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# Ndoto Au Ota: Jifundishe's Strategic Planning Process: A Case Study of an Appreciative Approach to the Strategic Planning Process for a Small NGO

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# *NDOTO AU OTA: Jifundishe's Strategic Planning Process*

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A Case Study of an Appreciative Approach to the Strategic Planning  
Process for a Small NGO

Meg Bearor

PIM 75

A capstone paper submitted in partial fulfillment of the requirements for a Master of Arts in  
Intercultural Service, Leadership & Management at SIT Graduate Institute in Brattleboro,  
Vermont, USA

Capstone Seminar Date: May 22, 2017

Advisor: Karen Blanchard

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Student Name: Margaret S. Bearor

Date: April 22, 2016

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I would first like to thank Jifundishe for welcoming me back into their community and for being open and willing to collaborate in this process. None of this would have been possible without their passionate participation and input in the creation of their strategic plan to craft a future desired by all. *Asante sana*.

I would also like to thank Karen Blanchard, my supervisor, professor of Intercultural Service, Leadership & Management at SIT Graduate Institute. Karen was always willing and available for me to bounce ideas off of. Her support never wavered in my pursuit of combining my hands-on experience and passions with my academic pursuits. My thanks also go out to the professors and staff of SIT for creating such a unique learning environment. And to my classmates, whom I learned knew things from every day. I will always value my time up on that hill in Vermont.

It should also be noted that I am forever grateful to Noah Cadet. He was a constant source of support and inspiration. Always ready with guacamole and chips.

## Abstract

In January 2017, Jifundishe, a small, local nonprofit organization based in Ngongongare, Tanzania undertook its first strategic planning process. I was asked to design and lead this initiative for the organization, finding a way to introduce tools and resources so that they, or a similar organization, could replicate the process in the future. To better reflect the values, culture, and constraints of Jifundishe, the methodology selected to drive the process was Appreciative Inquiry (AI). AI is a change model focused on strengths, and an appreciative strategic plan looks to take the best of what you already have and work to develop that further. This Independent Practitioner Inquiry Capstone (IPIC) seeks to identify how AI was used in the strategic planning process, examining what tools and approaches were chosen and how they were implemented. And then to present how those who participated in the process experienced it. Through a series of portraits, it became evident that using appreciative inquiry as an approach to the strategic planning process allows for the participants to participate in an inclusive, positive way and to dream big. This study highlights the importance of using a tailored approach to strategic planning grounded in AI methodology.

## Table of Contents

<b>CONSENT TO USE</b>	<b>II</b>
<b>ACKNOWLEDGEMENTS</b>	<b>III</b>
<b>ABSTRACT</b>	<b>IV</b>
<b>INTRODUCTION</b>	<b>0</b>
<b>BACKGROUND</b>	<b>1</b>
<b>ORGANIZATIONAL CONTEXT</b>	<b>3</b>
<b>LITERATURE REVIEW</b>	<b>5</b>
APPRECIATIVE INQUIRY	5
<b>RESEARCH/PRACTITIONER INQUIRY DESIGN</b>	<b>10</b>
CULTURE OF INQUIRY AND CONCEPTUAL FRAMEWORK	10
DATA COLLECTION METHODS	12
DATA ANALYSIS METHODS	14
LIMITATIONS	14
<b>FINDINGS</b>	<b>15</b>
<b>DESIGNING THE STRATEGIC PLANNING PROCESS</b>	<b>16</b>
<b>AI SUMMIT</b>	<b>19</b>
<b>PORTRAITS</b>	<b>24</b>
SUDI MULI – PORTRAIT	24
DEB KELLY – PORTRAIT	27
SAM OBAE – PORTRAIT	29
<b>DISCUSSION</b>	<b>31</b>
<b>SUB-QUESTION 1</b>	<b>32</b>
AFFIRMATIVE TOPIC CHOICE	33
USE OF THE 4-D CYCLE	33
ADHERENCE TO AI PRINCIPLES	34
S.O.A.R.	36
<b>SUB – QUESTION 2</b>	<b>37</b>
POSITIVITY	38
INCLUSIVE	39
DREAMING	40
<b>CONCLUSION &amp; FURTHER RESEARCH</b>	<b>41</b>
<b>BIBLIOGRAPHY</b>	<b>43</b>
<b>ANNEX</b>	<b>1</b>
<b>ANNEX 1: INTERVIEW QUESTIONS</b>	<b>1</b>
<b>ANNEX 2</b>	<b>2</b>

## INTRODUCTION

Graduate school was the next 'step' in my goals of becoming an international development professional. It was to supplement the work I had started to do in East Africa after I had finished my bachelor's degree. For two and a half years I worked around all of East Africa, spending the bulk of my time with a nonprofit in northern Tanzania, called Jifundishe, that is small by monetary calculations but not in impact. I first visited Jifundishe in 2008, when I was seventeen, at the time it was just a tiny, two-room, library. Today the organization is housed in a much larger, brighter space that includes a library, classroom, and community room. The work I was able to do with Jifundishe was rewarding and I learned so much. But I felt that my skills needed to be developed so that I could be a better ally and supporter for those I was working with and for. After my time on campus at SIT and engaging with my coursework I set out to complete my practicum with a large-scale International Non-Governmental Organization (INGO) in Washington, DC, called Pact. Pact has a focus on capacity development and of improving small organizations and individuals. Their vision reads, "Pact envisions a world where those who are poor and marginalized exercise their voice, build their own solutions and take ownership of their future" (Pact). During my internship, with Pact, I was approached by Jifundishe to support them with a strategic planning process. Knowing that I could not be present full-time at the organization I wanted to find a way to best support them through that process. From January to March 2017 we engaged in the strategic planning process, including a two week trip to Tanzania for some activities. What better opportunity to use my capstone as a practical way to merge my SIT education and my learning's from my practicum while simultaneously giving back to the organization and community that put me on this path.

## BACKGROUND

This paper examines how a small – in budget, scale, and scope – nonprofit conducted and perceived a strategic planning process grounded in appreciative inquiry. Jifundishe is anticipating a period of transition, growing at its quickest rate and expecting upcoming leadership changes. To prepare for these changes they undertook a strategic planning process. They reached out for support with this process. Through my time at SIT and in the Strategic Planning course offered there, I developed a solid foundation from which to work to support the organization. In addition to this knowledge set, I had the opportunity to work with Pact during my practicum, an organization that prioritizes capacity development and supporting its partner organizations building their abilities, and learn from them. Through Pact's work they have developed many tools to assess an organization's strengths and gaps, in order to best create a development plan.

Strategic planning is a necessary activity for an organization to go through because it helps provide direction and focus for all stakeholders. It directs the organization toward achievable results and outlines a set of steps for achieving them. The strategic planning process can also be critical for the various factions of an organization to stay on the same path and align themselves and their actions with the common mission. In the case of Jifundishe, they have existed for 10 years and are trying to phase out their extremely hands on co-founder and executive director and sustain their vision. There needs to be an understanding of the direction of the organization, that is agreed upon and understood by all members so that they can move away from having a single individual providing that direction. By developing a strategic plan an organization has a document that communicates their goals and the actions needed to achieve them. A strategic plan would make it possible for anyone to come in and continue running the



organization because there is a set of directions and priorities that everyone in the organization knows and respects that is the direction agreed upon.

There are differing beliefs on whether it is best to have the strategic planning process facilitated by an external entity or by someone who is a part of the organization. Myself, a past employee who is extremely familiar with the organization but no longer an active day-to-day member, conducted Jifundishe's process. This strategic planning process was developed as a part of a request by the organization. There is a direct need to the beneficiary (the requesting organization). They do not have a lot of financial resources and so having the opportunity to get someone who is willing and able to conduct the strategic planning process was of great need.

The area of inquiry of this report is grounded in a specific methodology for conducting the strategic planning process. The approach to this strategic planning is one that is rooted in their name. Jifundishe means *to teach yourself* in Kiswahili, nurturing what is already there. This approach to the strategic planning process was chosen to reflect Jifundishe and their values. An appreciative strategic plan takes the best of what you already have and works to develop that further. The same thing happens with Jifundishe's programs and how they work to develop the best of individuals and their community.

This area of inquiry is necessary because much of the information that is out there surrounding the practice of strategic planning is focused on a top-down approach from the person (or persons) conducting the strategic planning and dictating the results. But there is a smaller amount of research done surrounding tailored strategic planning for small organizations.

The research aims to understand how the Jifundishe community experienced the strategic planning process. In addition to understanding how the community perceived the experience, is the production of a strategic plan that the organization, Jifundishe, will use to better manage

themselves, and tools/resources used for this strategic plan and design process that they can use again in the future. The major component of this research is to understand how those who were a part of the process experienced the appreciative approach and to discover how the appreciative inquiry approach can make the strategic planning process as inclusive, positive, and collaborative as possible.

This case study is an exploration of how the appreciative approaches were used and perceived during Jifundishe's strategic planning process. The central research question looked at, *How was appreciative inquiry used and what was its reception in Jifundishe's strategic planning process?* And its secondary questions delved into that question further:

*How were appreciative approaches/tools used in the strategic planning process?*

*How did those who participated in the appreciative-based strategic planning experience the process?*

## **ORGANIZATIONAL CONTEXT**

Jifundishe is a small, Tanzanian non-profit that funds and manages projects for community development by providing educational opportunities to the community. Jifundishe is the Swahili word for *to teach yourself* and, as an organization believe in creating collaborative change for community members through both formal and informal education. Jifundishe is located in northern Tanzania in Ngongongare village and serves the surrounding four villages – a population of about 8,000.

They are a NGO and nonprofit working in and administered from northern Tanzania. The organization began implementing projects in 2005 by opening and running a free library in the village of Imbaseni. The mission statement of Jifundishe is: “To provide opportunities for young people as well as adults to teach themselves using technology, books, and programs relevant to

their lives and their futures.” This statement aligns with the translation of the Kiswahili word *Jifundishe*, *to teach yourself*.

Today, Jifundishe is a registered Tanzanian NGO, registered in 2008. Since its inception it has acquired land and extensive facilities in the neighboring village, Ngongongare. In a given week the library sees 400 unique visitors who are seeking to access their programs. It operates in partnership with Project A.B.L.E., an American 501c3, allowing it to accept tax-deductible donations from the United States.

Tanzania is one of the poorest countries in the world with overall literacy rates on the decline, and education opportunities often inaccessible due to financial, geographic, and resource constraints. The founding members of Jifundishe recognized that education not only greatly improves one's general quality of life - but also that literacy and schooling are important common denominators in addressing disease prevention, birth rates, access to income, and community health. Jifundishe employs all local staff with a few key volunteers from the United States. This diverse, multicultural team of staff and volunteers has allowed Jifundishe to develop a model of enrichment for those served. The organization has an operating budget of less than \$100,000 USD for any given year.

Currently, Jifundishe runs their programs out of the Jifundishe Free Library, which is home to over 4,000 books and resources, including all Tanzanian school curriculum texts; children's educational resources and games; a computer lab with internet access; and a safe, clean, well-lit space that is open to all to learn. The programs offered today are: UKUWAJI - Women's Microfinancing Group; Independent Study Program; and Secondary and University Scholarships.

## Literature Review

This literature review was undertaken as an assessment of current literature to support the exploration of the research question: How were appreciative approaches used and what was their reception in Jifundishe's strategic planning process? This question is hoping to explore how appreciative inquiry tools were used by the organization, Jifundishe, during their strategic planning process and how the process and use of tools were experienced by those involved. This literature review is an exploration of the knowledge base surrounding appreciative inquiry and how it has been used for organizational development, its critiques and validations and how the study can work to fill identified gaps in the literature. This will be done by examining the current literature, to better understand and place the development of the strategic planning process and appreciative inquiry as a methodological approach to strategic planning and to understand how it may potentially be perceived by those individuals involved.

Bear in mind that this literature review is of a sampling of material available on this topic, no claims are being made that it is a definitive or cumulative review of all the literature available, it is an attempt.

## APPRECIATIVE INQUIRY

There is a traditional approach to change that involves looking at a problem, doing a diagnosis and then fixing that problem. With the emphasis being on what was wrong or broken. Traditional strategic planning processes follow this approach by implementing the infamous SWOT analysis. By seeking out problems we emphasize them and amplify them (Hammond, 1998). In the early 1980s, David Cooperrider and Suresh Srivastva developed Appreciative Inquiry (AI). The approach looks to flip the conversation that often surrounds organizational change, and change

on a more general level. It is developed on the belief that the direction of the line of inquiry determines the direction of the change. Instead of looking into the *problems* of an organization as what you are trying to change, look at the *successes* and what the organization does best. Change in the direction of what is already good. It is the notion of finding what already exists and works well in an organization and capitalizing on that. Hammond (1998) says that because, "this is grounded in real experience and history, people know how to repeat their success."

Steve Webb (2001) describes AI as having two fundamental principles: 1) "appreciation of people and the organizational system" and 2) "articulation of organizational best practices as a means of creating a better vision for the future".

Other definitions and descriptions of AI by observers and practitioners:

*"Appreciative Inquiry is a paradigm of conscious evolution geared for the realities of the new century." (Hubbard, 1998)*

*"It [Appreciative Inquiry] is an affirmative approach to change which completely let's go of problem-based management and in so doing vitally transforms strategic planning, survey methods, culture change, merger integration methods, approaches to TQM, measurement systems, sociotechnical systems, etc." (White, 1996)*

In 2005, one of the founders of AI, David Cooperrider, recognized that his area of inquiry – AI – was hard to pin down and sum up. Depending on its context and use it can be classified as any of the following, *"a philosophy of knowing, a normative stance, a methodology for managing change, and as an approach to leadership and human development."* This study will be examining AI as a methodology for managing change. AI can be used to achieve many different means but at its heart, "Appreciative Inquiry is about the co-evolutionary search for the best in people, their organizations, and the relevant world around them." (Cooperrider & Whitney, 2005).

As noted by Cooperrider and Whitney, AI is a methodology for managing change. Webb (2001) acknowledges that as AI has developed into a change process, *“its aim is to generate new knowledge and to assist members of an organization to collectively envision a desired future.”* This is very like participatory approaches. AI as a process engages stakeholders from all levels. It is both an art and a practice of asking questions that work towards strengthening a system's capacity to understand, prepare for and increase their potential (Cooperrider & Whitney, 2005). When used as a methodology for managing change, organizations use AI as a way of examining themselves and upon reflection, identifying the areas that they are successful at in their current systems. Once identified, then they are to determine how to make those successes happen more consistently. Often, storytelling and interviewing are a part of the process, as a way to draw out the best and as a way of allowing people to easily visualize what a successful future might look like because they've already done it (Webb, 2001).

As a methodology for managing change, AI as an approach is also attitudinal. Sarah Michael (2005), in her examination of using AI as an interview tool for field research, recognizes that AI, *“looks to create an energy, a renewed commitment to change and sense of home among the groups of people working to achieve that future.”* This idea is supported by the numerous, successful, case studies of AI being used as a team building, visioning activity for organizations. AI, because it recognizes successes already achieved by the team, sparks that energy that comes from success and achieved good work. Like a plant leans towards the light – the heliotropic principle – so too will people be drawn towards positive actions and positive images of the future (Michael, 2005, Postma, 1998).

A recurring critique that has been appearing since early on in the life of AI is that the approach negates the failures and difficult experiences of the organization. But Elliot (as noted in

Michael, 2005) insists that the approach is not intending to not recognize those experiences as being a part of an organizations history but that they are making a conscious decision to choose a positive starting point. The more traditional approach to change management is to, first, identify the negatives of the organization – what needs to be changed, and from there set unrealistic, idealistic goals. Using AI as an organizations methodology for managing change, an intentional choice is being made to start at what you are good at and recognizing that “the positive core of organizational life is one of the greatest and largely unrecognized resources in the field of change management today” (Bushe, 2011).

Building off of the critique of the “best of” approach utilized by AI, Bushe recognizes that a number of researchers – Barge & Oliver, 2003; Fitzgerald, Oliver & Hoaxey, 2010; Oliver, 2005; 2005b – have consistently presented an argument on the lack of reflexivity within the approach. In addition, he notes that Oliver presents an argument that there is a consistent “decontextualizing and polarizing the positive to the negative” (Bushe, 2011). What is often overlooked in this juxtapositioning of the positive and the negative is that one person's negative could potentially be someone's positive, and vice versa. As Bright notes, “social constructionists argue that such meanings can't be pre-assigned by a third party, they are relational.” (Bright et al, 2011). But looking at this a different way, Johnson (2011) recognizes that the process does not need to discount those ‘negative’ experiences, instead when looking at them with an appreciative lens, they can result in “positive, generative outcome”. Like with any new fad or trend, newer more popular methodologies develop, which can result in some disillusionment from change management practitioners who use AI. But Bushe and Kassam, with similar statements made by Fry (2002), recognize that, “after 20 years it is abundantly clear that

appreciative inquiry, when skillfully done with proper sponsorship and resources, is a potent planned, transformational change process” (Bushe & Kassam, 2005).

Much of what is out there regarding the literature of Appreciative Inquiry are handbooks and case studies. Cooperrider – one of the fathers of AI – according to Bushe (2012) hesitated to write a book about AI because he was concerned that any book on AI methodology would lead people to focusing on AI as an event and stop experimenting if it became so prescriptive. In his hesitation, other writers came along and created many handbooks and tools for AI – the first of which was “The Thin Book of Appreciative Inquiry” by Sue Annis Hammond in 1996. This has become arguably the most widely read but does what Cooperrider fears and dumbs it down from a philosophical perspective to a simple set of steps (Bushe, 2012).

AI continued to develop through the 90s with the creation of the 4-D Model, and in the early 2000's the 5-D model. Early 2000's saw a plethora of AI articles and books being written – both theory and practice. By the mid-2000's the AI Summit became understood as an important tenant of AI as a way of enforcing widespread engagement. Again, thinkers like Vanstone and Dalbiez (2008) had concerns that AI would be seen as an ‘event’ instead of a long-term process.

Today some of the seminal AI literature come in the form of handbooks: *The Power of Appreciative Inquiry: Practical Guide* by Whitney and Trosten-Bloom, *Appreciative Inquiry Handbook* by Cooperrider, Whitney and Stavros and *The Thin Book of Appreciative Inquiry* by Sue Annis Hammond.

Although, AI has been around since the 80's as a methodology and it is a fairly common method of inquiry there is an expressed need, as identified by researchers such as Head (2005) and Bushe (2011) for more studies that explore AI in practice - it's successes, failures and explanations for what influenced these outcomes. Bryan (2009) and Messerschmidt (2008) call



for longitudinal case studies that highlight the nuances of the particular case. What they don't need more of are pieces that are descriptive and short, outlining AI and what it is. This research paper aims to begin to work to fill these gaps. As a case study that looks into the implementation, success, and reception of AI tools it will be both nuanced and could be used for future studies as a comparison when similar processes are carried out in the same or other, similar organizations.

## **Research/Practitioner Inquiry Design**

### **Culture of Inquiry and Conceptual Framework**

This research was conducted within the realm of qualitative research and is primarily exploratory research of a descriptive nature to increase our knowledge of an area by delving into a case study. The intended purpose of the case study is to gain an understanding of the motivations for, and opinions of an appreciative strategic planning process and to gain a better understanding of the effects this style of a strategic planning process has on the organization and its stakeholders.

This research is presented as an illustrative, sometimes known as descriptive, case study of the strategic planning process conducted at Jifundishe, highlighting how a (modified) AI Summit was used and its reception by those involved in the process. A case study is both a process of inquiry and the result of that same inquiry. This inquiry will be used to provide a more detailed picture of what happened in a particular case or setting and particularly where/when there is an interesting or unique story to be told (Neale, Thapa & Boyce 2006). Another way to

categorize this form of case study is by calling it an intrinsic study, "one where the aim of researchers is to better understand the case itself, as opposed to intending to understand some abstract concept or generic phenomenon" (Stake, 1995). This paper follows Stakes (1995) suggestion that when researchers are attempting to describe the effects or process of an intervention or circumstance then a case study approach should be taken.

This research project falls under the interpretive framework. Within the interpretive framework it is an ethnomethodological study intended to help the researcher understand how people make sense of their everyday world (Hesse-Biber & Leavy, 2011). It is intended that by implementing an ethnomethodological approach under an interpretive framework, it will provide us with evidence for how appreciative inquiry is used in strategic planning. This approach will allow us to engage with the personal, lived experiences of the research subjects to gather a qualitative interpretation of the situation.

Case study research is sometimes criticized for how it can introduce layers of subjectivity during the research stages of implementation, evaluation and presentation (Flyvbjerg 2006; Yin 2009). Yin (1984) identifies three common critiques of case study research: 1) A lack of rigor, often researches can be sloppy and let's evidence slip through the cracks or allow their bias to interfere. 2) They do not provide opportunity for scientific generalizations because the number of subjects is often too small to generalize. 3) The documentation produced is often too long and as a result of there being too much is often poorly managed. The most common criticism of case study research, according to Tellis (1997) is that they are too dependent on a single case exploration and this makes it difficult to generalize. These critiques were kept in mind while conducting the research and subjectivity of the researcher is addressed later on in this section. In regards to the Tellis' critique that case study research is often too focused on a single case and

difficult to generalize, it should be noted that this research was never intended for that. The research was intentionally conducted as an ethnomethodological case study to allow us to engage with the personal, lived experiences of the research subjects and to gather a qualitative interpretation of the situation.

### Data Collection Methods

To obtain credible data the methods of data gathering used in this research will be varied: observations, interviews, document review, and findings based on relevant research.

Methods:

- Research
  - Literature Review
  - Review of Documents
- Observations
- Interviews

### Notes on Methods

**Research:** The first phase of the data collection process was done in two parts: a literature review and a review of documents. The literature review was intended to place this research amongst what has already been understood about the creation and progression of appreciative inquiry and how it has been and can be used in strategic planning. The second phase was a review of Jifundishe's documents, including program implementation plans, financials, any evaluations and past grant applications.

**Observations:** As I, the researcher, was also the person who conducted the strategic planning process and activities I used my experience with conducting the process to support the research. Notes were taken after the summit and each planning session with members of the strategic planning committee.

**Interviews:** Originally I had intended to interview a total of 10 people who had been involved in the process to get an understanding of their experience. There were to be two focus groups, each with 3 people, in addition to there were to be 4 individual interviews. This would have resulted in a total of 10 people questioned. There was also an intention that there would be a gender balance of those interviewed, 5 female and 5 male. But at the time of the proposal it was not yet determined who these individuals would be.

After the strategic planning activities were completed a total of 8 people were interviewed. There were two focus groups – the first with 3 interviewees and the second with only 2 interviewees. In addition, there were three individual interviews conducted. A gender balance was maintained with 4 females and 4 males interviewed.

It should be noted that an appreciative inquiry lens was also used in the interview portion of this research. An appreciative-grounded set of interview questions were compiled. The questions largely revolved around the individuals' personal experience and how it made them feel/how they perceived the experience and less about what they know or the knowledge they have about something. This was intended to even the playing field of all participants because they all have feelings about this shared experience, even if they haven't all had prior experience with strategic planning.

It was intentional to use a variety of data collection methods to overcome any limitations that could come from just relying on one. Strategic planning is not a sensitive topic but because I was asking individuals to reveal and reflect upon personal experiences and perceptions, the interviews were conducted with sensitivity and carried out with the highest ethical standards. All interviewees were informed of the research and its purpose and were provided with all the

potential risks that could come from participating in the research. The interviewees were also informed throughout the process that they had the right to not answer any questions they did not feel comfortable with or stop the interview at any time.

### **Data Analysis Methods**

We will look at the strategic planning process - how it was executed, along with the elements of the AI Summit held in Tanzania. These events will be analyzed with the responses gathered through the interviews to identify how AI was used. The interviews will also be organized and analyzed to identify themes that emerged and variances. These findings were then compiled with my observations from conducting the strategic planning process, along with other research findings that came from the literature review process.

### **Limitations**

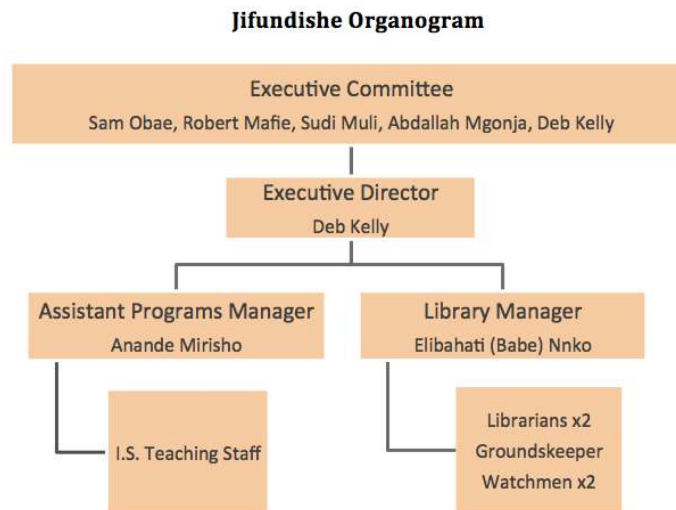
I traveled to Tanzania for two weeks, in February 2017, to conduct the strategic planning process; it was also during this time that I gathered most of my observations and interviews. Two of the interviews were conducted after I returned back to the United States due to time restrictions. Those interviewees were intentionally left until later because they had access to the technology needed to do a skype interview. Some of the other participants in the process do not have access to that technology and those interviews needed to take place while there.

Positionality was also a limitation that arose during this research process. Both my positionality as a white, Western interviewer, not of the community and also positionality of individuals within the organization. Power dynamics can be challenging both from an organizational standpoint but also from a cultural one. Tanzanian culture is very hierarchical and a lot of reverence is given to people with 'big titles'.

## Findings

The following section contains the findings from the research process – the design of the strategic planning process, the purpose goals and objectives of the AI Summit along with schedule and participant list, and 3 portraits of participants in the process. These findings will help us to answer the research questions: central question, *How was appreciative inquiry used and what was its reception in Jifundishe’s strategic planning process?* Sub-question 1: *How were appreciate approaches/tools were used in the strategic planning process?* Sub-question 2: *How did those who participated in the appreciative-based strategic planning experience the process?*

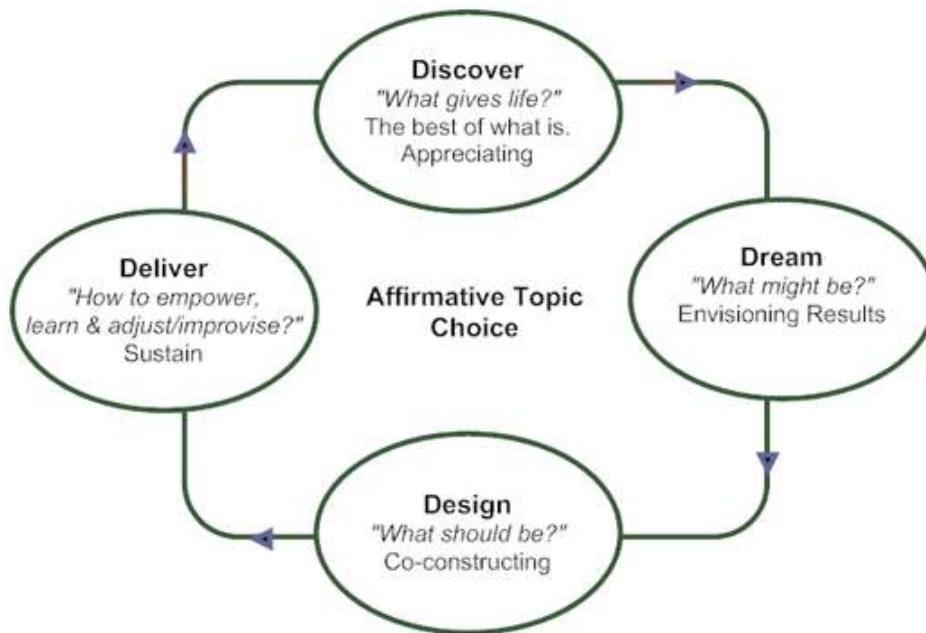
For Reference:



## Designing the Strategic Planning Process

The strategic planner, who proposed the idea for a strategic planning process, grounded it in appreciative inquiry spearheaded the design of the strategic planning process. Upon acceptance of this proposal by Jifundishe it became the responsibility of the Executive Committee to select an Affirmative Topic that would be at the driving purpose of the process. After some discussion between the Executive Committee and the Strategic Planner the following Affirmative Topic was chosen: *Developing a strategic plan that reflects Jifundishe's mission of community driven in both creation and implementation.*

Next came the plan design, this included what activities would go into the planning process. The design of the process selected was in line with Appreciative Inquiry and followed its signature model the 4-D Cycle to guide the process. For reference, the cycle is presented below.



"4-D Cycle", Cooperrider

## Phases of S.P. Process

The chart to the right, lays out what phase of the strategic planning process corresponds with which phase of the 4-D cycle.

Following that is the presentation of four graphics, each noting the activities required for that phase.

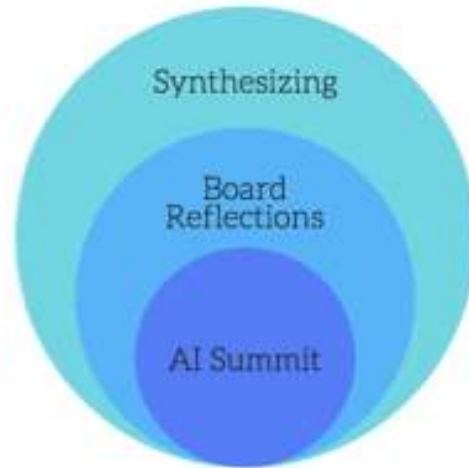
Discovery	<h3>Document Review</h3> <ul style="list-style-type: none"><li>• This phase began in January of 2017, reviewing program reports, budgets, and reviewing website and social media.</li><li>• Upon completion of this phase had completed the internal, external, and stakeholder analyses.</li></ul>
Dream	<h3>AI Summit</h3> <ul style="list-style-type: none"><li>• This phase of the process was completed on February 25, 2017 - Consisting of a full day workshop, first part with large group, second with Executive Committee.</li><li>• Upon completion of this phase had completed the S.O.A.R. Analysis and identified strategic areas.</li></ul>
Design	<h3>Planning</h3> <ul style="list-style-type: none"><li>• This phase of the process was completed between February 27, 2017 and March 31, 2017 - Consisting of sessions with planner and key Jifundishe staff.</li><li>• Upon completion of phase had completed strategic objectives.</li></ul>
Destiny	<h3>Future Activities</h3> <ul style="list-style-type: none"><li>• This phase of the process is ongoing between now and 2020!</li><li>• Upon completion of phase Jifundishe, hopefully, will have excelled in the areas of impact, growth and sustainability.</li></ul>



**Discover: Document Review**



**Dream: Workshop**



**Design: Planning**



**Destiny: Future Activities**

- 1. Effective Programming
- 2. Funding Opportunities
- 3. People Power
- 4. Spreading Our Message
- 5. Better Research = Better Impact

## AI Summit

On February 25, 2017 a daylong workshop was conducted for members from many of the stakeholder groups – participants, community members, staff, and Executive Committee members. The day was structured as a mini-AI Summit. Typically, an appreciative inquiry summit is, “a 3 to 4 day Appreciative Inquiry intervention that seeks to gather the whole system in one room to collectively go through all phases of the 4-D cycle.” (Cooperrider, Whitney, Stavros, 2008) Cooperrider says that AI Summits are unique and not formulaic but successful ones all have similar elements: a positive core and run through the 4-D cycle (Cooperrider and Whitney, 2005). Jifundishe's AI Summit was shorter than the average summit but followed the positive core and 4-D cycle structures.

### Considerations for Summit

A major consideration for the Summit was language limitations of both the facilitator and participants. The facilitator has a limited working proficiency in Kiswahili and while most participants have a working proficiency in English, there were a few that have a limited working proficiency in English.



It was important to the process that there be ample time for translation and when able to have material translated so all participants feel actively engaged the whole time. For example, the agenda, shown above, was translated by a participant (proficient in both English and Kiswahili).

*Ndoto* means dreaming while asleep and a more accurate translated needed to be made to indicate dreaming in a visioning for the future way. So *ndoto au ota* was agreed upon by the participants.

Another consideration for Jifundishe's AI Summit was the timeline. The Summit was tailored to be a one-day workshop and was dictated by a few time constraints. First was the time constraint of myself, the strategic planner, I was only in Tanzania for two weeks and had all of the other planning activities to conduct, in addition to the Summit. Secondly, the communities that surround Jifundishe are reliant on subsistence farming and most individuals have a *shamba* (small farm) that requires attendance nearly everyday. The AI Summit, due to availability of the strategic planner, was scheduled for the very beginning of planting season and therefore it was not appropriate to ask individuals to give up more than a day away from their farming, their livelihood. Also, we did not want to take away too much time from the library being open (it runs Monday – Saturday). And because the community is very religious, Sunday was not an option. The Summit was therefore set up for one day, a Saturday, to accommodate and not put-out, in anyway, the participants.

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### **Summit Logistics:**

Below is a list of program participants without names but including their relationship to Jifundishe, gender, and years associated with the organization. Following that list is a copy of the schedule of activities for the Summit. Including a brief description of the activity, along with a purpose statement for each activity.

**List of Summit Participants:**

1. Library Manager, JFL	M	9 years
2. Librarian, JFL	F	4 years
3. Assistant Managing Director	F	12 years
4. Executive Director	F	12 years
5. Teacher, IS Program	F	2 years
6. Past Participant / Teacher, IS Program	M	7 years
7. Community Member, Grandmother/Businesswoman	F	14 years
8. Community Member, Local Primary School Teacher	F	3 years
9. Community Member, former Executive Committee Member	M	12 years
10. Participant, UKUWAI	F	12 years
11. Member, Executive Committee	M	10 years
12. Member, Executive Committee	M	12 years
13. Member, Executive Committee	M	12 years
14. Chairperson, Executive Committee	M	12 years

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<b>AI Summit Schedule</b>			
<b>Part I</b>			
<b>Session</b>	<b>Activity</b>	<b>Purpose</b>	<b>Time</b>
Energizers	Babe, Library Manager, led the team in 3 activities.	To get participants loosened up.	15 min
Introductions	Everyone go around state name, how long they have been at Jifundishe, and their role.	For everyone to become familiar with each other.	15 min

Ndoto Au Ota: Jifundishe’s Strategic Planning Process

Activity #1 – Box	Connect the dots activity.	Get participants thinking outside the box.	20 min
Introduction to Strategic Planning & Appreciative Inquiry	Lead a quick presentation on SP and AI – definitions and answering any questions before diving into activities.	Provide background knowledge to all participants around SP and AI – so all participants feel comfortable with content.	30 min
Activity #2 – Appreciative Inquiry Interview	<p>First alone, then in pair share, then group share out – participants answer first two questions:</p> <p>1) What would you describe as being a high-point experience with Jifundishe, a time when you were most involved?</p> <p>2) What is it that you value most about Jifundishe, the work you do there and yourself?</p> <p>Question three will be shared out, a few seconds for reflection and then answers put on board:</p> <p>3) What factors give life to Jifundishe, without which we would not exist?</p>	Bringing the participants feelings and experiences with the organization into the room.	40 min
<b>Chai Break</b>			20 min
Activity #3 – Tree	Spread out lots of post it notes. First, have participants write down what Jifundishe is built on – put papers on tree roots. Second, brainstorm what makes Jifundishe strong – place on trunk of tree. Lastly, brainstorm what we are reaching for – put in the leaves of the tree.	To thoroughly understand what we know about what makes us what we are from, what makes us strong, and what we are striving for. To understand the perspectives of others.	40 min
Activity #4 – Dream Teams, Visioning	Break into groups of 3 to 4, give them lots of paper and markers to come up with their biggest and most creative plans of what Jifundishe would look like in 10 years with unlimited resources	To dream. To get a sense of what the community envisions for their organization.	1 hr
<b>Lunch Break – Prep for Executive Committee Session</b>			
<b>Part II</b>			
Board Reflection	Board discusses how the morning session went.	To allow the board a chance to reflect and digest what was brought up in the morning session.	30 min

## Ndoto Au Ota: Jifundishe's Strategic Planning Process

EEMO Questionnaire	Board anonymously responds to the EEMO Questionnaire.	Get a quantitative assessment of the organization.	45 min
Priorities Discussion	S.O.A.R. Analysis	Taking in all of the info from the previous sessions and begin to set priorities for strategic plan.	30 min

## Portraits

Following Jifundishe's AI Summit, 8 of the 14 participants were interviewed and provided feedback on their experience at the workshop and how they received the various AI methodologies and tools. 3 of those interviews were developed into portraits to represent the experiences of those individuals with the process and to give context to who some of the participants were. Each portrait is a mix of the individual's own words and background information, combined with the researcher's observations of the individual. In addition to these portraits, the Discussion portion of this paper will draw on some of the statements from other participants.

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### Sudi Muli – Portrait

*“Dreaming. Yes, dreaming. That was my favorite part.”*

Sudi is an occupational therapist by trade and an innovator at heart. Sudi Muli has been a member of the Jifundishe community on and off since it's beginning. For about four years now he has had an official position with the organization, first as Assistant to the Executive Director from 2013-2015, and since then as a board member. Sudi participated in both parts of the strategic planning summit – Part I: the full community session and Part II: the Executive Committee session. He felt that he needed to participate as a board member so that he could be *“fully involved in shaping the path of Jifundishe onwards”*.

Prior to participating in Jifundishe's strategic planning summit Sudi had had some familiarity with strategic planning, working with other organizations doing community work. Through that experience and by dissecting the word, he has come to understand strategic planning as, *“planning a strategy to do something”*. He had a good understanding from his past experiences of what a traditional strategic planning process entails: an organization, *“looking at*

*what they have and where they want to go and what they will need to get to where they want to go."*

Sudi's view of Jifundishe's strategic planning process is in keeping with Sudi's views of most things, grounded in reality but eternally optimistic. It was evident during his interview and through his participation and responses to the various activities at the summit that Sudi believes Jifundishe is doing a great job and that the organization matters but, *"we can't be perfect and we all need to do better every day and I think that's a nice goal to wake up in the morning to wake up every day to strive to be better in everything."* Sudi, who is a learner, has been well educated and has a thirst for knowledge – he is one of few Tanzanians I know who is always reading just to learn what he doesn't already know; of the thousands of users of the Jifundishe Free Library, one of a handful who have checked out a fiction book to read for fun. For him the strategic planning summit was an opportunity to *"learn something new and use that to shape Jifundishe's path"*.

At the outset of the summit it was apparent that Sudi was engaged in the activities – the opening activity (Activity #1) was done in small groups and was a puzzle that could only be solved by, literally, thinking outside of the box. Eager was the word written on Sudi's face, very engaged in the problem solving portion, and just as curious to see what others came up with. He very much resonated with the ideals of appreciative inquiry methodology. He said that he feels as though he has always practiced it but didn't know how to articulate it. *"[When I started working as an occupational therapist] I saw children and I was trained to do a SWOT analysis and every time I see a child I hesitate to write weaknesses and I don't know why but my hand stops writing... And when I came to the workshop, you talked about SOAR and it is very different from SWOT. Which is a very nice thing to look at something without focusing on the weaknesses so*



*being positive about something I think from my opinion is better.*” Sudi saw that when people are focusing on a positive they push themselves more and put less limitations on themselves, he noted how the appreciative approach and the SOAR tool do this.

Another tool that Sudi reflected on, as being important to him, was the 4-D cycle – Discover, Dream, Design, and Destiny. Dreaming was the word he came back to in his interview, noting that, *“Not very many people here believe in dreams. To them dreaming is only something done when you are sleeping and most people also believe that dreams are useless.”* He connected a lot of this back to the education systems of Kenya and Tanzania, Sudi did primary school in Kenya and secondary school in Tanzania. In those two contexts he reflected how people come out of school with a lot of things memorized and a lot of lines, boundaries. *“You have these lines these borders and they limit us to think outside the box you know if you are taught how to define this when the teacher asks you on the exam, they want you to write the exact definition that they give you don't think outside that.”* This *“blocks us to think, to imagine”*. These constrictions permeate life even after school. Sudi sees that recitation-style of knowledge as a hurdle to the community, and after 14 years of staying within those lines at school there need to be opportunities for individuals to see how things can be done differently, and then be given the resources to try. He highlighted the opening activity as a good way to start the workshop for people, *“to come out of this line and jump that line, and think outside the line.”* Sudi believed that dreams and thinking outside them box allows people to forget everything and stop thinking about stress and poverty, and that there was no food yesterday, *“dreaming is a moment when you become a little healthy.”*

*“You just think about the future and how you want to paint it. It is like painting a picture with brushes on all the colors in the world and no one is telling you where to put the colors no*

*one is telling you where to write, no one is telling you how thick the bristles should be just, just anything and then you will be appreciated. So the dreaming part was the favorite for me from the workshop.”*

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### Deb Kelly – Portrait

*“Change is hard no matter what approach you take. Everything is easier when it is viewed in a positive light.”*

[I have known Deb for nearly ten years now and my bias of her should be acknowledged from the beginning. It was still important for this case study that her portrait be compiled because of her unique role in the organization.]

Deb Kelly, a 60+, white, American woman never expected to spend the years after her children were grown in a village in Tanzania running a nonprofit. After a stint volunteering in the Ngongongare area Deb was a part of ongoing informal conversations with community members surrounding the creation of a community library, back in 2005. Fast-forward 12 years and Deb is still the Executive Director of Jifundishe. Given the reality of funding for small-scale organizations like Jifundishe in the global south, Deb's connections (that turned into donors) in the U.S. were critical to Jifundishe's survival.

Jifundishe will someday have an Executive Director who is not Deb and as that becomes more of a reality steps like strategic planning processes are being undertaken to ensure success. When asked what her hopes were for the strategic planning process, she responded: *“That we would agree on a way forward that helps us map out future programs and priorities.”* It speaks to Deb and her character – that she is not a stereotypical white savior living in a rural village in ‘Africa’ – that she looking forward to and anticipating her inevitable departure from the organization. Her stepping down is an acknowledgment that she replaceable. She has lived in the

community for 14 years, speaks the language but has never sought or expected to be 'of' the culture, only a part of it.

Deb spoke about how she wanted to ensure that as many voices as possible were heard at the summit. She acknowledged that often due to both her skin color and her position as Executive Director people defer to her or take her opinion as the only one. To avoid this, Deb only contributed during the summit after another opinion or two were already shared. And this was a huge opportunity for other voices to be heard. Deb also noted that she, *"was surprised by all the things I did not realize other people thought."*

This was the first strategic planning process that Deb had officially been a part of. She note she, *"was familiar with the SWOT process and knew we needed to talk about these important issues."* She was quick to note that she was surprised by all of the things that came up at the summit that surprised her. The opportunity for everyone to have equal ground and spread their voice was an extremely part of the day for Deb.

Having, *"always been a positive thinker"*, she really liked the appreciative approach to the process and the positive style of data collection. She *"felt that the positive approach gave everyone the confidence to speak. With positivity there is no judgment."* With the fear of judgment gone and using language and approaches that involved all participants we were able to see, *"everyone's ideas of the ideal future"*, which was her favorite part.

Her hopes for the strategic planning process are that it shows, *"our stakeholders that we are serious about the future of Jifundishe. And for the long-term, we will have a road map to keep us focused."* In Deb's opinion it is now their responsibility to adopt the changes that have been decided upon and to make sure that those changes and plans of action be communicated to the community at large, whether they participated directly in the process or not. In looking

towards the future, she thinks, *“there is a renewed sense of energy in those who attended.”*

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### Sam Obae – Portrait

*“I think this is going to be eye-opening for Jifundishe, first to realize what the weaknesses we have, what are our strengths and what is the better way now to deliver [our services]. Because as we grow, we grow with a lot of responsibilities and we also have to realize ourselves where we are going and start realizing the things that are really important for us to be able to live longer.”*

Calm, cool, and collected are the words that spring to mind when you see Sam Obae walk into a room. In a country where the pace of life is a juxtaposition of slow and chaotic, Sam never seems to be shaken. Soft-spoken but with conviction and expertise, Sam leads Jifundishe's Executive Committee as chairperson. He is also a founding member having been with the Jifundishe community for more than 10 years. Sam is the General Manager of a local nonprofit called Kilimanjaro Film Institute, providing film training to underprivileged youth in Tanzania. Sam brings an interesting perspective to the board – he was born and educated in Kenya, spent most of his twenties in the villages where Jifundishe is located and now as a successful adult has chosen to give back to that community and brings with him his experiences running a nonprofit.

Sam was the participant who had the most experience with strategic planning prior to the summit, having participated in three other workshops, he said during those times strategic planning was described, *“as a map that is clearly shown where you are and where you are going and what you need to reach your goal.”* He spoke about the other strategic planning workshops he had been a part of and how they were very formal, and followed a linear, step by step process: *“It has been formal, like a class – you come day one you talk about this and you are given an assignment to come, day two sort of like four days or five days before you reach conclusion.”*

Very formulaic. He noted that he was excited by our process because it was new and different than approaches he had used before.

Being a part of Jifundishe's strategic planning process was definitely something Sam noted he wanted to do but also very much viewed it more so as a responsibility he had as a member of the Executive Committee: *"it is one of our responsibilities to come up with the strategic plan for the organization because it is also our role to make sure it is actually built up and implemented."* As an Executive Committee member, he also felt the responsibility to, *"first learn from what others are thinking about the organization and bring it together and build it to something that is inclusive of all the stakeholders."*

In particular the appreciative approach really resonated with Sam because he felt a responsibility to not only participate as a 'high-up' member of the organization but also, as *"a fly on the wall and really grasp what others say and bring it together so that we can develop something."* He was very aware of the fact that this summit allowed for some lines to be crossed between the Executive Committee and the staff and participants. Sam identified two ways that the appreciative approach helped bridge the divide between the executives and everyone else, through the positive nature and its simplicity. *"The aspiration part really made it you know very positive because everyone felt the need to participate and actually break the line that I have been ashamed of. People really said what is there."* *"The approach made it very simple. You know with this professional language you build a very big wall. And the approach was very easy, I mean a lot of questions but very simple questions in a way that had very simple wording and very relating words and it made it easier for us to think and answer them."*

Sam found the appreciative approach that the strategic planning process took very good because he had gone into the summit *"prepared [myself] to be disappointed somehow because*

*you have questions all the time like - hmm we don't do this, we don't do that, and you feel like what am I doing here?"* He recognized that this was going to be a, "very challenging transformation" that the organization would need to go through and anticipated the summit to be that first challenge. He noted that normally with, "the SWOT analysis you know what are the weaknesses – you have twenty lines of weakness and only five lines of strength and you feel like hmm it's more harder to transcend to a professional level."

Sam spoke a lot about this, about "professionalizing" Jifundishe. In the past, "because the nature of Jifundishe has been very much rounded with the community feeling, we trust each other. So you end up doing things that perhaps you have never done it before. But just because you are passionate about it, you do something good and people appreciate it. But as we grow I think strategic plan is a key tool for us to grow and really sustain ourselves as we move forward."

## Discussion

As presented throughout this paper Appreciative Inquiry is used as a model that hopes to engage stakeholders in a process of self-determined change. It was, according to Bushe, a movement "that revolutionized the field of organization development and was a precursor to the rise of positive organization studies and the strengths based movement." (Bushe) AI is a model but in its essence, it is an attitudinal approach to organizational management and planning (Michael, 2005). This strategic planning process was able to take the richness of AI methodology and adapt it to fit the needs of a small, resource scarce organization. It did not come with fancy software or

the need to hire consultants to 'think differently about/fix the problems of the organization'. But instead it provided a platform for the community of Jifundishe to ask intentional questions, share narratives and experiences, and to take stoke in what they do possess, in order to build the path to their future.

This last section, the Discussion, seeks to answer the research questions presented at the beginning of this paper, as a refresher the questions are:

*How was appreciative inquiry used and what was its reception in Jifundishe's strategic planning process?*

- How was appreciative inquiry, both approaches and tools, used in the strategic planning process?
- 
- How did those who participated in the appreciative-based strategic planning experience the process?

Appreciative Inquiry methodology and tools were used at all levels of the strategic planning process for Jifundishe. As presented in the Findings, the process followed the flow of an appreciative inquiry model – aligning the 4-D phases with each phase of the planning process.

The AI Summit format was structured to gather as much feedback and information from as many stakeholders as was possible. Tailoring the summit to meet the needs of the Jifundishe community. In the end personal reflections were gathered from a number of participants regarding their experience with the strategic planning process, and consequently with AI. From those interviews came three major themes that seemed to resonate with many participants regarding their experience and reception with the appreciative approach. Those three themes are positivity, inclusion, and dreaming (to reviewed under sub-quesyion 2).

### **Sub-Question 1**

*How was appreciative inquiry, both approaches and tools, used in the strategic planning process?*

Jifundishe chose to engage with AI as a model and an attitude. Jifundishe chose to ground the entire process in AI, first by selecting an Affirmative Topic to guide the process. Next, AI became the model for the design of the strategic planning process and also of the Summit – both activities mirroring the 4-D Cycle. To encourage the attitudinal/behavior change needed to go along with AI, in order for its success, it was important that AI Principles be followed as much as possible. AI is a process for positive change, at its core. AI touts having no formula for change and its processes can be used informally, as conversation starters or as formal 4-day workshops (15, Cooperrider and Whitney, 2005). It can be used in formal or informal ways but it is meant to be adaptive for your organization.

### **Affirmative Topic Choice**

At the heart of the strategic planning process is the selection of our Affirmative Topic – the center of the 4-D cycle. “The Affirmative Topic is the starting point and the most strategic aspect of any AI process...The topic sets the agenda for learning, knowledge sharing, and action.” (p. 17, Cooperrider and Whitney, 2005). The AI process was used by Jifundishe in their approach to this strategic planning process by going through the process of selecting an Affirmative Topic that was decided upon by a few key staff members, the strategic planner and upheld by the Executive Committee. The chosen Affirmative Topic: *Developing a strategic plan that reflects Jifundishe's mission of community driven in both creation and implementation*. This statement was the guiding force for the process.

### **Use of the 4-D Cycle**

Using the 4-D Cycle (put a reminder of the D's list the 4) as the template for both the design of the strategic planning process and also the layout for the Summit allowed us to mitigate



some of Vanstone and Dalbiez' fears of AI being perceived as a one-time event, versus a longer process (2008). It was a great opportunity to use the 4-D Cycle to design both an event and a process – having both activities come out of the same design methodology really spoke to the breadth of the model. It can be adapted for many purposes.

It was very common to find examples of the 4-D Cycle being used in other AI Summits but most were designed for much larger organizations and over the course of the four full days – as presented in two of the most well known how-to books on AI: *Appreciative Inquiry Handbook* (Cooperrider, Whitney, and Stavros) and in the *Thin Book of AI* (Hammond). Adapting the cycle design to fit into one day was definitely challenging, priorities were made to have the focus of the day be on Discover and Dream. Wanting to get into the room as many experiences and ideas of the future as we could. Leaving the tasks of Design and Destiny, more to the Executive Committee for the second part of the day.

Designing the planning process around the Cycle helped to keep the attitudinal approach to the process AI focused. It forced reflection on every activity and how all questions asked needed to stay in line with AI – positive and intentional.

### Adherence to AI Principles

AI Principles are the basic beliefs of AI philosophy. They are the attitudinal changes that lend to the behavior change. The five original principles are referenced below with an example from the process of how the actions adhered to the principles. It should be known that this is not an exhaustive list but one that sheds light on how these principles were used.

**Constructionist Principle** – What we believe to be true, determines what we do.

This means that our reality is shaped by what we talk about and how we talk about it, by talking about what works or what we are proud of in an organization we are creating that reality. This principle was seen throughout the Summit and the strategic planning process. All activities focused around times where participants felt positive and we had success. Same is true for the strategic plan – the experiences referenced and activities tools used, such as the S.O.A.R. analysis allow us to build what we want out of what is already positive about the organization.

**Principle of Simultaneity** – Inquiry is an intervention, inquiry creates change.

The questions posed to the participants during the AI Summit and also during their individual interviews were carefully constructed to spark curiosity further the conversation towards positive change.

**Poetic Principle** – Organizational life is expressed in the stories people tell each other every day.

The power of an individual's story was used during the AI Summit. Every session in the morning was designed around getting people's experience into the room and therefore into the conversation. Questions asked throughout the process: What was your favorite experience with Jifundishe, the time you felt most proud?

**Anticipatory Principle** – What we do today is guided by our image of the future.

One of the most well-received activities at the AI Summit, according to the interviews conducted, as the Dreaming Big activity. Participants were encouraged to think of the

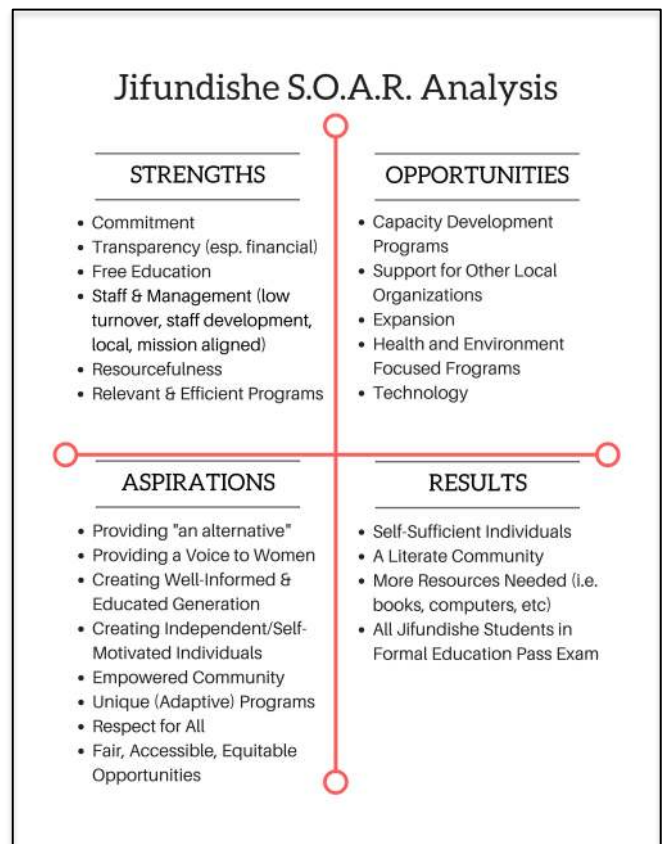
biggest dreams for Jifundishe and working in groups plan out what that would look like. These dreams became the inspiration for the strategic plan. Together they became the future.

**Positive Principle** – Momentum and sustainable change requires positive affect and social bonding.

At the AI Summit people were encouraged to focus on bringing into the room only positives. By focusing on the positive and having that at the forefront the conversation around potential interventions became one that was proactive – building off of what we have and know. Versus being reactive and trying to correct all the flaws.

### S.O.A.R.

One of the most well-known tools of AI is its S.O.A.R. Analysis. This is a replacement of the, more common, S.W.O.T. Analysis. It takes out the Weaknesses and Threats categories and replaces them with Aspirations and Results. This was very much a surprise to many of the participants of the strategic planning process. A number of them had experience with strategic planning and said that they were expecting to have to conduct a



S.W.O.T. analysis. For some it was hard than others to wrap their minds around this new approach. For some, like Sudi, it felt very natural – something he had always done but never had the framework to articulate it. Others, such as one of the focus group participants had a hard time understanding how you could acknowledge strengths without weaknesses, viewing them almost as yin and yang, you have one without the other.

As stated in the Literature Review, AI does not try and pretend that weaknesses don't exist and neither does S.O.A.R. But what it does aim to do is to focus the direction of the reflection on what we already do well and hope to do. Sam noted in his interview that he felt in other strategic planning processes he had been a part of that they got bogged down with the weaknesses and threat, there were usually many lines for weaknesses and only a few for strengths. Providing an assessment that focuses on the positive, the good solid work that is already being done and what you want to see come from that, you only go up from there – the voice saying you can't or it's too risky isn't allowed into the conversation.

### **Sub – Question 2**

*How did those who participated in the appreciative-based strategic planning experience the process?*

For the majority of those who participated in the various elements of the strategic planning process, their engagement with AI methodologies and tools left three themes resonating with them: **positivity**, **inclusion**, and **dreaming**. These themes are alluded to in the portraits presented in the Findings and are corroborated with the other interviews and focus groups conducted, post-planning process.

### Positivity

Participants felt that the way the process was designed, notably through the use of the S.O.A.R. methodology, allowed them to focus on what was positive. By highlighting the strengths, as opposed to the weaknesses – which is what happens in a more traditional S.W.O.T. analysis.

Sudi spoke directly to the use of S.O.A.R. over S.W.O.T. and its role in keeping the conversation positive; “S.O.A.R. is very different from S.W.O.T. Which is a very nice thing to look at something without focusing on the weaknesses so being positive about something I think from my opinion is better.” – Sudi For Sam felt that the aspirations and dreaming parts of the Summit made the activities positive because they were conducted in a way that everyone felt the need to participate. Deb mentioned that she felt the approach, as a whole was positive and that gave everyone the confidence to speak. “With positivity there is no judgment.” (Deb)

The focus group participants interviewed, recognized the importance of the use of positivity during the activities but found it challenging to stay positive. One of them felt that when there is a strength there is also a weakness. It was going to take longer for her to focus solely on the positive. And yet two other participants reflected on how they hope to use the appreciative approach in other aspects of their life, especially in the home. To have better teamwork and “bring positive effects.”

AI, sparks energy that comes from success and positivity because it recognizes successes already achieved by the team and works to continue the conversation and/or activities in that direction. Like a plant leans towards the light – the heliotropic principle – so too will people be drawn towards positive actions and positive images of the future (Michael, 2005, Postma, 1998). Deb summed up the connection between strategic planning and AI well by saying, “Change is

hard no matter what approach you take. Everything is easier when it is viewed in a positive light.”

### **Inclusive**

As mentioned in the Literature Review, AI is a process that, like participatory approaches, works to engage stakeholders from all levels (Cooperrider & Whitney, 2005). It has an aim of inclusivity. This is why you will often hear about AI Summits having thousands of participants because one of the aims is to include all – or as many stakeholders as possible. Because of some limitations discussed in the Findings section – time and language – Jifundishe's AI Summit used a representative model with stakeholders from various groups – users, staff, and management.

This was a fantastic opportunity for the participants and nearly all of them, 7 of 8, commented on it during their interviews. Sam discussed how it seemed people wanted to participate and the saw the approach, “break the line that I has [have] been ashamed of.” The line he is referring to is the division between the Executive Committee and program participants and staff because they do not have many intentional opportunities where they get to interact. 4 of the 5 other participants interviewed referenced how impactful it was for them to have members from all levels of the organization together and interacting with one another. For example, the participation of the board, for one interviewee, was particularly impactful because he felt that because he was doing the same activities as the board members and sharing ideas with them that his ideas had value.

It was expressed that the Summit and AI approaches were a great opportunity to learn what others were thinking. Deb was genuinely, “surprised by all the things I did not realize other people thought.” Jifundishe has always had a mission to be of the community and being reactive

to the needs of those they work with. What came out of the AI Summit and the learnings from exposure to AI methodology and questioning was that there need to be deliberate opportunities of engagement across sectors of the organization. AI, “looks to create an energy, a renewed commitment to change and sense of home among the groups of people working to achieve that future” (Michael, 2005). The participants in this planning process recognized and valued this energy and some made verbal commitments in their interviews to ensure more opportunities for this type of exchange are created in order to learn from others and bring it together to build something inclusive (Sam Obae).

### **Dreaming**

By far the most enlightening discovery from this case study was the importance of the opportunity to dream that came out of the process. Strategic planning is a visioning exercise, yes, but all too often it is rigid and constrained to what can reasonably be done with the resources already assessed. What AI allowed the community of Jifundishe to do was to step out of the constraints of those resources and gave them an opportunity to dream big with disregard for resources. Once all of those ideas were out there we could begin to create a shared vision and the objectives defined in the strategic plan are our short-term steps to achieving the communities dreams.

Both Sudi and Sam commented in their interviews that as a result of the strict education systems of Tanzania, and East Africa more generally, people were not encouraged to dream or imagine. These constraints spill over into other areas of life beyond education where people have an expectation of what you want to hear. This was supported by a few of the interviews when participants gave almost verbatim definitions of strategic planning and what steps go into it. “Right answers” in Tanzania are the ones that have been told to you.

There is not a lot of dreaming in everyday life either. Sudi and one of the focus group participants remarked that people don't often dream. "To them dreaming is only something done when you are sleeping and most people also believe that dreams are useless." (Sudi)

Brainstorming, being creative, and dreaming were a major activity and objective of the AI Summit but it surprised me the importance of providing that platform to 'think big' and focus on fantasizing about the future. Teams at first were wary of their last activity of the Summit to go off and come up with whatever they wanted to see for Jifundishe with no restrictions. Having set the stage by creating a positive and inclusive environment that all participants felt comfortable AI was able to become the change process it is destined to be, a way to "generate new knowledge to assist members of an organization to collectively envision a desired future." (Webb, 2001).

"It feels good to dream...but not all dreams come true...then, another dream comes. Another vision comes. You keep on dreaming." (Focus Group Participant)

## **Conclusion & Further Research**

In the research presented in this paper, the strategic planning process undertaken by the Jifundishe community was followed and examined through an AI lens, and the experiences of the community were explored. It looked at how both the setup and activity of the process followed the AI 4-D Cycle; how AI tools, such as S.O.A.R. analysis and the AI Summit were executed; and how the entire process adhered the AI Principles. Combining these findings with the individual experiences of participants in the process sheds light on how AI's usage in the



process impacted their experience. Several conclusions can be drawn from the data analysis of our research. Through these exploratory data collection efforts, we found a few overarching themes describing participants' experiences: the AI based strategic planning process was a positive, inclusive experience for participants that sparked in them the importance of dreaming.

It is suggested that this research is extended into a longitudinal study and to do follow-up with those interviewed in a year's time and then again in five years to track their continued experience and it's effects on their daily lives. It will be good to see if the strategic plan developed with an AI lens has been successfully implemented and if those participants have taken any of the AI tools for use in their daily lives. These findings would also be beneficial for other communities who are looking to do a strategic planning process to see an alternative to the more traditional processes and to understand the benefit of selecting a methodology that resonates with their unique community.

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## Annex

### Annex 1: Interview Questions

- How long have you been a part of the Jifundishe community?
- How were you involved in Jifundishe's strategic planning process?
- What were your thoughts about strategic planning prior to the process starting?
- What were your hopes for the strategic planning process?
- What was your reaction to the strategic planning process?
- What was your favorite part of the strategic planning process?
- What were your feelings about the appreciative/positive approach to the process?
- How did you feel being included in the strategic planning process?
- How did you see the appreciative approach play out in the process?
- What do you perceive as the short-term effects of the strategic planning process? The long-term?
- How, if at all, have you seen yourself or others affected by the strategic planning process?
- How do you see yourself using this appreciative approach in other parts of your life?
- What new challenges or opportunities do you think the community has now?
- Have your views of approaches to change altered at all through this process?

## Annex 2

# Jifundishe Strategic Plan

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2017 – 2022

## Introduction

This strategic plan is the culmination of community input and commitment to the long-range direction and priorities for Jifundishe. The Executive Committee has reviewed and approved this document and will guide, in partnership with the staff and community of Jifundishe, the efforts and investments needed to see that the strategic goals and objectives are met.

In February 2017, Jifundishe began their first ever strategic planning process. After 12 years of operating, and in anticipation of a period of transition, not to mention growing at its quickest rate, decided to prepare for these changes by undertaking a strategic planning process. Strategic planning is a necessary activity for an organization to go through because it helps provide direction and focus for all employees. It directs the organization toward achievable results and outlines a set of steps for achieving them. The strategic planning process can also be critical for the various factions of an organization to stay on the same path and align themselves and their actions with the common mission. By developing a strategic plan an organization has a document that communicates their goals and the actions needed to achieve them.

The strategic planning process was undertaken using appreciative inquiry methodologies. This methodology seemed fitting for Jifundishe, it is rooted in their name. Jifundishe means *to teach yourself* in Kiswahili, nurturing what is already there. This approach to the strategic planning process was chosen to reflect Jifundishe and their values. An appreciative strategic plan takes the best of what you already have and works to develop that further. The same thing happens with Jifundishe's programs and how they work to develop the best of individuals and their community.

## What's Next?

It is now up to the entire Jifundishe community to support their inclusive vision and make it happen!

## Visioning

### *Vision Statement*

*Empowered communities of well-informed, educated, and self-motivated individuals.*

### *Mission Statement*

*To provide opportunities for young people as well as adults to teach themselves using technology, books, and programs relevant to their lives and their futures.*

### *Values*

**Fairness  
Respect  
Community  
Education  
Sustainability  
Transparency (Ethics)**

**Accessibility  
Effective  
Quality  
Empowerment  
Impactful  
Collaborative**

These values were collected after being heard as recurring themes and standards that were discussed and presented during the appreciative summit that was held on February 25, 2017. This event brought together board members, staff, program participants, and community members.



## Organizational Profile

Jifundishe (pronounced "JEE-foon-DEE-shay") is the Kiswahili word meaning *to teach yourself*.

In 2005, Jifundishe opened its doors at the Imbaseni Free Library and began its journey to become a reputable, contributing member to the futures of individuals in the greater Arumeru Region.

Jifundishe became a registered Tanzanian NGO in 2008. It currently operates in a partnership with Project A.B.L.E., an American 501c3, allowing it to accept tax-deductible donations from the United States. The organization funds and manages projects for community development in the rural village of Ngongongare and its surrounding geographic regions. It is a grassroots organization that seeks to "create meaningful collaborative change in rural Tanzanian communities through education and opportunity". Tanzania is one of the poorest countries in the world with overall literacy rates on the decline, and education opportunities often inaccessible due to financial, geographic, and resource constraints. The founding members of Jifundishe recognized that education not only greatly improves a general quality of life - but also that literacy and schooling are important common denominators in addressing disease prevention, birth rates, access to income, and community health.

Jifundishe employs all local staff with a few key volunteers from the United States. This diverse, multicultural team of staff and volunteers has allowed Jifundishe to develop a model of enrichment for those served. The organization has an operating budget of less than \$100,000 USD for any given year. Its programs span microfinancing for women to English language learning and their flagship program: the Independent Study program. Jifundishe places a strong focus on cultural relevance and programmatic sustainability.

Currently, Jifundishe runs their programs out of the Jifundishe Free Library, which is home to over 4,000 books and resources, including all school curriculum texts; children's educational resources and games; a computer lab with internet access; and a safe, clean, well-lit space that is open to all to learn.

The programs offered today are:

- UKUWAJI - Women's Microfinancing Group
- Independent Study Program
- HSF - Secondary School Scholarships
- Library - Stocked with Kiswahili and English resources

## Timeline & History

### Timeline

#### 2005

- **February:** The idea emerged for a free library through informal discussions had by friends.
- **May to September:** Renovations began on a rented building in Imbaseni village. At the same time gathering books and supplies from both the States and Tanzania.
- **November 15:** The official opening of the Imbaseni Free Library.

#### 2006

- **February:** Eye Clinic held at the library
- **April:** Malaria Prevention Program held at the library
- **May:** Madeline Austin teaches dollmaking to local villagers \*\*\*(this program continues!)
- **August:** Soccer/HIV Clinic held at the library
- **December:** Bed net distribution to homes in the village.

#### 2007

- **January:** Ann Hanin visits the Imbaseni Free Library. After returning to the U.S. she establishes Project ABLE in an effort to support Jifundishe.
- **June:** Anne Angarola volunteers with Anande Mirisho and facilitates an HIV/Soccer clinic for girls in the village with "brown bag" lunch informational sessions and skills workshop.

#### 2008

- **January:** First scholarship recipients chosen for the Houston Scholarship Program for secondary students.
- **February:** Jifundishe becomes a registered NGO – The Imbaseni Free Library is their first project and the home base for the organization
- **March-July:** Volunteers come to the JFL and conduct workshops and projects in knitting, beading
- **July:** Jifundishe raises funds to complete the Ngongongare Dispensary
- **August:** Belgian volunteers come and work with local secondary students on an Essay Writing Olympics project
- **August:** Building begins on the new Jifundishe Free Library

#### 2009

- **January:** Jifundishe opens the Jifundishe Free Library
- **July:** Jifundishe dedicates the JFL with a village celebration
- **July:** Jifundishe sponsors the "850" campaign to provide health insurance for over 2,500 villagers

- **November:** Volunteers Linda Cartwright and Annie Dineen work on collecting testimonials from program participants

## 2010

- **January:** The Independent Study Program officially begins at the JFL
- Mike Bennett and Anna Davis conduct a journalism and bookkeeping project for secondary students
- Sudler Computer Lab opens at the JFL providing free access to laptops and internet to the public
- **June:** University of Virginia Jefferson Scholars volunteer at the JFL, conducting an eye clinic and various workshops for the public

## 2011

- **January:** Michelle Melnick volunteers at Jifundishe and helps with Houston Scholarship Fund intake
- **May:** UKUWAJI has their first round of lending after a donation from Unlimited Possibilities helped create the program.  
Jifundishe constructs the "mobile science lab" for the Independent Study program

## 2012

- **April:** Judy Gigliotti and her daughter, Kate, teach 50 women how to make paper beads. This workshop produces Mama Shanga, a beading cooperative that is still in business today  
Jifundishe starts building Cacti House, our new volunteer house.
- **May:** Patrick Shandonnay brings a solar project to the JFL staff house and teaches I.S. students about solar installation.
- **September:** Jifundishe Free Library creates the first Primary English Tuition program for Standard 7 students who have passed the exam.

## 2013

- **January:** Jifundishe establishes a partnership with Extraordinary Journeys to provide structured visits to the JFL for their clients
- **February:** Jifundishe publishes its first children's book *Kuhesabu Pamoja*.
- **June:** Jifundishe opens Cacti House.
- **July:** Students from UVA come to facilitate an agriculture project for local women

## 2014

- **February:** Jifundishe builds the *Goody Classroom* for the Independent Study program.
- **October:** Unlimited Possibilities delivers a test-taking workshop for all I.S. students
- **November:** Innocence Amos is the first Houston Scholarship Fund recipient to graduate from university

## 2015

- **May:** Jifundishe sponsors reproductive health workshop for all of our students
- **August:** Jifundishe becomes a Segal Family Foundation partner and receives its first grant for the I.S. program costs.

- **September:** Jifundishe announces the May Higher Learning Fund, a program to support students from the I.S. and HSF programs to attend university.
- **October:** Jifundishe launches E-Reader Program at the Jifundishe Free Library  
Jifundishe celebrates its 10th anniversary!

## 2016

- **June:** Jifundishe hosts 36 Project ABLE supporters at the JFL.
- **August:** Meg Bearor and Elibahati Nnko attend the WorldReader conference in Nairobi, Kenya
- **September:** Jifundishe purchases Shule Direct, which provides electronic versions of Tanzanian curriculum.  
Jifundishe receives a grant from Project ABLE to conduct a pilot English tuition/conservation program for primary school students

## 2017

- **DESTINY**

## Narrative History

### **Where it all began: *Imbaseni Free Library***

In early 2005 an idea was proposed by a group of friends, living in Imbaseni village, for the construction of a free library. This group was composed of Debra Kelly and a mix of teachers, volunteers and students – most of which were from nontraditional schooling backgrounds in Tanzania. After many informal discussions on what was wrong with the local education system – why it was so hard for students to succeed, and if they did happen to succeed what were the challenges that followed – the group decided that something needed to be done to help tackle these issues. It was agreed upon that the best way for them to help fill the gaps was to construct and run a free library. Together, this Library Committee established and developed the idea for the first, no strings attached, completely free learning resource in Tanzania, in the form of a library. In Tanzania libraries were (and still are) few and far between, with even fewer of them being completely free.

A few things needed to be acquired for this to happen: a space to house the library needed to be secured; staff needed to be hired; books and resources needed to be gathered; and people needed to be made aware of this new addition to the community.

The Imbaseni Free Library (IFL) had its official opening ceremony on November 15, 2005. Everyone from the surrounding area was invited. It is estimated that around 300 people came out to the event. David Read, a prominent white African from the community, spoke at the event. He himself wasn't literate until he was an older child and became an author. The Founding members put on skit about what a library is and how to use it. Even the concept of a library was very new to people in the area because most schools in the area did not have such things and the closest public library was in Arusha.

The first people to start using the library were students. They came in to access the schoolbooks. Next were little kids who were just curious but because they weren't chased out they kept coming and they stayed. Very organically the children's programs were developed to give them something to do. The mamas followed the kids, wondering where their kids were going. The mamas would come and sit at the picnic tables, not all of them literate and very few with secondary educations. This was a comfortable, safe place for them to come and meet. With no structured programming for the mamas, they very naturally started forming their own groups and clubs. The last to come were the men, drawn in by the gazettes and newspapers provided, resources focused on current events.

The agenda of the library could only reach so far. At first it was just putting books on the shelves and making them accessible. Then after assessing the needs it was ensuring the most relevant books were made available. When it became clear that there was much to be gained outside of just books Jifundishe began subsidizing those resources with teachers and workshops. Jifundishe developed out of the needs that were presented to them by the community and the IFL did the best it could with the space and resources it had. When it became clear that the needs of the community were beyond that which the IFL could provide plans were put in place to build a new space with more books, a computer lab, outdoor study

space, and rooms for workshops and classes. In December 2008 the doors of the IFL were closed and Jifundishe opened the Jifundishe Free Library in January 2009.

## Current Programs

After the library began running well and there was a steady flow of users – kids playing, students studying, mamas seeking a place to chat and men browsing the newspapers and gazettes – Jifundishe sought out other ways to get people involved. The Jifundishe Free Library started to play host to various specialized one-day clinics. These clinics and activities extended over a wide range of areas: health, education and fun. It remained Jifundishe's focus though that no matter the clinic it needed to be educational, culturally relevant and free and open. Following short-term clinics, Jifundishe began to develop long-term programming beginning with a knitting club. From there, Jifundishe has continued to run 3 signature programs – Houston Scholarship Fund, Independent Study Program, and UKUWAJI alongside their ad hoc, short-term programming – English Language Learning for adults and secondary students, Primary After-School Programming, Technology Classes: Computer and E-reader, Conservation Programs, and Workshops.

### Independent Study Program

#### Purpose

This program recognizes and aims to address the needs, schedules and interests of those students who for a myriad of reasons were not able to complete their secondary education.

Jifundishe's Independent Study (IS) Program is a comprehensive initiative offered at the Jifundishe Free Library (JFL) for those students who wish to prepare for the national exams but who are unable to attend school because they could not afford school fees, did not pass secondary school originally, or because of cultural reasons. Students who participate in this program have access to tutors, teachers, and the entire required curriculum needed to study from to pass the national exams.

The students attending this program not only gain academic knowledge but also practical knowledge – through skills building sessions also offered – that will apply to their everyday lives. If they pass the final national exams as independent candidates, they have a chance to re-enter the education system at a higher level or garner higher wages in the job market. The students have ranged in age from 14 to 72, male and female.

#### Inspiration

Amani H. Amani (the first “unofficial” IS student) made the decision to study for - and pass - his secondary school exams as an independent candidate. In 2006, Amani came to the Imbaseni Free Library daily to use the books available to him to study for his exams. He sat his first national exam as an “independent candidate”, and he passed. As his success grew, so did that of Jifundishe, Amanai studied for his Form 4 exam in the new Jifundishe Free Library. It took him two more years of independent study to pass his Form 6 exams. Then, with sponsorship from a connection made with a former volunteer of Jifundishe, Amani went on to get his Bachelor's of Education from St. Augustine University. He spent his holiday breaks being a temporary teacher to those studying in the Independent Study program at Jifundishe. During his studies for his Master's in Linguistics at Makumira University, he was a teacher in the IS program.

### History

7 years the program has been running  
A-level classes began 3 years ago

### Program Logistics

These services are free to students; enrollment is open to all who have the desire to learn.

### Current Status

**Total Number of Students Over the Life of Program:** 225

**2017 totals:** 40 PC; 40 QT; 20 A-Level

**Pass Rate Over Life of Program:** 75%

## UKUWAJI

Umoja Kuendelea Wanawake Jifundishe (Women of Jifundishe Developing Together)

### Purpose

The aim of the program is to provide, much-needed, capital into the hands of women. The women are provided with (limited) business skills training via the program, along with a supportive network of their peers to launch or develop home-based businesses. Through this program, Jifundishe recognizes the exponential benefits that come from empowering women.

### History

In 2010, Jifundishe was granted conditional funds from Unlimited Possibilities to develop and implement a women's micro-lending program. Over 150 women have taken advantage of these loans, with the funds being used to start a variety of businesses - crop planting, chicken farms, tailoring, clothes selling, vegetable kiosks, and even small restaurants. To date, the program has enjoyed a 100% return rate, without a single default or late payment. Jifundishe correlates much of the success of the program to its unique and effective implementation process. UKUWAJI is organized and managed by a committee of respected women from the community, appointed by the group. It was a similar committee - some of the founding members still on the current committee - that carefully developed the requirements, assessment tools, and cooperative measures needed to ensure successful participation of all participants.

### Program Logistics

Once every calendar year, there is an open call for loan applications. The applications are reviewed by the four person committee, sometimes with the support of volunteers. The committee conducts interviews and home/business visits to assess the credibility of the application. All women who apply, whether awarded a loan or not, are invited to participate in a business planning workshop at the Jifundishe Free Library. Upon selection the recipients are organized into groups. These groups are created as an additional tier of accountability. This creates a team-like approach to accountability. The women are expected to come to the library once a month, to make their payments, socialize, participate in Jifundishe organized programming, and gain support and encouragement from their fellow participants.

### Current Status



UKUWAJI is currently in the fifth and final iteration of its loan cycle. As agreed to when Unlimited Possibilities made their initial grant for the program, the ultimate goal was for the women to have a self-sustaining program and over the five loan cycles worked out the majority of the kinks to become independent of Jifundishe. As of, February 2017, UKUWAJI has entered the last three months of its fifth loan cycle. They have submitted an application with the local municipal government to create a Community Based Organization (CBO), with their own bank account, and full control of the program. They have voted on and established the first committee for this newly independent group. They hope to be fully functioning by June 2017.

Jifundishe has offered to continue to be the base of the organization, providing meeting spaces and helping coordinate workshops should the group request support. Jifundishe is proud to say UKUWAJI is nearing the point of independence and excited to have them as a continued partner.

## Houston Scholarship Fund

### History

In, 2006 Annie Houston traveled to Tanzania with the International Theatre and Literacy Project to help secondary school students improve their English language skills through the use of drama. While in Tanzania, she recognized a great need for financial support for marginalized children who did not have the support needed to attend mainstream government or alternative private schools. In an effort to help these young people, the Houston Scholarship fund was established in 2007 and seeks to provide financial support for eligible students to attend educational institutions at all levels. In 2008, Jifundishe launched their Houston Scholarship Fund.

### Purpose

The purpose of the Houston Scholarship Fund is to provide financial support for educational fees for children and young adults who have little or no support from family. The scholarship fund pledges support to students who have achieved high enough marks on their primary school exams to continue on to a secondary school or vocational program. The fund targets children who have been orphaned or live with a single parent. The fund seeks, especially, to help girls and young women who are challenged by discrimination and oppression and are more at risk for future poverty due to these challenges. It is the purpose of this fund to help create a sustainable life for the candidates who are chosen to receive financial support from this fund.

### Program Logistics

To be eligible for the fund, a student must meet the following requirements:

- Have "orphan" status as the term is defined by the United Nations \*
- Have acceptance into an approved educational institution in Tanzania \*\*
- The student must be currently living in the Arumeru District and must have lived in the Arumeru District for at least 5 years prior to application.

*\* The United Nations defines an orphan as one who has lost at least one parent*

*\*\*All educational institutions will be evaluated by the selection committee and approved by the fund managers.*

Candidates will apply for the scholarship in writing. Each application will be evaluated for meeting the criteria for eligibility and each eligible candidate and their family will be interviewed by representatives of Jifundishe. Candidates who are being considered for scholarship funds will participate in a family interview. The fund fully supports the student's education financially with money for fees, supplies, board, and transportation, if necessary.

### Current Status

**Number of Students Supported To Date** Over 100 students, mainly girls and many of our participants finish in the top 20% of their class.

**2017 Totals:** 29 students at 3 Government schools and 1 Private school

### May Scholarship Fund

Three years ago, Jeremy May and his family came to visit and found students in our programs that were working hard to obtain their secondary school education, but had no access to higher learning due to economic restrictions. He decided to help by establishing the May Higher Learning Fund which supports our program participants that do well in their studies with us by helping them access college and university level educations. Those who qualify to apply for a government loan for university also have the chance to qualify for the May Fund. There are currently three May Higher Learning Scholars.

In 2016, Lazaro Mbise was the first recipient and is now in his second year at Jordan University College. He is in a teaching program and hopes to one day be a secondary school teacher so that he can help young Tanzanians improve their lives.

For the 2017 school year, Jifundishe selected Lameck Wilson and Amani Peter, two Independent Study graduates for the May Higher Learning Fund. Lameck will be studying law at Makumira University and are now and Peter is studying at Cardinal Rugamawa Memorial University.

As part of their May scholarship, our students return to Jifundishe and perform volunteer work at our library. For the last two weeks, these three recipients have been teaching classes, working in the library and helping with computer training for this year's students.

### Others

At any given time in Jifundishe's past, in addition to the programs listed above, they have been/are running other more temporary programming to fill community requests or because there is more support on hand due to volunteers.

**Standard 7 Secondary School Prep:** Every year in Tanzania standard 7 students, in their final year of primary school, have to take a test to determine if they can continue

on to secondary school. This test is administered anywhere from 1.5 – 3 months before the next school year is to begin. This leaves a long stretch of time that the students are idle. To support the transition from primary to secondary school and the switch from Kiswahili to English instruction, every year between October and December, Jifundishe hosts a program for any standard 7 student in the community that anticipates moving on to secondary school. The program typically revolves around English and math skills. Some years though, depending on the people power, the skillset of any volunteers or teachers, or in lieu of grants, the program can run with a theme. This past year, 2016, the theme was environmental conservation.

**English Language Learning:** In the past Jifundishe has run English Language Learning programs for adult learners. This program typically runs for 16-20 weeks, once a week and in the past has run after normal library operating hours to accommodate attendees. There is not currently enough staff to run this program at all times but when a request with a significant number of supporters is presented to Jifundishe they work to hire a temporary teacher for this program.

**Primary After-School Programming:** There are often young students using the library after school hours and on weekends. During the school breaks when the students have lots of free time the librarians will do impromptu activities with them in the afternoons after the librarians duties are done. If there is a long-term volunteer, 2 weeks or more, coming to Jifundishe and if their skills align, we will often utilize them to conduct programming with the primary students. The library has a lot of craft resources, kids books, and games for this age level but often lack the people power for ongoing programming.

**Technology Classes: Computer and E-Reader:** Desire for technology focused programs are high in the community and Jifundishe works to fill that gap where it can. The library has 20 computers and 35 e-readers that have been the focal point of programming in the past. There is a constant ask for programs that build people's capacity in this area but finding the time, manpower, and electric energy are challenges.

**Workshops:** At the request of the community, Jifundishe has hosted a number of workshops in the past: business skills, agriculture, health – eye clinics, malaria awareness, solar energy, and lots in between.

**Reproductive Health Workshops:** Jifundishe facilitates two workshops a year where a doctor from Tengeru comes to present material on life skills, reproductive health and other issues affecting adolescents. We use the It's All One curriculum.

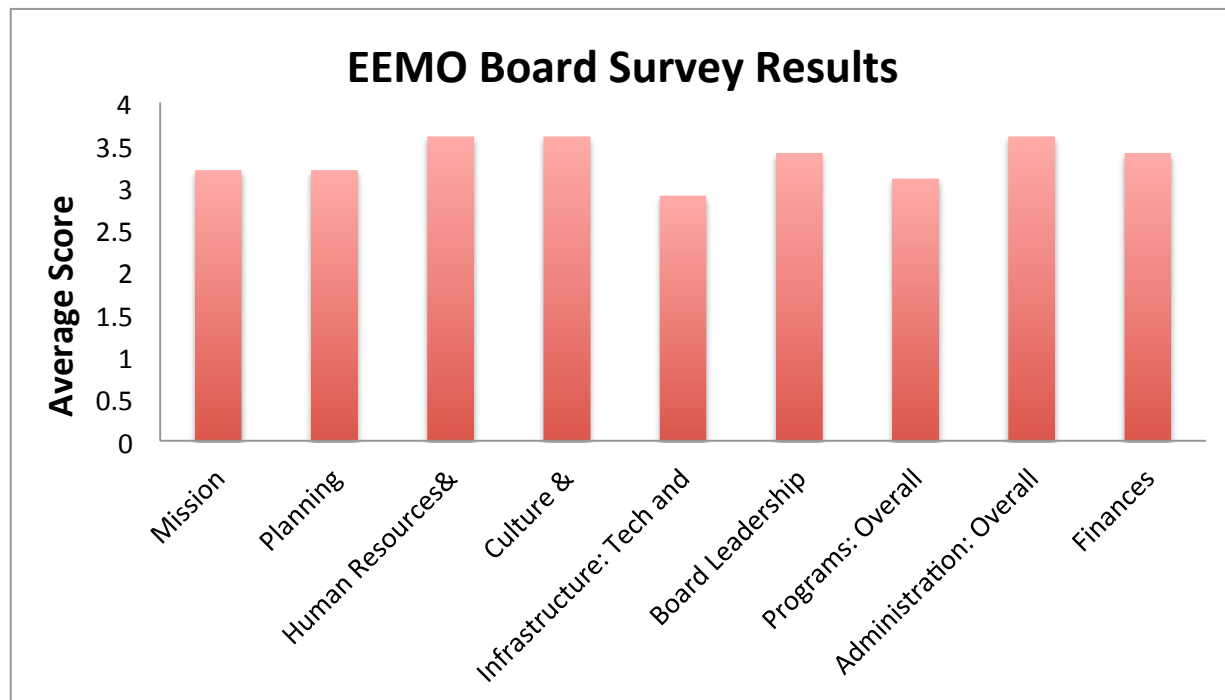
## Internal Analysis

The internal analysis was conducted in two parts, the first an Elements of an Effectively Managed Organization survey taken by all Executive Committee members and the second an assessment of seven broad areas making up Jifundishe’s core competencies and resources.

### Elements of an Effectively Managed Organization (EEMO)

One of the methods that were used to evaluate the organization was by conducting an EEMO (Elements of an Effectively Managed Organization) survey of the Executive Committee. The complete results of the survey are found in Appendix 1 but are summarized here and visually below in Graph 1. All members of the Committee replied to the survey anonymously during the session with the Executive Committee following the Appreciative Summit.

There were two major findings from this survey. The first is that the board is very much on the same page. Generally, the questions with the highest scored responses were consistent across each individual, similarly for the lowest scored responses. The second finding is that the Board has an overall optimistic view of Jifundishe, its core programs, operations, etc. Their highest scoring went to rank Overall: Admin, Financial, and Governance at 3.66 out of 4, whereas Infrastructure – Technology and Facilities was identified as the weakest area at 2.94 out of 4.



Graph 1: EEMO Board Survey

## Internal Audit

A second method of internal analysis was the Internal Audit. Each of six overarching areas was evaluated and the narrative below illustrates the main findings.

### *Facilities & Operations*

Jifundishe owns about 3 acres of land in Ngongongare village. On this tract of land are the Jifundishe Free Library, a spacious space that houses over 4,000 books and magazines, an laptop computer lab, space to sit and read or study, and a large community room for internal and external events that doubles as the children's room. There is also a classroom that is used almost exclusively by the IS program. On the grounds of the library are various tables and chairs with some shade covering for outside working. Located behind the designated library grounds are the office of the organization – a building that once was a home and could be again should the need arise for on-site staff housing. On the side of the property opposite the library grounds is Cacti House, a house that can sleep 8 with running water and solar power for volunteers/visitors of Jifundishe.

The upper level management of Jifundishe consist of Debra Kelly, a founder and Executive Director. Deb is present in Tanzania between September and April to support with programming and day-to-day operations. During the rest of the year, Deb is in the States doing fundraising and "big picture" work. Anande Mirisho is the Assistant Programs Manager and is located in Tanzania all year round, focused on the day-to-day operations of the organization. The third member of the management team is Elibahati Nnko, the Library Manager. Babe reports to Anande and is responsible for the running of the library and supporting the programs that use that space. Elibahati oversees two librarians and a groundskeeper who work Monday-Saturday. Jifundishe is also supported by two night watchmen – this keeps someone present at the library grounds at almost all times. In addition, the IS program has a number of short term teachers who teach 2-6 sessions a week.

Jifundishe is a registered nongovernmental organization in Tanzania, gaining that status in 2008. At the time this plan was written, they were not registered as a nongovernmental organization in the United States but was exploring the possibility. To help fill the gap of not being a 501-C3, Jifundishe works with Project A.B.L.E. to provide their donors with a tax deduction should they so choose.

### *Programs*

Reference the **Current Programs** section, beginning on p.9

### *Marketing/PR*

In assessing Jifundishe's past, they have not had to put many efforts into marketing their programs. The community they work in is around 10,000 people and is developing quickly with new families moving in. This allows for there to be a steady flow of individuals hoping to access their programs and kids growing up who use Jifundishe's programs at different stages in their

lives. Currently when a new program is being promoted to the community Jifundishe will post a notice about it on the new board outside of the Library. In addition, they will provide handouts to some of the larger dukas (shops) in the village and to churches and/or schools.

The organization also has an external marketing and PR approach for those who are not beneficiaries but are donors. Jifundishe has a website – jifundishe.org – that is hosted on Wordpress. In addition to their website, they have a Facebook page – one in English and one in Kiswahili and send out quarterly newsletter to their email listserv and that also gets posted on the website.

### *Fundraising/Revenue*

Since its inception, Jifundishe has relied heavily on private donations as their primary source of funding. Much of their donations have come by word of mouth and 'on good faith' from individuals who know someone who has been to and cultivated a relationship with Jifundishe. On an ad hoc basis Jifundishe has engaged in fundraising campaigns to solicit funds for a particular project or just as an easy way to capture a lot of funding in one go. In addition, there have historically been one to two fundraisers held each year in the States but that number has dropped to one. Project A.B.L.E. does some of its own fundraising for Jifundishe.

In 2015, Jifundishe applied for and was awarded a grant from the Segal Family Foundation. This was Jifundishe's first grant and added nearly 25% to the annual operating budget. Jifundishe has continued this relationship with the Segal Family Foundation and benefits greatly from their monetary contribution as well as the network they have within Tanzania and the learning opportunities they offer their grantees.

It is recognized Jifundishe's leadership that there should be more of a monetary investment from the local community into the organization. As of now, less than 5% of their funding comes from within Tanzania.

### *Financial/Accounting*

The organization had an operating budget of \$68,023 in 2016 and a total of \$260,853 net assets. Jifundishe conducted a 2015-2016 audit and a quote from the auditors stated: "Proper books of account were maintained by Jifundishe for the whole of this period and the financial statements prepared there from are in agreement with such books." (Taken from Jifundishe's Annual Report – 2016)

### *Management/Governance*

Jifundishe's board, known as Executive Committee, serves in a pro-bono capacity, and is involved in the long-term planning of the organization. The board meets quarterly in person, with one member calling in via Skype and communicates via email as needed. The only benefits allotted to board members are a per-diem given for their attendance at meetings, to help cover transportation costs, and eligibility for a loan from Jifundishe. Each board member has a direct

link to the villages directly impacted by Jifundishe. They are fully committed to the organization and two were founding members. Their expertise ranges from managers of other local non-profits, technology gurus, former employees of Jifundishe, and a local community leader. It has been the Executive Committee and their expertise that has established the infrastructure (policies, procedures, programs, etc.) of Jifundishe; they receive quarterly reports from the Executive Director and the Assistant Managing Director and are kept abreast of any pertinent ongoing issues.

### *Technology*

Technology is a key component of Jifundishe's mission and plays a role in nearly all of its programs. Jifundishe promotes the use of solar power – the library and its buildings ran for 10 years strictly on solar and now has back up electricity to use during the rainy system and to support the every growing collection of devices that need to be charged. Jifundishe also provides solar lamps to all IS students and scholarship fund recipients to use in their homes. The library project includes a computer lab that has available 17 computers with access to the Internet. There is also printing services available, for free, from these computers. In 2015, Jifundishe received a donation of 35 e-readers, in partnership with the organization WorldReader. These e-readers are used by IS students and program specific resources can be downloaded for new and unique programming, such as the conservation program for Standard 7 students in 2016. Technology, access to it and understanding of it, is an important element that the people of the Jifundishe community need to be able to navigate the changing world.

## External Environment Analysis

STEEP Analysis

**S**ociocultural - Demographics

**T**echnological

**E**conomic

**E**nvironmental

**P**olitical

The External environmental analysis is a tool to allow the organization to be proactive, anticipate changes and plan for them. Having a read on the external environment can also allow an organization to influence their environment through lobbying and being able to anticipate a social trend - should they want to. Context is continually changing and therefore an organization must do the same in order to stay relevant to its stakeholders and be able to provide for them. An external analysis is different from an internal one, whereas it is a macro-level, big picture representation of what is happening the world that the organization exists within. And that outside world has impacts on the operations and success of the organization.

### *Sociocultural Factors*

Tanzania is made up of about 120 ethnic groups, each with their own customs and language. This level of diversity can often be a hurdle for countries to overcome but since its establishment as a nation in 1964, Tanzania has remained stable and peaceful, with ethnic groups cohabitating and mixing with little to no tensions. The first president Julius Nyerere is usually credited with this social stability. Nyerere was a socialist and promoted a practice called ujamaa – meaning ‘familyhood’ in Kiswahili – this was the basis of his economic and social policies. One major component of this was promoting Kiswahili as the national language. This helped to create a Tanzanian identity above the ethnic identity. Today, Kiswahili is the official language and most commonly spoken language, it is also the language of instruction all through primary school. English, the second official language, is the language of instruction from secondary school onwards.

Tanzania has a population of around 51.8 million people, with about two-thirds of the population under 25. With such a young population, the government education system has been under strain, leading to the development of many private schools that come at a high price but varying levels of excellence.

### *Technological Factors*

Like many other developing nations, in 2013 only 18.4% of Tanzanians had gained access to electricity. The grid was slow to move across the nation. This electric system was owned and operated by the government agency, Tanzania Electric Supply Company (TANESCO). Some of this gap has begun to be filled by solar energy. Individuals are buying their own small solar lamps and charging stations, or if income allows their own solar panels to supply their homes.



In order to keep up with the world mobile phones are more prevalent than electricity is in homes. Mobile phones have helped to fill many gaps in the country - more people use mobile money for their banking than regular brick-and-mortar banks. This is also how schools announce exam results. With the growth of the internet, smartphones are also on the rise. The data system is more expansive across the country than the electric grid.

### *Economic Factors*

As was mentioned in the sociocultural section, Tanzania has been able to retain domestic stability, since independence unlike many of its continental neighbors. But this sociocultural peace and stability is not seen in the economic spheres.

On the Human Development Index, Tanzania comes in at #151 out of 188 countries. Roughly 68% of Tanzania's population lives below the poverty line of \$1.25 per day. UNDP notes that there are little to no resources for Tanzanians around credit services, infrastructure, agriculture technologies or education - making worse the hunger and poverty conditions in the country.

### *Environmental Factors*

Five years ago, Jifundishe would not have anticipated an environmental scan would have been a necessary action for the organization to conduct because none of their programming, at the time, related to that. In light of climate change and its effects on the community - a community that is hugely dependent on farming and the ecological elements of tourism - environmental factors are becoming a major player in Jifundishe.

Tanzania has very vague environmental regulations, very little trash and recycling facilities or strategies most especially in rural areas. This has led to increased levels of pollution because people's main form of disposing of trash is through burning it - everything from food waste to plastic to batteries.

In addition to this, climate change is having an increasing effect on the seasons in northern Tanzania. The rains are becoming harder to predict and there have been multiple years of individuals planting in anticipation of rains that didn't come for weeks, resulting in crops dying. There is a looming threat of drought throughout the region of East Africa, already Tanzania's president has come out saying that individuals are on their own during this time, no government assistance is coming. Cattle are dying at rapid rates.

For the first time in Jifundishe's history, people have been asking for agricultural workshops and conservation programming so they can better position themselves to better handle these changing conditions.

### *Political Factors*

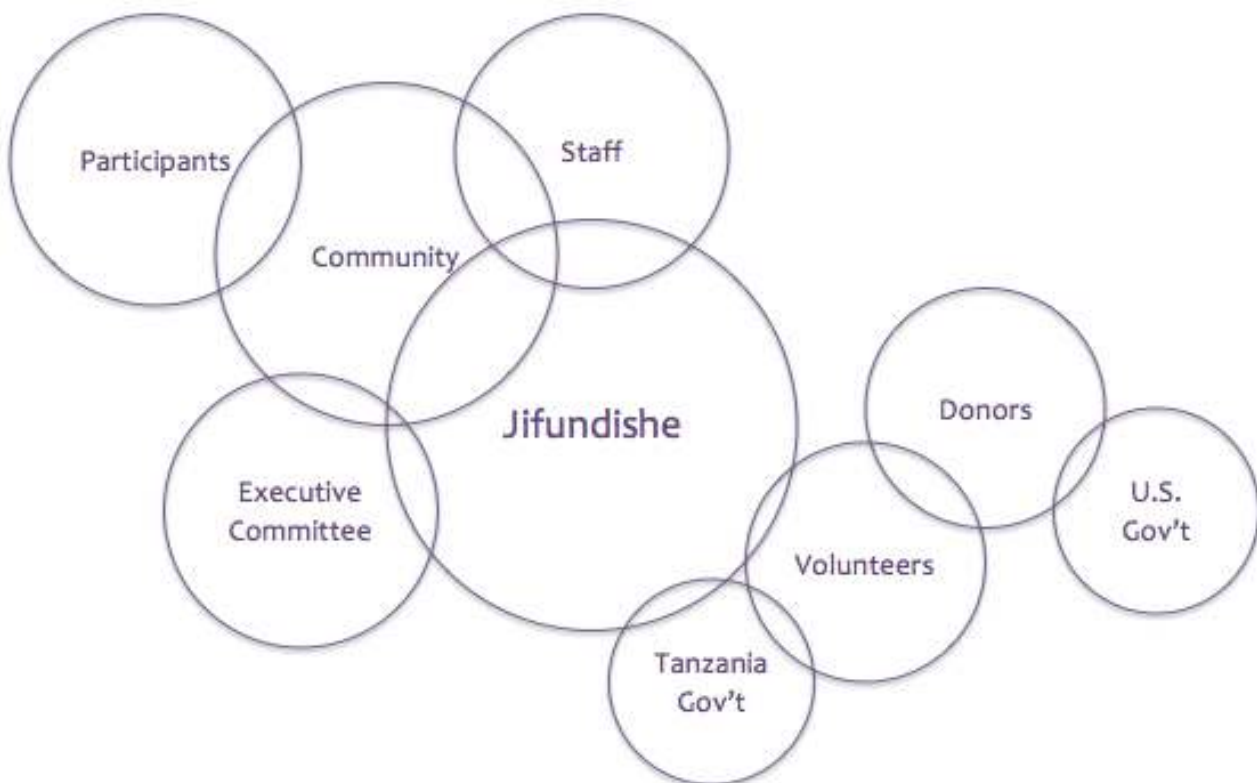
Tanzania operates as a unitary presidential democratic republic with a President and multi-party system. Since independence, the party in power has remained the same showing little change in policy and approach. The country is politically stable, although the most recent election – October 2015 – saw the biggest challenge to the ruling party and it was led by the youth. Tanzania is divided into 26 regions and to further decentralize, 99 districts (local government authorities) which increases local authority. Jifundishe is located in the Arumeru District in the Arusha Region. The administration is further broken down at the village level, headed by a mwenyekiti and below them are balozi's who head a group of 10-15 households.

Under the new presidential administration, Tanzania has been enforcing tax policies and immigration policies that have before been overlooked by previous administrations. This is having a huge impact on business (and volunteer aid workers) coming into the country. The increased taxes are hitting everyone hard.

## Stakeholder Analysis

For being a relatively small organization, upon completion of a stakeholder analysis, it is evident Jifundishe has a number of stakeholders both internal and external. A stakeholder is any individual or organization that impacts or is impacted – both directly and indirectly by Jifundishe. After conducting our stakeholder analysis, we have identified two internal (or primary) stakeholders – The Board of Directors, the Staff and Volunteers, and external (or secondary) stakeholders – Beneficiaries, Donors, Government, and Community Members.

The accompanying image (Graph 1) shows a visual representation of how all of the different stakeholders impact and influence Jifundishe. The larger the circle the more dominating a force they are in the conversation. And the more they overlap with the central circle, Jifundishe, indicates how much influence they have on the organization.



### Internal Stakeholders

The **internal stakeholders** are those that are committed and in some way serve Jifundishe and have power to influence it and it has the power to affect them based on the successes and

failures of the organization. They have a vested interest in Jifundishe and are the key players in the long-term survival of the organization.

Jifundishe has had an **Executive Committee** as a part of their governance structure since 2006. This group is composed of 6 positions, 5 of which are currently filled. Each of these individuals have to be due-paying members of Jifundishe and are nominated and then elected by the members at the annual meeting. The committee is made up of 4 men and 1 woman and 4 Tanzanians and 1 American. The Executive Director of the organization has a position on the Executive Committee. The current members all have a direct link to the community – either a current resident, lived there in the past, or were born and raised there. These positions are voluntary, with no salary. They receive a per diem for attendance at the quarterly meetings and are eligible for loans through Jifundishe, just like the staff. The committee members all bring a unique perspective, some run other NGOs in the area and one was a former employee.

The other internal stakeholder is the **staff and volunteers** working for Jifundishe. The staff consist of two dedicated Jifundishe staff - Deb Kelly, Executive Director and Anande Mirisho, Assistant Director. Deb and Anande are responsible for the running of Jifundishe as an organization. They oversee all programming, communicate with donors, support volunteers and are the face of the organization.

The JFL program has three staff who are responsible for the day-to-day operations for the library. Babe Nnko is the Library Manager and also the Manager of the IS program. Liz and Rena are librarians at the office, in addition to supporting the UKUWAJI program (Liz) and the IS programs (Rena). Another member of staff is Eliza - the Groundskeeper. Her duties are to ensure that the grounds, both inside and outside the library, classroom, office, and volunteer house are kept up. There are also two watchmen, Sam and Kelvin, who are responsible for securing the property in the evenings and on weekends during the off hours of the library.

## Both Internal & External Stakeholders

A group of unique stakeholders of Jifundishe that straddle between internal and external, and are arguably the most influential, is the **community**. Jifundishe was community driven, executed, and sustained by the community. This community spans more than five villages, many primary and secondary schools, a number of churches, and upwards of 10,000 community members. The community members are the driving force of the organization. From the community come participants, staff, and motivation.

## External Stakeholders

The **external stakeholders** are those who are impacted by the work of Jifundishe, not knowing the internal workings and decision-making processes of the organization, but are indirectly affected by the choices made and carried out by the internal stakeholder groups. Jifundishe has four external stakeholders – Beneficiaries or Participants, Donors, and the Community.

The first group, and arguably the most important, are the **beneficiaries or participants**. These are the people - students, young and old - who participate in Jifundishe's activities and utilize

their resources. Currently Jifundishe has participants in a number of programs, who frequent their library on a daily, weekly, or monthly basis. On average the library has 400 unique visitors a week.

**Donors** are another group of external stakeholders that were identified as having a stake in Jifundishe. Currently the donors have varying levels of stake in Jifundishe. Individual donors, make up about 50% of the donors but have a relatively low stake - in large part because 50% of those donors are one time donors. Those who are regular donors have a higher stake in seeing the organization succeed at its activities. Although, Jifundishe has always made a point of developing programming based on what the community desires and not that of individual donors. The remaining percentage of donations comes from grants from the Segal Family Foundation and Project A.B.L.E. The size and scale of the grant does increase the Foundations stake in the organization – for example, requiring deliverables or activities that must be accomplished by Jifundishe.

The third external stakeholder of Jifundishe is the **Government** - both of Tanzania and the United States. Jifundishe is a registered NGO in Tanzania. Their most frequent interactions with the government are via the District Education Office, to advocate for the students they support in government schools and also to ensure the schools in their community are functioning. Jifundishe partners with Project A.B.L.E., a 501-C3 non-profit in the U.S., to help Jifundishe receive tax-deductible donations from donors.

## S.O.A.R. Analysis

There is a traditional approach to change that involves looking at a problem, doing a diagnosis and then fixing that problem. With the emphasis being on what was wrong or broken. By seeing out problems we emphasize them and amplify them (Hammond, 2013). In the early 1980s, David Cooperrider and Suresh Srivastva developed Appreciative Inquiry (AI). The approach looks to flip the conversation that often surrounds organizational change, and change on a more general level as well. It is developed on the belief that the direction of the line of inquiry determines the direction of the change. Instead of looking into the *problems* of an organization as what you are trying to change, look at the *successes* and what the organization does best. Change in the direction of what is already good. It is the notion of finding what already exists and works well in an organization and capitalizing on that. Hammond (2013) says that because, "this is grounded in real experience and history, people know how to repeat their success."

As noted in the introduction to this strategic plan this strategic plan was grounded in appreciative inquiry. A flagship of appreciative inquiry is the appreciative summit that brings together members of the organization from all levels – staff, management, and participants – to discuss about the future of the organization. Jifundishe held one of these appreciative summits on February 25, 2017. One of the deliverables from that session was the completion of a S.O.A.R. analysis.

A S.O.A.R. analysis is an alternative to the traditional S.W.O.T. analysis used in strategic planning. A S.W.O.T. looks at Strengths, Weaknesses, Opportunities and Threats whereas a S.O.A.R. takes a more positive approach looking at Strengths, Opportunities, Aspirations and Results.

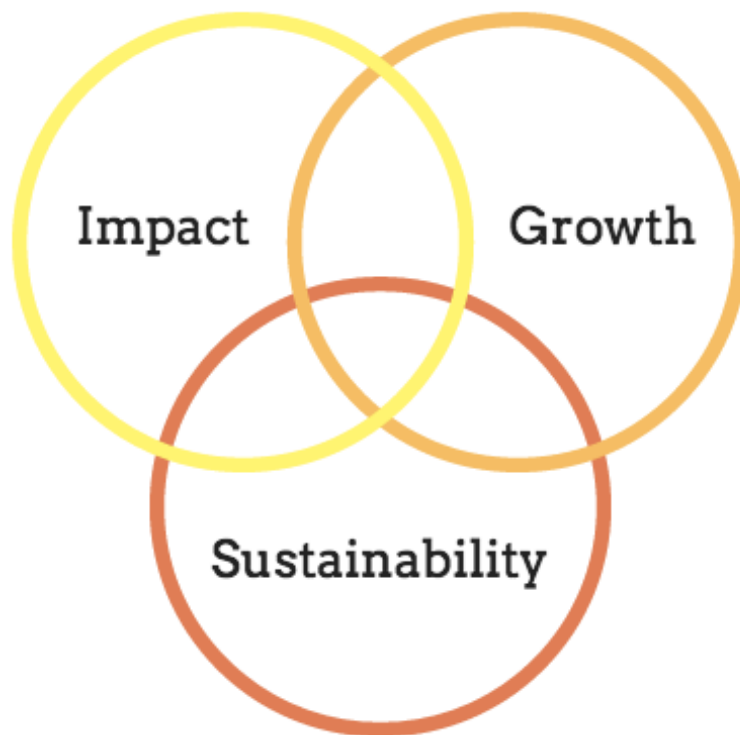
Completed S.O.A.R. Analysis matrix below...



## Strategic Goals

The summation of the findings of the historical assessment, evaluation of the current programs, internal and external analyzes, the stakeholder analysis, and after a full day workshop with staff, executive committee members, and program participants discuss dreams for and the destiny of Jifundishe. Jifundishe has been extremely successful programmatically, financially, and overall as a member of its community but they are at a point in their story that they recognize the changing needs of their community, new technology is more readily available, and there are anticipated changes in leadership. The following are strategic goals that were identified by the management of Jifundishe after the workshop in which they heard all of the recommendations and hopes of the group.

The following three goals are the big picture goals for the organization's future and each of the Strategic Objectives and their Key Activities fall into 2 or 3 of these Goals.





## Strategic Objectives

The strategic objectives are an organizations stated actions that they believe need to be met in order to achieve their goals and fulfill their mission. Jifundishe has identified five strategic objectives that they believe will lead them to their strategic goals.

The below strategic objectives all correspond to two or three of the identified goals of the strategic plan.

- 
1. Effective Programming
  2. Funding Opportunities
  3. People Power
  4. Spreading Our Message
  5. Better Research = Better Impact

## **Focus Area #1: Effective Programming**

### ***Diversify and Strengthen our Programming***

Jifundishe has a history of meaningful, successful, community-driven programs. We are our programs and our programs are us. A program at Jifundishe ranges in scale from the running and managing of the Jifundishe Free Library to a one-off, day long themed workshop. These programs can vary greatly in budget and timeline but what they have in common is that they strive to be purposeful and impactful. To meet the strategic goal of Effective Programming Jifundishe will seek to diversify and strengthen our programming with the following Key Activities:

- Create 4 new programs over the next 3 years.
- Diversify programs - broaden what "education" means.
- Sustain and strengthen the programs already running, indefinitely.

## **Focus Area #2: Funding Opportunities**

### ***Seek and Secure New Funding Opportunities***

It has always been a pride point for Jifundishe that they are seen as responsible and transparent with their finances by both donors and beneficiaries. Having had a successful 12 years funded almost exclusively by donors, with a few grants, it is important that there be an articulated approach to the organizations finances in order to continue being viewed as responsible and transparent while also keeping up with growth. Jifundishe has set the strategic goal to Seek and Secure New Funding Opportunities and will meet that goal through the following Key Activities:

- Seek out local opportunities:
  - Encourage community members to become Jifundishe 'members' - goal of 100 new members by July 2020 - +25 new members by July 2017, +25 members by July 2018, +25 members by July 2019, +25 members by July 2020.
  - Hold a Harambee annually in December for the next five consecutive years.
- Develop a fundraising strategy that outlines the target revenue for the next five years by June 2017. By 2022 - the funding breakdown should be set to 35% individual donations (from abroad), 50% grants, 15% local donations/funding streams.
- Secure a treasurer for the executive committee by July 2017.

## **Focus Area #3: People Power**

### ***Ensure Staff, Board, and Volunteer Development***

The individuals that make up Jifundishe are critical to the work that gets done. They are members of the community and their education and development is equally as important to

those in our programs. Moving forward it is important to be intentional with how and why we build our people power. Key Activities:

- Expand the board to 8 members by July 2018.
- Structure the volunteers program by September 2017.
- Provide staff development opportunities - one opportunity annually for a staff member on a rolling basis.
- Add staff where and when necessary, happening simultaneously to the creation of the new programs.
- Cultivate an internship program to help fill the gap of staffing, have first inter in June 2018,
- Analyze the need for hiring an education coordinator by December 2017.

#### **Focus Area #4: Spread Our Message**

##### ***Spread Our Message to the Community and Beyond***

With 12 years of successful programming and community development, Jifundishe and the work it does should be shared. This strategic objective is two-fold it is to ensure all members of the community understand Jifundishe's services and know how to access them, and also that our message is articulated to donors. Key Activities:

- Translate into Kiswahili and make the quarterly newsletter available to the village community. (Community Level)
- Produce a brochure for Safari companies in the Arusha area to promote visits to Jifundishe - securing 5 partnerships by April 2018.
- Website
- Better utilize social media platforms - update them once a week and use it to host an annual fundraising campaign.

#### **Focus Area #5: Better Research = Better Impact**

Jifundishe has hopes to harness its past success of gathering information on what projects are desired and turning that into gathering information on how our projects have impacted individuals. And what can we do better. This has always been conducted informally at Jifundishe and this objective seeks to solidify and formalize that. Key Activities:

- Explore how other organizations working within the same context conduct and approach M&E and research.
- Create a M&E policy for the organization by September 2018 - that states the criteria that identifies which programs will have M&E elements, and how extensive they must be.

Appendix 1

Results from the Elements of an Effectively Managed Organization survey, taken by all 5 of the Executive Committee members on February 25, 2017.

<b>Mission</b>	<b>3.246</b>
1. Core Programs: Consensus exists on the core program areas or core services the organization offers.	3.8
2. Primary Constituencies: There is agreement on the primary constituencies the organization should be serving.	3.5
3. Program Portfolio: Programs are chosen to support the mission of the organization and with respect to how they fit together (and are not just a collection of projects and activities) and how they meet needs in the community.	3.8
4. Feedback: The organization has feedback mechanisms in place for regularly assessing constituencies’ needs and satisfaction.	2.5
5. Performance: The organization has a history of delivering successfully on program/service goals and of making changes or eliminating programs when they underperform.	3.8
6. Exciting: Programs/services elicit enthusiasm from staff and board as well as from supporters and clients and stakeholders. People feel that the programs/services are important, valued, high quality, and making an impact on constituents’ lives.	3.5
7. Reputation: The organization is respected by its peers in its field for being well run, delivering high-quality and innovative programming that meets the needs of constituencies.	3.8
8. Alliances: The organization advances the organization’s goals and expands its influence through participation in alliances and working collaboratively with other groups.	3
9. Public Information: The organization’s stakeholders and target populations are well informed about its work.	2.5
10. Media Coverage: The organization receives the media coverage it needs to reach its target populations as well as potential and actual supporters.	2
<b>Administrative Capacity: Planning</b>	<b>3.2</b>
11. Vision: A clear organizational vision exists and is widely supported by board and staff. The vision is inspiring and communicates the impact the organization wants to have in the world and what it will take to make that vision happen.	3.6
12. Purpose: The organization’s mission statement clearly articulates an agreed-on purpose—the ultimate result the organization is working to achieve. This purpose serves as a guidepost for organizational decisions.	3.3

13. Annual Plan: Annual workplans exist for programs and administration; these workplans relate to the strategic plan.	2.5
14. Measures of Success/Impact: Programs have measurable goals relating to quantity, quality, and impact of work.	3.5
15. Ongoing Planning and Evaluation: There is a commitment to ongoing planning and evaluation by the board and staff as an essential part of how the organization does its work. Plans are reviewed regularly and modified as needed to reflect trends in the environment, current and future client needs, and the organization’s capacity to meet those needs.	3
<b>Administrative Capacity: Human Resources and Leadership</b>	<b>3.619</b>
16. Staffing: The organization attracts and retains staff members who have the appropriate experience and expertise to perform their duties well.	3.8
17. Compensation: Benefits and paid compensation are competitive for the positions and relevant market(s)	3.6
18. Supervision and Professional Development: Employees receive appropriate supervision, annual performance reviews, needed training, and professional development opportunities.	3.5
19. Workload: Workloads for all staff members are reasonable and manageable.	3.8
20. Volunteer Management: Responsibility for volunteer recruitment and management is clearly and appropriately assigned, and volunteers are integrated as an important part of the overall workforce of the organization.	3.6
21. Leadership: Managerial leaders support shared values, attend to results, and lead by example where appropriate.	3.6
22. Shared Leadership: Leadership is not overly dependent on one person but is a shared function among many people.	3.1
<b>Administrative Capacity: Culture and Communication</b>	<b>3.625</b>
23. Decision Making: It is clear who makes what decisions and who has input into the decisions on all levels of the agency.	3.6
24. Communication: Communication is clear, and the flow of information is adequate and efficient in the agency.	3.3
25. Conflict: Conflicts are resolved constructively.	3.6

26. Teamwork: There is a strong commitment among all employees to work effectively as a team. Team spirit within and among departments is encouraged and supported, and there is effective coordinated services among departments.	3.8
<b>Administrative Capacity: Infrastructure—Technology and Facilities</b>	2.944
27. Use of Technology: Sufficient training and support exist to facilitate staff use of information technology.	3.2
28. Web site: The Web site is consistent with the communications strategy of the organization; Web site is updated regularly and is accurate.	3
29. Facilities: Facilities are in good repair, current with all code/ADA etc. requirements, and used appropriately. There is sufficient office space to accommodate the needs of volunteer and paid staff members and constituencies/clients.	3
<b>Board Governance</b>	3.416
30. Board/Staff Partnership: There is an effective working relationship between the board and the staff.	3.5
31. Membership: The board has members who: • Are committed to the mission Have the skills and experience the organization needs Are able to represent those groups involved in the organization’s work	3.3
<b>General—Programs and Services</b>	3.166
32. Overall, my rating of the organization’s programs and services is:	3.1
<b>General—Administrative, Financial, Governance</b>	3.666
33. Overall, my rating of the organization’s administrative, financial, and governance capacity:	3.6
<b>Finances: Financial Management &amp; Fund Development</b>	3.416
34. Budgeting: The organization has an effective budgeting process, including a program-centered approach to budgeting.	3.8
35. Diverse Funding: Funding is attracted from multiple sources.	3.4
36. Long-Term Fundraising Plan: The organization has a realistic fund development plan for long-term financial stability.	2.5
37. Financial Reporting: There are effective financial reporting and monitoring systems in place to: • Track expenses on a program as well as funder basis. • Ensure that revenue and expenses are monitored.	3.8
<b>AVERAGE</b>	3.3