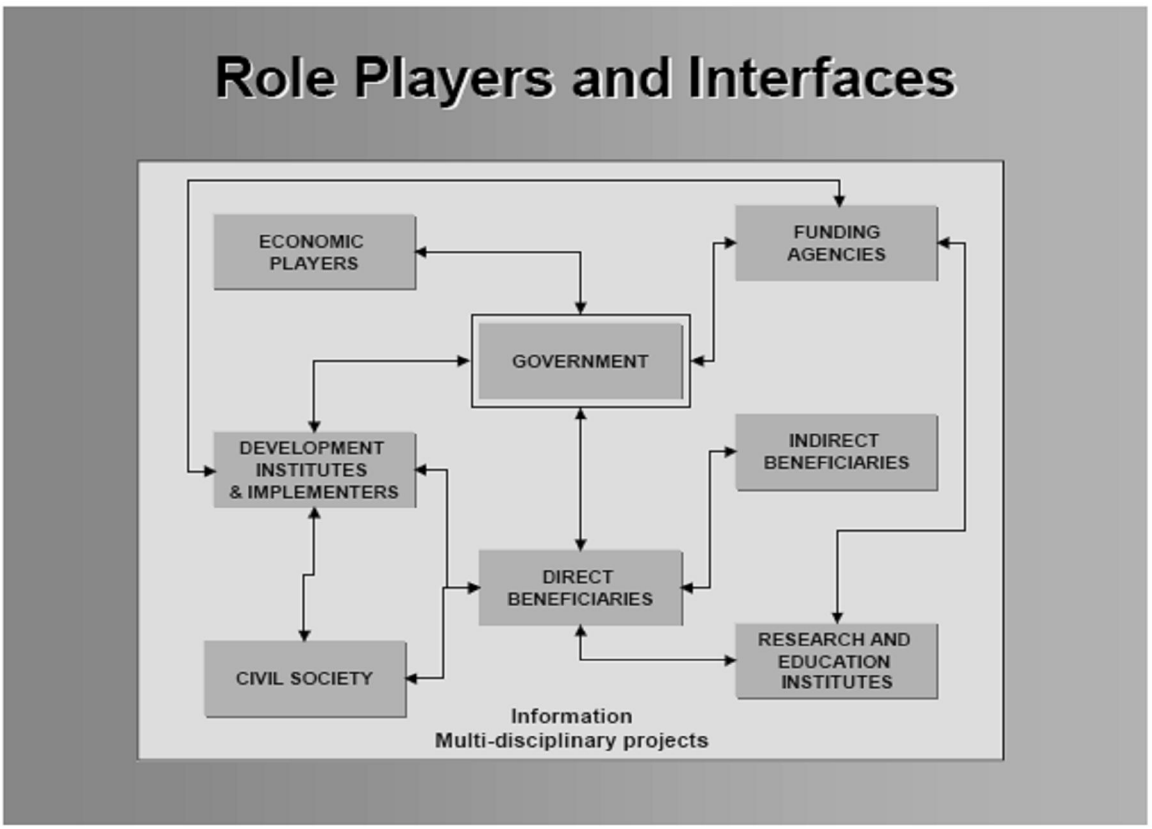

Figure 1.1: NPAS Role players and interfaces model (Turpin et al, 2005:7)

To contribute to the work on poverty alleviation undertaken by CSIR, this thesis aims to explore the functioning and management of a selected NGO. NGOs constitute one of the identified anti-poverty role players in the CSIR model. Though the concerns of CSIR is that of lack of coordination amongst anti-poverty role players, nonetheless, lack of good control, inefficiency in the organizational management and improper administration of poverty alleviation projects by anti-poverty role players will further aggravate the poverty situation. Thus this work will focus on how to assist the management team of SHAWCO to uncover management issues affecting their organization.

One of the benefits of the MDGs is to focus attention on key outcomes for government activities, which then provide a basis for prioritizing capacity-building activities. Good governance, adoption of best principles for public expenditure management, and involvement of professional groups, civil society (especially NGOs), private sector, and the community in decision-making and in the provision of public services are fundamental towards reducing poverty, and improvements in the capacity to deliver public services to the population, especially the poor. Simultaneous improvements in the various aspects of institutional capacity could create positive synergies. However, such progress requires an effective participatory strategy, commitment to action by all stakeholders and implementation of reforms.

Governments in many developing countries are increasingly turning to civil society, especially NGOs, as partners in meeting their countries developmental needs. There is no doubt that NGOs as poverty alleviation and development organizations need to be well organized and efficiently managed. These expanded roles for the NGO sector have been accompanied by heightened expectations of accountability, and also require demonstrable evidence that NGOs can significantly contribute to development (African Youth Alliance, 2005).

Mostashari (2005) argued that one of the many ways NGOs are achieving efficient and productive organization is through augmentation and strengthening of the functioning, management structure and the board composition of the organization. Mostashari (2005) further argued that a good and effective organizational board composition and management structure provides a basis for successful management of the organization (Mostashari, 2005).

Concerns around poverty alleviation in South Africa include the lack of capacity and inefficiency in the management and administration of poverty alleviation projects. Addressing issues of management in the non-profit sector is necessary to assist role players in improving managerial competence, implementing efficient and effective poverty alleviation programs and effective use of available resources.

For productive partnerships to exist between the government and the NGOs as well as the continued existence of the NGO, there is a growing need for NGOs to be more transparent, effective and productive. Government considers the structural effectiveness, organizational performances and the institutional capacity of these anti-poverty agencies, in evaluating or assessing their competence. Finally, organizational sustainability and good management is critical to the continued existence of the NGO sector, and their ability to become a viable partner with governments in bringing about sustainable development.

1.3 Research Problem

In the context of limited resources, it is important that poverty alleviation efforts are well coordinated, efficient and resourceful. Good coordination, regular monitoring and evaluation of the operations of the multitudes of anti-poverty role players engaged in a variety of poverty alleviation programs is necessary to ensure efficient use of limited resources and eradication of poverty. Furthermore, an effective organizational and management structure of these anti-poverty agencies is a pre-requisite for successful management of the organization and implementation of poverty alleviation projects.

Our case study for this research is SHAWCO, a registered NGO and a prominent anti-poverty role player in the Western Cape (Van Heyningen, 1975). After undergoing a recent structural transformation, the management team of SHAWCO believed the current management structure of the organization to be effective, and the transformation to be yielding positive results. This research will seek to explore the effectiveness of the current organizational structure of SHAWCO.

1.4 Aim of Research

This research seeks to explore issues around the current management structure of SHAWCO and aims to create a shared understanding of the structure of the organization, and identify inefficiencies and/or gaps within the management system. This research aims

to apply PSMs with the management of SHAWCO to promote a shared understanding of the issues affecting the organizations' ability to achieve their objectives.

1.5 The Scope and Limitation of the Research

Time: The life span of the project was 18 months, which was inadequate for the scope of work envisaged

Area: This study was carried out in a selected organization within the Western Cape Province.

Accessibility: It was difficult to reach all role players and stakeholders involved within the project time frame, but efforts were made to include the views of many relevant stakeholders.

1.6 Thesis Structure

Chapter 2 provides a brief overview of the methods used in this research. This chapter illustrates the techniques that are applied to the problem situation. PSMs and reasons for selecting SODA are discussed.

Chapter 3 presents a brief history of SHAWCO, the chosen case study, covering their management structure and the need for the research.

Chapter 4 provides the research design and approach employed, including data collection techniques. The chapter also describes the criteria employed in selecting participants for the study.

Chapter 5 presents the outcome and process of application of PSM as a research tool in creating a shared understanding of the complex issues. The results of the findings from the interviews, workshop and causal maps are also presented.

Chapter 6 provides the conclusion and the evaluation of the research process. Also included in this chapter are the discussion and recommendations.

CHAPTER TWO: PROBLEM STRUCTURING METHODS

This chapter provides a brief overview of Problem Structuring Methods (PSMs), Strategic Options Development and Analysis (SODA) and outlines the methods used in this research. The chapter describes the techniques that are applied to the problem situation and the philosophical framework of the research creates an opportunity to state assumptions of the approach.

2.1 Problem Structuring Methods

Social science, technology and natural science have been identified as components affecting the process of how OR and System Dynamics should be understood and practiced (Ormerod, 1996). Advancements in the field of Social Science have contributed immensely in influencing the practice of OR. According to Ormerod (1996), 'the third force that affected the course of OR was the increasingly coherent development of the social sciences. There was a growing recognition both that OR is a social process with a culture and programmes, and that the target of the intervention is itself an organization with its own social culture and programmes' (Ormerod, 1996:5).

Between 1940 and early 1970s, OR entailed 'the application of quantitative methods to model decision making situations in view of achieving some well-defined objective within a systems framework. Optimization of some performance measure was usually an integral part of the methodology' (Daellenbach, 2001:1). However, this process has been changing since 1970 with the development of alternative approaches to decision making and problem solving. Ackoff in "Resurrecting the Future of Operational Research" called for more superior development strategy and the need to focus on the totality of the problems, which he referred to as 'messy' (Ackoff, 1979). Ackoff's argument was based on his long work experience in the public sector, in which he highlighted the 'cultural' obstacles to economic development, including corruption, paternalism, patronage and conformity. All of these obstacles had the potential to strengthen the problem that well-designed intervention programs intended to solve. He expressed strong reservations about

the trend towards sub-optimization and, more critically, the fact that OR models were being applied to problems of limited scope (Ackoff, 1979).

Changes in the understanding of natural science, recognition of the limitations of natural science, the relevance of social science, and concerns about OR's lapse into a tactical, technique-based discipline stimulated a vigorous debate. Whereas it is believed that the forms of modeling which make up 'hard OR' can be useful in analyzing organizational situations, some practitioners wondered why it seemed that these techniques were not always useful - especially in strategic management (Rosenhead, 1989). It became clear that some organizational problems could not be solved by pure logic, and that some complicated situations could not be usefully modeled mathematically. For example, to use 'hard' OR modeling techniques to describe the role that internal politics and interpersonal relations can play within organizations.

Furthermore, while the nature of science itself was being redefined, social scientists started questioning the applicability of the methods of natural science to social issues. Their concern was: whether the methods of natural science could be applied to social issues without the dismissal of the very object of inquiry that is the human element. They found the approach of natural science inadequate when it comes to capturing the fragility of a situation where different meanings could be attached to social issues. In affirmation of this explanation Ormerod argued that 'attempts to use the methods of science to define social attributes and the relationship between them could only give a partial picture and in the eyes of many a very inadequate one' (Ormerod, 1996:4).

Different views of what an organisation's priorities are, might lead to different ideas about what decisions are to be made. Practitioners of OR observed that when these kinds of internal differences become too serious, it might aggravate the problems within organizations. As a result it became paramount that a way of modeling organizations which took into account the human elements of organizations was necessary.

Practitioners of 'soft' OR attribute ineffectiveness of hard OR to various reasons. They feel that fundamental differences between physical and social systems prevent rigorous analysis, or that complexity of managerial and social systems excludes quantitative analysis, or that the human element precludes effective modeling, or that multiple criteria for desirable behaviour prevent specifying objective measures of system performance (Checkland, 1981). Thus soft OR evolved as a result of the inability of classical or 'hard' operations research to deal with the major issues of interest to managers and political leaders.

There are many problems whose outcomes depend significantly on the initiatives and actions by individuals and groups. These problems are referred to here as soft problems. It is often said that any situation in which human beings try to act together will be complex simply because individuals are autonomous (Rosenhead, 1989). It is true that individuals act in a manner which he thinks best in terms of his own perceptions, values, knowledge and similar other parameters. However, these actions by individuals and groups may not necessarily be best in terms of the interests of the organization and other stakeholders in a given problem situation. In order to be able to address these problems in a desirable manner, it is necessary to recognize the concerns of various individuals and groups and reorient them towards a desirable solution (Tripathy, 2005).

Soft OR approaches attempt to find a rational framework with which to deal with the complexities of human organizations. This framework is based on the realization that organizations are groups of human beings, each with their own interests and motivations. Soft OR, it could be argued, contributes to those interested in studying or working with organizations, in finding a new and realistic way of understanding the dynamics upon which organizations work.

According to Tripathy (2005) 'It is essential to have greater understanding of the problem in order to solve them in an effective manner. PSM provides an approach for greater understanding of problems which can then help in a better solution of the problem' (Tripathy, 2005:1). The term Problem Structuring is generally applied to the process of

making sense of an issue; identifying key concerns, goals, belief, values, stakeholders, actions, culture and uncertainties (Belton and Stewart, 2002). White (2006) characterized PSMs ‘as a family of methods for supporting decisions for groups of diverse composition within a complex environment to agree a problem focus and make commitments to a series of actions. They are usually applied to unstructured problems characterized by multiple actors, multiple perspectives, conflicting interests, and high levels of uncertainty’ (White, 2006:3)

Soft OR techniques allow situations to be modeled which were beyond the capabilities of other forms of modeling (Eden and Ackermann, 1998). The techniques represent different ways of understanding the various human perspectives on organizations or on problem situations. They are ways of dealing with apparently messy or intractable problems. Practitioners have found that problems which often seem intractable are characterized by the various individuals involved in a situation failing to understand the point of view of the other actors in that situation. Soft OR techniques are used to enable understanding of various perspectives, roles and worldviews, and the interrelationships between each. They can help to lay out these perspectives, in such a way as they can be understood by others, discussed and acted upon.

Soft methods can be seen as techniques to facilitate and structure the negotiation of the organization and its problems. They aim to provide structures which can enable and enhance learning within the organization, with the hope that such learning will help in finding a solution to a problem. It recognizes that each of these situations is unique. Therefore, these approaches are methodologies, flexible sets of principles, which can be used to investigate, and intervene in, complex situations.

However, these approaches do not claim to be routes to finding a definitive answer to any set of problems or issues. Indeed, there cannot be any guarantee that there will be any particular product of an intervention using 'soft' techniques. Rather, they tend to be ways of generating debate, learning and understanding, and using this understanding to make progress through complex situations (Checkland, 1981).

2.1.1 Features of Problem Structuring Methods

PSMs developed pragmatically. They grew out of practice, and were theorized and systematized at later stages (Blackett, 1943). PSMs are classified as Interpretative system approaches, that seek to alleviate or improve situations characterized by uncertainty, conflict and complexity (Daellenbach and Flood, 2002). Such unstructured problems according to Rosenhead and Mingers (2001) are characterized by the existence of multiple actors, multiple perspectives, incommensurable and/or conflicting interests, important intangibles, and key uncertainties (Rosenhead and Mingers, 2001).

One of the features of PSM is the process which involves the facilitator working with the stakeholders, clients, participants or members of the society or an organization on an intervention over issues of concern to the society or organization; the stakeholders take action based on the outcome of the intervention. Another key feature of these approaches is 'the use of a model to represent alternative scenarios or versions of the situation of interest, combined with facilitation to help group members make constructive improvements' (White, 2006: 2).

Some of the features common to most of the PSM methods include: negotiation, workshop/participation, large group methods, co-operatives process and change management (Tripathy, 2005). It has been suggested frequently that problems of this kind are more 'strategic', in the sense that they set the 'givens' of well-structured problems (Ackoff, 1979; Checkland, 1985; Rittel and Webber, 1973; Schon, 1987). This perspective actually makes it difficult to talk of "problems" as such, since the very construction of the situation as being a problem of a particular type is a result of the process of problem structuring rather than being a given starting point. It may therefore be better to talk of different aspects or dimensions of a problem situation, rather than different types of problem (Mingers and Brocklesby 1997).

2.1.2 Types of Problem Structuring Methods:

The Soft Systems Methodology (SSM) developed by Peter Checkland, is a qualitative technique that can be used for applying Systems Thinking to non-systemic situations or

the real world of human organizations. SSM originated from the understanding that 'hard' Systems Thinking, such as OR techniques, is inadequate for enquiring into large, complex organizational issues. It is a way of dealing with problem situations in which there is a high social, political and human activity component. The approach is a general method for system redesign (Checkland, 1981). In this approach, 'Participants build ideal-type conceptual models, one for each relevant world view. They compare the model built with perceptions of the existing system in order to generate debate about what changes are systemically desirable considering the cultural and political feasibility of the change' (Mingers and Rosenhead, 2002:5).

SODA is a method for working on complex problems. The approach is a general problem identification method that uses cognitive mapping as a modelling device for eliciting and recording individuals' views of a problem situation. 'The merged individual cognitive maps (or a joint map developed within a workshop session) provide the framework for group discussions, and a facilitator guides participants towards commitment to a portfolio of actions' (Mingers and Rosenhead, 2002:5). It is an approach designed to help OR consultants help their clients with messy problems. SODA aims to provide a management team with a model as a device to aid negotiation, working with individuality and subjectivity as the basis for problem definition and creativity (Rosenhead, 1989).

Strategic Choice Approach (SCA) is a PSM developed as a methodological support for decision making within multifaceted problem areas. It is a planning approach centred on managing uncertainty in strategic situations (Friend and Hickling, 1997). In addition, the approach 'focuses on the decisions to be made by a group in a particular planning situation, and recognises that strategic decisions are interconnected in complex ways as well as surrounded by uncertainty' (Ryd, 2004:93). Furthermore, the facilitators assist participants to 'model the interconnectedness of decision areas. Interactive comparison of alternative decision schemes helps the participants to bring key uncertainties to the surface. On this basis the group identifies priority areas for partial commitment, and designs explorations and contingency plans' (Mingers and Rosenhead, 2002:7). The

method helps planners to make decisions in a systematic way, taking into consideration the uncertainties involved.

Drama Theory draws on two PSM approaches, Metagames and Hypergames. According to Mingers and Rosenhead (2002), the approach is an 'interactive method of analyzing cooperation and conflict among multiple actors. A model is built from perceptions of the options available to the various actors, and how they are rated. Drama theory looks for the 'dilemmas' presented to the actors within this model of the situation. Each dilemma is a change point, tending to cause an actor to feel specific emotions and to produce rational arguments by which the model itself is re-defined. When and only when such successive re-definitions have eliminated all dilemmas is the actors' joint problem fully resolved. Analysts commonly work with one of the parties, helping it to be more effective in the rational-emotional process of dramatic resolution'. (Mingers and Rosenhead, 2002: 8)

Other PSM methodologies in order of date include; operational gaming (1950s & 60s), metagame analysis (1960s), interactive management (1974), hypergame analysis (1980), robustness analysis (1980), strategic assumption surfacing and testing (1969/81) and the theory of constraints (1994) (Rosenhead, 1989).

2.1.3 Areas of PSMs Application

In practice, there are many areas or fields or discipline where the applications of PSMs had been established to be very successful. Today PSMs are applied to a wide variety of different areas such as health care, transportation and tourism, government administration and public service, universities and research institutions, consultancy, water management, electricity and energy consumption, telecommunication and many other areas of social need. Rosenhead and Mingers (2001) argued that OR practitioners have made use of more hard OR than PSM or soft OR in guiding decision makers in achieving desired goal. On the other hand, the numbers of published PSM applications are now far too large to permit any kind of extensive listing. A large number of successful PSM case studies can be found in several OR related texts, publications and websites.

2.1.4 Shortfalls of Soft OR/PSMs

Practitioners have argued that 'soft OR' lacks the discipline of explicit model creation and simulation. Soft OR relies on subjective use of unreliable intuition for evaluating the complex structures that emerge from the initial description of the real system. Also, Checkland (1981) argued that there is no generally accepted process for testing the dynamic assertions that come out of group discussions. This means that soft OR is inherently vulnerable to the same fallacies that plague management and political practice in the real world (Checkland, 1981).

2.2 Strategic Options Development and Analysis

Mingers (2003) in his work, 'a classification of the philosophical assumptions of management science methods' proposed a framework within which to examine and compare the philosophical assumptions supporting management science methods. He suggested that all the methods have in common, the basic mechanism of modeling; however, they differ in terms of what they model, why they model, and how they are applied. Some schools of thought have contradicting opinions concerning the classification. For instance, Ormerod (2005) is of the opinion that the overall result of Mingers work should be 'described as a characterization of the methods rather than a classification.' Ormerod (2005:1).

Mingers (2003) aimed to propose such a general classification that can be used to understand the main characteristics of any management science methods. Table 2.1 displayed part of the framework for characterizing the philosophical assumptions of management science methods proposed by Mingers (2003). The framework intends to assist users in understanding both the implicit or explicit assumptions underlying the methods, and their principle aims and purposes, in order to be able to make more informed and critically aware choices when designing' an intervention (Mingers 2003:561).

		Ontology	Epistemology	Axiology			
Methodology/ technique	**What it does A system to…**	**What it assumes to exist**	**Representation by modeling…**	**Necessary information**	**Source of information**	**Users**	**Purpose in order to...**
Mathematical programming	Model the relation between many variables using linear or nonlinear equations and optimise the value of an objective function	Relations between the measurable attributes of entities and processes, together with explicit objective(	Variables, linear and non-linear; constraints, optimisation software	Relevant variables and necessary data to model the relations between them	Observation and measurement of real-world processes	Analyst	Evaluate many different options and decisions thereby optimising an objective(s)
Visual discrete-event simulation	Simulate the behaviour of particular entities and the activities they undergo in a visual interactive form	Entities and activities with stable patterns of statistical behaviour that form inter-linked processes	Activity-cycle diagrams, entity life cycles, visual, interactive software	Entities, their interactions, and the behavioural patterns	Observation and measurement of real-world entities and procedures	Analyst	Explore the operation of complex real-world interactions between discrete entities to aid understanding and control
System dynamics	Simulate the dynamic behaviour of physical and social flows and processes, and their causal relations	Material and immaterial stocks and flows, and their causal feedback relations, information and decisions that link them	Influence diagrams, system dynamics diagrams, icon-based interactive software	Structure of causal relations between flows, ideally with quantified data and mathematical relations	Observation and measurement of real world together with judgement and opinion	Analyst	Explore the operation of a complex real-world system to aid understanding and control
SODA (including cognitive mapping)	Represent explicitly an individual's views about a particular issue or event in their own language	Individual beliefs about particular issues expressible in terms of inter-related constructs	Psychological constructs and their mutual influences in the form of a map, software for representing, analysing and merging maps	Personal constructs and their interrelations	Interviews/ workshops with (groups of) participants	Facilitator, researcher, participants	Surface and understand individual beliefs, and generate consensus about possible strategic actions
Soft systems methodology	Explore different worldviews relevant to a real-world situation and contrast them in a process of debate	Real-world problem situation; conceptual human activity systems (holons); worldviews (Ws)	Systems concepts; rich pictures, analyses 1,2,3; RD/CMs; logical relations	Hard and soft information concerning structure, process, climate, and relevant worldviews	Concepts, language, logic, and participation by concerned actors	Analyst, researcher, facilitator, participant	Learn about and improve a problematic situation by gaining agreement on feasible and desirable changes
Strategic choice approach	Assist groups of users in making incremental progress toward implementable decisions by recognising and managing uncertainties	A network of interrelated problems, decisions, and uncertainties as viewed by participants	Models of the decision space, interconnected decision areas, decision schemes, and commitment packages. Walls, flip charts, software	Participants' views concerning decisions, options, uncertainties, and feasibilities as well as real-world data	Workshops with (groups of) participants	Facilitator, participant	Structure decision choices under conditions of uncertainty and reach agreements and commitments for action
Drama theory/ hypergames	Represent a competitive situation involving different players and interacting decisions using a variety of gametheory-based modelling tools	Complexes of interacting decisions consisting of competing players, strategies, viewpoints, and preferences under conditions of uncertainty	Game matrices, trees, decision arena models	Competing players, their interests options and strategies, and the decisions and uncertainties involved	Various real-world players and parties involved in the decisions	Analysts, players	Clarify the competitive structure of a situation in terms of interactive and conflicting decisions and possibilities for cooperation

Table 2.1: Framework for characterising the philosophical assumptions underlying OR/MS methodologies and techniques (Mingers, 2003:563)

Although other frameworks could be suggested, Mingers' framework is useful in understanding method choice in our context. The purpose of the model to be described here can be classified as surfacing and understanding individual beliefs, and generating

consensus about possible strategic actions. For this reason, the method used in this dissertation is the Strategic Options Development and Analysis (SODA).

SODA begins from the psychological and cultural perspective that individuals have differing perceptions about an organization and that their perceptions are central to understanding the issues in the organization. Cognitive theory is a part of psychological theory that argues that human beings are continually seeking to make sense of their world in order to manage and control that world. The theory implicitly sees an individual that uses concepts rather than emotion to guide action, as a problem finder or problem solver (Kelly, 1955). Therefore the method serves the purpose of working with individuals who are constrained by the need to explain their action within their organizational world.

SODA is used when groups of people both individually and commonly may have difficulties in defining and structuring their perception of a problematic situation (Eden and Ackermann, 1998). Amongst the purposes of SODA, is the aim to provide the management team of an organisation with a model, which will create a forum for negotiation, working with individuality and subjectivity as the basis for problem definition and creativity. The method aims to develop high levels of ownership for a problem, by paying attention to problem definition and creating a shared understanding of the problem by the key decision makers of the organization. It is usually aimed at a small group of participants. (Institute for Manufacturing, 2006).

SODA uses interviews and cognitive mapping to capture individual views of an issue. Individual cognitive maps are constructed during the interviews. Group maps constructed through the aggregation of individual cognitive maps are used to facilitate negotiation about value, goals of the systems, key strategic issues, and option portfolios, as well as problem content, paying attention to the communal, political and process dynamics in the group (Eden and Ackermann, 2004). The approach tends to generate increasingly rich models, rather than move towards abstraction or simplicity. The approach sees strategic management in terms of changing thinking and action rather than planning. SODA is a way of working with a group of people and a technique for constructing cognitive maps

of how people perceive and think about a problematic situation. The Table 2.2 outlines in summary some of the characteristics of SODA.

Background	Psychology/social psychology
Focus	Focused on perception and structuring of a messy problem situation
Process	Learning process where map comes from analyzing individual perceptions and these are gathered in an aggregated model
Organisation	Individual interviews and workshops
Technology	Cognitive maps and use of software. Tools and techniques for supporting workshops
OR function	Facilitator and analyst

Table 2.2: Characteristics of SODA

2.2.1 Underlying Assumptions Guiding the Application of SODA

SODA, developed through action research, has its roots in the fields of soft OR and cognitive psychology (Checkland and Holwell, 1998). The epistemology that informs SODA is subjectivism, as it focuses on the individual perspective guided by the theory of Personal Constructs (Kelly, 1955). For the SODA method to be applied, four important and interacting theoretical perspectives are needed. These include individual perspectives, nature of the organization, consulting practice and the role of technology and techniques (Eden and Ackerman, 2001a). According to Eden (1998) SODA is made up by a number of concepts and theoretical perceptions about how we think and act. The concepts and theories are based on the following assumptions (Eden, 1988):

That each individual perceives the world subjectively;

That the organization is made up of processes and negotiations more than structures;

Little weight is put into official power relations;

That the planner's function is defined as being supportive in the negotiation processes so decisions can be reached through consensus in contrast to demonstrations of power; and

That the primary tool or technique used is cognitive maps. The cognitive map is a way of trying to grasp different ways of thinking and to involve all partners to redefine the problem perceptions and form a common ground for commitment and consensus decisions.

2.2.2 Cognitive Mapping for SODA

Cognitive Mapping has been developed over a period of time. Through its application, it has demonstrated its use for operational researchers working on a variety of different tasks. These tasks include providing help with structuring messy or complex data for problem solving, assisting the interview process by increasing understanding and generating agendas, and managing large amounts of qualitative data from documents (Pidd, 2003). SODA uses the device of cognitive mapping as a modeling technique and is supported by the hypertext software Decision Explorer (formerly known as graphics COPE). Cognitive mapping technique help participants externalize their perceptions about the problem situation and develop constructive debate about actions to be taken. COPE cognitive mapping software was created specifically for use with SODA. COPE is used to map individual cognitive maps of the problem space and then to combine those individual maps into a group map that can highlight both areas of consensus and areas of disagreement. (Institute for Manufacturing, 2006)

A cognitive map is a technique designed to capture the thinking of an individual about a particular issue or problem in a diagrammatic rather than a linear format. The map is designed to focus on the values, beliefs, and assumptions an individual has about particular issues (Eden and Ackermann, 1998: 285). It is a model of the system of concepts used by clients to communicate the nature of a problem. The model representing the meaning of a concept by its relationship to other concept, thus cognitive map is the representation for organizing people's perceptions of the situation and the alternative actions (Pidd, 2003).

Cognitive Mapping is often carried out with individuals on a one to one basis. It can be used with groups to support them in problem solving. Cognitive maps are diagrams

which are constructed by the practitioner in interviews with stakeholders. The diagrams are a way to surface the way individual stakeholders understand and react to the situation (Pidd, 2003). Figure 2.1 shows an example of such cognitive map.

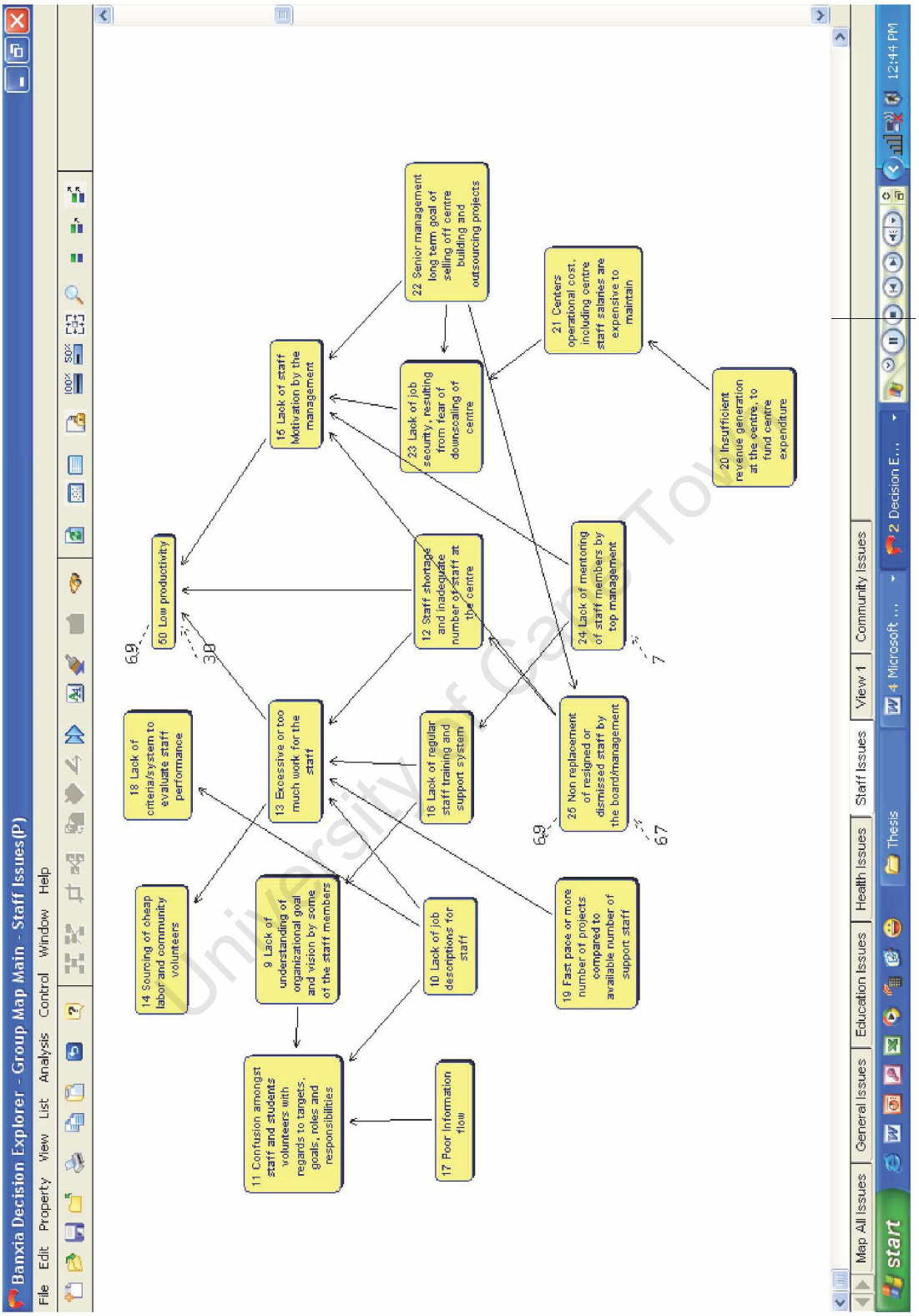

Figure 2.1 Part of the causal map– some of the issues identified in the interviews

CHAPTER THREE: CASE STUDY

This chapter gives a brief history of the chosen case study Student Health and Welfare Centres Organization (SHAWCO), their management structure and the need for this research. The chapter starts with a description of the process used in selecting a case study.

3.1 Criteria Considered in Selecting the Case Study

In identifying and selecting the organization to be used as a case study, amongst other criteria already considered, the following four main criteria were used;

The functioning of the organization should support the aim of poverty alleviation;

The organization should have a well established documented management structure;

The organization should be a registered NGO; and

The management team of the organization selected as case study should be willing to engage in the problem structuring process.

Securing commitment from an organization to participate in the research was not easy, especially when it came to availability of the management team. After several visits to many anti-poverty organizations in Cape Town in search of a case study, the management of the following organizations demonstrated their readiness for and commitment toward the problem structuring process. These organizations included; ICare Children's Foundation in Khayelitsha**,** IYEWA, a non-profit Governmental Organization in Mitchell's Plain, and SHAWCO, a University of Cape Town NGO. Overall, it appeared that SHAWCO had many features more suited to the aims of this research than the other organizations visited.

3.2 SHAWCO

SHAWCO was founded in 1943 by staff and student volunteers of the University of Cape Town. According to Van Heyningen (1975), 'In the early 1940s, students from the University of Cape Town began to visit some of the poorer communities of the Cape

Peninsula. They recognized that the current health care provision in such areas was inadequate and that there were a huge number of sick and needy people without access to adequate treatment. In 1943, as a result of this conviction and subsequent action, the Students Kensington Clinic was established**.** SHAWCO was started in 1943 as a volunteer organization by Andrew Kinnear, a University of Cape Town medical student with the assistance of Dr Golda Selzer from the UCT medical school. In 1954, it became SHAWCO, a registered welfare organization, and was officially recognized by the university' (Van Heyningen, 1975:8).

The constitution of the organization specified the aim and objectives of SHAWCO, which include the provision of free social and medical services in the Cape Town metropole. The mission statement incorporated SHAWCO's principles of humanitarian values, commitment from students, staff and the community, and development at the grassroots level. 'SHAWCO aims to work for the improvement of health, education, and social conditions and welfare services in communities in need, thereby alleviating deprivation and addressing the consequences of oppressive state policies and other socio-economic and political dynamics' (SHAWCO, 1991: Inside back cover). 'SHAWCO aims to foster interaction between volunteer students and the various communities we work with, thereby overcoming traditional divisions and ensuring that the development of programmes and skills becomes a mutually productive process' (SHAWCO, 1993: Inside front cover).

3.2.1 Activities of SHAWCO

For over six decades SHAWCO has continued to play a leading role in alleviating poverty in poor communities in the Cape Town metropole. The organization provides many opportunities for students to get involved in various activities aimed at assisting people in the underprivileged communities (SHAWCO, 1991). Medical students have continued to play a key role in the organization's activities. SHAWCO clinics across the Cape Flats are dependent on the flow of doctors-in-training. The medical centres, providing drugs and healthcare, are staffed by these medical students. SHAWCO operations are not limited to the medical field but encompass also education and welfare

activities. The Group '5' Scheme in 1975, for example, helped to build self-confidence and other life skills in children (SHAWCO, 1975:6). Students helped in running youth groups as well as extra-curricular sporting activities. In 1990, the SHAWCO Tutoring Education Programme (STEP) began, consolidating existing programmes and providing an alternative curriculum with topics such as sex education. In 1990, 100 university students were recruited to help tutor 750 pupils. By 2002, SHAWCO involvement had increased to over 25 community projects in the following communities; Joe Slovo informal settlement in Marconi Beam, Milnerton, Kensington, Manenberg, Brown's Farm informal settlement in Philipi, Masiphumelele informal settlement in Noordhoek, Elsies River, Nyanga, Khayelitsha (K1), Khayelitsha (K2) and Khayelitsha (K3) (SHAWCO, 2002).

3.2.2 Management and Structural Changes in SHAWCO

There is no doubt as to the dependency of the organisation on student participation and commitment. Students' involvement in SHAWCO is fundamental to the management; planning, functioning, organising and continuation of this organisation. As stated by Sir Richard Luyt, the 1975 Chairman of SHAWCO, student involvement is the 'very life-blood of SHAWCO' (SHAWCO, 1975:2). In 1975, the Student President of the organisation, David Marais, stated that 'Student involvement is a vital part of SHAWCO's activities. The never ending stream of students keeps SHAWCO viable and exciting as they are a valuable source of new ideas. SHAWCO wants to use every student who feels a need to contribute to the welfare of communities and individuals' (SHAWCO, 1975:7). The students ideas contributed enormously towards the expansion of the organisation, as confirmed by Beverley Wrighton, student president in 1987, who stated that SHAWCO had 'experienced unprecedented student involvement…leading to the expansion of almost every existing activity' (SHAWCO, 1987:5).

Though the top management structure and the board composition is gradually changing to include staff and other non student members, students still constitute the majority of the management team or decision makers within the organisation. At present, SHAWCO have about 1200 student volunteers and 22 employed staff.

The management structure, organizational objectives and strategies have constantly gone through a process of change and restructuring so as to achieve a well coordinated, efficient and productive NGO. Repositioning to effectively meet the challenges of the day, over the years the organisation has propelled strategies and adopted policies that ensure their continued existence and increased effort to fight poverty. Prior to 1979, various modifications were made to spread out the organizational branches over the poorer communities of the Cape Town metropole and improve service delivery to these communities. In 1979 the organisation went through a process of restructuring and decentralisation. In 1981, the constitution of the organisation went through another systematic revision, and a wider representation on the Board of Management was effected (SHAWCO, 1981).

3.2.3 Recent Structural Change in SHAWCO

In 2005, the management structure of SHAWCO was modified. However, the modification has not been documented at the time of the study. According to the management team of SHAWCO, the current organizational structure of SHAWCO is a modification of the immediate previous structure. The previous management structure of SHAWCO comprised of the board at top of the organogram, at the next level, two independent sectors; Health Sector and Education Sector. And finally, at the next lower level, the employed staff sector, that carried out instructions from the Health Sector and Education Sector (Figure 3.1). The old structure, according to participants interviewed, was characterized by delayed decision making by the board, difficulties in working as a team, conflict between sectors, lack of proper coordination and lack of effective communication within the organization.

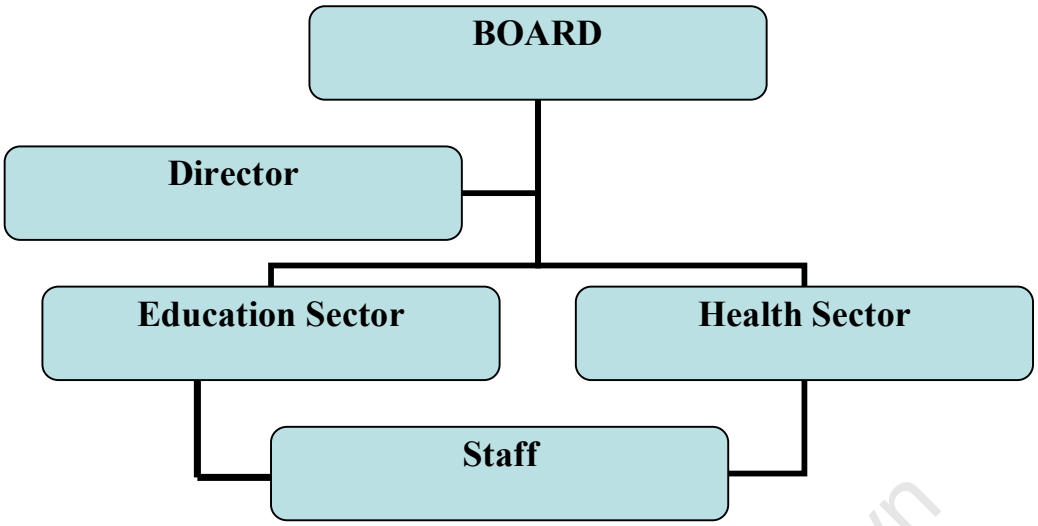

Figure 3.1 Old management structure of SHAWCO

Consequent upon these problems, structural changes was introduced by the new director and the chairman of the board. This modification rearranged the structures and introduced two new components in the organogram namely "Conscience" and steering committees (Figure 3.2). The Conscience was introduced to assist the board in coordinating and speeding up the decision making process of the organization. Also established to coordinate the activities of their respective sectors were a staff steering committee, health steering committee and education steering committee. According to the director of the organisation, the primary purpose of the change was to improve efficiency, enhance communication between the sectors, empower staff members, and create independent staff that could move the organization forward, making them a better supporting team for the student volunteers.

Each steering committee supervises the function and the activities of their respective sector and reports to the Conscience or the Board. The staff sector was moved up the organogram to level with the Youth and Health sector. Furthermore, the staff sector was restructured to enhance their assistance to the other two sectors and to run the activities of the organization when the students are on break.

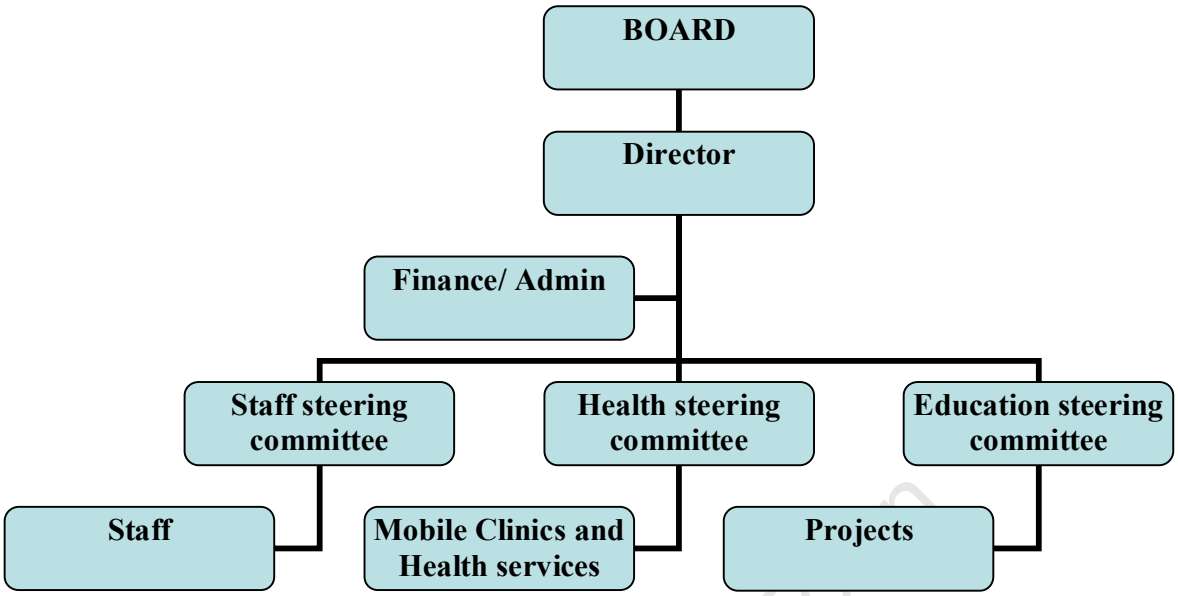

Figure 3.2 SHAWCO's current organizational structure

Over the years, SHAWCO has undergone various transformations so as to put in place an effective structure that will aid the organization in achieving desired objectives. There is a view that the new management structure of SHAWCO is effective, and that recent management structural changes are yielding good results. This research will seek to investigate this view. The objective of the research is to uncover issues within the organization that could affect the efficiency of the new structure.

CHAPTER FOUR: RESEARCH DESIGN AND METHOD

4.1 Choice of Research Focus

A preparatory meeting (Appendix D, 1) was held with the director of SHAWCO. The purpose of the meeting was to discuss with the SHAWCO management the procedure and methods to be used for the research. A summary of the organization's background was given by the director; he specified his area of interest in the research. He stated that the organization is moving in a new direction, after the difficulties they had experienced in the past due to financial instability. The organizational restructuring was undertaken as a matter of survival.

The director indicated three objectives he would like to see as the focus of the research:

- To find out whether the staff are adapting to the change
- To discover the workability of the new structure
- To determine the effectiveness of the structure

At the end of the meeting, it was agreed that the research will focus on the effectiveness of the current management structure of the organization. The expectation of the director in terms of outcome from the research was high. However it was pointed out to the organisation's management team that the research would not provide solutions to their problems, rather it would provide tools with which to facilitate conversation amongst the members of the organization. A letter of intent (attached as Appendix G) clarified the intention and objectives of the study.

4.2 Aim of Research

This research aims to explore the use of PSMs to assist a selected NGO to function more effectively. The case study explores issues around the current management structure of SHAWCO by using the knowledge and wisdom of the people within the organisation to create a shared understanding of the system, and identify (if any) inefficiencies and/or gaps within the system. The aim is to generate multiple perceptions about the nature of the organization from the staff and student volunteers of SHAWCO, through the use of PSMs.

4.3 The Research Framework

This study employed the SODA method. There are four important and interacting theoretical perspectives, which made up the core notion that drives SODA (Eden and Ackerman, 2001a). These four perspectives focused on the following subjects; about the individual involvement in the decision making process, 'about the nature of organization, about consulting practice and about the role of technology and technique' (Eden and Ackerman, 2001a:23).

The wisdom and experience of each member of the team is a key element in developing decisions with which participants feel confident (Eden and Ackerman, 2001b). Each participant in the study is assumed to have his or her own personal subjective view of the organization and the issues around it.

Eden and Ackermann (1998) suggested that the working approach of SODA will tend toward a contingent and cyclic approach. Furthermore, Eden and Ackermann (2001a) stated that 'the original SODA methodology has been developed. The developments have allowed the methodology to go beyond complex problem solving to encompass work by senior management team on strategy making. The developed methodology is known as JOURNEY Making. As with SODA, JOURNEY Making focuses on the importance of process and negotiation in strategy making and strategy delivery – it suggests that 'the journey' is as important as the outcome in ensuring the development of good strategy and implementation of agreements. JOURNEY represents an acronym for Jointly Understanding, Reflecting, and Negotiating StrategY' (Eden and Ackermann, 2001a:21).

Ackermann et al (2004) proposed step-by-step frameworks that guide the JOURNEY of strategy making (Ackermann et al, 2004). The aim of this research is to explore and surface issues around the current management structure of SHAWCO, since it is not a full strategy making session, the complete step-by-step framework as proposed by Ackermann et al (2004) was not adopted. Nonetheless the framework used for this study borrowed a lot from Ackermann et al (2004). The following working approach was used in this study:

1. Constituting a team of participants; this involves making contact with the organisation that will be the focus of the study and choosing the appropriate participants.
2. Gathering the perceptions of the individuals in the organization through interviews. Interviewing each member of the participant group using cognitive mapping techniques to elicit the perception of the individual with respect to their strategic views of the issues of concern in the organisation.
3. Revisiting the participants to validate their input in the cognitive map or the information generated during the interview process.
4. Building a group or causal map by drawing on individual cognitive maps or information generated from the interviews.
5. Conducting an interactive problem structuring workshop with all participants to build up a distinctive and realistic goals system by working from the detailed issues to the goals of the system.

4.4 Participants

The target population consisted of the staff and student volunteers of SHAWCO. Handy (1993) suggested that any attempt to assess effectiveness of the organizational structure should involve all members within the structure (Handy, 1993). Although it was difficult to reach all role players and stakeholders involved within the project time frame, efforts were made to include the views of many relevant stakeholders. Emphasis was laid on the decision makers within the organization, comprising of the top to bottom management levels within the organization (see Figure 4.1).

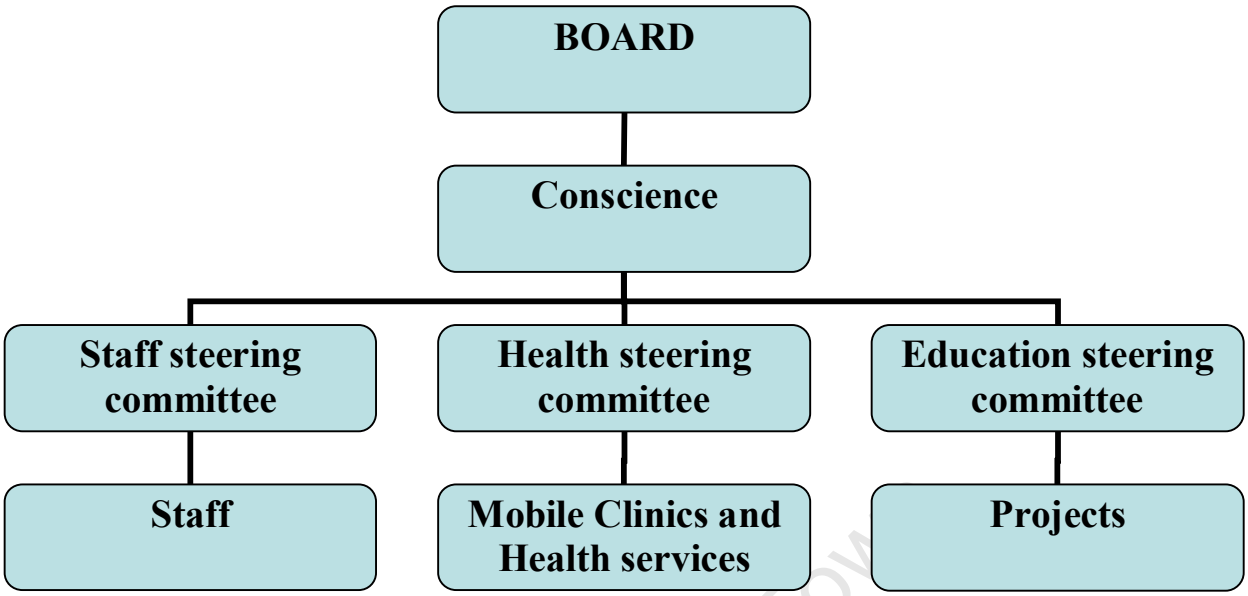

Figure 4.1 Organogram of SHAWCO

A purposive sampling method was used in the study. Purposive sampling is a situation where information-rich participants with both depth and breath of experience are selected, and whose shared commonalities are also identified (Punch, 2006).

Time was spent with the management of SHAWCO, in jointly defining the problem and identifying stakeholders, especially stakeholders with opposing views in the system. Effort was made to convince the management of the need to include stakeholders with opposing views in the study.

Eden and Ackermann (1998) suggested that the first point in any intervention is to 'identify *who* is the client and sponsor of JOURNEY making. Determine, with the client, who is to make up the 'management team' – who are to be the focus for the JOURNEY making and the power brokers in terms of the final agreements about strategic management' (Eden and Ackermann 1998:181). In selecting the participants for the study, effort was made to select participants who are members of the powerhouse of change within the organization. The key participants are 'those who have the most power and influence, including those with knowledge, experience and skill that could persuade

or sway the process' (Eden and Ackermann, 2005:12-13). Key participants included; chairman of the board, director of the organization, education sector president, health sector president, and the head of the staff steering committee. This group of people constitutes the powerhouse of the organization; considering their role, position and experience within the structure of the organization, they have the power to sabotage or support effective delivery of the change.

Although the key participants have a sound knowledge of the organization under consideration, to enhance the chances of uncovering more facts, other participants with knowledge and experience about the operations and functioning of the organization were selected. These participants where identified either by the relevance of the positions they occupy within the organization, or their years of experience and knowledge of the organization. These selections were done with the assistance of the powerhouse members and included: 4 participants from the staff sector, 5 participants from education sector and 4 participants from the health sector.

The selection process also considered the similarities and the differences between each independent sector with the organization. The structural arrangements within each sector, the participant's position within the level of management and knowledge of organization constitute criteria considered in the selecting participants for the study.

4.5 Research Methods

To gather the perceptions of the individuals in the organization, qualitative data collection techniques were applied. The techniques utilized in the study include designing a semi structured questionnaire, interview, causal mapping and the interactive problem structuring workshop.

4.5.1 Semi-structured Questionnaire

Krueger (1994) argues that because questions are the heart of the focus in an interview, they must be carefully selected and phrased prior to the interviews in order to elicit the maximum amount of information (Krueger, 1994). The pre determination of questions

was for the purpose of making sure that the researcher had some control over the interviews so that the resulted causal map could be focused. Appendix B contains the list of questions that was used to focus the initial interviews.

4.5.2 The Interviews

The interviews were designed to be fact finding inquiry sessions. At least 10 minutes or more were to be devoted to introduction, general questions and informing the participants about the research. The first round of interviews was to allow the facilitator to acquire information about the organization and start identifying the structure, the communication flow, distribution of power, lines of authority, and also the process of decision making within the organization.

The concepts or ideas from the first interviews were to be used to construct the framework that would guide further interviews and the workshop session. Individual causal maps were constructed with the data collected from the first interviews, the maps would serve a dual purpose in the second round of interviews; one, to provide a framework for further questions about the organizational structure, two, to serve as a medium for validating and clarifying (where necessary) information generated from the first interviews.

4.5.3 The Workshop

An interactive problem structuring workshop was designed using a modified Oval Mapping Technique (OMT). OMT is designed to enable a map of aspirations, beliefs, and assertions to be created by a group. This map will resemble a cognitive map in that it will represent group and individual assumptions about relationships between beliefs and assertions. The OMT provides groups with the ability to surface issues simply using a manual technique (Eden and Ackerman, 2001b).

The purpose of the workshop was to promote team building and learning amongst the participants. More so, to produce a network of issues, goals, beliefs, which are jointly agreed upon by the participants.

4.6 Permission and Ethical Consideration

Informed consent was obtained from the participants and their right to withdraw from participation at any time was assured. Confidentiality was also guaranteed to the participants.

CHAPTER FIVE: RESULTS

This chapter presents the outcome and process of the application of PSMs as a tool to create a shared understanding of complex issues. The results of the research process are presented below. The results focus on issues raised in the interviews and the interactive problem structuring workshop.

5.1 Individual Interview

5.1.1 Interview Process

The interviews started with the Kensington centre manager (appendix D, 3), followed by the education sector president (appendix D, 4), the director (appendix D, 9) and the head of clinics (appendix D, 10). The last interview session was with the board chairman (appendix D, 11).

The interview appointments were scheduled with each participant, at his or her convenient time and venue. Effort was made to create an enabling environment for open communication, which could encourage clear exchange of information without fear or anxiety. The interview process involved the use of semi structured one-on-one discussions to generate how each participant perceived the problems/issues around the management structure of the organization.

The interview process allowed the facilitator to acquire more information about the organization and start identifying the structure, the communication flow, distribution of power, lines of authority, and also the process of decision making within the organization.

5.1.2 Interview Results

In the first round of interviews, the participants were more engrossed in discussing the historical structural changes in the organization. One participant spent most of the time giving the reasons behind the conflict between the organization and one of the benefiting

communities. The first round of interviews resulted in between 10 and 20 concepts per interview.

Most of the participants were revisited for a second round of interviews. The second round of interviews, unlike the first interviews, was quick and to the point. The process was used to ensure that what was heard and said in the first round of interviews was the same thing. The participants were probed further on what they believed were the characteristics of the problem being addressed, and possible solutions.

The Education sector was in the spotlight for most participants interviewed, revealing two main concerns: (a) the structural gap in line of authority between the project leaders and the education steering committee members, was felt to affect project delivery in the community, and (b) lack of an efficient evaluation tool for the education sector projects.

In addition, other wide ranging issues emerged from the interviews. These issues were further classified into sector specific issues and general organizational issues. The data collected were individual views of the participants, from their wisdom, belief and personal understanding of the organization. The concepts from the participants interviewed, classified according to respective sectors, are listed in appendix C.

At this stage, a group map was constructed by drawing on information from the interviews and creating a larger causal map (Figure 5.1). The map emerged by using Decision Explorer to link all the relevant concepts, ideas and opinions elicited during the interview sessions.

A Decision Explorer model is a collection of ideas (concepts) and relationships connected in the form of a map. Ideas are expressed by short phrases which sum up a single notion. The relationships between these ideas are described by linking them together in a causal, connotative or temporal manner (Westcombe, 2002).

A causal link implies that one concept leads to, or affects in some way, another concept. The connotative link suggests only that the concepts are associated in some way. Temporal links suggest that the concepts follow in time. All links except connotative links can be positive or negative. A positive link is a plain arrow on a map, and a negative link represents the converse of the positive link. Negative links can also be illustrated with a negative sign (-) in Decision Explorer.

In Decision Explorer, a Set is a method of grouping concepts that constitute an arbitrary set of concepts, such as the set of concepts which are the company objectives. Each set has a unique name, and can be used as the basis for analysis. Grouping related concepts (clusters) within a model helps to find the focus areas or themes within a model and to check that like categories are linked with like. Decision Explorer allows you perform a cluster analysis on all or part of the model.

Decision Explorer allows a user to experiment with different ways of segmenting and clustering the concepts. The software allows the user to analyze qualitative data by taking several clusters from the data and exploring the interaction between those clusters (Westcombe, 2002). Figure 5.1 shows the clusters and the causal map of the issues identified in the interviews. When the facilitator felt that a good model which had struck a balance in the conflicting views of the interviewees had been captured, and that a rich picture of the situation had been demonstrated, the next step was to organize a problem structuring workshop with the interviewees, which is discussed in the next session.

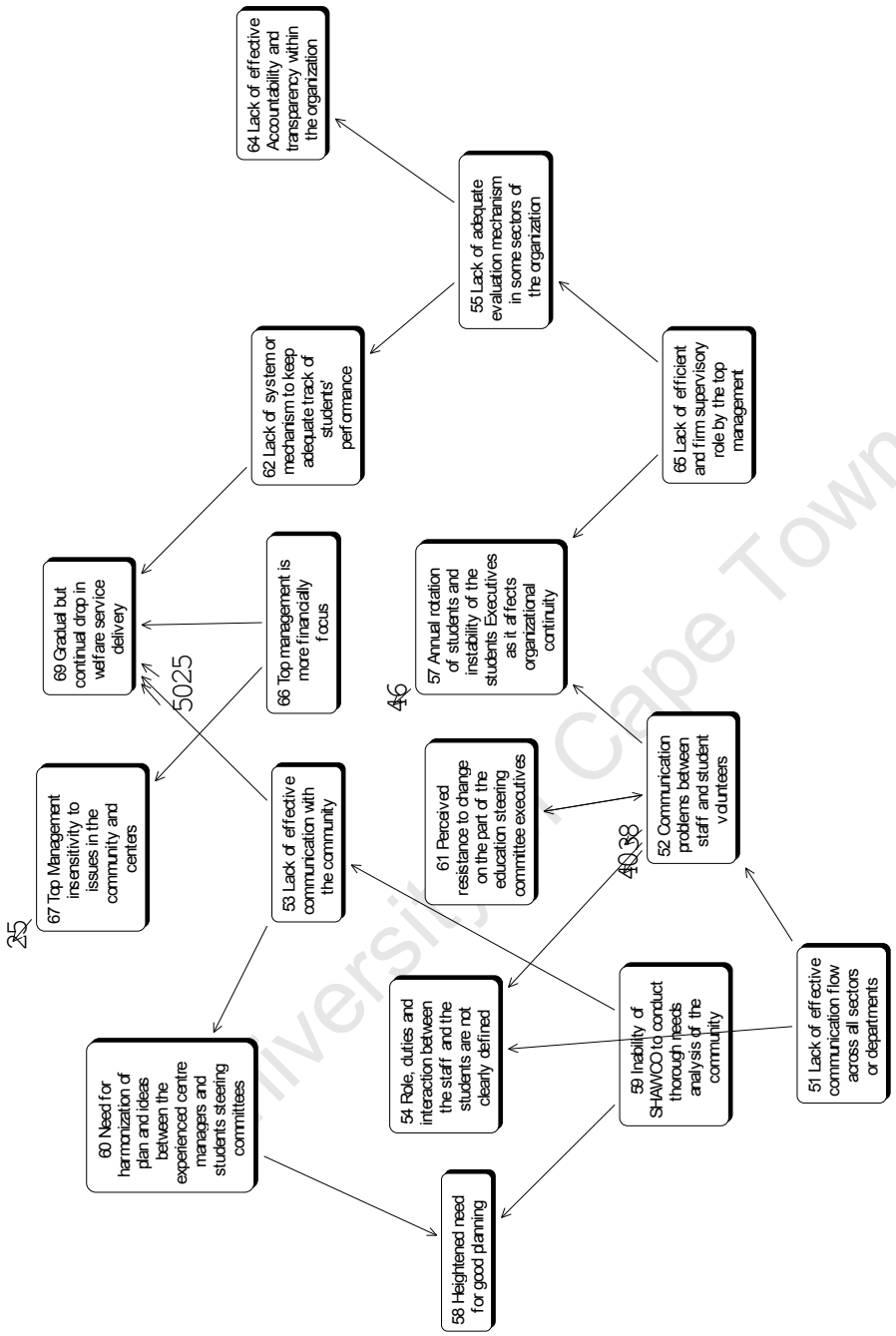

Figure 5.1 Causal map of the issues identified in the interviews

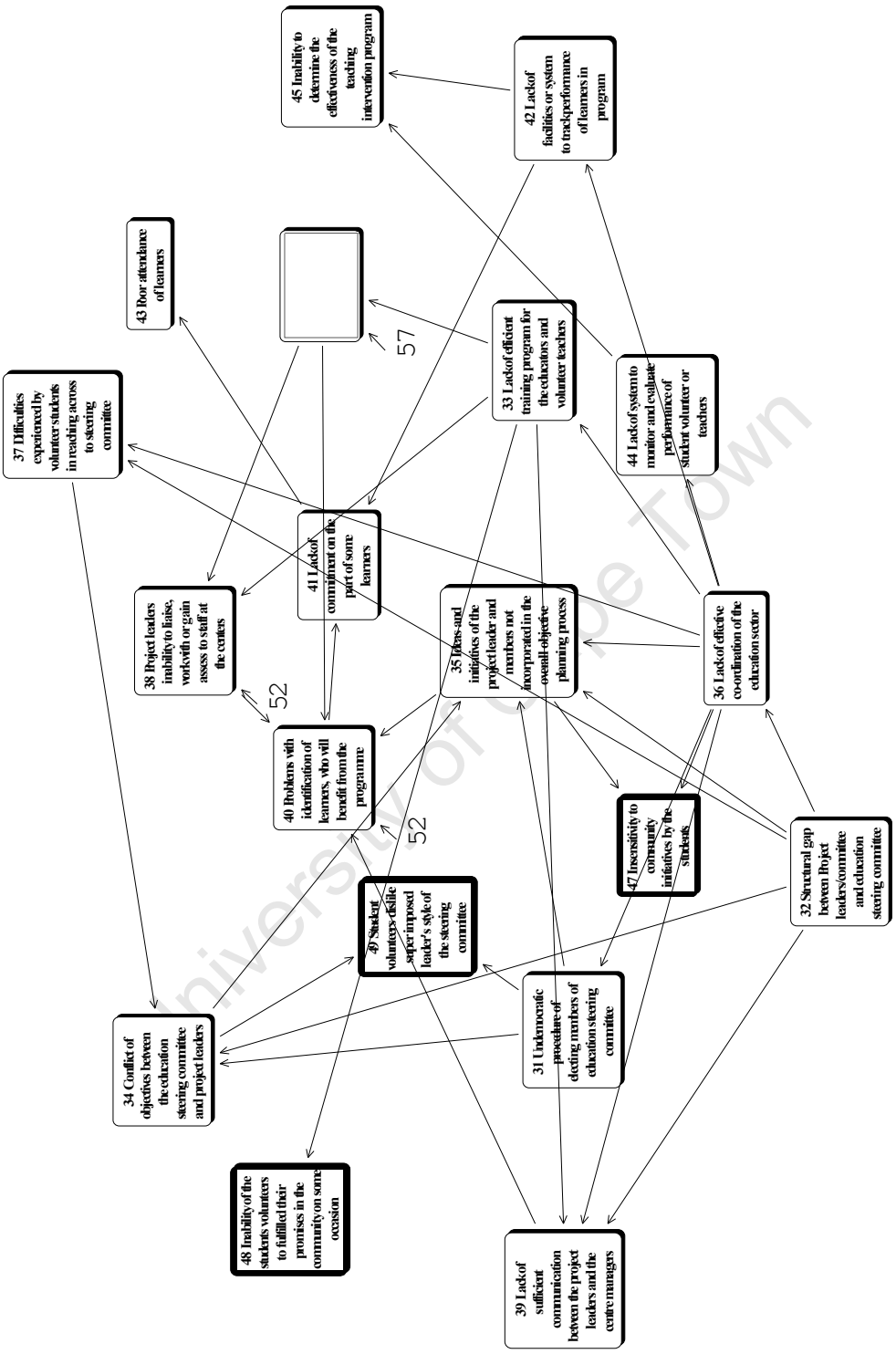

Figure 5.1 (cont.)

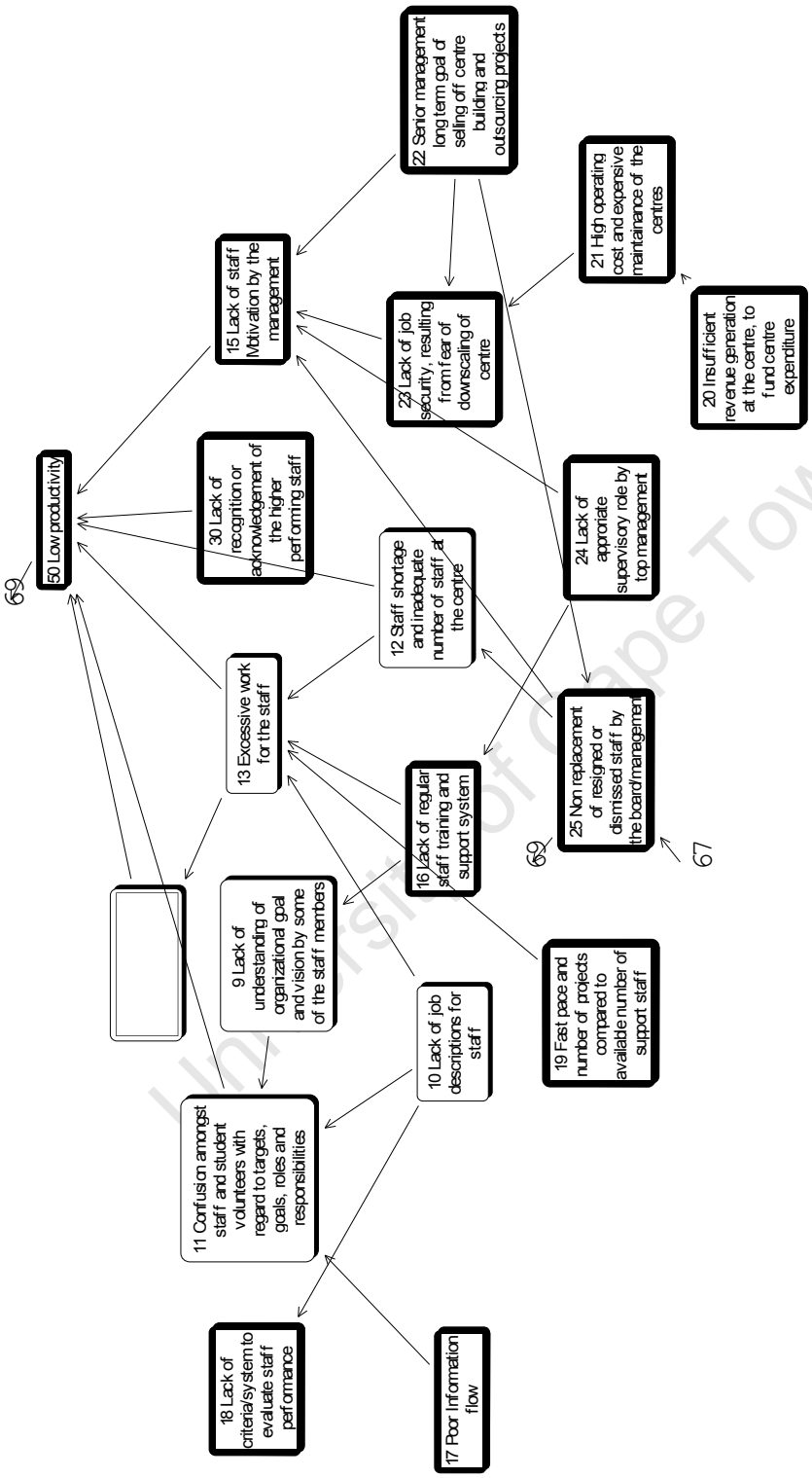

Figure 5.1 (cont.)

5.2 Interactive Problem Structuring Workshop

5.2.1 Preparation for the Problem Structuring Workshop

A planning session was conducted in order to structure, plan and design the problem structuring workshop. Figure 5.2 shows a planning session. The key areas of concerns, goals and suggested solutions from the interviews were considered. Effective and appropriate approaches to the project were considered, taking into consideration the findings in the interview session.

Although several concerns identified in interview sessions could have been the focus of a joint workshop, due to limited time and availability of the participants, concentration was placed on two key issues, regarded as issues that could most affect the functioning of the organization.

In the workshop session, the key areas of concern identified during the interviews were formulated as the key questions to be addressed. These open ended questions formed the basis of the interactive problem structuring session:

Question 1

In the current management structure, what do we need to do to ensure efficient and effective implementation of educational projects, adequate monitoring and evaluation of the process, and enhanced system performance?

Question 2

What are the current factors in respect of organizational structure, roles and responsibilities, paths of communication, management style and level of support which impact on SHAWCO's ability to function effectively?

5.2.2 Agenda for the Workshop

Drawing on the research framework outlined in chapter four, an agenda for the problem structuring workshop was formulated.

Workshop agenda

Introduction

- ✓ Introduction of the participants
- ✓ Introduction of the background and rationale for the workshop
- ✓ Brief summary of the interview findings
- ✓ Explanation of the ground rules for the workshop

Data generation

- ✓ Project the open ended questions on the wall, visible to all participants
- ✓ Provide the participants with the required material for the workshop
- ✓ Participants to stick their responses on the wall paper
- ✓ Discussion and grouping of the responses
- ✓ Break for tea

Specifying weights

- ✓ Explain the process to be followed
- ✓ Participants apply stickers as weights
- ✓ Summarize the results
- ✓ Break

Conclusions

- ✓ Wrap up - discussion on the way forward

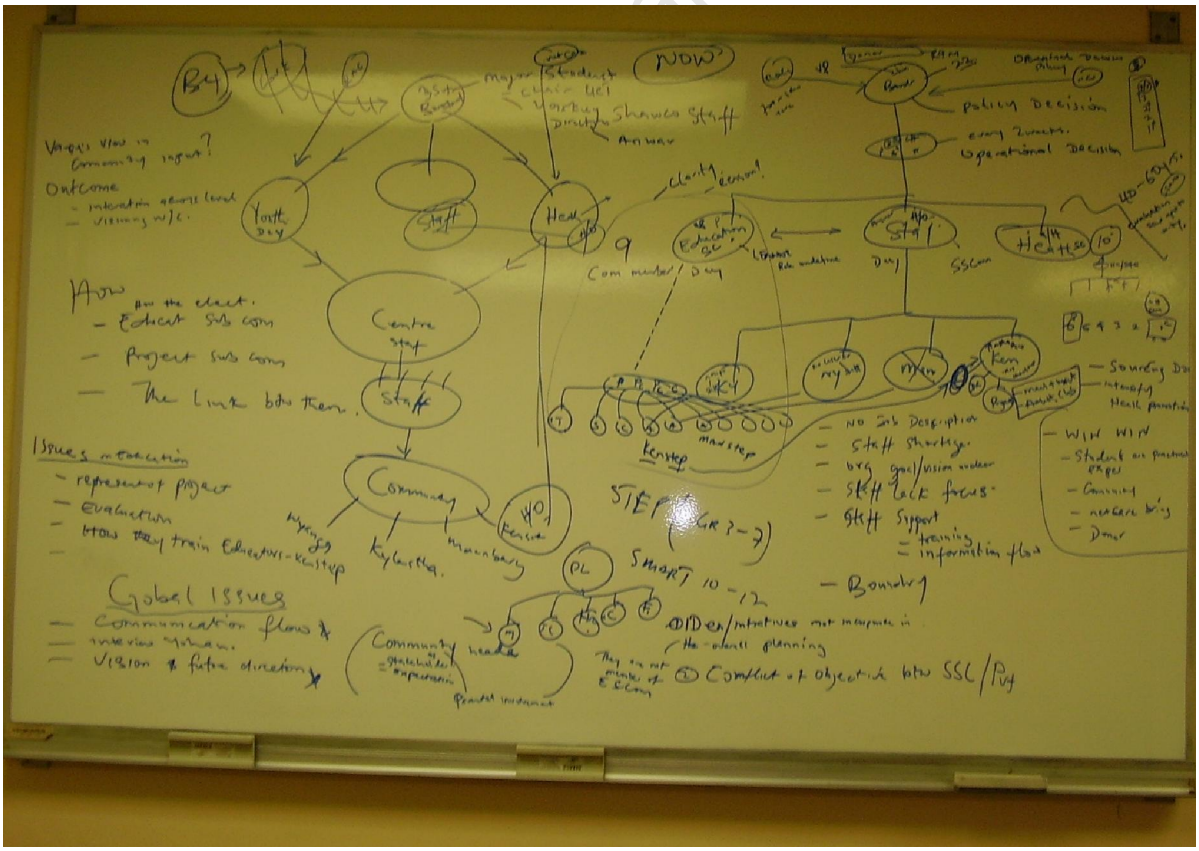

Figure 5.2 Pictorial display of the data derived from the interview sessions

5.2.3 The Workshop Process

The workshop (appendix D, 12) started by introducing the participants (appendix E) to the background, concepts and expectation of the study. After the introduction, the rules guiding the process, and the procedure for the workshop were explained. The role of the facilitator as well as the importance of the contribution of the participants was explained. Participants who were not members of the management team were urged to air their views in the workshop as an opportunity to influence the direction of the organization.

Figure 5.3 Photograph of the workshop in progress

To provide a base point for the workshop a summary of some of the issues (including recommendations) identified in the interviews was presented.

Figure 5.4 Question 1, projected on the wall

The first issue of concern (question 1) was projected on the wall (Figure 5.4). The participants were asked to write their ideas or views in response to the questions 1 on post-it cards and paste these on the paper on the wall.

After grouping the concepts into clusters of related issues, the next step was weighting. Since all participants in the workshop were given equal weight of importance, there was no need to differentiate the participants based on their managerial position or status. All the participants were given the same color and equal amount of stickers to distribute between the clusters.

5.2.4 Workshop Results

The participants noted that the issues raised during the interviews were commonly felt within the organization. Most issues raised in the workshop could be linked to the

structural gap and poor communication that existed between the Education Sector project leaders and their steering committee members. Another issue that was in the spotlight was poor information flow within the organization and lack of an efficient evaluation tool with which to monitor education sector projects.

Participants offered actions or interventions that could potentially provide solutions to identified issues. The concepts that emerged from the workshop were clustered into 8 groups (Figure 5.5) namely Communication, Support, Evaluation, Curriculum, Network, Planning, Structure and Goals. The facilitator assisted the participants during the clustering process. The clustering process also provided an opportunity for participants to clarify their written responses if need be.

Figure 5.5 Picture of the clusters at the workshop

Communication

Issues around communication constituted a focal point at the workshop. The issues raised about communication included:

- Poor information flow within and across the sectors of the organization,

- Lack of effective communication,
- Inconsistent communication from top management to staff and student volunteers,
- Poor access to information,
- Lack of well-organized system of documentation,
- Lack of monthly report from the sectors, and
- Exclusion of the project leaders from the finance committee meetings.

The participants suggested some interventions on how to resolve the issues raised above. Their opinions on how to solve the communication related issues included:

- Management should create a better reporting structure, to ensure that projects' activities are regularly reported to head office and the centre offices,
- Management should ensure regular access to information about management activities and goals for staff and student volunteers,
- Improved feedback process from the sectors and regular publication of relevant information, for example board meetings' minutes should be available to all volunteers, and steering committees meetings' minutes should be available to staff project leaders and volunteers.
- Monthly reports of activities and events from all sectors within the organization,
- Management should include project leaders in finance meetings,
- Encourage active participation, open discussion and evaluate continuously.

Support

The participants felt that the student volunteers were not adequately trained for the task assigned to them. As a result they suggested that management should provide a better training facility for the student volunteers. They also suggested that management should employ the services of consultants or professional teachers to mentor the student volunteers.

Evaluation

The participants pointed out the lack of an efficient evaluation tool with which to monitor education sector projects, track learners' performance or evaluate learners' growth. They

emphasized the need to continuously and consistently monitor the projects implemented by the organization.

Planning

The concern of the participants around planning was that some stakeholders were excluded from the planning processes, especially the project leaders and the beneficiaries.

The participants felt the need for proactive or forward planning. The participants suggested that including the opinions of the beneficiaries, the project leaders, and centre managers could improve decision making, and help the staff and student volunteers to find synergy and work together.

Networking

The participants felt that the organization should network with other role players with similar objectives. They suggested that management should seek the opinion of the experts on critical issues.

Curriculum

The participants felt the need for management to update the current curriculum used by the education sector and include lesson plans for the student volunteers.

Structure

The participants felt that the structural gap between the project leaders and the steering committee in the education sector was affecting education sector projects in the centers.

Goals

The participants felt that the goals and objectives of the organization are still unclear to most of the staff and student volunteers. They suggested that management should ensure consistent communication of clear and measurable goals to all staff and student volunteers, to ensure that everyone is doing the right thing.

The concepts, issues and opinions raised in the workshop and how they were clustered are listed in appendix F.

After the sticker pasting (weighting), the number of stickers for each cluster was counted. Table 5.1 below displays the score for each cluster. By reviewing the result of the weighting session, the participants were able to express how important resolving each cluster is to the organization. Most emphasis was placed on Communication and Planning. The relative weights are shown in the table 5.1 below;

Theme	Score	Relative Importance
Communication	18	25%
Planning	15	21%
Curriculum	9	13%
Evaluation	8	11%
Goals	7	10%
Support	5	7%
Networking	5	7%
Structure	4	6%

Table 5.1: The weighting results

CHAPTER SIX: DISCUSSION, RECOMMENDATIONS AND CONCLUSIONS

6.1 Discussion

The information collected from the case study indicates that over the years SHAWCO has undergone various transformations so as to put in place an effective structure that will aid the organization in achieving their desired objectives. The management structure, organizational objectives and strategies of SHAWCO have constantly undergone changes and restructuring in an attempt to achieve a well coordinated, efficient and productive organization. It is important to note that many positive concepts about the organization such as staff commitment, enthusiastic student volunteers, and mutual team work emerged from the study.

Kahn and Katz (1966) argued that conflict constitutes an integral element of an organization, especially when two or more independent sectors or departments decide to operate side by side with each other (Kahn and Katz, 1966). Jones and George (2003) stated that conflict is inevitable given the wide rage of goals for different sectors within the organization. Lack of functional conflict indicates that management emphasizes conformity and suppresses innovations. They further suggested that conflict is good for organizational performance. However, dysfunctional or destructive conflict, works to the disadvantage of the organization by promoting interpersonal hostility and creating overall a negative working environment for the organizational staff (Jones and George, 2003). The data collected from the survey suggested that there is no evidence of dysfunctional conflict within the SHAWCO organization.

With the recent change in the structure of the organization, the management team believed that a good working relationship exists amongst the staff and volunteer members, and also that the projects are functioning well. However, findings from the study indicate that the staff and student volunteers are still unclear about their job descriptions and job boundaries. Other issues raised by the participants include; lack of effective communication, poor flow of information, lack of appropriate evaluation processes, poor planning and inadequate training of staff and student volunteers. These

issues constitute key elements of management that could affect productivity and organizational efficiency.

6.1.1 Structural Issues

A major concern observed from the study is the structural gap that exists in the Education Sector (figure 6.1). A structural gap in the line of authority exists between the project leaders and the education steering committee members. According to the participants interviewed, the structural gap was felt to affect project delivery in the community.

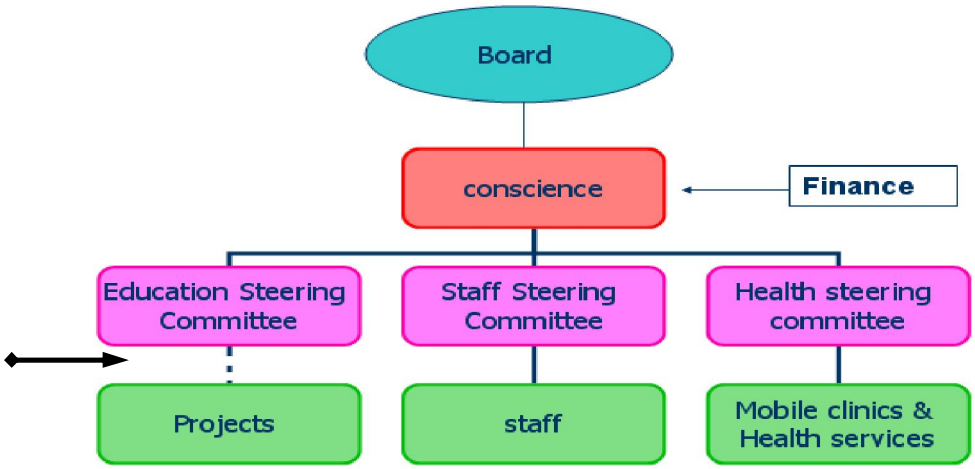

Figure 6.1 The organogram showing the perceived structural gap in Education sector

Issues like poor planning, poor communication and poorly designed curricula were attributed as consequences of the structural gap existing in the Education Sector. Project leaders were perceived to not effectively work together with their steering committee members, in the planning and implementation of community projects.

A well coordinated and implemented organogram exists in the health sector; consequently there is good communication and a good working relationship amongst members of the sector. A management team made up of the project leaders (otherwise known as heads of mobile clinics), the sector president and the deputy, meet regularly and discuss issues affecting various projects or clinics. The president and the deputy then

act as a link between the projects, the health steering committee and the top management of the organisation.

From the participants interviewed, it was observed that the health sector is doing well and that the performance of the sector has continued to improve over time. This efficiency can be attributed to good structural arrangement of the sector, which created room for improvement, its management consistency, proper communication flow and good feedback structure between the health steering committee, the health project and the top management of SHAWCO. The transfer of knowledge from the experienced members to the new and upcoming student volunteers also contributes to the overall success of the sector. Therefore, borrowing from the health sector, the formation of a management team in the education sector can provide the basis for improvement, and the development of enhanced cohesion within the sector.

6.1.2 Low Productivity

Staff performance is critical towards achieving organizational success. Figure 6.2 shows the mapping of the staff sector related issues that were raised during the study. The map explores the causes of low productivity in the organisation. The map suggests interrelationships between the issues identified. The causes of low productivity in the organisation were identified as:

- Lack of staff motivation and acknowledgement of staff contribution,
- Lack of job descriptions for staff,
- Excessive work for the staff,
- Lack of regular staff training and support system,
- Staff shortages,
- Lack of criteria or a system to evaluate staff performance, and
- Lack of an efficient and firm supervisory role by the top management.

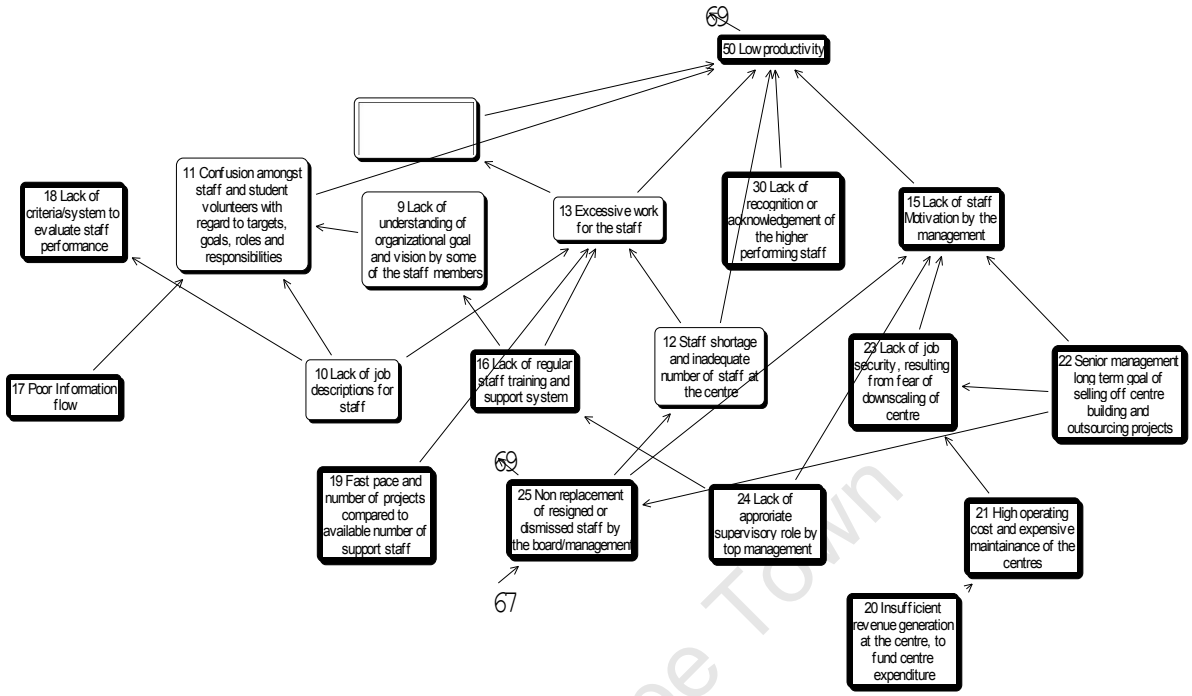

Figure 6.2 Part of the causal map – Staff sector related issues

If the issues identified with the current organizational structure of SHAWCO are not resolved, they will continue to hinder the aim and functioning of the organization.

6.2 Recommendations

For continuity, improved performance, enhanced productivity and organizational efficiency, it is crucial to attend without delay to the issues raised in the study; especially the identified causes of the organizational problems. More strategic sessions (possibly engaging a professional consultant by the organization) are needed to aid decision makers in resolving the issues raised and in building an efficient and improved organizational structure.

The lessons learnt from the study should be incorporated into the future strategy making sessions of the organization, to create room for improvement and commitment by all key role players.

Good management and improved performance are essential for efficient functioning of poverty alleviation programs. NGOs and civil society that constitute role players in poverty alleviation projects require these support systems. Sometimes it can be difficult for some NGOs to afford the services of management consultants that could assist in improving the functioning and efficiency of the NGO. Governments could provide such support systems needed to ensure that these NGOs are capable of implementing their programs successfully. Furthermore, continuous assessments of the NGOs capability to implement their programs should be conducted, and technical assistance provided to ensure that NGOs have the basic managerial skills required to plan, implement and manage their programs.

6.3 Critical comments on the applicability of the SODA

Clearly, the main part of the design process is in choosing appropriate methods, bearing in mind both the competencies and the perceived needs of the project (Mingers and Rosenhead, 2002:5). The 'needs' and the problem context of the project are often not clear. The choice of suitable criteria to differentiate types of problem context and relating the problem contexts to different problem solving methodologies play a crucial role in determining the success of an intervention. In choosing the appropriate methodology for this case study, the facilitator was guided by the classification framework proposed by Mingers (2003) as discussed in chapter two, and the minimal necessary and sufficient conditions for the existence of a problem proposed by Ackoff (1962) – see, for example, 'Towards a system of system methodologies' by Jackson M and Keys P (1984).

This research explored the use of PSMs to assist SHAWCO to function more effectively. The primary purpose of the case study is to explore issues around the current management structure of SHAWCO by using the knowledge and wisdom of the people within the organisation to create a shared understanding of the system. According to Mingers (2003), 'SODA, represent explicitly an individual's views about a particular issue or event in their own language; Soft systems methodology, explore different worldviews relevant to a real-world situation and contrast them in a process of debate;

Strategic choice approach, assist groups of users in making incremental progress toward implementable decisions by recognizing and managing uncertainties'(Mingers, 2003:563). The SODA approach was then considered appropriate for this case study, as the purpose was to capture individual views of the problem and facilitate negotiation of the problem contexts amongst the management team of SHAWCO.

The case study focused on the individual involvement in the decision making process, the nature of the structural arrangement with SHAWCO, the efficiency of the organization in terms of its operations and performances. The consulting practice employed SODA techniques to acquire information about the organization, identify their structural arrangement, communication flow, distribution of power, lines of authority, and also the process of decision making within the organization. Each participant in the study was assumed to have his or her own personal subjective view of the organization and the issues around it. The wisdom and experience of each member of the team was the key element used to generate multiple perceptions about the nature of the organization from the staff and student volunteers of SHAWCO

The two basic aims of evaluation is to describe what happened during the intervention and to carry out further reflections of the findings in order to provide some insights and guidance to other similar interventions (White, 2006). Recent evaluations of PSMs revealed that, while there is a desire to evaluate PSMs, there is no consensus on how it could or should be done (Mingers and Rosenhead, 2002). White (2006) proposed a more pragmatic approach to PSMs evaluation instead of the traditional approach of evaluation. He called for insights into specific purpose of the intervention, result attained and the participant's perception of the process or facilitation. The purpose of the intervention as discussed in chapter two informed the choice of the methodology (SODA) and the following feedback from the management team of SHAWCO explains the participant's perception. At the feedback meeting (appendix D, 13) held with the director of SHAWCO, the director affirmed the following assessment of the study, that;

1. The feedback interview session, allowed the participants gained clearer picture of what the survey intended to achieve. The session extended their strategic thinking, provided a better understanding of the objectives of the study.
2. The workshop session, enable the participants to admit that the issues observed during the interview session were common with the organization.
3. The workshop session, enable the participants to gain mutual ownership of the problems of the organization, which were individually contributed by the participants during the one on one interview session.
4. As the participants jointly discussed the issues raised, a shared understanding of the issues by the participants began to emerge.
5. The participants were able to proffer certain action or interventions that will provide solutions to the issues identified.

This research was not structured to provide specific answers to the problems identified within the organization - SHAWCO. The major shortcoming of this research is that the life span of the project was inadequate for the scope of work envisaged. Nevertheless, the study achieved its objective, which aimed to identify issues affecting the current functioning of the organization and create a shared understanding of these issues amongst the participants. In addition, it was difficult to reach all role players and stakeholders involved within the project time frame, but efforts were made to include the views of many relevant stakeholders.

6.4 Was the Project a Success?

Feedback from Management of SHAWCO on the Usefulness of the Survey

Five months after the workshop, a feedback meeting (appendix D, 13) was held with the director of SHAWCO, who stated that a lot of progress had been made after the survey. According to the director, as a follow up to the issues raised by the study, the management team of the organization conducted other sessions by themselves. The issues identified during the workshop were the major focus of the subsequent sessions. The sessions were limited to the management team from the education sector and the staff sector, since most issues identified in the study were relevant to these sectors.

At the end of the sessions, a new organizational structure was achieved. Interventions from the follow up strategic session by the management team of the organization addressed most of the issues identified in the study, including structural issues, planning and communication problems. By way of structural changes, for example, the position of operations manager was introduced to monitor the activities of the education and staff sectors. The new model enabled decentralization of power, where supervisors were given a bigger role in ensuring accountability and efficiency within their respective departments.

To solve communication flow issues, sub-committees were created for the purpose of generating and sharing essential information within the organisation. The committees formed were not part of the new organizational structure. However, they were set up to provide the required information for effective planning and coordination. For example, a committee made up of the centre managers and project leaders known as the Centre Committee was formed for the purpose of providing a holistic planning approach in the education sector. Planning now emanates from the centres starting with the contributions and input from the members of the Centre Committee.

6.5 Conclusions

The participants and the management of SHAWCO were notified beforehand that the research was not intended to provide specific solutions to problems, rather the process would aim to promote within-group interaction and so the participants would learn more about each other's perception of the problem, which would hopefully enable them to determine what they wanted to achieve as a group.

The primary aim of the study was to identify issues affecting the current functioning of the organization and create a shared understanding of these issues amongst the participants. Many positive concepts about the organization and its current management structure emerged from the survey. However, since the area of interest centers on issues

that affect the organizational efficiency, the data collected and discussed has been limited as such to reflect the purpose of the study.

Though the management team of SHAWCO believed the current management structure of the organization to be effective, the study identified several issues of concern within the structures of the organisation. The issues identified may affect the functioning and efficiency of the organisation. In the Education sector, the structural gap in line of authority between the project leaders and the education steering committee members, and lack of an efficient evaluation tool for the education sector projects were the main issues of concern. Major concerns within the staff sector were issues raised around performance, which may possibly lead to low productivity. These concerns were felt to affect project delivery in the community.

The management of SHAWCO took up the challenge of resolving the identified issues via follow up meetings and the formation of a new structure. The interactive problem structuring process was designed to facilitate a negotiated problem definition amongst the participants; it involved the recognition, and agreement on the components of the problems. As a follow up to the issues raised at the study, the management team of the organization conducted subsequent sessions by themselves, the aim of these sessions was to resolve the issues identified during the workshop.

Finally, this study has used PSMs to explore management issues of SHAWCO. The PSM approach helped SHAWCO's management team to understand issues around its current management structure. The approach provided the organisation with appropriate techniques and methods for tackling the issues that might affect its efficiency. By identifying issues such as structural gaps, possible causes of low productivity and other management issues, this research has explored the effectiveness of the current organizational structure of SHAWCO. Finally, by engaging in subsequent management session to tackle these identified problems, the approach has helped SHAWCO to explore strategic ways of improving performance.

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APPENDIX A

Poverty Alleviation

This appendix provides background to the contextual issues and environment surrounding poverty and poverty alleviation in South Africa. It provides various definitions of poverty as well as a brief history of the poverty alleviation process in South Africa. The chapter focuses on policies and programs put in place globally and nationally towards eradication of poverty. Furthermore, the chapter also highlights the need for effective organizational management structure and enhanced productivity within the structures of anti-poverty role players.

Poverty and Poverty Alleviation

The attempt to define poverty has generated much debate. Several types of poverty have been identified depending on such factors as time or duration (i.e. long, short-term or cyclical) and distribution (widespread, concentrated, and/or individual). Measuring poverty is not a straightforward matter, as it depends on critical assumptions (Landman et al, 2003).

The World Bank defines poverty as 'the inability to attain a minimal standard of living' (World Bank, 1990:26). The World Bank definition sees poverty from a material point of view. One of the reasons why the material definitions of poverty are commonly used is because they make it easy to make a quantitative analysis from which to operate. They make it easier to give comparative descriptions of socio-economic conditions in different contexts.

Poverty is not all about material deprivation. Haralambos & Holborn, (1995) argues that poverty should not only be viewed from one outstanding defining characteristic (e.g. economic deprivation) but also as a social, political and psychological characteristic of people (Haralambos & Holborn, 1995). In spite of the fact that poverty usually entails much more than merely lacking sufficient means of access to basic goods and services (including all aspects related to a households well-being such as vulnerability), it is

common practice to utilise monetary measures in determining the extent of poverty in any given population (Oosthuizen and Nieuwoudt, 2002).

Poverty is multi-faceted. It can be linked with hunger, unemployment, exploitation, and lack of access to clean water, sanitation, health-care or schools. It can be about vulnerability to crisis and homelessness. While clearly many of these issues are related to not having enough money, it is simplistic to ignore the non-material aspects of the experience of poverty. The poor are not concerned exclusively with adequate incomes and consumption. Achieving other goals such as security, independence and self-respect may be just as important as having the means to buy basic goods and services. Nevertheless, money-metric measures of welfare such as income or expenditure would most likely provide the most practical indicator for poverty evaluation (Baulch, 1996).

South Africa is an upper-middle-income economy, (World Bank, 2006) but despite this relative wealth, the experience of most South African households is of outright poverty or of continuing vulnerability to being poor (May, 1998; African Economic Outlook, 2006).

Inequality in South Africa is exceptionally high. The distribution of income and wealth in South Africa is among the most unequal in the world with a Gini coefficient of 0.59 (African Economic Outlook, 2006). Although South Africa is an upper-middle-income economy, it is a country of severe contrasts. The extreme inequality evident in South Africa means that one sees destitution, hunger and overcrowding side-by-side with affluence. Breaking the grip of poverty on the substantial portion of its citizens is the single most important task facing the new democratic government.

Why is there Poverty and Inequality in South Africa?

Past policies of segregation and discrimination have left a legacy of inequality and poverty especially poverty based on racial lines, and, in more recent decades, low economic growth, within the underprivileged communities. The apartheid system was heavily biased towards providing health, education and housing services to the white

minority, to the detriment of the black population who were denied the opportunity to accumulate human and physical capital. Labour market policies were aimed at protecting the white minority (Woolard, 2002). The Taylor Commission reports that South Africa is the 5th most unequal country in the world (Ravallion, 1992). By way of comparison, in Malaysia – a country which also has a history of racially-based inequality –the between-race component was only 13% in 1983 (Hoogeveen and Ozler, 2004). The position of white workers was promoted through active policies such as job reservation, while inferior education, influx control and the Group Areas Act ensured little competition from other race groups. Apartheid was all about inequality, unequal distribution of resources (including land, mining rights and access to capital) and the marginalization of a large sector of the population to menial and poorly paid sectors of the labour market. The massive investment in state education for white school children in the 1950s and 1960s resulted in white workers securing the skills that enabled them, in the 1970s and 1980s to command high incomes without the need for policies such as job reservation (Woolard, 2002) Restrictive past economic practices thus prevented much of the population from vertical mobility within the labour market, leading to a skewed income distribution which was in turn reinforced by an unequal distribution of skills and training (Woolard, 2002).

Global War on Poverty

The war on poverty is being fought globally by one and all, from musicians to sports stars and business men. The United Nations (UN) finds progress on world anti-poverty goals, but crisis areas remain. The broad global consensus around a set of clear, measurable and time-bound set of development goals has generated unprecedented, coordinated action.

According to UN annual progress report from Secretary-General Kofi Annan, released in September 2005, developing countries are reducing extreme poverty, extending access to primary education, alleviating disease and hunger in many regions of the world, in pursuit of targets set in the year 2000 UN Millennium Declaration (UN Press Release, 2005).

The UN, however, warns that progress has been slowest in the poorest nations, landlocked communities, lowly developed, and those that are in sub-Saharan Africa. In many cases, there is lack of significant progress or even reversals. There is a discouraging lack of progress on child survival and on very poor rates of maternal mortality that prevail in much of the world, and slow advances on access to improved sanitation (UN Press Release, 2005).

Mark Malloch Brown, chairman of the UN Development has said that as a result of a history of failures of programmes in the past, development experts have become cautious in their thinking. The Science, Technology and Innovation Task Force of the UN, suggested a rather ambitious solution to poverty where it called on poor countries to lift themselves out of poverty by promoting technological creativity. Through higher education, international organizations and donors needed to strengthen developing country expertise in science and technology (UN publication, 2005). Countries also should take advantage of opportunities for their nationals to learn about technologies, along with institutional and management arrangements, at every stage of an infrastructure project. The report suggested that 'This technological learning can promote the private sector and stimulate development,' (UN Millennium Project, 2005:1).

Poverty Alleviation Trend in South Africa

One of the major priority objectives of the new South Africa government is to eradicate extreme poverty and hunger; the war on poverty is South Africa's most in precedence and its greatest challenge. Eradication of extreme poverty is important in consolidating the gains of the new democracy. At the world summit for Social Development in Copenhagen in March 1995, President Mandela made a commitment to eradicating absolute poverty by 2015 (UNDP, 1995).

Following South Africa's democratic transition in 1994, faced with these enormous challenges, the new government launched public works programs that shared four objectives: to create jobs to respond to extremely high levels of poverty and

unemployment; to build or rehabilitate infrastructure in poor, underserved areas, or improve the natural environment; to provide job trainings that would enable workers to find post project employment; and finally to build the capacity of communities to control their own development processes through community participation in public works projects (Adato et al, 2005).

To perk up South African Government effort toward alleviation, in February 2003 President Mbeki formally reintroduced the public works program as the Expanded Public Works Programme (EPWP) aimed at the provision of additional work opportunities together with training programmes (Department of Public Works, 2006)

Hoogeveen and Özler (2004) argued that, using new comparable consumption aggregates for 1995 and 2000, real per capita household expenditures in South Africa declined for those at the bottom end of the expenditure distribution during this period of low GDP growth. As a result, poverty, especially extreme poverty, increased. Inequality also increased, mainly as a result of a jump in inequality among the African population. Even among subgroups of the population that experienced healthy consumption growth, such as the 'Coloureds', the rate of poverty reduction was low because the distributional shifts were not pro-poor.

Need for Poverty Alleviation in South Africa

Many compelling economic reasons make it of paramount important for the South African government (and any government at that) to address poverty, including the following five points;

1. Globalization has immense benefits for any economy; however, there are also potential costs. The costs of globalization are borne particularly severely by the poor who face increased inequality, joblessness, the fallout from unequal trade regimes and the impact of the country's vulnerability to capital flight that fuels job losses,

2. Globalization and global competitiveness require well-managed cities. The inclusion of all citizens to manage and eliminate the negative impacts of escalating inequality (such as crime and low levels of service payment) leads to good governance,
3. When a pristine and attractive environment, free of the ravages of unchecked poverty and inequality is promoted an economy becomes globally competitive,
4. Local demands for goods and services will be expanded as a result of the reduction of poverty, and
5. A systemic understanding of how the poor survive will help the informal sector, which is the fastest growing sector of the economy, to be effectively managed and constructively integrated with the formal economy.

The enduring high levels of poverty are the single biggest threat to sustainable economic growth and democratic consolidation. The commitment of all relevant stakeholders will play a critical role in addressing this challenge and this must be well appreciated. Focusing on the reduction of poverty is a constitutional and legislative mandate of government in order to fulfill its responsibility to effect social and economic development. Government also plays an important role in enhancing global competitiveness of localities and regions, but competitiveness requires social stability and an educated population (May, 1998). Importantly also governments are closest to the 'problem', and consequently makes it best placed to design and implement strategies that reflect local needs and opportunities.

APPENDIX B

Semi-structured Questionnaire

Aims and objectives

What are the aims and objectives of Shawco and the core business of the organization?
Can you summarize the types of project and program the organization is undertaking to achieve these goals?
Do you think these programs are in line with the needs of the community/beneficiaries?
What is your assessment and evaluation of the current performance of the organization and how does the community or the beneficiaries feel about these programs?
What kind of support and funding does the organization receive and from whom?
What do you think can be done to improve the service delivery of the organization?

Management structure and performance

Can you enlighten me about the current management structure of Shawco? In your view, how would you appraise the system, the communication flow and the interaction within the organization?
What is your assessment of the current performance of the team (staff, students and management), what is your expectation from the team?

Individual members of the organization

Could you explain to me what your job entails and where you fit into the organization as a whole?
How can you assess your contribution to the organization, what support would you require to improve your current performance?
Could you explain to me the link between your task and that of other members of the organization and what you expect from them to assist you in your work?

Conclusion

Could you explain to me, from your experience, the relationship between the organization and the external stakeholders (community and other partners of the organization)?

What do think the role players/stakeholders (internal and external) must do to improve working conditions and organizational performance?

APPENDIX C

The concepts from some of the participants interviewed, classified according to respective sectors are listed in below;

General organizational issues

Lack of effective communication flow across all sectors or departments

Communication problems between staff and student volunteers

Lack of effective communication with the community

Role, duties and interaction between the staff and the students are not clearly defined

Lack of adequate evaluation mechanism in some sectors of the organization

Consequences of incorporating SHAWCO into the Social Development department of UCT

Annual rotation of students and instability of the students Executives as it affects organizational continuity

Heightened need for good planning

Inability of SHAWCO to conduct thorough needs analysis of the community

Need for harmonization of plan and ideas between the experienced centre managers and students steering committees

Perceived resistance to change on the part of the education steering committee executives

Lack of system or mechanism to keep adequate track of students' performance

Lack of involvement of UCT Students from all departments at all level of their specialties

Lack of effective Accountability and transparency within the organization

Lack of efficient and firm supervisory role by the top management

Top management is more financially focus

Top Management insensitivity to issues in the community and centers

Non replacement of discharge, retired or dismissed staff by the board/management

Gradual but continual drop in welfare service delivery

Issues in Education

Undemocratic election procedure of members in education steering committee

The gap in structural link in the organogram between Project leaders/committee and education steering committee

Lack of efficient training program for the educators and volunteer teachers

Conflict of objectives between the education steering committee and project leaders

Ideas and initiatives of the project leader and members not incorporated in the overall objective planning process

Lack of effective co-ordination of the education sector

Difficulties experienced by volunteer students in reaching across to steering committee

Project leaders' inability to liaise, work with or gain access to staff at the centers

Lack of sufficient communication between the project leaders and the centre managers

Problems with identification of learners, who will benefit from the programme

Lack of commitment on the part of some learners

Lack of facilities or system to track performance of learners in program

Poor attendance of learners

Lack of system to monitor and evaluate performance of student volunteer or teachers

Inability to determine the effectiveness of the teaching intervention program

Lack of experience amongst some students volunteers

Insensitivity to community initiatives by the students

Inability of the students volunteers to fulfilled their promises in the community on some occasion

Student volunteers dislike superimposed leadership style of the steering committee

Health Issues

Problem associated with sourcing of volunteer doctors

Need to intensify effort on health promotion

Need to intensify effort to encourage student participation and involvement

Staff issues

Lack of understanding of organizational goal and vision by some of the staff members

Lack of job descriptions for staff

Confusion amongst staff and students volunteers with regards to targets, goals, roles and responsibilities

Staff shortage and inadequate staff members

Excessive or too much work for the staff

Sourcing of cheap labor and community volunteers

Lack of staff Motivation and acknowledgement of staff contribution

Lack of regular staff training and support system

Poor Information flow

Lack of criteria/system to evaluate staff performance

Fast pace of projects compared to available number of support staff

Insufficient centre revenue generation that can fund centre expenditure

Centers maintenance and payment of staff salary in centers are expensive to maintain

Senior management long term goal of selling off centre building and outsourcing projects

Lack of job security, resulting from fear of downscaling of centre

Lack of mentoring from management to staff members

Non replacement of discharge or dismissed staff by the board/management

Community relationship

Some communities still perceive SHAWCO as community problem solving organization

Communities want total involvement of SHAWCO in community activities

Kensington community frowns at students coming and running independent projects

Lack of primary health care or health project in Kensington

APPENDIX D

The table below contains dates and venues of meetings or interviews held with some of the participants

S/N	Name of interviewee:	Position Held:	Date of interview:	Time:	Venue:
1	Varkey George	Director	17 October 2006	8:30am	SHAWCO Head office Medical School
2	Leanne Baguley	Education Sector Coordinator	19 October 2006	2:00pm	SHAWCO Education office Upper Campus
3	Anwar Parker	Centre Manager	20 October 2006	9:00am	SHAWCO office Kensington
4	Heinrich Minnaar	2005 SMART Project Leader	23 October 2006	5:00pm	Upper Campus Library Foyer
5	Leonard Sauls	Drivers - Health	24 October 2006	3:00pm	SHAWCO office Kensington
6	Nick Friedman	Education President	25 October 2006	10:00am	SHAWCO Education office Upper Campus
7	Megan Borkum	Health Sector President	25 October 2006	1:15pm	SHAWCO Head office Medical School
8	Zanele Lupondo	Admin Officer	25 October 2006	3:00pm	SHAWCO Upper Campus office
9	Varkey George	Director	27 October 2006	8:30am	SHAWCO Head office Medical School
10	Mfanelo Sobekwa	Head of Clinics	27 October 2006	2:00pm	SHAWCO Head office Medical School
11	Yohann Graaff	Board Chairman	10 November 2006	10:00am	Upper Campus UCT
12	Workshop		17 November 2006	11:00am	P D Hann building, University of Cape Town
13	Varkey George	Director	13 April 2007	2:30pm	SHAWCO Head office Medical School

APPENDIX E

The list of the participants, who attended the workshop session

1. Varkey George,
2. Leanne Scott, (facilitator)
3. Anwar Parker,
4. Wendy Cornelius,
5. Jean Sabwa,
6. Alex Anyogu, (facilitator)
7. Debbie Lodder,
8. Wendy Lewin,
9. Leanne Baguley,
10. Insaaf Abrahams,
11. Yumna Moosa,
12. Heinrich Adrean Minnaar,
13. Dorcas Anguria,
14. Deidre September,
15. M.Sobekwa,
16. Sharika Raga
17. Grant Thomas.

APPENDIX F

The concepts, issues and opinions (verbatim) raised in the workshop and how they were clustered or classified

Communication

Absence of a flow of communication and the need to improve bottom-top communication

Consistent communication from top down to ensure everyone's doing the right thing and there's consistency across goals.

Access to information and putting appropriate systems in place for documentation

There should be access to information about management systems and channels i.e. who to go to for what

Better reporting structure from projects right through to Head office as well as centres and head office

More feedback from different level of the structure, eg board meetings minutes available to volunteers, steering committees minuets available to staff and project leaders

Monthly report from various sectors that deal with a set of relevant questions

Include project leaders in finance meetings

Encourage active participation, open discussion and evaluate continuously

Support

Better and adequate training of volunteers

The need to support student intervention with professional intervention

The link between education and health should be developed and the need to take advantage of each other's strength and support each other

Evaluation

Tracking the learners and better means of evaluation of learners' growth

Focus on all round well being of learners and the need to create innate resilience with learners.

The need to continuously and consistently monitor the projects and have workshop to help with general problems

Planning

More proactive or forward planning

Consultation of stakeholders in planning and having the beneficiaries at the centre of the planning, execution and evaluation processes. Involve them more!!

Centre staff to be able to state community needs and make input on projects planning

Ensure sustainability before implementations

Focus on all round well being of learners and the need to create innate resilience with learners.

Reduce separate planning of steering committee that create radical change within projects

More communication flow and info between education and health sectors: finding synergies in services and working together

Better process of consultation between all levels in the structure with regards to decisions which affect everyone and recognition that most decisions do affect more people than is believed.

Networking

Access to experts/people who know how to do what we do but better

Identification of key external role players

Curriculum

More informed curriculum advice

Lesson plans that short-term volunteers can use

Structure

Structures that allow for continuity

Create positions that maintain homeostasis of the intervention/projects

An accountability structure where a specific individual is solely responsible for a specific task

Goals

Goals to be clear to all stakeholders

Clear measurable goals

Consistent communication from top down to ensure everyone's doing the right thing and there's consistency across goals.

APPENDIX G

A letter of intent stating the intention and objectives of the study

8th November 2006
Attn: Mr Varkey George
Director: SHAWCO

For circulation to : …….

Re: Masters dissertation of Alex Anyogu (ANYALE001) for the degree of Masters in Operational Research in Development in the Department of Statistical Sciences

As most of you are aware, Mr. Anyogu has been using SHAWCO as a case study for his dissertation, which is focused on the use of problem structuring methods as a tool to enhance the effective functioning of organizations/ interventions which broadly support the aim of poverty alleviation. The aim of this particular case study is to explore and surface individual and joint perceptions of the organization, its structure, vision, modes of communication, external and internal relationships, and modus operandi. Ideally the project seeks to craft a shared view of the organization and its future path.

Mr. Anyogu has already interviewed a number of individuals within SHAWCO, and has constructed a number of individual cognitive maps of the organization, its structure and effectiveness in achieving its goals. He is now at the stage where he would like to arrange a joint workshop of individual members of the organization to construct a shared/ integrated view of the organization. We would greatly appreciate your participation in this workshop which is scheduled for Friday 17th November from 9h30 to 1pm at the offices of SHAWCO, Upper Campus. The workshop will be followed by a finger lunch which we hope you will stay to share.

All information which is surfaced at the workshop as well as that which was expressed in the individual interviews will be treated as confidential and no information will be divulged to any other party without the express consent of the interviewee. SHAWCO will have the right to approve the final written report of the workshop.

Many thanks for your assistance so far and we look forward to working with you further.

Regards

(Dr) Leanne Scott
Senior lecturer, Dept Statistical Sciences
UCT