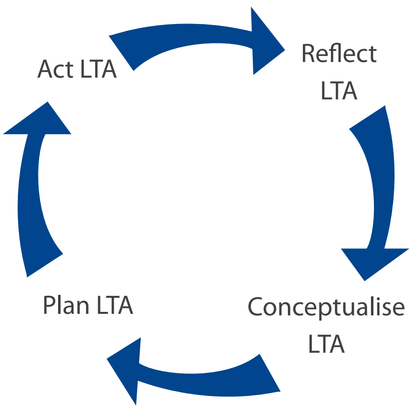
PART 2

Let's begin: achieveing your LTA

We live in a cycle and therefore need to constantly analyse, revise and evaluate regularly on how we operate, what we do, how we report and what we don't do. We are not proposing you create a separate LTA strategy; rather, assess your current goals, their achievements and your organisational processes against the LTA principles. Identify areas were improvements can be made and what resources you will need. Once you have done that, you might want to write your next LTA steps down and assign people responsible. Try to link LTA tasks to your main work and daily activities.

4. Planning your LTA

LTA deals with you from the moment you say that you have an idea. It continues to deal with you when you have the organisation and programmes. And it does not leave you alone after you submit the report. LTA, like any other organisational system, is a process: you need to act, reflect, conceptualise, plan and act again etc. (four stages of the experiential learning model).



Set a dream objective

Discuss and agree what LTA means for your CSO and what kind of organisation you want to be. Vision your future as an LTA organisation. Your LTA plan should be designed so that it helps you to move from the existing state to the visionary and wished state.

Assess yourself

Then, you should take your "LTA audit" of the existing state and see how you are actually doing. Between your dream vision and the assessment, you can see what you are lacking and what you need to do; devise your plan, choose methods tools and begin the implementation. Here is a checklist for the assessment or LTA audit.

Tip

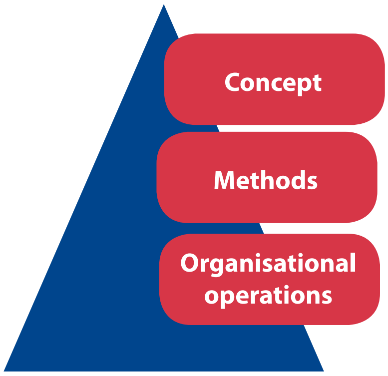
Urmo Kübar, NENO: Before you begin with the assessment, take a moment and think who you could engage in this exercise. Indeed, an executive director or a manager can do it alone, but by involving the governing body and the staff you manage to bring in more angles and opinions. LTA assessment is mostly about them and less about facts. If you have time and are ready to do that, you may want to ask your members, beneficiaries, partners and funders since they could provide different opinions. For example, the bureau of the CSO constantly sends overviews and information to the member list but the members do not read them since there is too much information, the texts are not edited properly or they are far too long. As a result, the actual work of the CSO may remain unclear and unnecessary.

	1 to 5 5 = Very good 1 = Very poor	What to do? Our next steps:
Are we legitimate:		
We have an accurate statutes/ bylaws		
We oblige to the law		
We have an appropriate and clear mission, vision and goals		
We have an intelligible and shared strategy on how achieve the goals and implement the mission		
We have identified, promote and honour sectoral values (e.g. code of ethics)		
Our activities and goals are widely seen as appropriate, proper and "making sense" to the larger society		
Our stakeholders are satisfied with the quality of our work		
If possible, we involve volunteers and have a respective policy		
We have a policy and principles of being politically and financially independent (i.e. funders and legislators do not prescribe CSO's mission and activities)		
We have set up or joined a joint civil society platform to discuss civil society and our mission related issues		
Are we transparent:		
We are open, clear and communicative about our: - mission, vision, goals and activities as much as possible. It is especially important for advocacy CSOs and those who advocate for a topic, not for a particular group; - leaders, staff and members; - activities, services and projects to achieve its goals; - funders, income, expenditure and voluntary work; - information we have, collect and use for our work and the development of our particular field		
We have clear decision-making procedures and guiding principles in place		
We have clear fundraising procedures to ensure independence in place		
We have developed resource mobilisation policy and procedures in place to ensure that resource mobilisation activities are consistent with mission and vision		
Our programs and budgets are established for fundraising period and consistently used in proposals/reports		

	1 to 5 5 = Very good 1 = Very poor	What to do? Our next steps:
We have clear procedures for adopting advocacy/ policy positions		
We have functioning internal communication mechanisms		
We involve our stakeholders in a transparent and efficient manner		
We have clear procedures for collecting, verifying and offering information		
We use auditors, budgetary reviews, independent evaluators and democratic election mechanisms		
Are we accountable:		
We have established internal policies and procedures, e.g. code of ethics, gender policy, transparency policy to improve organisational democracy or follow existing one		
We have established appropriate organisational structures to mobilise people and resources through commitments to values and missions		
We have established appropriate governance (board) systems and procedures		
We have set financial and management accountability and controls to improve our financial independence and transparency		
We have established appropriate diverse stakeholder (members, donors etc) involvement and reporting mechanisms		
We have created mechanisms for stakeholder feedback		
We engage our stakeholders in the review of its mission, activities and impact measurement		
We have created monitoring and evaluation of activities, independent program evaluations and social audits to increase our public reporting about our work		
We address problems and have created complaints handling mechanisms		
We practice responsible advocacy		
We do not discriminate		
We manage the organisation professionally		
We use annual report, donor reports, social report, activities report, financial report, environmental report (ecological footprint)		

Prioritise your challenges

Once you have finished the assessment, you may be faced with hundred tasks. Take a moment and think carefully how you prioritise and plan you work, how you design your strategy. We suggest you look at all your LTA challenges via the "Concept-method-organisation" scheme:



Adapted from Willem PA van der Tuuk Adriani and Smit Sibinga

TIP

Dave Brown: Try to focus on how you practice LTA with respect to your organisational own strategy. Instead of creating another one, include it in the existing strategy. How can it generate information that allows it to be transparent and accountable about its performance in delivering service, building capacity or advocacy?

Level	What it means:	How to reflect LTA:
CONCEPTS	In the concept part, we deal with the main purpose, mission, goals and plans of the organisation – why we exist, who we serve, why we do what we do.	Look at the results of the LTA assessment and analyse which are conceptual challenges, which do not allow you to move forward, which prevent you, which pose considerable obstacles to all other level and which don't. List them according to their priority levels.
METHODS	In the methods part, we choose how we do it – do we have members or not, do we have a board, do we have programmes or do we have projects or do we have services, what actions we need to take etc.	Based on the priority list according to the concept, revise what challenges you can and should deal with on the methods level. E.g. work with members, activate the board, etc. What is important that the steps on this level are based on the results of the concept level.
OPERATIONS	In the organisational operations, we then decided what systems we need to put in place for those methods to work for that concept to achieve.	And then you reach the last level. You know which LTA challenges are critical on the concept level; you have grouped and screened them on the methods level; now you can see what you need to actually exchange or work on in your operations. Do not begin with operations.

Devise your LTA plan

If you are still confused, go through these ten points. That outline helps you to put it in writing:

1. Formulate your general vision and state what kind of LTA organisation you want to be – although most of us want to be legitimate, accountable and transparent, we might lack the actual content of what it means. Therefore the previous assessment and analysing and screening the results based in three levels is necessary since they help you to articulate what these concepts, LTA, mean in your organisation and what you need to achieve. Then test them on your staff, board, beneficiaries,

partners, etc. To see if they sound important, achievable and sufficient also to them. In other words, avoid making general goals like "We want increase our legitimacy".

2. Look at the LTA picture where your organisation operates, who its stakeholders, funders, partners are; what they are expecting from you; how much transparency they are assuming; what are the "mainstream" LTA norms in your sphere of work (e.g. annual report public on websites, written in a manner that a person with little knowledge of your CSO is also able to read).
3. Assess your LTA – what you really are; what you need to do; what your challenges are; what you do well; what happens around you that enables or prevents you from achieving your goals. Focus on LTA, not on everything under the sun. You have those results based on the assessment described before.
4. Set your LTA objectives and goals – long-term objectives (major change you want to achieve, e.g. increase our transparency) and goals (objective that is made specific with respect to magnitude, time and responsibility, e.g. all our reports will be made public by 2011, on the website and who is responsible). So, what are the three-four main LTA objectives you want to achieve? But begin implementing them one by one since some of those changes can be quite big and you and your people will be so swamped and overwhelmed.
5. Choose your methods – what actions are you going to take to achieve those goals? Look at the tools in the database for ideas.
6. Determine your performance benchmarks – how do you monitor and evaluate your progress? How do you report? And do not forget, be realistic and take one goal at a time.
7. Implement your plan – make sure you have budgeted money, you have a person/ persons responsible, work on your systems and tools.
8. Communicate, especially the changes – LTA affects all others around you, your board, your members, your funders. Some changes might seem strange and some harsh. Make sure you negotiate and communicate them. If possible, allow feedback before actually implementing them.
9. Monitor, evaluate and think cyclically: act, reflect, conceptualise, plan à act.
10. Report on LTA – do not settle with "We did this". Go for what impact your LTA had, how you know that, what happened in the society because of you, how much environmental resources you used etc. By impact, we mean the effects your LTA steps on your organisation and its stakeholders. For example, if you decided to publish your annual report on your website, are your stakeholders finding it easier to know about you, has your reputation increased, etc.

Also find friends. It is not a one person job.

Matching actions with objectives and goals

First and foremost, keep in mind that both the LTA objectives and goals and the subsequent actions are your choices and based on the needs of your CSO. You do not need to follow exactly what others are doing; you should also not copy others' actions. Make sure you know what is needed and expected from your CSO in the field of LTA by your people, beneficiaries, partners and funders. Here are some examples and if you have a good peer story that you want to share with others, please send it to lta@civicus.org or send us a link.

TIP

CSOs should plan their LTA together with general organisational planning (strategy and operations); include LTA as part of the strategic planning process rather than a whole new process that will look intimidating to CSO leaders who are already overworked. Tie LTA to strategy and organisational impacts for the purposes of strategic and operational learning as well as responding to accountability and legitimacy issues. LTA should form a part of an organisational culture.

LTA area	Possible goals	Possible tactics/ actions	Good peer story
Overall LTA of your CSO	Plan your LTA together with general organisational planning and prepare an LTA strategy for the next 2 years and implement it.	- Appoint an LTA team (begin with giving it as an extra task to somebody; hiring an outside person is costly and migh also be seen as an imported product) and give them a task to develop your LTA strategy. - On your website, enable your people and your stakeholders to offer recommendations and facilitate feedback on your steps. - In addition, visit your members, have focus groups, use open space methods etc. - Communicate your initiative to your stakeholders. But if you want it to reach the target groups, make sure you use a variety of channels and methods and use them consistently. Write about your LTA plans and actions in a newsletter, give easy-reading overviews in your blogs, talk about them in your general assembly, etc.	How we prepared an LTA strategy for our organisation.
LTA monitoring	Monitor and evaluate your LTA achievements regularly and improve your LTA performance.	- Fill each goal in your LTA strategy with specific content on what the principles mean, how you measure it, how well you are doing and what needs to be done. - Build the LTA reporting into the general staff reporting on projects and programmes, focusing not just on outputs but also on outcomes in the framework of LTA.	CIVICUS Acc Charter
Member engagement	Develop a member engagement plan and have all your policy statements and positions discussed with your members proactively.	- Analyse your current practice and write down when you need to inform, when to consult and when to involve your members. - Analyse your advocacy work and write down what statements	A good member policy. How do you ensure representativeness in decision making processes.

LTA area	Possible goals	Possible tactics/ actions	Good peer story
Accountability to beneficiaries and to target groups	Have a proper reporting to communities on peripheral areas, to those vulnerable and end beneficiaries of the CSO's missions and programmes in place.	- Together with the end beneficiaries, analyse and develop the model of your outputs and outcomes and indicators that tell you and your beneficiaries of your impact. - Constantly facilitate input and feedback from end beneficiaries.	How to go beyond the simple checklist of accomplishments and/ or donor requirements.
Governance	Develop procedural systems for governance within your organisation.	- Revise your existing internal procedures, both written and oral, and ensure that you have policies for the conflict of interest, financial and political independence, representation, decision-making and purchasing of good and services in place. - Get acquainted with good governance principles and revise your existing board practices.	How have you developed a code of self-regulation for the CSO or for the sector.
Communication	Publish your annual report on time; include also a report on your social and ecological impact. Use IT tools (website, TV, etc) and social media tools (blogs, Facebook, twitter, wiki etc) to promote your CSO and your LTA	- Appoint an outside person to read and edit your report. - Map and use all possible tools and channels to release and promote your report.	How have you used IT in reporting, collecting data and communication.

5. Choosing accountability tools and processes

** by Karin Weber, Programme Analyst M&E, United Nations Population Fund.*

Design and implementation of accountability is practised in many different ways in order to give an account, to take account of, or to be held to account. Existing tools, techniques and processes of accountability are summarised below. Key characteristics of the accountability mechanisms, tools and processes discussed are presented in table at the end of this section.

Information and reports

Accountability and transparency of organisations to their clients can be increased by making reports publicly available at the community level (Cavill & Sohail, 2007). According to Naidoo (2003) documents such as annual reports, organisational or project evaluations, strategic plans and regular communications (newsletters, updates, briefs) can provide channels for public access to information about the organisation's work, financial status, governance structure and operational impact. Ebrahim (2003) emphasises that the distinct and tangible nature of these documents makes them easily accessible. However, the majority of this reporting emphasises upward reporting of financial data, with only limited indication of the quality of the organisations work and almost no attention to downward accountability to stakeholders.

The Global Reporting Initiative (GRI) and AccountAbility's AA1000 state that reports alone have little value when they fail to inform stakeholders or support a dialogue that influences the decisions and behaviour of both the reporting organisation and its stakeholders. According to them a quality reporting process is governed by the principle of accountability, which is itself underpinned by the principle of inclusivity. In other words: accountability to all stakeholders (AccountAbility, 1999; GRI, 2002 in Cooper & Owen, 2007). There are countries that have established standards for disclosure and public reporting. Naidoo (2003) shows that several organisations have adopted these standards in other contexts on a voluntary basis.

Auditing

Auditing is a systematic control-oriented process assessment to evaluate the match or discrepancy between an established standard and the existing condition (Rist, 1989 in Dicke & Ott, 1999). In financial audits, auditors conduct a formal assessment or verification of financial records. In program audits, auditors try to verify that program goals and objectives are achieved (Sharkansky, 1998 in Dicke & Ott, 1999). Auditing is most effective when there are clearly established standards by which performance can be measured (Dicke & Ott, 1999). Ebrahim (2003) states that social auditing should take place especially through stakeholder dialogue.

Monitoring and evaluation

Another set of tools that is used for facilitating accountability includes different kinds of monitoring and evaluation methods (Ebrahim, 2003). The most common monitoring methods include direct observation and progress (Dicke & Ott, 1999). Evaluation often includes performance and impact assessments. It is important to distinguish between external and internal evaluations (Ebrahim, 2003). Evaluation (with the exception of mid-term evaluations) take place in retrospective audits, whereas monitoring is ongoing. According to Cavill & Sohail (2007) most International CSOs (ICSOs) have monitoring and evaluation requirements for donor funded projects (for example, log frames, performance assessments, strategic evaluations, reports and disclosure statements). These are used as a mechanism through which an ICSO can be held to account.

Self-regulation

The term 'self-regulation' refers to efforts by organisations to ensure quality assurance, expertise and competence in their performance. Self-regulation mechanisms include voluntary (or certified) compliance with codes of ethics or codes of conduct, but can also imply complaint mechanisms (Ebrahim, 2003; Naidoo, 2003; Cavill & Sohail, 2007). Naidoo (2003) states that "the idea behind self-regulation mechanisms is that the sector itself should be actively engaged in promoting a certain set of values and norms as part of maintaining a public reputation for professionalism and high ethical behaviour". Dicke & Ott (1999) question whether established codes of ethics are adequately defined to be enforced in any meaningful way. Consequently main criticisms of self-regulation mechanisms point to the 'non-enforceability' of such mechanisms. Very few mechanisms involve a certification process whereby teams of evaluators are empowered to grant or withdraw certification to organisations (Naidoo, 2003).

Contracts and Legal Control

Contracts are "formal, binding agreements between two or more parties, presenting pledges of tasks, acts, processes, products, or resources, to be provided by one party in exchange for a consideration (money or other goods) from another party" (Rhea, Ott, & Shafritz, 1988:163 in Dicke & Ott, 1999). A contract is an agreement to do or not to do a certain thing. Contracts include three major components: agreement about what is to occur (or not to occur), specification that performance will be in accordance with an agreed upon plan and financial consideration (Dicke & Ott, 1999). Cavill & Sohail (2007:235) make a distinction between enforceable and non-enforceable laws and regulations. UK-based CSOs, for example, must register with the UK Charity Commission in order to operate as charities in England and Wales. In addition CSOs must act in accordance with a number of other laws (i.e. non-profit legislation, international human rights law, local and national laws) as well as legal and quasi-legal mechanisms such as contracts and memoranda of understanding.

Board of Trustees

Boards of trustees, according to Cavill & Sohail (2007: 235), have "responsibility for the overall policy, the direction of [the organisation], monitoring and approving the financial income and expenditure, while also ensuring that the organisation operates in a way that complies with statutory obligations and in accordance with its own mission and values". Naidoo (2003) explains that governing boards are comprised of individuals external to the organisation. They are selected by and operate according to clearly defined and transparent procedures.

Whistle-blowing

Whistle-blowing is an action by an individual who believes that the public interest overrides the interests of an organisation and who publicly exposes corrupt, illegal, fraudulent, or harmful activity (Shafritz, 1992 in Dicke & Ott, 1999). "Whistle-blowers may be internal or external to an organisation and may include, for example, government employees, contractor employees, advocacy groups, or the media", as stated by Dicke & Ott (1999).

Participation

Participation is quite distinct from evaluations and reports because it is an accountability process rather than a tool. In examining participation, it is helpful to distinguish between different levels of participation. Ebrahim (2003:818-819) makes a distinction between four different levels or kinds of participation: 1) participation refers to information about a planned project being made available to the public, and can include public meetings or hearings, surveys, or a formal dialogue on project options; 2) public involvement in actual project-related activities, this may be in the form of community contribution toward labour and funds for project implementation; 3) citizens are able to negotiate and bargain over decisions with CSOs or state agencies, or even hold veto power over decisions; 4) people's own initiatives occur independently of CSO and state-sponsored projects. Examples of this last kind of participation include social movements. Ebrahim explains:

The first two forms of participation are commonly espoused by state agencies, donors and CSOs and are based on an assumption that poverty can be eliminated by increasing local access to resources and services. At both of these levels, very little decision-making authority is vested in communities or clients, with actual project objectives being determined by CSOs and funders long before any "participation" occurs. (2003: 818).

Levels three and four of participation stress that poverty is based in power structures embedded in social and political relations (Ebrahim, 2003). Consultation and participatory mechanisms that are being used by organisations include: stakeholder survey, stakeholder dialogue, focus groups, discussion forms, participatory evaluation and consultative committee type structures (Cavill & Sohail, 2007; Cooper & Owen, 2007; Ebrahim, 2003). It is however difficult to make direct links between a specific participatory process and a particular management decision of a organisation. Whilst, for example the bringing in of a consultative committee, with direct lines established to main board level decision- making, is certainly a step forward in transparency terms, it is debatable as to how much such initiatives achieve in terms of empowering stakeholders and thereby democratising a process. The crucial question from a stakeholder accountability perspective has to be whether the engagement and 'dialogue' processes they are invited to participate in do meaningfully influence specific aspects of decision-making of the organisation (Cooper & Owen, 2007)

An overview of the key characteristics of the accountability mechanisms, tools and processes discussed above are presented in this table:

Accountability mechanism (tool or process)	Accountability to whom? (upward, downward, or to self)	Inducement (internal or external)	Organisational response (functional or strategic)
Information/ reports (tool)	- Upward to funders and oversight agencies - Downward (to a lesser degree) to clients or members who read the reports. Or downward when the principle of inclusivity is adhered to	- Legal requirement - Tax status - Funding requirement (external threat of loss of funding or tax status)	- Primarily functional, with a focus on short-term results
Auditing (tool and process)	- Upward to funders - To CSOs themselves - Downward and upward to stakeholders in case of stakeholder dialogue	- Funding requirement (external threat of loss of funding or tax status) - Erosion of public confidence (external) - Valuation of achievement of program goals and objectives (internal)	- Functional to the extent it affects the behaviour of a single organisation - Strategic to the extent it involves CSO-stakeholder dialogue, promotes longer-term planning
Contracts and legal control (tool)	- Upward to funders and oversight agencies	- Legal requirement - Tax status - Funding requirement (external threat of loss of funding or tax status)	- Primarily functional, with a focus on short-term results
Monitoring and evaluation (tool)	- Upward to funders - Significant potential for downward from CSOs to primary stakeholders	- Funding requirement (external) - Potential to become a learning tool (internal)	- Primarily functional at present, with possibilities for longer-term strategic assessments

Accountability mechanism (tool or process)	Accountability to whom? (upward, downward, or to self)	Inducement (internal or external)	Organisational response (functional or strategic)
Board of Trustees (tool)	- To CSOs themselves - Downward when board members represent primary stakeholders	- Overall policy; ensuring that organisation operates according to its mission and values. (internal)	- Primarily functional at present, with possibilities for longer-term strategic assessments
Whistle-blowing (tool and process)	- Upward to funders - Downward to primary stakeholders - To CSOs themselves	- Public interest overrides the interests of an organisation (external)	- Strategic in that it concerns long-term change
Self-regulation (process)	- To CSOs themselves, as a sector - Potentially to clients and donors	- Erosion of public confidence due to scandals and exaggeration of accomplishments (external loss of funds; internal loss of reputation)	- Strategic in that it concerns long-term change involving codes of conduct
Participation (process)	- Downward from CSOs to clients and communities - Internally to CSOs themselves	- Organisational values (internal) - Funding requirement (external)	- Primarily functional if participation is limited to consultation and implementation - Strategic if it involves increasing bargaining power of clients vis-à-vis CSOs and CSOs vis-aa-vis funders

Source: Adapted from Ebrahim, 2003: 825

Monitoring and evaluation

Monitoring and evaluation of your organisation's LTA is not very different from your programme monitoring and evaluation. During the development and planning phase of your LTA system it will be necessary to develop an M&E framework with clearly developed short term and long term results, indicators, baselines, targets and methods and frequency of data collection, etc.

When developing your M&E framework for LTA it is important that your M&E framework reflects multi-stakeholder accountability. Specify how you will be accountable to different stakeholders. Being accountable to donors or governments will require a different set of methods and techniques than being accountable to primary stakeholders/right holders/ beneficiaries. For example, the level of participation will be different as well as whether data will be collected by internal or external actors. When collecting data on your LTA progress especially participatory methods and techniques of data collection will prove to be useful. Consider, for example, stakeholder dialogues, focus groups, discussion forms and participatory evaluations. For quantitative data, a partner survey is a good tool to receive first hand feedback from partners on your organisations' LTA performance.

In addition, ensure user friendliness of M&E data for all stakeholders, especially when it comes to language, the way you present data and validation of findings. For example, when writing an evaluation report ensure that the report (or at least the executive summary) is available in the local language of the target group. After collecting data in the field ensure that you go back to the field to follow-up on the results of the evaluation and to validate your findings with all different stakeholders. Consider using different methods of presenting findings other than reports since not all stakeholders (in most cases especially beneficiaries) are literate. Be creative and consider using different media such as interactive workshops, gaming and simulation, or even radio and television to receive feedback on your organisations' performance from different stakeholders and to validate findings that resulted from monitoring and evaluation.

TIP

It is important that your people have a common and shared understanding of the organisation's LTA objectives and consecutive activities and that your beneficiaries and stakeholders have a clear understanding of organisation's LTA purpose, role and activities.

6. Getting people on board

Do not begin the LTA efforts alone and do not implement the LTA principles alone. Together you can make a difference.

Openness and clarity within your organisation

Engage your people (staff, board, volunteers) in the LTA visioning, assessment, planning and implementation. They can articulate what has been worrying them, where they see shortcomings and what challenges they have faced by your partners, members etc. They have the most contacts with the beneficiaries of your CSO. Make it possible for them to give input, choose methods to facilitate that and give feedback. Be clear about the purpose of LTA: not to sack anybody but to improve the reputation, image and performance of your organisation. For example, you can create a forum in intranet where people can discuss LTA issues; you can include LTA into your regular staff meetings; you may discuss the LTA and its part in the organisation-wide strategy in a staff retreat; you could include LTA into a project or annual reporting, thus making is part of everybody's thinking and attitude. There is no need to build a grand system; do simple, logical and reasonable things.

There are two important things to keep in mind: first, communicate properly and clearly why and what you are doing. Otherwise your staff may get anxious and afraid. Second, once you have identified the LTA target for your organisation, make sure they are accurately reflected in all materials of the CSO: strategy, funding proposals, reports, job descriptions etc.

It is extremely important to discuss and explain all LTA promises and tools that you have made to funders or other stakeholders or you use to all people involved in your organisation.

Case study

As part of its board, CIVICUS has a governance committee that oversees CIVICUS LTA promises, shortcomings and actual achievements. They report the progress to the members of CIVICUS and take members' complaints and suggestions to the management of CIVICUS.

Leadership

It is quite normal for the CEO of an organisation to lead the LTA debates and process. But you can also delegate and share; for example, discuss it in your board and perhaps there is a board member who is willing to lead the LTA component.

Another option is to appoint an LTA team of the staff members. This is especially useful when staff is anxious about the organisation's LTA and there are also individuals who know about LTA practices and tools. And then there is always an option of bringing on an outside person. No matter what you choose, remember that the actual leadership should remain with the CEO (unless the board has initiated the LTA process because they are dissatisfied with the CEO's performance) and it is he/she who is responsible for allocating resources and delegating tasks. He/she reports to the board.

TIP

Involve the board since governance is their focus and LTA is widely also a governance issue. They need to be aware of and agree to the pursuit of LTA even if it may bring along disclosure of some mischief or problems.

Members

If your CSO is membership-based, the proper engagement (informing, consulting and involving) of members is one of the most important LTA questions. It could even be one of the LTA objectives: to activate its membership for executing and making decisions about its objectives by empowerment, training and systematic proactive involvement.

The reasons are quite simple: you get information, expertise, alternatives and ability to forecast potential impacts. Thus, you decisions are much better. Second, member engagement builds coherence and secures members' loyalty. Third, member engagement and CSO's accountability is a normal behaviour for an accountable, transparent and open organisation. Moreover, if involved properly, they can act as messengers and champions for what the CSO wants to achieve. Members also pay membership fees that allow the CSO to pursue its mission.

Another challenge is the conflict between the interests of the members and the interests of the particular sector and/ or other CSOs. For example, a national association conducted a study on income tax exemption on donations. Members want one; international law suggests different approach and the wider CSO community is asking for a third option. For that purpose, it helps for the CSO to have a policy in place on how to do what, when to inform members, when to consult them, when to involve them and when a consensus is appropriate and when a reasonable logical solution needs to be suggested. Such policy is very much a question of internal accountability and transparency that offers leads your CSO to higher legitimacy. Having said that though, the policy or approach should be flexible enough to allow the CSO to come to the best of decisions. For example, if there is no consensus among members or between the CSO and its members, the CSO might present various options that have been discussed and analysed beforehand what members want, what international civil society says etc. If these options are equipped with analysis and possible scenarios, they might offer information and increase awareness which could lead to a consensus.

TIP

Many associations still believe that they need to have more and more members. Moreover, some have even stated such a goal. Quite often, there is no need for this. Strength of the CSO does not come from the number of members only but from your ability to engage and work with them. Make sure you know why you have members, who they should be, what you offer them and what they give to you.

How to engage your members:

- In your communications and strategy preparation, be open, transparent, clear and flexible: do not hide things, do not be secretive and do not ask for input for decisions that have already been made.
- Allow your members access to information about the CSO and its plans at the early stages: remember, members own your CSO, not the staff or the funders.
- Allow your members access with "low costs": do not make their participation expensive or impossible.
- Make the engagement wide and balanced: make sure that you listen and consider all opinions and suggestions. Let your members argue among themselves. But you cannot listen or involve only those who are in agreement with you. Your role is to facilitate

and give your members the voice, not to be that voice.

- Keep a continuous and structured dialogue: don't approach your member only when a request from the government comes or some of your members require that. Make constant communication and feedback part of your strategy.
- Feedback: allow your members give you feedback and make sure that you give them feedback.
- Assessment and learning: evaluate how you have done, are your members satisfied, would they like something done differently, learn from them.

To achieve results, involvement must be the way of thinking, not just a series of actions.

TIP

You can involve members proactively, meaning you set the agenda. Or reactively, meaning you need to react to the requests of others. The more you concentrate on former, the easier it is to deal with the latter.

Engaging partners

There is no need to discover, discuss and implement LTA on your own. Building alliances with other CSOs and jointly approaching your LTA challenges is a crucial step in becoming more LTA. You can learn from each other, tell stories, solve problems, ask for information, seek experience, share opinions, discuss developments, visit each other, map knowledge and plan for the future. If you do it together, the whole LTA topic will have much more support and clout in the society. Moreover, you need to reflect your own understandings and perceptions of what is accepted and expected by your stakeholders, including your partner CSOs. For that purpose, it would be useful to tackle the LTA challenges and possible responses together with other, like-minded CSOs. Sometimes, it may lead to actually creating a joint self-regulation mechanism like a code of ethics.

As a result of such joint discussions and platforms, you are in much better position to know your partners and make sure that you choose open, responsible and legitimate ones. You can talk to your partners about their LTA principles and implementation: have they thought about them? Have they done anything? What codes govern them? What do they consider ethical and moral? If you have doubts or you not happy with their answers, you can help them to improve their practices by sharing your expectations and performance principles. With partners, we do not consider only other CSOs you work with; we also think about your funders – for example, you accept resources from organisations (foundations, businesses etc) that are sharing your values.

Olga Gladkih Senior Program Staff -- Advocacy & Citizen Engagement, Coady International Institute, St. Francis Xavier University:

Credible evidence to support CSOs' views is required to be seen as a legitimate voice on issues of public concern, particularly those engaged in advocacy work. CSOs often, however, do not have the capacity to conduct rigorous, reliable research on their own. One way CSOs have addressed this gap is to turn to universities and research institutes to investigate and report on issues of local, national and global importance. This type of joint university/community partnership is gaining increasing attention in countries such as Canada where action research is being conducted into the social exclusion faced by aboriginal peoples in the health sector. Similarly, CSOs could engage with universities to help them design, monitor and evaluate their LTA practices and to provide evidence to their stakeholders, including donors, the state and the general public, about the effectiveness of LTA activities and the importance of investing the time and energy to engage in them.

TIP

Rules of engagement for other stakeholders are the same as for members. Probably it is easier with members since you know them better and you might have more direct channels, but the logic and approach behind the engagement are the same.

Your members and stakeholders have their own strategies, principles and missions. As a legitimate and accountable CSO, you should involve your target groups in the discussions about what your LTA might mean to them or how it may affect them. Your plans cannot be imposed on your members and stakeholders; you need to sensitise them to your plans and LTA principles and demonstrate how jointly you can achieve them better.

It is fair to say that if you have achieved your staff's common and shared understanding of the CSO's objectives and consecutive activities; have built LTA in your organisations strategy and have a small LTA action plan and budgets in place; you have facilitated suggestions for the development of your CSO's LTA; and the public has clear understanding of your CSO's purpose, role and activities, your LTA efforts have been successful.

7. Communicating your LTA

One of the key tasks in implementing the LTA is let people know about your plans and actions. Sensitise your audiences to your LTA steps, inform them, and, if necessary, involve them in the process. Do not forget the media including mainstream, community and alternative social media for broader reach and to build a public profile for your CSO and its work.

Act and then communicate

Once you have set your goals and devised tactics (prepared an activity plan), communicate. This is usually one of the main mistakes CSOs do – we do good things and we do them well, but we do not bother to talk about them! Perhaps one of the reasons why we don't do that enough is that when taken separately, many LTA actions are quite small and simple things, e.g. implementing an innovative approach of getting feedback from the members. Yet they are important. Perhaps one way is to use less official or ceremonial methods to spread the word, e.g. write about the innovation in your blog; or instead of a long analysis of your impact, rather talk about your experiences and lessons learned after the innovation was put into practice; or organise a focus group or chat group to discuss what other methods have been and can be used. LTA can be easy, simple and consist of small steps.

Tip

First and foremost, focus on your work and use LTA; do your work well and only then talk about it. You can add your LTA principles in your funding proposals, you may open your general assembly of members up to non-members and other interested parties, and you can write articles not on what you do but how you do it through LTA. Just keep in mind that by promoting your LTA, you are challenging yourself and your CSO to go for an innovative and advanced agenda.

Talk about expectations

Do not forget to communicate what effect you hope to achieve and what, if any, differences the new tactics will have on others. Again, no need for profound analysis; simply share your learnings and lessons during the general assembly, talk informally, and be open to questions and advice when other as you. Also, share with others what you expect them to do. Keep in mind that some of those ideas might be strange and "selling" them might take time, even to your most loyal members and supporters. In other words, once you are comfortable with your LTA plans and convinced that they are necessary and good, take into account that your members or stakeholders may not have been through the same process and you might move forward steady but slow. If you are a national association or an umbrella, you might consider to test your ideas within the CSO before you suggest your members to act.

Tip

Not all results of LTA may be good, especially when a CSO does not measure up to its goals and plans. Therefore there is a possibility of embarrassing shortfalls in committing to LTA and be careful about them.

Quite often CSOs tell what they plan to do but forget to express their expectations and, thus, may end up of being alone or not getting necessary support. In other words, a CSO can be very transparent and accountable, but if its members are not, they damage the reputation of the CSO and all LTA efforts may have little, if not negative, effect.

TIP

Before you promote your LTA and make LTA claims, ask for an independent party to analyse the balances between your promises and the actual truth, no matter how inconvenient that is. For example, when you claim that you are fully transparent, make sure that information on your achievements, people, resources and plans available and updated. Or when you claim that you are very accountable, make sure that you have reported it equally to all your stakeholders.

CASE STUDY

GuideStar International's work is premised on the belief that every national society gains from a diverse population of innovative, energetic, well-resourced and responsive CSOs. Through national GuideStars CSOs can explain their aims, activities, accomplishments, structure and finances. By making the work of CSOs transparent, over time, national GuideStar systems:

- make CSOs more visible, accountable and effective;
- enable more confident and effective philanthropy; and
- promote vibrant and well governed civil societies.

View the explaination of the GuideStar proposition.