

Are expatriate staff necessary in international development NGOs? A case study of an international NGO in Uganda

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Summary

This paper explores problems and challenges in the management of expatriate staff in Northern NGOs. It finds that very little research has so far been carried out on this issue despite its importance in international NGO development work. Drawing on a recent case study of a NNGO working in Uganda, the author makes a preliminary identification of a number of key issues, which are discussed against the background of debates around changing power relations between Northern and Southern NGOs. Six key problem areas are identified: (i) the frequent changes of expatriate staff, (ii) the tendency for local staff knowledge to be undervalued, (iii) the emergence of structural barriers in staff relationships, (iv) cultural sensitivity and awareness, (v) contradictions and lack of clarity in overall staffing policy, and (vi) tensions around differences in lifestyles and living standards. The paper concludes by setting out both positive and negative arguments for the use of expatriate staff and argues that while the presence of expatriates may potentially bring distinctive benefits and advantages to development work, more careful attention needs to be given by NNGOs to the management of expatriate staff. It is recommended for maximum effectiveness in this area organisations will require a staffing policy which is consistent, transparent and can be evaluated.

Introduction

The problem

In the last decade or so, NGOs have moved to the forefront of international development, bringing with them considerable influence in shaping development policy, planning and implementation. This in turn has led to greater scrutiny of NGO management and performance in developing countries (see Edwards and Hulme, 1995; Brett 1993; Smillie 1995a).

At the same time, the global context in which NGOs operate has changed considerably over the last decade (Lewis, 1998). A significant development has been the emergence of strong, autonomous NGOs in the South that receive direct funding from donor agencies (Campbell, 1988). This has led to the re-examining of the roles of Northern NGOs (NNGOs); those organisations that have their roots in the industrialised countries of the west, but work in development in the South (Lewis, 1998). Many practitioners now question whether NNGOs should be involved in direct service delivery in the South (ibid). NNGO dominance in development discourse has been challenged by this new phenomenon and NNGOs are struggling to find a new identity (Smillie, 1995b). As part of this process, the management problems of NNGOs working in the South have been researched (Billis and MacKeith, 1992; Stark Biddle, 1984). A major problem is that of, 'managing an operation which spans many countries and cultures....' (Billis and MacKeith, 1992: 121). Central to this concern is the question of staffing and the overall impact that staff have on the effectiveness and performance of the NGO. This aspect has largely been ignored by the literature¹.

This paper will examine an aspect of staffing on which very limited research has been carried out so far. This is the aspect of expatriate staff² in senior positions in field offices of international development NGOs³. The essay will examine the impact that the staff have on the project, and some of the contradictions they throw up. The central question is whether or not expatriate staff are necessary in these organisations. It will conclude by arguing that in the continuing debate on the role of international development NGOs in the South, this aspect of NGO management is an area of importance which requires further and more detailed examination in order to inform and shape the future direction that these organisations will take.

The context

The term NGO is used to describe a number of organisations and groups that work in poverty alleviation. These organisations vary in size, structure, areas of operation and geographical location (Clark, 1991). The research has limited itself to a particular type of NGO, although its conclusions may raise issues of relevance for other kinds NGOs.

To provide the contextual framework for analysis, Korten's (1990) Three Generations of Voluntary Development Action is used. Korten identified three stages or 'generations' of NGO evolution. The first generation, he identifies as 'relief and welfare', in which the NGO is involved in the direct delivery of relief services to beneficiaries, such as the distribution of food, shelter or health services. At this stage, NGOs are responding to immediate needs. The second generation, he calls 'small-scale, self-reliant local development'. At this stage, NGOs focus on building the capacities of local communities to meet their needs through 'self reliant local action' (1990: 118). NGOs become more developmental in orientation. Korten calls the third generation, 'sustainable systems development'. At this stage, NGOs seek to make changes in policies and institutions at local, national and international levels. NGOs at this stage move away from operational service provision to taking on more catalytic roles. Underlying this theory of NGO evolution is the belief that NGOs learn from their experiences and adopt change accordingly.

Whilst Korten does not examine the staffing implications for organisations at each of these stages of the evolution process, his theory provides a useful framework in which to examine them in relation to the organisation's changing identity. This paper will look at expatriates working in NNGOs at Korten's second generation; that is those changing from relief to development. This stage throws up questions of how appropriate expatriates are at senior levels within the organisation and examines some of the contradictions they raise.

Methodology

Secondary data from the NGO, UK charity and US non-profit literature was reviewed but the data on the subject is limited. The paper therefore adopts the exploratory case study methodology (Yin, 1994). This methodology is useful for identifying key

issues for further study (ibid). The case study as a methodology of research has a number of advantages and disadvantages. The most significant advantage is that it allows for more in depth study of one aspect of a problem (Bell, 1993). It is used to draw attention to 'what can specifically be learned from the single case.' (Stake, 1994 236). It also allows the researcher to identify the processes that affect a particular situation (Bell, 1993). These processes although crucial to the outcome may remain hidden in large scale surveys (ibid).

The disadvantage of the case study methodology is that it is subject to distortion based on the researcher's own biases (Stake, 1994). The exploratory case study is not statistically relevant and generalisation is not usually possible (Bell, 1993). Nevertheless, it provides a useful means by which information can be gathered to understand new issues that are not well documented (Yin, 1994).

The case study draws on information gathered as part of a three week visit to an NNGO working to alleviate the socio-economic consequences of HIV/AIDS in South-western Uganda. The author assisted in the evaluation of the NGO's operations. The evaluation was not specifically about the issue of expatriates. The NGO's anonymity is therefore protected and will be referred to as Campaign Against Poverty (CAP) throughout this paper. At CAP's headquarters in Europe, there was some concern that this particular programme had expanded on an ad hoc basis and that this had implications especially in the light of reduced levels of donor support in the future. The evaluation was commissioned partly in fulfilment of donor requirements, but more importantly to produce a strategy for the rationalising of activities.

The information was gathered primarily through participatory interviews with relevant stakeholders including beneficiaries and staff (country expatriate and local staff as well as field staff). In addition, the author lived with CAP staff for three weeks and was able to collect data through the use of participant observation and informal interaction with CAP staff. The author was also able to make use of existing documents in which CAP had conducted a number of internal and external evaluations on aspects of its work. The case study draws upon field notes taken during the evaluation.

The structure of the paper

This paper consists of four parts. The first part explores some broader NGO management themes and issues. Drawing on NGO, UK charity and US non-profit organisation literature, it examines the organisational management problems of NNGOs. It also outlines the debate on the changing roles for international development NGOs. The second part analyses the literature on staff issues in NGO and other sectors. This chapter will briefly examine the literature on volunteers in NGOs before analysing the expatriate issues. The third part summarises a recent case study which highlights the important role played by the expatriate managers, its effect on the NGO's programme and implications for future analysis and policy. The final part, chapter four, will focus on conclusions and recommendations for future consideration.

NGO management themes and issues

NGOs as agents for change

NGO emergence to the forefront of development discourse has come about for a number of reasons. Much has been written about the strengths of NGOs as agents for change (MacKeith, 1993). NGOs are said to have comparative advantage because of their flexibility, their ability to reach the trouble spots of the world, and their participatory approach to development (Seibel, 1989). In addition they are said to be innovative and cost effective (Cernea, 1988; Brown and Covey, 1989). NGOs are said to be value driven organisations, whose staff are highly motivated and committed to serving the needs of the poor (Korten, 1990; Clark, 1991). These qualities have helped to promote the view that NGOs are on the whole better and more effective as agents for change than governments. Larger development institutions have now adopted some of the NGO principles of sustainable and participatory development (see UNDP, 1993).

Recently however, there has been more critical assessment of these claims about NGO effectiveness (Brett, 1993; Edwards and Hulme, 1995). A primary concern, is that as NGOs continue to receive increased levels of donor funds, their autonomy will be compromised and their goals deflected to suit donor requirements (Biggs and Neame, 1995). In his study of NGOs, Brett (1993) concluded that often NGOs behave in ways no different to governments especially in situations where there was little or no alternative. In addition, NGOs have been criticised for weak and

inefficient management which is seen to be a major weakness especially in light of the increased levels of public funding being channelled through them for development (Clark, 1991).

The claims about NGOs being more participatory and reaching the poor have also been challenged (Tendler, 1982). In an evaluation for USAID, she concluded that often what American NGOs regarded as participatory decision-making, was in fact not the case. She identified three main types of decision-making processes. These were: (i) genuinely representative; (ii) top-down 'sensitive' in which despite appearances of participation the NGOs actually made the decisions in a relatively top-down manner, and (iii) local elite decision-making (1982:15) in which NGOs were criticised for responding to decisions made by local elites, which were taken by the NGO to be representative of all the poor.

These debates on NGO effectiveness have tended to concentrate on NGO operations. There has been little assessment of NGOs as employers and the ways in which staffing policies and procedures might affect these operations.

The study of NGO management

The organisational problems of NGOs are the subject of increased scrutiny and analysis. Central to this, is the question of whether or not the management of NGOs differs from other sectors (MacKeith, 1993). In comparing NGOs to the government and business sectors, some argue that because of their structure, their areas of operation, and their values amongst other things, NGOs are distinct from other organisations and therefore require distinct management approaches (Billis, 1993; Fowler, 1989). Others argue that regardless of these distinctive features, NGOs, like all other organisations, require basic management skills (Dichter, 1989).

From welfare to development

The literature in this area distinguishes between humanitarian relief or welfare and development. It discusses whether NGOs can make the transition from one to the other (Buchanan-Smith and Maxwell, 1994). The shift from welfare to development creates organisational change. Generally speaking, the welfare approaches involve 'top-down', short term planning with little consideration for the long-term sustainability

of the interventions (Walker, 1994; Moser 1993). The principles of grassroots development which involve participation, capacity building and sustainable approaches require different forms of management (Stark Biddle, 1984, Walker, 1994). These involve long-term planning and participatory forms of management (Walker, 1994). NGOs have in the past been criticised for not handling the transition from welfare to development very effectively (Abdel Ati, 1993, Buchanan-Smith and Maxwell 1994). Others argue, that the changing nature of crisis around the world challenges the linear development model in that the two areas of work are now inextricably linked (Duffield, 1994). There is recognition however, that management structures, funding strategies and personnel should be changed in order to manage the process better (ibid).

Organisational problems of NNGOs

Research into this area produced a number of common problems and dilemmas that NNGOs experienced. One of the most mentioned was that of the decision-making processes (Billis and MacKeith, 1992, Billis and MacKeith 1993; Brown and Covey 1989). Tensions often occurred between staff and senior managers because of the staff expectations that they would be equal partners in the decision-making process (Billis and MacKeith, 1992).

Another common problem was to do with the governance of the organisations and the relations between board members and staff (Hodson, 1992). These stemmed largely from the boards' inability or unwillingness to carry out their responsibilities of governing the organisations (Harris, 1993). Board members often lacked the time or the expertise to be able to carry out these responsibilities effectively (Harris, 1989). As a result, senior staff were often left to make policy decisions with little or no support from board members (Hodson, 1992). Stark Biddle (1984) found that leaders often lacked management skills, having come from a tradition of relief and '...crisis response.' (1984: 1).

NGOs were found to be weak at staff career development (Billis and MacKeith, 1992). Often organisations lacked a career structure in which staff could develop. In addition they were not good at budgeting for staff training (Stark Biddle, 1984). In situations where the organisations were expanding rapidly, it created problems for many who were unable to keep up with the demands of their work (Billis and MacKeith, 1992).

Fund raising activities were often the source of much tension in organisations (Stark Biddle, 1984). The strategies and images used to raise funds from the public were often felt to compromise the nature of the work done by other members of staff (Billis and MacKeith, 1992). These images often depicted beneficiaries as helpless victims in need of assistance, which other staff felt was inaccurate and lacked respect for the beneficiaries (ibid).

The difficulties of managing NGOs with operations in several countries also raised concerns. The difficulties came from the inability to define proper lines of autonomy on policy issues (Stark Biddle, 1984; Billis and MacKeith, 1993; Butler and Wilson, 1990). Field staff often felt isolated, unsupported and felt there was a lack of understanding of the issues they were dealing with at field level (Brooke, 1984). In addition, they often found it difficult to be loyal to headquarters (ibid). Headquarters staff on the other hand, felt that field staff had too much power which needed to be controlled if all the interests within the organisation were to be adequately addressed (Stark Biddle, 1984).

The theme at the heart of these difficulties is that of centralisation juxtaposed in some way with other concepts such as autonomy or participation. Brooke (1984) noted that the root problem is balancing the need for co-ordination with demands for participation and democracy. Zald (1970) in his study of the YMCA, found that there was an endless cycle of power struggle between the centre and local units.

The tendency is to offer decentralisation, in which some power is devolved to field level, as a solution to the problem of tensions between field offices and headquarters. However, decentralisation can have the paradoxical effect of increasing bureaucracy as organisations devolving power on the one hand, tend to set up all sorts of control measures on the other (Perrow, 1977).

These problems revealed a clear gap between the values that NGOs espouse and what actually happens in practise. Balancing the needs of the different stakeholders who each feel they have an equal right to the decision-making process has created a number of management problems for these organisations (Rochester, 1995).

Changing relations between NNGOs and SNGOs

Changes in the relations between NNGOs and their Southern counterparts have come about for a number of reasons. Traditionally NNGOs have implemented their own development projects such as health clinics, income generation schemes and so on (Lewis, 1998). However the emergence of SNGOs has meant that these roles have been challenged, as SNGOs such as The AIDS Support Organisation (TASO) in Uganda now implement development projects of their own. In addition, they receive direct funding from donor agencies (Smillie, 1994). NNGOs are as a result moving away from their traditional roles and replacing them with the 'partnership' approach in which local organisations deliver services (Lewis, 1998). NNGOs act as funders and provide organisational support concentrating on developing the organisational capacities of local partners (ibid).

This approach has been criticised by a number of SNGOs (Kajese, 1987; Nyoni, 1987). Many do not regard the relationship as an equal partnership but one of donor and recipient in which the balance of power lies solely in the hands of NNGOs (Elliot, 1987). In this respect, NNGOs are regarded by their Southern partners as being no different from donor agencies. Others have accused NNGOs of operating on double standards. For while they demand transparency and participation at grassroots level from SNGOs, they rarely demonstrate the same approaches in their relations with their Southern partners (Nyoni, 1988).

The concept of capacity building itself seems to lack clarity amongst NNGOs. In a study of NNGOs involved in capacity building, James (1994) found a number of varying responses to what these organisations understood capacity building to mean. For some it meant management training, whilst for others it was a process of empowering SNGOs through devolving power, funds and technical assistance (Spraos, 1993).

The capacity building concept has also been challenged for having as its basic premise, the notion that the necessary skills and expertise come from the north (Lewis, 1998). As the organisational problems discussed above show, capacity building is a concern for all NGOs. Furthermore, James (1994) found that NNGOs lacked the staff with the necessary management backgrounds and skills to do this kind of work in the South. Another point is that many NGOs in the South have developed organisational capacities that far surpass those of many NNGOs (Dichter, 1989). Many of these SNGOs are now calling for more radical approaches to

development (Kabeer, 1994; Sen and Grown, 1987). These involve long-term strategies of empowerment through popular education, alliance building, and challenging political, social and economic structures that promote inequality to achieve social transformation (Razavi and Miller, 1995). They argue that the short term project interventions such as those traditionally offered by NNGOs will not address the underlying causes of poverty and inequality unless they are part of this broader vision (Sen and Grown, 1987).

The change from traditional service provision appears to have made little difference with regard to the staffing policies of NNGOs. Many still made use of expatriates. James (1994) found that of the 47% of NNGOs that provided staff attachments to partners, 66% employed expatriate staff. There appears to be little analysis of the long-term sustainability of this strategy and whether or not it creates a paradoxical effect of reduced levels of learning between partners. In addition, of the 74% of the organisations that provided organisational development consultancy training, 75% carried out the consultancy work themselves (1994:23). However, given the fact that the vast majority of NNGO staff lacked management backgrounds and skills, their effectiveness as management trainers should be a cause for concern. A number addressed this by employing consultants (68% from the South and 51% from the north) (1994:23). This too could be viewed as a possible cause for concern, if one takes into account the argument that NGOs as organisations have distinctive features which require specialist management approaches and disciplines. In his conclusion, James pointed out that NNGOs also required capacity building of the kind they were providing their Southern partners.

The literature on NNGOs and expatriate staff will be examined further in the next section.

Staffing issues in NGOs

In general, NGOs usually employ of two types of staff in the form of paid and unpaid staff (volunteers). Much has been written about the relation between these two sets of people in the NGO and non-profit literature. A brief examination will be made of this literature. An examination of expatriate issues both in NGOs and some of the generic management literature will also be made.

Volunteers

The NGO literature has highlighted that NGOs attract people and with a high commitment to the organisation's principles and aims (Korten, 1990; Smillie 1995b). These people are also said to have high expectations of being involved in the decision-making processes of the organisation (Hodson, 1992). The literature often does not make the distinction between paid and unpaid staff.

The US non-profit and UK charity literature on examining what motivates people to join organisations as volunteers reaches different conclusions to the ones above (Harris, 1987; Pearce 1993). Very rarely were the reasons altruistic. Rather they were often self-serving. Examples were the need for experience, the need to gain new skills and the need for contacts. Often volunteers viewed their involvement in these groups and organisations as something they did in their leisure time (Pearce, 1993). As a result they were very reluctant to be involved in the decision-making process as they were unwilling to take on the responsibility that came with it (Harris, 1995). This made them extremely difficult to manage and the relations between paid staff and volunteers were often a source of tension (Harris, 1995). Similar tensions have been highlighted in relations between expatriate volunteers and paid staff especially in situations where they worked on the same projects (Suzuki, 1998).

The literature points to the fact that it cannot be taken for granted that all who join NGOs are there for altruistic reasons. The complex and multifaceted motivational issues of these and other staff need to be clearly understood if they are to be effectively managed (Pearce, 1993).

Expatriate staff in NGOs

The literature on the subject is very limited. What little there is, is on the whole negative to the use of expatriates in international development NGOs (Dichter, 1986; Fowler, 1997; M S, 1992⁴). Much of the negativity is on the grounds of cost. All compare the cost of hiring expatriate staff to local staff and the overall conclusion is that the results of using expatriate staff do not justify the costs (Dichter, 1986; MS, 1992). Edwards (1996), in a comparative study of a number of Save the Children's local partners in South Asia, concluded that those partners who used 'outsiders' to run programmes were on the whole less successful than those who used local staff. Local staff, he concluded were better at making linkages with grassroots

beneficiaries and the organisations experienced fewer tensions between “ ... ‘insiders’ and ‘outsiders’” (1996: 56).

Aside from the cost argument, there is what Dichter (1986) terms the ‘moral’ argument. This argument asserts that country nationals are the best to run country programmes and that it is the best way to ensure long-term effectiveness and sustainable development. In addition, some are concerned that the use of expatriates takes away much needed work from qualified workers thus weakening rather than building local capacities (MS ,1992).

In their report, MS (1992) found that in cases where they were supposed to be transferring skills, the expatriates rarely worked on this basis. Instead they worked on a management basis which meant in practise that they retained overall control, rarely devolving it to locals. Also, anxious to create a good impression at home in the short time they had abroad, expatriates worked on short term projects which were not sustainable once they had left (ibid). The report highlighted a number of other concerns related to the use of expatriates.

Amongst these was the concern that the use of expatriates was usually donor driven. Donors were usually more willing to finance projects that are headed by expatriates (Dichter, 1986; Fowler, 1997). This often meant that projects were initiated to suit donor requirements rather than to reflect the local needs and aspirations.

For all these weaknesses that the literature highlights, there is acceptance that there are legitimate reasons for the use of expatriates.

When to use expatriates

(a) Justifiable reasons

Fowler (1997) divides the reasons for expatriate staff into justifiable and ‘less justifiable’ categories (1997:86). Amongst the justifiable reasons are when skills are not available locally. Dichter (1986) argues that whilst it may have been the case that local skills were not available a few years ago, it is no longer a reasonable argument to make. Rather, it is a weakness on the part of the NGOs recruitment methods that fails to identify local skills.

A second justifiable reason Fowler identifies is the case in which there is a need to build the confidence of the donor in the short term. To this list, he adds cases in which there is a need for mutual learning and the breakdown of stereotypes. Other justifiable reasons are when comparative experience is needed and expatriates can reduce learning time and finally when there is 'a recognised, valid need for the challenging inputs that expatriates can bring.' (1997: 86). Dichter (1986) also makes the point that at the formative stage of a project, it is useful to have someone who really knows the organisation well and that expatriates fill this requirement.

(b) Less justifiable reasons

Fowler identified a number of less justifiable reasons for the use of expatriates. These reasons whilst being problematic, were nevertheless common in the decision to use expatriates. Amongst them are, that expatriates act as impartial gatekeepers for resources meaning that they are independent from the 'corrupting' influences that local staff are. Expatriates are also seen to be better able to ensure that organisational concerns are met, cross country consistency with organisational aims and the promotion of the organisation's national identity which he describes as a donor motive.

Dichter too mentions another reason that is common but unspoken. This is to do with the prestige attached to having an expatriate working in the host country. He illustrates with examples in Africa and Latin America where ministries rejected local staff and insisted on having expatriates.

Theoretical perspectives: Hofstede's five cultural dimensions

It could be argued that expatriate staff in NGOs face problems comparable to expatriates working in multinational companies. Issues of unfamiliar cultural beliefs and understanding, languages and so on can present a number of management challenges. Hofstede (1994) analyses culture at national levels and discusses their implications for organisations. He argues that organisational behaviour is culturally dependent. He identified five cultural dimensions. These were, the power distance dimension, in which countries range on a comparative ranking between low acceptance of unequal power (as is the case in a number of countries from the west) and a high acceptance. The second was the extent to which particular countries were

inclined towards individualism or collectivism. The third aspect related to the extent to which nations adopted what he termed masculine (eg competitiveness, and assertiveness) or feminine (eg caring persuasion and creativity) principles. A fourth major national determinant was the uncertainty avoidance in which national characteristics ranged from acceptance of unknown situations and intolerance with reliance on what he termed belief systems and institutions. The final dimension was the time orientation where the distinction was made between those national cultures that had short term values such as getting quick results, spending and stability as opposed to those in which long-term values of perseverance and being virtuous dominate.

Hofstede developed this framework as a means by which the expectations that people have of management could be understood. In addition he uses it to explain what can happen when different national cultures meet in for example an organisation. Misunderstandings and conflict can arise. The challenge for management is to understand the forces at play and use them to create an organisational culture that encompasses all these facets.

Reeves-Ellington (1995) in a study of multinational corporations concluded that the companies were failing because of a failure to manage internal cultural and value differences effectively. The employment of people from a number of cultural backgrounds and perceptions, coupled with the rigid, bureaucratic structures resulted in a lack of flexibility to accommodate these differences. This significantly reduced their ability for global effectiveness. Using Hofstede's framework, the idea of a new 'ethnic organisation' (1995:249) was created. The organisation addressed organisational needs on all the dimensions so that for example, on the power dimension, staff had a right to information and that a supportive environment consisting of staff teams with leadership and devolved power would be the norm. The thrust of this organisational construct, was that rather than demanding that societies adapt to them, organisations should be striving to fit into the wider, global environment.

Analysis of the NGO literature

The NGO literature, though limited, raises a number of issues which have implications for policy. The literature points to the fact that expatriates are costly and may not be all that effective. The research on expatriate performance show a gap

between what actually happens in practice to what is assumed to happen. The issue of transfer of skills which is often used as a valid reason for expatriate use has been shown in the M S evaluation, to rarely happen. Also the sustainability of the interventions once the expatriate has left the project is shown to be minimal. Expatriates may be good for ensuring accountability to donors but are not successful at building community links as Edwards (1996) shows.

The arguments about cost and efficiency whilst being legitimate causes for concern are in themselves not enough. They tend to overshadow the wider, and some would argue, more fundamental issue of equity and power. As NGOs involved in development, the power imbalance within their own structures should be a cause for major concern.

Suzuki (1998) emphasises the power relations between expatriates and local staff. In comparing the two sets of staff, he notes that the relations between them are characterised in employer - employee terms. Expatriates have salary scales and benefits that are higher than local staff. In addition, expatriates have overall control of the programmes. They are involved in the hiring and firing of local staff but not vice versa. In emergency situations, expatriates are flown out but local staff are not.

Even in cases where it has been accepted that the use of expatriates should be reduced, there still seems to be a reluctance to address the issue of power relations. Dichter (1986), points out that to eliminate the role of expatriates altogether would be to create disincentives for staff in the headquarters office. A few posts are therefore earmarked for expatriates who go to field offices on a rotational basis. This, he argues, whilst giving incentives to headquarters staff, also gives a very useful and vital link between headquarters and field offices. There are no such incentives offered to local staff, who it could be argued can provide just as effective a link to headquarters as expatriate staff. In addition, the expatriates' use on a rotational basis, it could be argued, may create problems of lack of continuity. This may adversely affect development projects that require long-term planning and management. Similarly, the reasons identified by Fowler (mentioned above) require further scrutiny. As the MS report highlights, there are very few cases in which transfer of skills happen in the way he implies. It also has to be asked why for example on the issues of mutual learning and comparative learning, it is expatriates from the north who are assumed to be best placed to fill the gap. It may be more appropriate to transfer skills from other Southern contexts.

The generic literature provides useful insights in analysis of the problems that can occur for organisations working in a number of countries. The emphasis on a global perspective in which flexible and supportive structures for all staff is a lesson that many NGOs could also follow.

Case study: Campaign Against Poverty (CAP), Rakai District, Uganda

History of the programme

The CAP programme began in the Rakai district of South West Uganda in 1990. It was in Rakai that HIV/AIDS (known as 'slim' amongst local people) in Uganda was first recognised in the early 1980's. Rakai had been at the centre of cross border trading and troop movements between Uganda and Tanzania during the war years. The AIDS pandemic crippled the local economy and placed a huge strain on the extended family networks, in that people were unable to continue with productive activities whilst at the same time caring for the sick and orphaned relatives.

CAP began in one sub-county of the Rakai District. In 1991, three more sub-counties were assigned by the government to CAP. The project then expanded into two more sub counties in 1993. By 1994, CAP had expanded its programme into two other districts in South west Uganda. These were the Mpigi and Mbarara districts. The evaluation was carried out for the Rakai programme. By 1996, the CAP programme in Rakai, covered six sub-counties with activities in a total of 207 villages. A map of the region can be seen in the appendix.

In response to needs identified by government and local groups, CAP began its programme initially on the basis of welfare provision. Broadly speaking, this means that CAP provided care to those affected or infected with HIV/AIDS, without paying much attention to the sustainability of the interventions. This welfare provision began with the distribution of blankets, and other essential materials such as cooking utensils, soap and crockery. CAP also provided support for orphans through the payment of primary school fees. In addition, CAP provided materials to schools in the way of building materials, furniture and sports equipment.

The programme, as well as expanding geographically, expanded in activities and by 1996 had added an extensive number of new activities to the programme that there was difficulty monitoring and managing it. These activities were more developmental in character. The activities were based on needs identified in discussions with local communities. They were also based on staff (especially senior expatriate staff) expertise and interests.

CAP activities⁵

Between 1991 and 1996, CAP had expanded its activities to include, AIDS education in schools, agricultural projects in which agricultural training to villagers was provided, hoes for cultivating were distributed and a tractor for shared use in cultivating was purchased. CAP later introduced its income generation projects which included, support of home care groups, local women's groups which gave support to bereaved families, small livestock schemes for villagers, and small grants provision for village groups. Other activities took the form of legal rights support for widows and orphans through trained volunteers, community work by children for vulnerable households, skills training for school leavers and literacy classes. CAP also established a herbal medicines project as part of its home care groups, supported scouts and guides with AIDS awareness initiatives. In addition, CAP established credit schemes for women's groups, guardians of orphans' groups and village development groups.

The programme operated through two broad categories:

- orphan support and education development (such as the payment of primary school fees and skills training) which was largely welfare assistance
- village development (such as income generation and agriculture) which was largely developmental in that it aimed to support groups in order to help them improve self-reliance

Both categories contained an element of AIDS awareness education and training.

In 1996, it was noted that by far the greatest cost to the programme was the orphan support (CAP's welfare component). This was shown to amount to 83% of CAP's direct costs. The other developmental activities totalled 17% of CAP's costs.

Concerns had long been raised in a number of internal reviews and evaluations about the spiralling costs of the orphan support project and on the dependency it created in the community.

Internal reviews and evaluation

CAP conducted a number of internal reviews and evaluations between 1992 and 1996. These reviews, whilst positive about CAP overall, expressed concerns on the long-term sustainability of CAP's welfare based activities. The first of the internal reviews in 1992 concluded that all activities should be continued with a few modifications on the agricultural projects.

An external evaluation was carried out later on that year which raised concerns about the orphan support project and recommended a move towards more sustainable projects. Similarly, in 1994, an internal evaluation recommended more support for capacity building projects.

In 1995, there was a review of programme objectives. It was noted that the programme had moved from the alleviation of the socio-economic consequences of AIDS to strengthening community capacity. As a result, new objectives were drawn up to reflect the nature of the programme. These aimed to address both the consequences and causes of AIDS. The main idea was to gradually reduce the role of welfare as the primary goal and attach greater significance for development projects. A number of activities were streamlined or discontinued. These included a number of agricultural projects such as the small animals project, the school gardens, and agricultural training with the district office. Other projects which were discontinued included the sports and cultural events and school tours. The orphan support project would have no new intakes and no replacement of drop-outs. In addition, there were to be no new activities added to the Rakai programme.

Staffing issues and their impact on the programme

(a) Staffing and organisational structure

The Rakai programme in 1996 had a total of 58 local staff, and three expatriates. Two of the expatriates were paid staff and one was a volunteer. The senior positions

of field representative, programme co-ordinator and programme manager were occupied by the expatriate staff. They were responsible for managing the overall programme in Rakai.

The most senior position held by local staff in CAP, Rakai was that of sub-county co-ordinator. In all there were six sub-county co-ordinators; one for each sub-county. They were responsible for managing and co-ordinating activities at sub-county level. They were assisted in this by the village based co-ordinators. Other posts occupied by locals were the administrative posts, technical support officers, transport and domestic staff. There were also a number of village based volunteer posts such as the paralegal teams, school leaver trainers and so on that were composed of locals from the sub counties.

The expatriate staff stayed in post on average for one year only before being posted to other country programmes. The current incumbents had been with the Rakai programme since 1995. Many of the local staff on the other hand, had been with the Rakai programme since it began in 1990.

(b) Relations between expatriate and local staff

Relations between the two sets of staff were extremely friendly and warm. Working relations were also good and staff on the whole worked well with one another to fulfil CAP's objectives. CAP had recruited a strong team of skilled and committed staff. It was however, noted during the interviews with both sets of staff that the frequent turnover of expatriate staff and the absence of local staff in senior positions presented a number of problems for the overall effectiveness of the programme.

Problems connected with staffing structure

(a) Frequent changes of expatriate staff

The high turnover of expatriate staff contributed significantly to the lack of cohesion among project activities and to the ad hoc expansion of the programme. Whilst it is true to say that CAP responded to needs that were identified in the community, and that the environment in which CAP was operating is complex and ever changing, the evidence tended to suggest that new activities were added just as much to reflect the interests and expertise of expatriate staff with activities changing direction often at

random. This resulted in unnecessary repetition or to changes in the workloads of staff leading to reduced overall effectiveness. Another point that was noted in relation to this is the fact that there was little documentation (particularly in the early years of the programme) concerning the monitoring and evaluation of activities. This made it difficult for new expatriate staff to orient themselves with the programme and they were often inadequately prepared for their work in Rakai. It was difficult to achieve continuity with changes happening so frequently at such senior levels in the organisation.

(b) Undervaluing of local staff knowledge

Some local staff expressed concern that their long-term experience was not always appreciated and respected with these frequent changeovers. Often, it was local staff who 'showed expatriate staff the ropes'. Yet in the time since the Rakai programme began, CAP had not been able to bring local staff to senior positions.⁶ As a result there was concern raised as to the level of 'ownership' of the programme by local staff. Some felt they were not adequately included in the decision-making process despite the length of their service, and felt they were there largely to implement decisions. Local staff found it difficult sometimes to understand their roles and what was expected of them every time new expatriates arrived. Similarly, expatriate staff had difficulty in clarifying and understanding their roles within the programme.

(c) Structural problems ("them and us")

It was observed that there were a number of structural problems in relations between local and expatriate staff. A prime example of this was the arrangements at mealtimes in which expatriate and local staff ate their meals separately. Local staff prepared and ate their meals in a room that was allocated for this purpose. Those who were on field visits made their own arrangements. The expatriate staff had their meals prepared for them by the domestic staff and ate in the main residential dining room. Other differences included the different sets of rules for the use of vehicles between the two sets of staff.⁷ These differences, whilst small within themselves, collectively created barriers to better communication and building of trust between the two sets of staff. For example, discussions during mealtimes often touched on important aspects of the work. There was a great deal of problem solving and decision-making that was done informally on these occasions. These subtle, structural differences also underlined the power relations and created a climate in which staff saw themselves as divided along these lines. The separate meal

arrangements provided the author the opportunity to discuss these and other issues informally with local staff. It was during these informal discussions that local staff raised these concerns. They were surprised at being asked about problems concerning their work in this way. Many had not formally discussed these difficulties in this way. A frequent quote given to the author, was in the form of a proverb in the local language, Luganda, which roughly translated means, 'The monkey does not tell on the forest that feeds it'.⁸ Local staff whilst working for CAP, saw themselves not as equal partners in the programme but as subordinates.

(d) Limited cultural awareness

Another area in which concerns were raised by local staff was a lack of awareness of and sensitivity to local customs and traditions on the part of senior expatriate staff. It was understood that the frequent changes made it extremely difficult for expatriate staff to acquaint themselves with cultural norms, which in themselves are extremely complex and always changing. However, the lack of regular contact with local people by management made it difficult for them to develop cultural awareness. It was pointed out that there were some basic mistakes made which affected the success of certain activities that CAP initiated.

An example given, was the paralegal training project. Volunteer trainees were recruited to educate the communities on legal matters affecting amongst other things, land ownership and the rights of widows and orphans. This area of work is extremely difficult and needs to be handled with a great deal of sensitivity as customary law does not recognise these rights. Recruitment of volunteers therefore had to be skilfully done in order to win community support for the project. Volunteers had to be people who had considerable influence in the community and who were also well respected. CAP's initial recruits were young people who did not have much influence or respect in the community. As a result the project almost failed. Staff felt it would have been better to recruit older people who were well known and looked on and trusted as leaders.

The household pet was the source of amusement and sometimes irritation, given the level of human suffering and deprivation with which the project was concerned. Comments such as 'the cat is treated like a child' were often made by local staff. Many found it difficult to understand and asked whether or not it was common in Europe to treat animals in this way. A few felt that the expatriates lacked a certain degree of sensitivity to the difficult environment they were working in. 'That cat is fed

better than some of the families we work with.' was said to the author on one occasion.

(e) Unclear policy on expatriates

CAP's policy on expatriates was not clear. There was no consistent definition of who was 'an expatriate'. This is problematic because CAP had operations in several other countries in the South. On this occasion, local staff in CAP's programme in Bangladesh asked to come to Uganda to gain experience in working in HIV/AIDS which is on the increase in Bangladesh. CAP's policy only concerned those staff and volunteers who were European nationals. Eventually CAP arranged for the local staff from Bangladesh to go to Uganda to run the Mbarara programme. However, their remuneration package was lower than that of the European international staff. They did however, still have their jobs in Bangladesh once their contracts in Uganda were completed which other international staff did not have.

(f) Expatriates' lifestyles

The cost of the expatriates' remuneration package was beyond the remit of the terms of reference for the evaluation and were therefore not included. Nevertheless, the author observed that lifestyles of the expatriates could send mixed messages to local staff. The expatriates lived in a fairly large complex to which the Rakai office was attached. In addition the programme director had paid accommodation in Kampala which was used when he had meetings with the country director, the use of CAP vehicles and paid travel abroad. This could be a potential source of tension in the future in that local staff may expect the same level pay once they make the senior grades. Also, the expatriates, whose lifestyles were characterised by status and high pay, might be seen as role models for those in the communities in which they worked with negative consequences for the project.

Advantages of expatriate staff

(a) Agents for change

The expatriate staff had considerable influence in the region when CAP embarked on its programme. They used this influence to challenge a number of assumptions and beliefs amongst the communities in Rakai. The employment of women in positions that had traditionally been regarded as belonging to men helped to raise the status of

women in these communities. A comment that was made to the author during a visit to one of the villages was:

'We now see the CAP women riding motorbikes and doing it just as well as the men. We did not know this was possible before. These women have shown us that they can do many of the things men do.'

Also, the support of women's groups, through provision of loans, training in basic management skills and other such schemes, afforded women a certain level of autonomy with which they could challenge some of the more oppressive traditions.

(b) Links with European headquarters

The presence of expatriate staff provided a strong link with CAP's headquarters in Europe. Many of the staff had been with CAP for a number of years and had developed relations with headquarters staff and board members. These allowed for better communications between the two branches of CAP and the field office had a vital input into decision-making at headquarters level.

Other NNGOs in Rakai

There were a number of other NNGOs operating in Rakai of which two were visited during the evaluation. Both of these NNGOs had began with welfare projects similar to CAP's such as orphan education support, but were now focusing their efforts on capacity building and sustainable development. Both were headed by local staff who had gradually replaced the expatriate staff. Both directors of these projects noted that there were a number of advantages in having expatriate staff. In discussions on some of the problems that they experienced, both noted that donors were less willing to fund projects in the absence of expatriates. Another thing they pointed out was that in a number of cases, the communities or beneficiaries were more receptive to initiatives headed by expatriates.

Conclusions

The case study has been used to highlight a number of problems concerning the use of expatriate staff in NGOs working in development in the South. These problems have a number of implications for the overall effectiveness of the NGO operations.

An analysis of the case study in relation to the literature will be carried out in this chapter along with what can be considered as recommendations for future consideration. The case study arguably highlights at a micro level the theoretical issues that have been raised about NGOs at the macro level. Many of the difficulties that are raised in the literature feature in CAP's internal organisation.

CAP had made a transition from welfare to development in its operations but had not changed its internal management structures to facilitate the change.⁹ CAP's structures were still relatively hierarchical, which meant that the bulk of control still remained with expatriate senior managers. These staff were perhaps *least* able to manage the long-term planning as their stay with the programme was only temporary.

CAP as a 'learning organisation'

The frequent changes of senior staff, the undervaluing of local staff knowledge and the lack of documentation particularly in the early years of the programme, reduce to a significant degree, the organisation's ability to develop as a 'learning' organisation (Korten, 1990). This in turn reduces the organisation's effectiveness. CAP, whilst responding to the needs of the communities by developing new activities, did so in a reactive rather than a proactive way. For example CAP had done very little assessment of the changing social and economic conditions in Rakai, which had changed significantly since the programme began in 1990 (DDP, 1994; World Bank, 1996). As a result, the organisation was unable to assess whether or not it was reaching the most vulnerable families in the district sub counties.

Networking

CAP also had limited contact with other NGOs in the Rakai district that shared that shared a similar history with CAP but had managed to localise senior positions and to discontinue their welfare work. Although attempts had been made in the past to promote better networking amongst NGOs and other development agencies, they had not been successful. CAP may have missed out on an opportunity to work with organisations that had experience in some of the projects CAP was running such as the loans provision and the other income generating activities. This failure cannot be attributed solely to CAP senior staff. Collaborative work amongst NGOs is notoriously difficult. This is in no small part due to the funding strategies of donors which often put NGOs in competition with one another for funds, thus making NGOs

reluctant to share information with one another. Nevertheless, the lack of continuity at senior level in CAP made an already difficult exercise even more difficult.

South - South learning

The problems surrounding CAP's Bangladeshi local staff raise another point for discussion. As an international NGO CAP had done relatively little to promote linkages amongst staff from other operations in the South. Some theorists argue that in many cases South - South learning might be of more relevance to building local capacities (Lewis, 1998). The Bangladeshi staff had long experience of working in development programmes but needed more knowledge on HIV/AIDS. Similarly, the Rakai staff had a great deal of experience of working in HIV/AIDS environments but not in running development projects. Here CAP appears to confirm some of the criticisms in the South about NNGOs assuming that all the necessary skills for organisational and management development are in the north and need to be transferred to the South.

CAP and capacity building

The expatriate staff flagged up a number of contradictions to the principles of capacity building. Whilst working to build the capacities of the local communities, CAP's own capacity to manage and sustain the work was in doubt. The programme had grown on an ad hoc basis and was difficult to manage because of this growth. Expatriate staff were to some degree responsible for this as they often implemented projects that reflected their interests. It is also not clear why expatriate staff were being used in the programme. The literature advocates their use when local expertise cannot be found (Dichter, 1986). Yet as other NNGOs in the area demonstrated, the expertise was available. Nor is it clear that expatriate staff had the management skills necessary to run development projects.

The use of expatriate staff in senior positions meant that very little investment was being made to develop local staff capacities. In not sufficiently including local staff (who in some ways were better equipped to make decisions, having been with the programme for many years), in decision-making the expatriates failed to demonstrate a participatory style of management. The use of expatriates to build the capacities of local people can actually have the paradoxical effect of undermining the very structures they are trying to build.

It would appear that CAP's attempts to include local staff at senior level may have been derailed with the incident in which a number of local staff were dismissed for the misappropriation of funds. However, it could be argued that the misappropriation of funds occurred because the system for accounting of funds was weak, and that the frequent changes in senior staff meant that monitoring of funds was a weakness in management. In the final analysis, the incident is neither here nor there in the context of the broader discussion of expatriates or local staff, as either one of these sets of people can and do misappropriate funds.

'Cultural awareness'

Cultural awareness or its absence can be a double-edged sword. As the case study demonstrates, the lack of cultural awareness affected project effectiveness in some instances. Yet had CAP adhered too closely to cultural traditions, the small achievements in enhancing gender awareness and sensitivity may not have been achieved. All too often, culture and tradition are used to justify negative and oppressive structures and practises. The idea then becomes that NGOs working in development, should have a clear understanding of these traditions in order that the negative aspects can be challenged in sensitive ways.

Expatriate management as a key issue in NGO management

The literature and case study have highlighted a number of issues which show that the use of expatriates is a key issue in NGO management which is under researched. Further investigation is required in order that a better understanding of what is a complex issue can be gained. In the context of the wider debate on changing relationships between northern and Southern NGOs, the lack of detailed research in this area is a huge omission.

Are expatriates necessary in NNGOs?

Clearly at this exploratory stage it is not possible to answer the question in definitive terms one way or the other. The NGO literature on the whole comes to the conclusion that expatriates are costly and have not proved to be effective (Dichter, 1986; Fowler, 1997). However, the literature lacks detailed analysis on this issue. As the case study has shown, there are instances in which having an expatriate presence is beneficial. It then follows that expatriates are necessary depending on why they are used, in what way and in what circumstances.

Clear guidelines

The process of employing does need better management however. NNGOs that use expatriates need to have a clear policy on why they are using expatriates and in what circumstances. These policies should be clear, transparent and monitored and evaluated periodically in order that changing contexts can inform the policies.

Structural changes - global perspectives

NNGOs changing from welfare to development as well as changing their external operations, should develop internal structures and cultures that are inclusive and value all their staff. Here the generic management literature, which promotes global perspectives, through the development of approaches that are flexible and try to fit into the wider global environment may be of use (Reeves-Ellington, 1995). For example, NNGOs can widen board membership to include regional representation. Similarly, NNGOs can promote more learning and exchange amongst their operations in the South through the development of exchange programmes and secondments.

Redressing the balance of power

The literature and case study point to the fact that it is not simply an issue of *whether* or not expatriates are used by NNGOs, but *how*. In particular, NNGOs need to examine closely the power given to expatriates in relation to local staff. If they are to improve their effectiveness, international development NGOs will need to address this power imbalance in their internal organisational structures and confront the unequal relationships which may be created by the use of expatriates within their organisations. The power relationship between expatriates and local staff mirrors the wider debate of relations between Northern and Southern NGOs. These relationships affect the NGO's operations, its principles and its efforts to bring about meaningful and fundamental change. In the continuing search to find a new identity, NNGOs cannot afford to ignore this issue.

Notes

1. The UK and US literature discusses staffing issues broadly in terms of their relationship with other 'stakeholders' such as board members (Harris, 1989; McLaughlin, 1986, Herman and Tulipana, 1989). More recent literature on staffing concentrates on staff development, or Human Resource Development (HRD) (Fowler, 1997).
2. Expatriate is defined as nationals of the country in which the NGO has its roots, employed by the NGO to work abroad. This definition is problematic especially in the context of international NGOs that have operations in a number of countries. Nevertheless it provides a useful starting point at which to analyse the issues raised on the subject.
3. The terms Northern NGO (NNGO) and international development NGO are used interchangeably.
4. M S is a Dutch international NGO set up in 1962 to place Dutch nationals on development programmes in the South. In 1992 the policy of placing Dutch nationals was under review.
5. The expansion in activities was difficult to chart partly because of its scope, and also because there was little documentation of the expansion. Gaps in the information were provided by staff through the use of a participatory 'timeline' exercise.
6. In 1995, CAP dismissed 14 local members of staff for the misappropriation of funds. Amongst them was a member of staff CAP had hoped to promote to senior management level.
7. The rules on vehicles also affected expatriate volunteers who were not allowed to drive CAP vehicles.

8. In the Luganda language the proverb is 'Enkima tesala gwa kibira.' Proverbs are often used in this part of Uganda to illustrate points made in conversations, discussions, debates, and disputes.

9. The only changes made came after the dismissal of the local staff. Financial control systems were tightened which made the flow of funds more accountable.

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