

**Organization Review Exercise of COPASAH**  
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**Summary**

**FUTURE DIRECTIONS AND FOLLOW UP**

*(Excerpts from the Organisational Review Report)*

**BACKGROUND:**

The Community of Practitioners on Accountability and Social Action in Health (COPASAH) is a global network of practitioners. Its members share a vision about social accountability, health, health care and human dignity. It was established in 2011 with the name Community of Practice on Community Monitoring in Health (COPCOM). The idea was to have a space and create opportunities for practitioners of community monitoring to come together to share, reflect on their experiences and to think about the field and its future. ([www.copasah.net](http://www.copasah.net))

**Organization Review**

As a major step in consolidating COPASAH as an institution to be able to achieve its vision, mission and goals, a need was felt by the core group of COPASAH after strategic deliberations with the larger group of stakeholders that an Organizational Review exercise needs to be conducted for COPASAH. This exercise aimed to assess the strengths and challenges of COPASAH with a focus upon taking stock of progress to-date and inform key directions and its mission, structure, and plan of action for the next five to seven years. Apart from this it expected strategies for the institutional strengthening of COPASAH to establish its autonomous identity and strengthen its governance mechanisms recommendations for its future. COPASAH commissioned this organizational review in 2017 to an external reviewer Dr. Florencia Guerzovich and her team after a process of calls and inviting OD reviewers. The review was conducted from June to August 2017, using a customized analytical framework by the reviewer and her team. The framework focused on understanding the value addition of COPASAH and its activities. The team reviewed program documentation and carried out 28 interviews over the course of the review. An interim report of the review was presented to the COPASAH's Steering Committee in September. Following which the key findings were also shared with a larger group of COPASAH including internal and external stakeholders.

**Excerpts from the Organisational Review Report**

**ORGANIZATIONAL OPTIONS:**

COPASAH could evolve in several directions in the next five years building on its upward start up trajectory. This evolution is a political decision of the community, considering the context. The challenge is to identify what is a feasible and relevant value proposition in the future. To identify a compromise "north" for COPASAH as a field building organizations that is driven by and provides value to diverse set of organizations that make up the community and the field. A group of external experts should not prescribe the direction moving forward.

The table below summarizes three alternative scenarios, each of them putting emphasis on a different strategic direction. This does not mean that there is a linear choice between these scenarios. There could be synergies in combining elements of them as well as conflicts. The point is to surface the alternatives and tensions for the community to develop a shared understanding about the possible implications of different, even if potentially related, pathways. Clarity and ownership of purpose for the consolidation of COPASAH is needed before any determination on its structure beyond Phase IV.

**Table 3: Scenarios to think about COPASAH’s future**

	Scenario 1: Return to COPASAH’s origins	Scenario 2: Strengthening the Conditions for Practice	Scenario 3: An opportunistic approach
<b>Cornerstone of the Strategy</b>	Focus on Improving Practice	Focus on the Global Enabling Environment	Responsiveness to opportunities
<b>Regional and Cross-Regional Capacity Building</b>	Most Resources are invested in supporting capacity development, through in-depth, long term engagement of a manageable number of practitioners in a select number of sites. The number and diversity could be increased over time, but the evolution should be gradual and contextualized.	Capacity building investments are kept to a minimum possible level, to sustain a vibrant and diverse membership. Membership is likely to cycle and not remain deeply engaged over time.	Capacity building activities will occur where opportunities emerge. Members relationships and funder priorities are likely to shape the direction and potential for growth for the Community.
<b>South-South Research, Communications and Knowledge Management</b>	Mainly targeted at exchange and cross-fertilization across members. Content and packaging tailored to support the uptake by members. Proportionally small investments, focus is mainly in development relationships.	Mainly focused on making visible the membership and shared positions. Content and packaging linked to specific campaigns, tailored to target audiences and critical influencers.	Mainly focused on growing and making visible the membership and shared positions. Content will likely combine broader shared narratives, with specific products and means of communication depending on the structures of opportunity.
<b>Field Building</b>	Limited to furthering the enabling environment for COPASAH.	Bulk of investments at this level, utilizing a broad range of entry points and interfaces with key decision makers and influencers for practices of the membership. Regional and thematic diversities will need to be accommodated.	Field building activities will occur where opportunities emerge.
<b>Dominant logics of organization of</b>	Multi-level community of practice with leadership,	Coalition/network /movement with a global	Coalition/network /movement with a flexible,

<b>COPASAH</b>	<p>facilitation and support structure.</p> <p>Focus is on producing largely tangible value to members. Decision making and MEL mechanisms should help remain attuned to the membership and the context, given the path chosen. Risk is to stifle the creative tension that has informed COPASAH's trajectory.</p>	<p>governance structure and secretariat to facilitate campaigns and activities</p> <p>Decision making and MEL mechanisms should help remain attuned to the membership, critical external actors and the context, given the path chosen. Risk is to stifle the creative tension that has informed COPASAH's trajectory.</p>	<p>largely informal structure that is responsive and intuitive.</p> <p>The risk of misalignment between the organizational set up and actions is larger than alternatives.</p> <p>Organizational tensions will regularly emerge, so will political tensions among members.</p> <p>However, lean the structure, it should consider regular ways to monitor, mitigate and address these conflicts.</p>
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**VI. RECOMMENDATIONS**

This section includes a series of recommendations for the consideration of COPASAH. The understanding is that factors beyond this review that will inform decisions. The list includes suggestions for immediate steps. The idea is to take advantage, to the extent possible, of the activities and resources available for Phase IV to negotiate the future with its membership:

- Focus on the applied value for members and other key stakeholders in the design, implementation and monitoring of COPASAH's strategy. Consider conditions under which COPASAH contributes to this value.
- Prioritize the identification and engagement of the membership. Ensure a meaningful and participatory process with COPASAH's key constituencies on the future. Facilitating the emergence of shared diagnostics and commitment about what is a feasible and relevant mission, strategy and value proposition as a group, paying attention to the changing funding environment.
  - *Consider whether and how the Global Symposium planned for 2018 could serve re engaging its key constituencies, reigniting ownership of the community and opening decision-making.*
  - *The definition of the process and criteria to select who can come to the Global Symposium will empower and disempower voices in charting COPASAH's future. So will the Symposium's agenda. It seems critical to invite members from different regions to feedback and engage in the design of the event.*

- *Cross-regional ownership should also be nurtured in the design and piloting of thematic hubs.*
- Sustain ownership of COPASAH by members through sound mechanisms for effective engagement at the strategic level, open and regular feed-back, revamped MEL system, and transparency on decisions taken and resources available.
  - *It seems critical to be responsive to the demands for increased transparency and ownership raised in the COPASAH' initiated regional consultation process. In this process, consider whether it is relevant to look beyond the countries/subregions of current focus.*
- Clarifications on the nature and purpose of COPASAH should inform definitions about the organizational structure and implementation of the strategy moving forward.
- Analyze all sources of potential financial contributions to COPASAH. Vigorously pursue priority sources with active support from the Steering Committee.
  - *Set out a process of in-depth, nuanced analysis of the funding footprint. Consider options for COPASAH's fundraising strategy, including specific funders in the health field. These options should not undermine COPASAH's identity.*
  - *Start early on a conversation with current funders about ways in which they can provide support. This may include potential shifts in the allocation of funding for Phase IV and/or non-material support they may provide to make decisions forward.*
- Codify and improve by-laws and manual of operation. COPASAH should pay special attention to mitigating risks of real and perceived asymmetries of power and conflicts of interests that could undermine the legitimacy of its decisions.
- Continue exploring the possibility of appointing an executive director, becoming an autonomous organization, and getting a Northern fiscal sponsor. Pay special attention to ensure decision-making remains grounded in the Global South and its practice.
  - *In Phase IV, secure time to explore in detail financial / administration arrangements to overcome the challenges of current base of operations from India.*
- Deepen the engagement of COPASAH within and across regions. Pay more attention to how political and organizational factors affect COPASAH's value proposition on the ground. These factors should inform the selection of regional and/or thematic representatives in the Steering Committee and hubs coordinators, localized strategies, expectations, plans of action, timelines and allocation of budgets.

- *As soon as feasible, fill regional gaps in the Steering Committee and, if possible, pilot a process to mentor/support new members. Take special measures to ensure that the decision is perceived as legitimate and does not exacerbate perceived asymmetries of power and to other tensions.*
- *Identify a transitional regional coordinator in Africa to support engagement with local practitioners. Consider the opportunity and feasibility of taking similar steps in Europe.*
  
- Make new commitments and allocate resources in ways that are consistent with COPASAH's comparative advantage, certifying the regular rhythm of community engagement within and across regional and thematic hubs.
  - *In Phase IV, COPASAH should explore mechanisms to guarantee the thematic hubs provide a minimum amount of capacity building support and value to members across regions.*