

## Engineers Without Borders Organizational Assessment

### Preliminary Findings and Recommendations

29 June 08

### Summary of Findings

EWB has established itself as a young and dynamic development NGO. Today it has:

- 25 paid staff (up from 6 in 2004) with a median age of less than 30
- 26 university chapters (out of 29 engineering schools in Canada)
- 50% female chapter members (about 20% of engineering students in Canada are women)
- 7 professional chapters (engineers and others in the working world)
- An annual budget of \$ 2 million.

EWB uses a pragmatic, performance-focused approach embedded in the best practices in organizational development techniques. Self assessment, coaching and team building (face-to-face and via the internet), as well as web-based communications are among the tools used to link the chapters, the National Office (NO)<sup>1</sup> in Toronto, and its overseas program. Increasingly, EWB is applying its in-house skills in organizational development with its African partners.<sup>2</sup>

Vigorous student chapters, with about 400 “leaders”<sup>3</sup>, are at the core of EWB’s success; most of the NO staff has roots in the chapters and much of the programming flows out from the chapters, with the knowledge gained flowing back into the chapters. With a hands-on leadership training process, candid and comprehensive guidelines for chapter management as well as active support from the NO and links to other chapters, EWB has strongly facilitated students’ desires to act on poverty reduction goals.

EWB provides students with the opportunity to lead and manage all the functions and programs of a chapter. In essence each chapter is an independent, micro social enterprise; in some cases with up to 40 active members per chapter and locally-raised revenue of up to \$ 40,000.

Many of the student members are not Engineers; in some chapters up to half are from other faculties. They have all been attracted by EWB’s dynamic leadership, organizational clarity, the chance to meet “interesting and influential people”, and the opportunities to learn – not just about international development but also about leadership itself, ones personal traits<sup>4</sup>, and taking action. The members met who have spent a number of years at the chapter level are remarkably open, articulate and confident.

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<sup>1</sup> Probably more often than not, “YES”, when it comes to responding to ideas from chapters.

<sup>2</sup> In effect one really cannot help with capacity development of other organizations unless one practices it in-house in ones own organization.

<sup>3</sup> Defined as persons who volunteer for 5 to 30 hours/week

<sup>4</sup> Starting with Myers-Briggs Type Indicators

While founded by engineers, in practice the phrase “without Borders” in the title pertains to eliminating boundaries between engineering and broader international development objectives, and modifying engineering culture to combine solving socio-economic as well as technical problems. Among the 29 engineering schools in Canada, about half of the Deans are strong champions of EWB. They, along with many corporations, are well aware that the 21<sup>st</sup> Century needs a new type of engineer.

EWB does not go “everywhere” like MSF, nor does it engage in crisis intervention. In its early learning phases it did go everywhere to some extent, geographically, but later decided to focus its fieldwork on 4 African counties.

One cannot appreciate the intensity of EWB or its agenda if one limits oneself to the CIDA-supported overseas volunteer and public outreach activities. These results of these two activities are coherently interlinked with and dependent on all the other parts.

### **Student chapters**

A description of the the different executive functions and programs within each chapter are openly available in the EWB "Orange Book of Change", Version 3 (about 200 pages) on the internet [www.chapters.ewb.ca](http://www.chapters.ewb.ca). Each chapter has its own annual plan and each program within it is linked to the annual operational plan at the National level. (In fact, the whole EWB annual plan is also openly available on the internet). The Orange Book is one of the best – if not the best – NGO operational manuals the Consultant has seen in 35 years. More importantly, it emerged out of chapter operational experience and is applied. Performance indicators are embedded in all functions and programs.

The key functions are member learning, fundraising and financial management. The main programs are public outreach and advocacy, school outreach, Junior Fellowship (short term overseas volunteers, members identified by the chapters) and curriculum enhancement in engineering schools. Each of the functions and programs is led by an executive. The over 20 chapter executives of each program (e.g. school outreach) are linked together via the internet, and supported by the person in charge of this program in the National Office. There are annual Presidents Retreats, Regional Meetings of executives and a “buddy” system where senior staff in the NO coach the chapter Presidents. The activism culminates in an annual (self supported<sup>5</sup>) EWB National Conference attended by about a thousand members and others including engineering faculty, and \$ 100 per minute influential and renowned speakers.

### **Long term Overseas Volunteers**

These volunteers spend 14 to 36 months in the field working with a carefully selected African partner organization. The volunteer selection, pre-departure training, identification of their specific tasks, and their contribution to member learning back in

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<sup>5</sup> With participant fees and corporate sponsors it roughly breaks even financially.

Canada are well conceived and of high quality. In the field, they are supported by 3 EWB field staff, and in turn they themselves support the short term volunteers (Junior Fellows).

## **Advocacy**

Advocacy is interlinked with chapter activity and the overseas programming. Given their limited resources until recently, EWB chose to use common advocacy themes where there are a number of other organizations involved. For example, it has worked on Fair Trade in tandem with 9 other national and campus organizations. Advocacy will increasingly become more substantial as EWB improves its advocacy skills and begins to pursue new themes outside the mainstream. They do not intend to set up a policy research unit, but rather will work in collaboration with selected research organizations.

EWB has a substantial and growing membership base which can act on advocacy issues.

In some senses, advocacy is infused in the whole organization, directly and indirectly. For example, EWB advocates for the establishment of performance oriented organizational cultures which continually seek new ways to reduce poverty. They also lobby influential parliamentarians and corporate leaders to become actors in the process. .

## **Fundraising and Financial Sustainability**

To reduce financial risks and too strong an influence from any single funder, the Board and CEOs prudently decided that EWB have a diverse financial base. To this end, they have been very successful and total revenue has quadrupled in 4 years from 2003 to 2007.

CIDA funding has ranged from 14 to 24% of total revenue over the last 4 years. The greater part of the organization's funding is from non-government sources. EWB National Office has become very skilled in tapping corporate, foundation and individual donors. EWB sees itself as having a particular competitive advantage in raising funds from engineers, as well as engineering and technology-based firms. For example, the Ontario Society of Professional Engineers with 12,000 members has chosen EWB as their "charity of choice". EWB is currently assessing if these are new funds for development programming or just displacing donations to other development NGOs.

In addition, student members are active fundraisers. In the last 2 years the student chapters alone raised more than EWB in its entirety received from CIDA. Some chapters have raised up to \$ 40,000 per year (mainly from student events, student councils and the university).

EWB's Three Year Fundraising Plan (May 2008 – April 2011) contains a frank and comprehensive assessment of its fundraising strengths and weaknesses to date, a clear strategy and an evaluation plan. The Plan envisages only a modest increase in CIDA funding. With higher percentage increases in individual and corporate sources of funding anticipated, it is projected that the proportion of CIDA funding will fall from 24% in 2007 to 18% by 2010.

In conclusion, financial performance to date indicates that EWB has significant fundraising skills as evident in the growth, its strategies and its ability to tap a diversity of types of donors. EWB has a high probability of financial sustainability.

### **Links with other organizations**

EWB collaborates with a number of other Canadian NGOs (for example, Oxfam/Equita, TransFair and seven others) on fair trade advocacy. As well, at the chapter level, they collaborate with other development-NGO affiliated groups. EWB also networks on specific issues with a variety of policy research institutions, corporations and others, including professional engineering associations particularly in Nova Scotia, Ontario and Alberta

University Deans are in their network. Recently they made presentations to a national engineering (29) Dean's meeting. Since a large proportion of engineering services is increasingly delivered in developing countries, ever more employers want engineers familiar with development issues, and Deans want their curriculum to be relevant. About half the Deans are active champions of EWB.

There are many "EWBs" worldwide, with diverse styles of programming. EWB Canada is by far the largest, and maintains relationships with the EWBs in Italy, France, UK and Australia – ones with similar views on programming combining engineering and development.

Working links with the other 9 VCAs supported by CIDA have been limited. In the early phases of designing its own overseas program, EWB consulted selectively with other volunteer sending agencies. EWB finds it challenging to collaborate given the time resources required compared to the potential benefits (EWB are excellent time managers). They also want to further develop their program model before wider collaboration.

### **Governance**

The active Board of EWB has recently established audit, human resources and governance committees, and overall governance is clearly moving towards best practices in non-profit organizations.

### **Performance Measurement**

#### **Efficiency**

EWB tracks and articulates their efficiency with hard data. Examples include the use of Aeroplan points for travel, a very low cost/volunteer, a compact office and low overheads, extensive use of IT, and volunteer input estimated at 240,000 volunteer hours, or 120 full time equivalents.

## **Effectiveness**

(This section will be more substantial in the draft report)

EWB has continually conducted formal and informal internal evaluations of all aspects of its programming. The effects on African partner organizations of the technical assistance by long term volunteers is increasingly being analyzed more rigorously.

## **Summary and Conclusions**

CIDA's funding is a wise investment. As well, it connects CIDA with another opportunity to learn about newer, innovative programming and how it's accomplished. EWB has:

- A coherent set of integrated and mutually reinforcing programs which have evolved out of many experiments. All staff and chapter members are pursuing the same goals.
- A “transparency” that is truly transparent
- A large and active member base, out of which its staff emerge
- Expanding networks now reaching into corporate, university and policy research circles of influence
- An entrepreneurial problem-solving approach; apply best practices in management and communications technology
- Extensive leadership development embedded in all its initiatives; its staff and members train, coach and build teams; and increasingly apply this approach with African partners.

Moreover, EWB continually:

- Functions in a learning and risk taking mode combined with a strong results-oriented culture; use both hard and proxy data to assess results
- Assesses cost efficiency; for example, to focus on achieving their goals they manage their time resources ruthlessly
- Gets quickly down to the details to link ideas to experiments, and goals to action.

Certainly there are many challenges – all of which EWB is well aware of – such as:

- Responding to the lively ideas and managing the increasing expectations of the chapters
- Developing and mainstreaming new programs in advocacy
- Changing the culture and public image of engineering
- Building the professional chapters
- Modifying its low cost salary structure to adapt to the expectations of its “aging” workforce, and turnover of key personnel<sup>6</sup>
- Avoiding personnel “burnout”

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<sup>6</sup> Unlike most corporations or CSOs the biggest competitor of EWB (i.e. attraction for staff who leave) is graduate school.

EWB are in the process of putting together a new independent cadre, a refreshing network outside of the old ones, which might in the decades to come have a profound influence on changing Canadian global action.

## **Recommendations**

### **To CIDA**

1. Let's learn, and even challenge this report. Since in many respects EWB is much more than just a Volunteer Cooperation Agency, it would be useful to stimulate discussions of this report, with EWB personnel leading the discussions, within other sections of the Canadian Partnership Branch, the Performance and Knowledge Management Branch and other Branches.
2. Accept that collaboration and learning among VCAs may be very limited 5 years down the road. Fostering real collaboration and learning among the 10 VCAs that CIDA supports<sup>7</sup>, organizations with 11 different cultures (including CIDA's), and applying lessons/best practices from the collaboration will require some finesse, wisdom and political subtlety on the part of CIDA at the highest levels over a number of years. It may not be feasible to stimulate substantial open discussions on programming and volunteer performance, internal organizational development and the sharing of candid information in general. Since some of the older VCAs are highly dependent on CIDA for funding, it will very likely be difficult for them to openly discuss their strengths and challenges, their performance including efficiency and effectiveness backed up with data, in joint meetings.
3. Allow EWB to fulfill its expected participation in the VCA/CIDA forums by making presentations as outlined in Recommendation # 3 to EWB below.

### **To EWB**

1. Appoint a staff person, other than the Co-CEO, to liaise with CIDA, to answer CIDA requests for information, and to manage the reporting and other requirements in the Contribution Agreement.
2. This person would also keep the VCA program officers informed about the timing and messages of major national EWB advocacy events; and EWB meetings in CIDA with other Branches.

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<sup>7</sup> Or groups within them. If the VCAs were in the private sector, more mergers would have happened long ago.

3. Present within the VCA/CIDA forums various aspects of EWBs experience and learning from its own programming and organizational development. For example, a partial list of suggested presentations for VCA/CIDA meetings could include:

- engaging students
- developing leaders
- being performance driven
- being cost efficient
- the EWB Orange Book
- stimulating, selecting, training and reintegrating volunteers
- choosing developing country partners
- quick methods of assessing the effects/outcomes of overseas volunteers

This recommendation could apply to all VCAs.