INNOVATIVE MODEL FOR NGOS BASED ON IMPLEMENTATION OF PROJECT MANAGEMENT METHODOLOGY: AN INTERVENTION RESEARCH IN LEBANON

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ABSTRACT

Non-Governmental Organizations (NGO) receive billions of dollars annually under the title of community service although being mostly lost on failed projects, unmet objectives and rework besides the high margin of overhead costs which raises a question about the amounts of money reaching the target beneficiaries. To address this question, an Intervention Research (IR) is carried out from 2017 till 2019 in a medical NGO A. We adopted the socio-economic qualimetrics approach to assess the impact of IR from the qualitative, quantitative and financial facets. Our IR comprises of valuing the impact of implementing Project Management (PM) as a methodology for enhancing productivity and efficiency, thus leading to a higher quality of services and quality of functioning, with cross-cutting quality of management. This anticipated improvement in performance would respectively increase the level of beneficiaries' satisfaction and the Return on Investment (ROI) thus ensuring growth and sustainability of NGOs in the Lebanese context.

Keywords: NGO, Intervention Research, Qualimetrics, SEAM, Quality, Efficiency

ABOUT NGOS

NGOs are nonprofit initiatives (Shahmansouri & Nazari, 2013) that came into presence and started to expand in mid-nineteenth century (Bromideh, 2011; Marshall & Suárez, 2014). The last decades have witnessed exponential global expansion in NGOs, especially in developing countries, as an intrinsic part of social movements (Willets, 2013). This was also due to an increase in the numbers of populations and the influx of refugees together with a heightened sense of the government's shortcomings as an agent of development (Brown & Kalegaonkar, 2002). The result is a notable trend of partial shift of governmental roles to the

NGOs (Yassine & Zein, 2016) which substitute or complement the work of government authorities (Lang, 2001) through the provision of public goods (Aboramadan, 2018) primarily in countries that have little institutional capability because of the evolving economic nature (Latif & Williams, 2017). Other reasons for the flourishing of NGOs include the complex interplays between political and economic changes; global forces and national contexts as well as the remarkable achievements of many development NGOs in *providing multidimensional community services that aim at* enhancing *the quality of life* of disadvantaged people (Brown & Kalegaonkar, 2002; Mungle, 2012).

NGOs are complicated entities called the third sector that function independent from the government and are not part of the for profit private sector. They are "individual, self-governing and voluntary *initiatives through an* association of people acting together for some common purpose other than making money" (Anheier, 2014; Bromideh, 2011; Pollack & Pollack, 2015; Tabsh, 2012). Hence, NGOs, also known as grassroots organizations or community-based organizations, have gained increased attention in recent years and became influential at the national or even global level and developed a growing research interest (Aboramadan, 2018; Willets, 2013; Yassine & Zein, 2016).

Around the world, there are about 3.7 million NGOs (Maximpact, 2017). In Lebanon, however, the exact number of NGOs is unknown. There are approximately 15,000 active NGOs with 5,000 registered and only 700 working effectively and continuously (Dawoody, 2014; Information International, 2016). An overview of the *history* of NGOs in Lebanon indicates signs of a *chaotic* sector. The associations' law was issued in 1909 when Lebanon was under the Ottoman Empire dominance, and it is mostly based on the French Law of Associations issued in 1901. Since then, the law was not abrogated or changed nor was it properly implemented. One of the problems of this law is that it does not provide any government restrictions since it limits the role of the government just to "accepting advice" i.e. issuing a factual certificate that the association is formed (Information International, 2016). This is why in 2008, the Lebanese Ministry of Interior issued permits for the formation of 493 associations in less than 6 months, which constitute around 25% of the total 1,878 NGOs that were established in 5 years (Dawoody, 2014; Information International, 2016).

NGOs are initiated and operated by citizens who are considered believers in its mission and aim to convey benefits which might be in any work area and fulfill basic requirements for community stakeholders, claiming to be the voice of the people (Willets, 2013). They are, thus, considered "strategic" to achieving national social, political and economic development goals (Brown & Kalegaonkar, 2002). These development endeavors are accomplished fundamentally through operational or advocacy *project-based* interventions (Latif & Williams, 2017). Projects are temporary, not necessarily short, endeavors with a set of coordinated and controlled activities that have a specific start and end where the latter is designated by achieving the goals (PMI, 2017). To perform their projects, NGOs get financial resources from various individuals or corporations (Shahmansouri & Nazari, 2013) although being criticized for lack of accountability, transparency, integrity and quality (Lang, 2001).

THE PROBLEM

NGOs in Lebanon have access to several fundraising streams and get grants which sum up to hundreds of millions of dollars annually under the title of community service. Unfortunately, most of this money do not reach the target beneficiaries because of being lost on failed projects, unmet objectives and rework as well as the high margin of overhead costs, all of which are *noticeable phenomena in NGOs* (Latif & Williams, 2017). The main factors leading to such failure include the lack of proper planning which results in having unrealistic deadlines as well as errors in the budget and inconvenient project infrastructure (Laurie, 2003). Other factors are defective design, faulty selection processes, inadequate external coordination and insufficient evaluation and follow-ups (Rondinelli, 1976). The problems further include poorly defined objectives, scope changes, inadequate risk management, ambiguous contingency plans and poor communication (PMI, 2017). The result are projects going over budget, missing essential project milestones, or delivering outputs which are short of scope or not delivered at all. Therefore, time, energy and resources are a wasted opportunity for making a positive effect on society (Jex & Britt, 2014).

So, the *main challenge is not the funding* per se *but rather the administration of these funds* and lack of work effectiveness against socio-economic community development that put organizational, service and financial sustainability at risk (USAID, 2001). Interestingly, the funds entail no liability and almost none of the NGOs introduce serious financial planning, disclosing and auditing, and are therefore poor in management of day-to-day cash flow and accounting skills. The major problem behind this weakness is the traditional managerial style (Chahine et al., 2009). Another issue are the NGOs that serve the personal or political interests of individuals or small groups and do not work for the community welfare (Information International, 2016).

Field observations show that people at NGOs design projects, write technical and financial proposals and implement projects and evaluate them. Although these tasks are repeated, yet, it is clear that PM terms, norms, best practices or techniques are still missing. PM is perceived to be much more an art rather than a practical science and thus not enough money or time is invested on the implementation of its structured frameworks in organizations (Kear, 2009). Hence, NGOs *lack the organizational structures which support reliable PM*. These PM deficiencies, being technical or related to actors' capabilities, create management challenges facing projects and an ultimate *compromise between timely delivery and quality*. Management challenges include, but not limited to, identification and elaboration of demands; multi-disciplinary team makeup; competing resource stressors; collaborating with non-project oriented organizations; growing funding requirements and pressures. While the technical challenges can be summed up as the need to equalize efficiency against reasonable robustness (Kear, 2009).

However, the fact that *top and middle managers lack PM know-how* is on top of all these challenges. To have a successful project, the project managers should possess good PM competence and be responsible for the entire project. They plan and manage the project by data and evidence, set a good example, have objective judgment and are able to delegate (Kear, 2009; Rusare & Jay, 2015).

Project managers therefore have a unique ability to control all procedures and structures. They must coordinate resources, streamline the main initiatives and services, and be qualified to sustain and execute all of NGO services effectively. Having availed that, ROI is in the mind of each project manager, or should be, so that any donation contributed by individuals and funding organizations will get a full benefit (Green, 2013). This is why every project needs a clear evaluation to detail the major progress from the start to closing. The assessment process consists of analyzing the project real value, pre-implementation, monitoring and execution (Green, 2013; Joslin & Müller, 2015; PMI, 2017).

Having said all that, however, the first step towards adopting a PM methodology is to embrace the principle by realizing that better ways are available to do things than those practiced currently. So, this is about the *aversion of workers to change itself*, which is a *significant obstacle for implementing PM*, and is a major hindrance to any attempt for successfully reforming the organization. Resistance demonstrated by inadequacy of attitude (e.g., disengagement) and behaviors (e.g. immorality) will destroy productive procedures and strategies for organizational improvements (Avey et al., 2008). The egoistic attitudes among other variables may be a great margin of this resistance. In other words, the ego system should tolerate change, but this can only happen once the degree of discomfort of an individual is not bearable. Only then can the individual use reasoning to get the ego over and deliberately incorporate essential improvements into obsolete or unsuccessful opinions and patterns of behavior. This change might be problematic because elitism and egotism are systemic issues inherent in the field of NGOs (Brown & Kalegaonkar, 2002; PEN, n.d.). But some literature indicate that the readiness to change does not appear to be a sufficient preliminary step in the transition process to achieve successful change (Datry et al., 2017). This is a debatable point.

THE CONTEXT

NGO A is legally registered and working in Lebanon since 2010. This startup venture began, as other ventures, with a traumatic point; one that the founder of the NGO encountered personally. It provides home-based hospice care to terminally ill patients in different regions of Lebanon and addresses the medical, social and psychological needs of patients and their families. Their mission is about preserving the dignity of chronically and/or terminally ill patients and improving the quality of their lives. The goal is to help patients stay as attentive, efficient and relaxed in the quiet sanctuary of their own homes, surrounded by families and loved ones (Anonymous, 2010). The organization is anonymous, so that strategic or sensitive data can be easily accessed (Savall & Zardet, 2014) which increases the quality for scientific use (Buono et al., 2018).

The reputation of NGO A has been growing so rigorously during the past years due to the community need for such services. NGO A is one of very scarce PC providers in Lebanon, a fact which increased the already existing high demand for this service in the community. These factors were reflected through a remarkable workload on the young NGO and its staff which is limited in number and experience in this field. So, NGO A is naturally in a period of stabilization as well as geographic expansion.

As all NGOs and other types of organizations, NGO A has its dysfunctions that need to be unveiled and treated. In this context, we approached them to execute an IR based on the socio-economic theory. Due to their enthusiasm to excel, they approved with one concern about the high load of work versus the number of employees which might be a limitation to giving enough time to the IR activities. Our research focus is on the strategic, organizational, human and financial issues leading to socio-economic methodology (Savall & Zardet, 2014). *It aims at studying the impact of implementing a PM methodology, well known as an organizational change methodology (knowledge creation).* It further aims at *assisting NGOs in the Lebanese context, for enhancing their productivity and efficiency which lead to a higher quality of services and quality of functioning, with cross-cutting quality of management to achieve satisfaction of beneficiaries, hence sustainability and growth (intervention consulting).*

THEORETICAL FRAMEWORK

The implicit hypothesis states it would be beneficial to adopt PM to attain goals (Pollack & Adler, 2014) and is widely reflected on overall productivity, performance, efficiency and organizational successfulness (Cleland, 1984; Pollack & Adler, 2014). Implementing PM development measures is examined as an innovative mechanism. It involves incorporating the principles of implementation as an ongoing and organized initiative to introduce creativity, diffusion as a passive distribution of inventions, dissemination entailing proactive and organized attempts to encourage target audiences to embrace ideas, then execution and routinization to institutionalize the innovation and having it as a built in structure in an organization. In this perspective, embedding PM is examined as a method rather than an occurrence, while adopting change programs is the outcome, i.e. embraced by all actors and integrated into the operations as "standard" (Fernandes et al., 2014). This is possible within companies because nothing seems to be indeed "locked”. However, the need to adopt *mechanisms for this systemic transformation* is grounded in procedures which are designed for best results towards *ensuring the longevity and the growth* of organizations (Voyant et al., 2016).

Many classify Organizational Development (OD) as a technique, while others define it as a process that may be actually compared to certain areas such as strategy or management consulting. OD, in plain terms, is an institutional vision and method where both are comprehensive and individualistic (Wright, 2011). Donald Schön's key area of study and philosophy has been individual and organizational thinking. He stressed how human thought, rather than just behavior, can become a foundation for diagnosis and intervention (Argyris & Schön, 2014). So, the performance of OD has three other related elements: individual, viewpoint and action (Wright, 2011). As such, the mechanism of successful transition requires all parties to coordinate efforts and successfully enforce it (Voyant et al., 2016). It requires a change in the activities of organizational members which need a collective and individual process of learning and integrating external data with intellectual effort required to improve the knowledge and expertise while generating new information (Ginsburg & Opper, 1988). The cumulative success of the transition cycle improves with systemic and behavioral improvements concurrently on the three levels, *employee, team and business* (Datry et al., 2017). This systemic transition is not the consequence of an intrinsic capability of the organization, but rather a time-consuming collaboration mechanism (Voyant et al.,

2016) triggered by a structural imbalance with the environment and motivated by the discrepancies between the priorities of an organization and its actual outcomes (Avey et al., 2008).

Given the above, we conclude that the importance of human potential is advocated by the "socio-economic theory of organizations". Cohesion seems to be one of the main success drivers in adaptive and proactive approaches with a tendency to harmonize between individuals and teams and trigger their collaboration. As a result, sustainable strategic efficiency is solidified by internal cohesion; the bedrock of an organization (Savall & Zardet, 2016). Hence, to address the research question, and upon evaluating many management and OD theories, we selected Socio-Economic Approach to Management (SEAM), being the product of a scientific consultancy approach, as both a change management methodology and a PM methodology.

SEAM, is based on three fundamental principles that *distinguish it from other global performance management methods* such as Lean Management, Six Sigma or the Balanced Scorecard (Handel, 2014; Savall & Zardet, 1992; Kaplan & Norton, 1996; author, 2006). First, it is developed through IR processes based on the observation of concrete management practices; second, it is built on the hypothesis that an organization's sustainable performance relies on its social results, i.e. satisfaction of employees and stakeholders, and its economic performance; third, it is based on the hidden cost method that assesses the economic consequences of organizational dysfunctions (Cappelletti et al., 2018).

SEAM is a technique used to improve the whole system by the identification of the root causes of dysfunctions, rather than the procedures, and help it by financial exploration (Goffnett et al., 2016). This is the type of improvement that managers are looking for to fix their organization dysfunctions. Yet, the root cause of these dysfunctions and the ability of an organization to deal with them are both linked to members of an organization. In this sense, these initiatives are not operationalized because of an absence of actors expertise in organizational change processes (Voyant et al., 2016). To address this, SEAM has mechanisms that concentrate on the human potential, coaching executives and stakeholders by utilizing specific tools to increase efficiency, and then guiding them through different organizational improvements, which would allow SEAM to remain consistent with strategic priorities. This absolutely depends on the development and distribution of knowledge. It is built on collaborative pedagogy in favor of increasing value for persons, organizations, community and the industry (Conbere & Heorhiadi, 2015). The IR is to empower the people and strengthen their commitment for better supporting organizational transformation that aims to improve efficiency and reduce hidden costs (Conbere & Heorhiadi, 2015). Consequently, this renders *SEAM a sort of special management consultancy approach* that adds to Evidence-Based Management and Engaged Scholarship (Cappelletti et al., 2018).

In this intervention, one of our aims is to see the movement of the bullet and this is exactly granted by SEAM as a technique of progressive transition and metamorphosis, i.e. observing changes in individuals (Conbere & Heorhiadi, 2015). It contradicts other traditional management theories by seeking to *improve both the social and economic efficiency* aspects of an organization. It handles the

NGOs' difficulties of efficiency, performance, expertise, communications etc. by training managers on socio-economic tools along with a highly regarded shock treatment which, as per Lewin, causes the senior executives to "unfreeze" and urge them to take corrective measures (Conbere & Heorhiadi, 2011). However, the drive of change is primarily generated from founders of the organization. We must, therefore, concentrate on enabling change management while investigating the conduct of top management and then exploring the relevance of the method to support their goals of organizational effectiveness. In this context, the intervener researcher needs to *acquire the characteristics of an OD practitioner* in being a skilled listener, caring, self-confident, knowledgeable, pragmatic, demanding, positive, resilient, and reliable professional (Wright, 2011).

The IR initiatives are performed in collaboration with the organizational actors and using a methodology focused on the actual physical presence inside the organization to facilitate the change function (Buono & Savall, 2007; Conbere & Heorhiadi, 2011; Savall, 2015). So, the secret of success is in keeping *constant interaction with the organization actors*. That consists of "irrigating the entire organization, taking into consideration the interaction between the change actions, initiated both at the top and at the various organizational levels". The constant relations with the administrators and staff have allowed them to objectively examine their organizational challenges and to enforce the framework of resolutions with the researcher, then executed by the managers and employees (Savall et al., 2018).

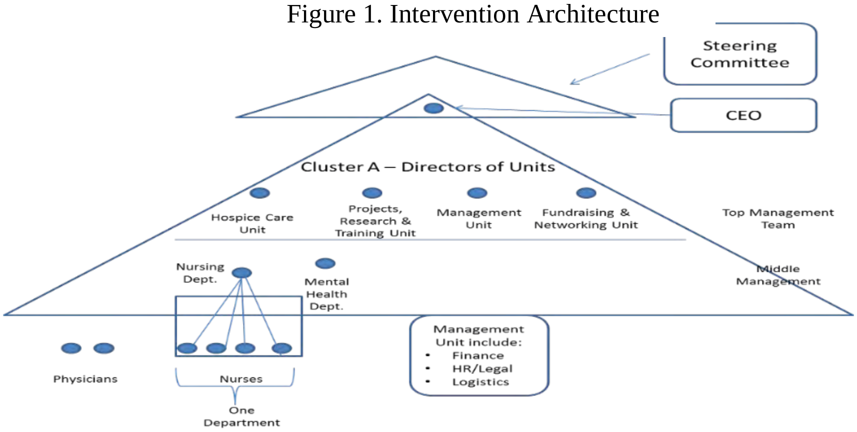
SEAM uses the very particular socio-economic qualimetrics approach, led by ISEOR, which introduces into the organizational dynamics a special and challenging stance based on the qualitative perspectives, quantitative knowledge and financial analysis, all together ((Savall & Zardet, 2011). The qualitative emphasis is on realizing the dynamic social structures and the meaning of a real human experience in the spheres of constructivism and interpretivism. At the other side, quantitative research, objectively and independently from the person, determines how often and how much under the positivism approach. SEAM is an Action Research focused on a scientific observation paradigm, differentiating it from other IR approaches and enhancing the precision and comparability of results (Cappelletti et al., 2007; Savall, 2010b; Savall & Zardet, 2011).

As far as our choice of storytelling, it's a strong way to share our experiences in the midst of transition and help modify knowledge about change and the intentional co-evolution. Being a witness to events and sharing the tale as we have experienced it, allows the audience live the occurrences again through our eyes (Boje, 1991b). Our story has three memory levels. The first is "cognitive-rationality" which is a mental topography recalling who was involved, when did it take place, what happened, and why was it like this; second is an "aesthetic-sensation" reflecting impressions embedded in the five senses of touch, smell, taste, sight and sounds; while the third is ethical-emotion denoting prior events marked with fear, expectation, excitement, anxiety, enjoyment or other feelings. It is important to be highly expressive in addressing the above elements so that to build the plot to its climax (Boje, 1991a)

THE INTERVENTION

The NGO A consists of four major units: the hospice care which includes the nursing unit and the mental health unit; projects research and training; management, as well as fundraising and networking unit. The number of managers is six in total including the director and the middle managers of the mentioned units. On the other hand, the staff are 9 including 2 part time physicians and 1 part time psychologist, 4 nurses, 1 part time accountant and 1 field officer. So, the units have only their managers doing the work with no subordinate employees except for the hospice care unit with mid-level managers and some staff (2 doctors and 4 nurses). Based on that information, we developed the HORIVERT intervention architecture diagram (Figure 1) which summarizes the diagnosis stage involving all actors. Cluster A horizontally includes the CEO and the five managers for the six units because one manager is taking dual responsibility of two units. Then a second cluster B vertically comprises the employees in the nursing department.

Figure 1. Intervention Architecture



The first meeting with the CEO included an explanation about the importance of forming a steering committee and its expected duties and roles. The CEO decided that the steering committee includes herself together with all the five managers of the NGO units.

Each interview was started by an introduction about the aim of this data collection and an assurance that the information collected will be treated anonymously. The target was to document dysfunctions from each interviewee which would be classified later under the SEAM six themes of dysfunctions (Savall, Zardet, & Bonnet, 2008) which would form the basis for the research intervention. The interviews retrieved a total of the 277 witness statements (190 horizontally and 87 vertically). All were categorized by the six SEAM themes as per table 1 below.

Table 1. Distribution of Dysfunctions by Themes of SEAM

Dysfunctions Themes of SEAM	Horizontal Dysfunctions Frequency	Horizontal Relative Frequency	Vertical Dysfunctions Frequency	Vertical Relative Frequency
Working Conditions	24	13%	22	25%
Work Organization	45	24%	9	10%
Communication-Coordination-Cooperation [3C]	19	10%	13	16%
Time Management	36	19%	11	13%
Integrated Training	28	14%	9	10%
Strategic Implementation	38	20%	23	26%
Total	190	100%	87	100%

The distribution of witness statements by theme of dysfunction by actor category shows that both managers and staff see strategic implementation is one of the major issues facing the NGO. However, the managers perceived work organization and time management as the other major dysfunctions while staff viewed work conditions and 3C as the major dysfunctions from their perspective. The vertical diagnosis revealed more practical and field dysfunctions related to the beneficiaries and provision of services including logistics as well as medical supplies and equipment, among other day to day operational issues. These were not mentioned by the managers of the units; not even the managers of the medical unit who supervise the staff involved in the vertical diagnosis. This is interesting in the sense that each actor category expressed based on daily work experiences. Top and mid managers suffer distractions and lack of organized work while the field staff suffer stressful work conditions and alienation from other units.

At first glance, these witness statements might call for an intervention action to resolve the dysfunctions. But we realized that a more thorough analysis of the classification by subtheme versus the literature on innovation management is deemed important for more accuracy of intervention projects at a later stage. So, we further identified the witness statements within each theme also by subtheme, as shown in Figure 2 below. First we observe that the two subthemes with the highest percentages are the factors disturbing time management and training needs (both at 38%). Then, the subthemes of available competency as well as distribution of tasks, missions and functions (both at 35%). These most frequent dysfunctions were repeatedly mentioned among other important problems such as transmission of information (31%), equipment and supplies same as rules and regulations (30%) followed by physical conditions of work and 3c internal to the service and personnel management (all the same at 28%) then workload and poorly assumed tasks (26%).

Figure 2. Distribution of Witness Statements by Subtheme

The frequently mentioned lack in *training* affects the level of expertise and *available competency* and leads to *poorly assumed tasks* among the managers and staff. Several root causes for this were mentioned such as the *poorly planned and implemented induction training programs* and the dissatisfactory career development plans aiming at *empowerment of human potential* and *capacity building* for *enhancing productivity and efficiency* while at the same time *providing the employee with self-actualization satisfaction*. This insufficient specialized training for capacity building is damaging the professional empowerment.

These findings were ensured by applying the SEAM "Competency Grid" which offers various applications such as the diagnosis of operational and strategic skills, the need for development of training programs, assessment of competencies growth and increasing the involvement of top level management in training people and enhancing the redesign of jobs (Savall, 1981-2010). On the other hand, it also serves as a potential strategic diagnostic to assess whether the staff are capable of executing the plans listed in the Internal External Strategic Action Plan (IESAP) and Priority Action Plan (PAP) (Buono & Savall, 2007; Savall & Zardet, 2011).

The competency grid, has been implemented at both the horizontal and the vertical levels in NGO A. This tool revealed the root-cause of many dysfunctions but at the same time it showed some contradictions in stated information. For example, the medical director and the nursing director are considered by the CEO as mastering the administration of psychological support to patients and involved caregivers, which poses a question about definition of psychological care and its quality of provision. For the managers, it lacked the skills section, while for the staff all the stated skills were perceived as mastered notably the psychosocial skills, end of life skills and problem solving. A remarkable point is about the CEO perceiving the managers as well as nursing manager perceiving the nurses as mastering almost all functions that they perform. This takes us into comparing these inputs from the competency grid with the witness statements from the interviews stating all the extensive needs for training in various areas of work. This is why we pose a question about the validity of this provided information for drawing reliable conclusions.

Another issue stated by the actors is that of time management which arises initially from the fact that people at the NGO *may not recognize the value of managing time* and its direct *effects on productivity* and *efficiency* for a working professional who aims for more opportunities and career growth. Unfortunately, the NGO staff *wrongly consider that the time spent chatting among each other is normal to relieve the work stress,* while in fact this *uncontrolled communication* between employees causes distraction and affects time management, both of which result in *stress and anxiety* at the levels of personal and workplace relations. This is due to perceived sense of lack of productivity and efficiency through meeting deadlines, avoiding delays and focus as well as sustaining work and life balance, all of which have financial consequences. These factors also lead into physical and psychological health problems which may later lead into an increased absenteeism and even increased turnover rate.

In a complimentary action, the time management self-assessment grid tool is filled by the CEO and the managers of the units for a period of five working days. The process took long time to be completed even after collective training and personal assistance due to some errors in interpreting the tasks as per the codes and the timings. The results indicate that distribution of time and number of distractions/passages per task are real time consuming factors; being scheduled or unscheduled meetings, phone calls or WhatsApp communication. For example, the CEO allocation of time between individual and collective tasks is not reasonably distributed. She assigns extremely limited times for writing, thinking, reading and document management while spends almost all the day in scheduled and unscheduled meetings, which are mostly operational meetings. The deficiency in staff training and skills have forced the CEO to be involved in almost all tasks. This result was clearly reflected in the time management grids filled by the managers, not surprisingly because they were members of the scheduled or unscheduled meetings of the CEO. As for the other middle managers their tasks are characterized by *interruptions especially by phone calls* or other staff coming in seeking an answer to work-related questions. One meeting, for example, was notably interrupted 8 times which *poses a question of efficiency* and concentration especially that the aim of that meeting was planning a certain important project to be executed abroad.

Another important result from the sample of the CEO time management grid shows very little percentage of time (9%) is spent on dysfunction prevention which explains the bigger percent of time spent rather on dysfunction regulation (18%). One more important risky indicator is to have the CEO considers that most of the activities are done with a sense of high urgency (76%) because this creates an atmosphere of work under pressure. This is apparently due to lack of proper planning, scheduling and due to unpredicted succession of events. What is still more alarming is the CEO considers that she has to keep 95% of her current tasks.

She is currently *insisting not to delegate her tasks* repeating and reminding that she is a technical manager.

One important outcome stemming out from the time management tools of the managers is the immediate need for eliminating or delegating low-value added tasks. However, for this to happen, they need to have the optimal number of staff in their units. Also, the *limited availability of nurses* due to home visits and of *part time doctors* is a hindering factor to efficient time management which results in *non-visible costs*. As such, the unavailability of some employees in the office affects *controlling communication* and *managing the time schedules*. We further noted from the diagnosis interviews and from personal observation that the *deficiency in modern technology availability* (hardware and software) affect *communication and work organization.* For example, the lack of simple office machines such as internal phones and printers and the unmounted laptops or more specialized computer hardware and software for PM or digital patient files etc. This lack *increases the margin of time waste*.

The work of NGO A is based mainly on providing services to ill patients at their homes. This means two things: First, field visits to patients' homes are tedious and costly due to various logistic factors and have consequential impacts on the team especially due to some gaps in case management. Second, the nature of the service is so demanding and necessitates that nurses have to be 100% devoted for the service. These two factors mean that the work conditions are physically and psychologically stressful to employees performing field visits and resulting in fatigue which hampers quality performance. On the other hand, this team *need specialized service training* to excel service provision. The first priority at NGO A is for certification training and quality indicators which covers a lot of the issues needed in service delivery.

The difference between traditional management and innovative management is that the nut is not broken; i.e. the hidden costs are not disclosed in the organization's accounting framework, thus not seen. These are incurred when the actors are busy with the visible cost, or not sensitized either because they do not know the dysfunctions or they ignore them. Whatever the reason is, the actors are causing their organizations to have lost opportunity cost (Savall, Zardet, & Bonnet, 2008). Such inadequate expenditures and the failure to build value-added through internal actors lead to the waste of the organization economic resources (Savall et al., 2015; Savall & Zardet, 2008). Hidden costs are not an action of one individual but rather produced, as well as reduced, by the cooperative effort of all actors in the organization.

In view of diagnosed dysfunctions, the hidden cost encompasses five socio-economic indicators, including absenteeism, industrial / workplace accidents, turnover, efficiency of the service/product and uninterrupted productivity. The six underlying components includes excess salary, overtime, overconsumption, wasted productivity, opportunity cost for not creating a strategic advantage and risks (Savall, Zardet, & Bonnet, 2008; Savall & Zardet, 2008). Given these definitions, the 277 dysfunctions -diagnosed during the qualitative interviews at NGO A- thus generate hidden costs, which although economic but affect as well the social performance of the organization.

To calculate the hidden costs, we conducted two consecutive quantitative interviews with all the team members to link the identified problems to their root causes, consequences, frequency of occurrence and estimated cost. However, the CEO at NGO A did not agree to provide the numbers related to budget and expenses necessary for calculation despite all our trials. So, we were obliged to take a *hypothetical value of $25 for the HCVAVC* in order to proceed into the evaluation of hidden costs.

For example, we clearly noted from the qualitative diagnosis that errors in implementation of projects is due to improper planning and result in extensions, facing issues during project implementation and rework. So we asked about it during the quantitative interviews to monetize it. Actors mentioned an average of three occurrences of training projects rework per year. That would include at least the reprint of material for participants, repaying the expert fees and repaying the planning and coordination time of an employee in the NGO. As such, the economic impact is calculated as over-time and overconsumption and the indicator of this cost is non-quality. This work is repeated to cover all the 277 diagnosed dysfunctions. This process shows the qualimetrics distinctive of SEAM which combines qualitative, quantitative and financial indicators and data to identify organization's dysfunctions, their root causes and hidden costs and potentials.

The total amount of hidden cost per year is estimated at $249,632 with overtime estimated with the highest amount of financial consequence reaching up to $114,102 followed by the non-production with estimated amount of $80,680. The NGO did not acknowledge openly these hidden costs, this is completely understood as a normal reaction after all the observations about egotism and pride in achievements, and the resistance to face the dysfunctions although expressed by the actors themselves. However, the enthusiasm to start the project phase was enough to indicate that they admit, even if only implicitly, the problems and showed the urge to work on projects that would minimize two of their major problems which are namely time management and inter-unit 3Cs.

Observation and documents' desk review were important tools during our intervention. It showed various issues related to patients' files concerning data collection, documentation, saving and dissemination. Various costly trials were done previously to enhance that issue but failed due to improper assessment. Another issue was about organizational documents not being finalized but rather dragging between decision makers such as the HR policy although it is simply an extract from the Lebanese labor law with very few amendments.

All these diagnostic steps were crowned by the mirror effect meeting which aims at sharing the image through getting actors hear themselves thus reducing the resistance to change (Buono & Savall, 2015). It is a dynamic considered prerequisite to mobilizing the people towards solving the diagnosed dysfunctions. The innovation projects will eventually tackle the quality of functioning, quality of services and, evidently, the quality of management. Attendees at the mirror effect meeting in NGO A are the members of the steering committee, i.e. 35% of the whole workforce. To prepare for the meeting, we grouped the witness statements by some frequent key ideas depending on the dysfunction mentioned by the actor, then each cluster of key ideas were categorized by subtheme and theme. Hidden costs were not presented because the financial data necessary to do the financial calculations was not provided, as described earlier. This is considered a limitation of the mirror effect meeting. During the same meeting, we presented our expert opinion which aims at clarifying the dysfunctions that the actors do not want or dare to talk about or those to which the organization is not alerted to. The pivotal ideas that we presented at the expert opinion meeting included issues related to the limited decision-making abilities and managerial capabilities of middle managers, having managerial titles but lack managerial activities and tasks; deficiency in PM expertise and tools; insufficient specialized training for capacity building as damaging the professional empowerment; the frequency of operational meetings indicating much time consumption although their efficiency is insufficient for the organization's work momentum; the lack of delegation of some tasks reducing the productivity and time management capability of the managers. We also presented and recommended to the CEO and the steering committee the baskets derived from the key ideas and the expert opinion. The themes of these baskets revolved around training and staff development, enhancing communication, time management tactics and implementation of PM methodologies. These baskets establish the hard core of the innovation projects by representing a map of major change actions for actors.

The biggest challenge of a change effort is its psychological effect especially on people who were not part of decision-making which leads to resistance to that change. Under the umbrella of resistance, there are issues like the habit and comfort with the known, where routine is usually preferred because it enables some control, hence the fear would be of losing that control (Jick & Peiperl, 2003). SEAM took these issues into consideration by stating that an intervener researcher never gives solutions but they are rather developed by the organizational actors themselves; when they develop the actions, they will adopt them. They will also be able to reconsider these actions and their results every 6 months (i.e. PAP) while working on potential creation.

The socio-economic project group in NGO A was built in 3 subgroups. The decision-making body, the select group, was made up of the CEO and the manager of the training and projects unit. A plenary group was composed from the entire management members and the CEO. The different working groups were composed of the expert staff for the subject covered. Within working groups, actors expressed themselves, clarified and developed micro projects which have created new sources of innovation actions (Buono & Savall, 2007; Savall, Zardet, & Bonnet, 2008; Savall & Zardet, 2008). The working group was led by managers due to the small size of the NGO.

We introduced the IESAP to the CEO and advised that it shall be circulated to the middle managers for doing similar training later on. The CEO was not convinced that she has to come up with corrective objectives and activities which created a good occasion for more explanation about SEAM as a modern change and PM methodology. We elaborated that the members of the organization need to identify strategic axes for the innovation projects and their corresponding objectives and define the related responsibilities of the main external and internal actors. This implementation socio-economic management tools identify and evaluate potential socio-economic solutions, in many organizational settings. These tools allow the implementation of collective targeted actions by managing priorities and while developing their managerial skills through training and personalized assistance. As such, the IESAP tool is a strategic tool that assists in putting a three to five year organizational strategic plan (Savall, Zardet, & Bonnet, 2008; Savall, Zardet, Bonnet, et al., 2008) and is updated each year. According to Savall, the IESAP "is crucial in making external objectives (strategy) consistent with the internal targets (reduction of dysfunctions), mainly in the field of new products, new markets, and the development of technological know-how and human potential" (Savall, 2010b).

The innovation meetings started and the groups showed high level of enthusiasm in expressing their ideas about enhancing the work in the NGO. Some personal assistance sessions were conducted with team members to help with formulating the strategic axes and putting down the priority objectives and actions. The innovation projects as per the IESAP of NGO A extends for a period of three years extending from 2019 till 2021 and is expected to be updated annually. It interlinks the quality of services with the functioning quality and calls to emphasizing the quality of management as a lever for boosting the aforementioned two indicators. The IESAP was developed through interaction between all managers and staff and then communicated to all the employees in the organization. The strategic axes that NGO A were three including: *enhance efficient communication between units; improve overall efficiency and productivity; and forecast the NGO growth*. Each one of these strategic axes were further elaborated to have strategic objectives and strategic actions. Work also continued to assign responsibilities by unit for each one of the strategic actions and the time duration limit of implementing it.

In a further step, the members of the steering committee were directly involved in the development of the organization PAP which allows the identification of innovative tasks to be implemented (Savall, Zardet, & Bonnet, 2008). The PAP presents a short-term vision of six months of the organization strategy which disseminates IESAP and enriches it with "local" actions planned to be implemented by the concerned units or actors within the organization. It follows the principle of consultation by a double movement, top-down and bottom-up, with direct interaction between the organization actors. The targets are identified at different levels to check their consistency, measure their feasibility, and to carry arbitrage allowing adjustment between the objectives and the time available to spend. One of the characteristics that strengthen the PAP is that it multiplies the strategy of the organization as a whole, down to the smallest collective unit of work. Developed for each unit and including actions from IESAP, it ensures flexible and dynamic strategic implementation and unfolds and explains the overall strategy to all the hierarchical level.

Extreme effort was done by the NGO actors to identify the priority objectives and actions at the PAP level. The process was characterized by interesting discussions and remarkable enthusiasm to give ideas and come up with innovative actions that would address the diagnosed dysfunctions. However, to decide on the innovation actions that NGO A is capable to adopt financially, and to assess its future benefits, we introduced the SEAM economic balance tool. The process entails listing all the actions needed for implementing a certain innovation project and their corresponding costs versus the results expected with their economic benefits and the *conversion of hidden performance into added value*.

So, the economic balance allows putting figures into the PAP at the end of an improvement action so that to evaluate the economic impacts of the proposed solutions by comparing the forecasted benefits to the realized benefits. Thus, it is a tool for decision making which provides details for the actions necessary to implement the project and gives more power to the manager to better calibrate and argue the PAP actions. An extract of the economic balance detailing all the PAP actions for enhancing efficient inter-unit communication sums up to a total costs of $29,276 versus a total benefits of $31,422. Similar calculations are done for all the strategic objectives and prioritization for choices of projects was done accordingly.

THE ASSESSMENT

The end stage of our intervention is the assessment process being vital for understanding the impacts of the socio-economic intervention and guaranteeing that value has been delivered to the organization in attaining sustainable organizational performance. The major indicator of success at NGO A is the change readiness which was gradually developed at the levels of both the teams and individuals, while making use of the catalysts offered by the HoriVert interviews, the mirror effect and the expert opinion as well as other tools. This matches literature in the fact that the multi-level dynamics added to the design and execution of the change process take a major part in improving both readiness for change and the effectiveness of organizational change (Datry et al., 2017).

The ex-post evaluation remarked a shift in the attitude of the CEO, the founder, to overcome the feeling of "parenting" the NGO and she noted welcoming work-related criticism. While at the staff level, the resistance to change is battled through *involving employees in the different decision-making activities* thus the *creation of a core group of positive employees*. The psychological capital of employees consists of faith, satisfaction, motivation and courage. It has to do with good feelings that are eventually related to their behaviors (engagement and belonging) that are important for organizing change (Avey et al., 2008). As a result, the NGO team demonstrated readiness to change by the first step of organizing internal workshops to act on the challenges in different work-related domains.

DISCUSSION

This IR effort over a two years period (2017-2019) addressed some of its objectives but also have a number of limitations in terms of the intervention itself while collecting data and in terms of results obtained and their contingent nature. For NGOs, service provision comes before research as the benefits of the latter are less measurable, which means that staff cannot take the time to address research issues (Gooding, 2017) or contribute with their time and effort to the research endeavors. Hence, we consider availability of the NGO teams for meetings and intervention related work a major challenge due to the prioritization of services delivery. It used to take some considerable time for arranging meetings or intervention activities that the concerned actors can attend.

Another major limitation was the attitude of the actors. We faced defensive behaviors from some managers, an issue which limited the organizational and individual learning. Additionally, the current leader is at the same time the founder who started the NGO and grew it up, hence the egoistic behavior was a hindering factor to spell out the dysfunctions especially in their approach to management that may be also causing secondary dysfunctional results.

Being an external intervener can also be considered a limitation in certain aspects, mainly related to accessing some information and to the limited time spent in the NGO for observation. As for access to information, the major issue aroused when the intervention site did not welcome disclosing financials for calculating the hidden cost. This kept some aspects of the organization unexplored. In addition, the application of some tools was not possible due to the perceived need for micromanagement and the decision of the management not to discuss rewards and bonuses.

The contextual limitations remain an issue that we have to mention. Lebanon has witnessed various disturbances during the year 2019 which affected the progress of the change initiatives and the results achieved. Also, the intervention took place in a comparatively short period while the socio-economic approach may take years to change the system and integrate new management methods. So, the results of this intervention can be only the start that open up perspectives for more focused and in-depth research. To be fully effective, recommendations are based on the *tools* and the *process of change* in addition to our perception about the *history of change* in the specific context of the country and the intervention site.

We recommend devoting more time for thorough exploration of all intervention phases in the presence of all NGO actors. As such, NGO A needs to put its second six months PAP and start immediate implementation not to lose the dynamic of change. On the other hand, it is advisable to use the other SEAM tools which have not been used in this IR such as the piloting logbook, the periodically negotiable action plan and the delegation span. This would be achieved by training the actors on the application of management tools as one form of establishing the change infrastructure and the maintenance of results.

The history of change in NGO A reflects the need to sensitize stakeholders to the hidden costs of malfunctions and of performance modelled by recycling. That is aimed to develop the appetite of all actors vis-à-vis the potential of innovation through generating internal energy poles. So, managers are invited to encourage employees to imagine new solutions to problems or identify opportunities. Without this stimulation, the risk lies in the propensity of actors to stay focused on routine operational issues that do not allow considering new possibilities. Here, we recommend a financial effectiveness study investigating the distribution of funds between administrative tasks and the target beneficiaries. Above all, the fact that NGO A is operating in Lebanon, makes us look at some environmental factors.

CONCLUSION

The practical significance of this research arises from the big number of NGOs worldwide and in Lebanon and from our personal involvement and experience in the actual work of NGOs. This paper presented our partial validation for the research hypothesis stating that NGOs manage their projects on a day-to-day basis without proper adoption of PM processes and this leads into possible failure of projects which result in losing accountability towards sponsors as well as community. The adoption of a PM methodology would lead into improved quality of services that precedes beneficiaries' satisfaction as well as increased efficiency and productivity plus higher ROI for the amounts of employed money. Based on the field results, the partial adoption of a change and PM methodology for a limited period of time was not enough to investigate all the expected results especially the ROI. We got some preliminary results for the satisfaction of beneficiaries but still more assessment is needed to make solid conclusions about the enhancements in efficiency and productivity.

The contribution of our IR to the existing studies and to the socio-economic theory was through highlighting its alignment with documented innovative OD approaches and management consulting processes. An important aspect are the future prospects towards further investigations and completion of the field initiative. Due to the stated limitations and to the time factor, the continuation of this effort would yield more tangible enhancements in the NGO. Note that this can only be a pilot to be rolled over in other interested NGOs.

Final words, this research work demonstrated that the implementation of a change and PM methodology has several effects such as unleashing the spoke; people can better express now and when speaking, people can find ideas that they can design to improve all organizational domains thus change its face. This is one effect. The second effect is that by implementing a PM methodology, the speech liberate the practices and would greatly support and motivate employee autonomy. As organizations grow, people evolve and organizational culture continues to be work in progress. So, there is no end line for building the organization we desire. The primary ingredient is the decision to change.

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