A gap analysis of NPO resource utilisation in a community literacy project

by

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PLAGIARISM DECLARATION

I, Nadine Mitchley, certify that the dissertation submitted by me for the degree of Master's of Commerce (Strategic Management) at the University of Johannesburg is my independent work and has not been submitted by me for a degree at another university .

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DEDICATION

To my parents without whom this would not have been possible.

ABSTRACT

Non-profit organisations (NPOs) play a critical role in national development; through the use of resources they obtain, they fulfil the needs of society that governments are unable to fulfil. Thus, the current study was conducted at an NPO – Rotary District 9400 (RD9400) – to identify gaps in resource utilisation and ultimately, performance planning practices. The research evaluated a key RD9400 literacy project and provided recommendations on how the value created through the project could be enhanced by improved management practices, leading to optimised resource utilisation.

A case study research strategy was adopted and literature was reviewed to gain an understanding of the research problem. Subsequently, a sequential qualitative and quantitative mixed methods approach was followed. Gap analysis was used to identify areas where RD9400 could enhance value creation.

The findings revealed gaps in RD9400's management practices, signalling the need for improvement in the performance planning of its key literacy project and perhaps other similar literacy projects. The findings also indicated that RD9400 needs to incorporate management practices through the use of management tools (e.g. the balanced scorecard) in order to standardise and optimise resource utilisation and project impact.

Limitations of the study included the focus on a single NPO, which reduces the generalisability of the findings. The sample also excluded individuals under the age of 18, which meant that not all the direct beneficiaries of the literacy project could be represented in the sample.

The study proposed a framework of recommendations for RD9400 on how to better manage, and thereby, measure the impact of the literacy project. As limited literature is available on the topic of NPOs in South Africa, this framework could also inform other NPOs and Rotary International globally on how to better manage their literacy projects.

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4IR	Fourth Industrial Revolution
ANOVA	Analysis of variance
CSO	Civil society organisation
CBO	Community-based organisation
GDP	Gross Domestic Product
NGO	Non-governmental organisation
NPC	Non-profit company
NPO	Non-profit organisation
PBO	Public-benefit organisation
RD9400	Rotary District 9400
RI	Rotary International
SAA	Social accounting and auditing
SROI	Social return on investment
STATKON	Statistical Consulting Services
TBL	Triple bottom line
USA	United States of America

CHAPTER 1

STUDY ORIENTATION AND PROBLEM STATEMENT

1.1 Introduction

Since the 1980s, non-profit organisations (NPOs) have been particularly active in supporting the needs of individuals that government services have not been able to address, predominantly in developing countries (Banks & Hulme, 2012:3; Golini, Kalchschmidt & Landoni, 2015:650; Nieman & Bennett, 2014:11; Wadongo, 2014:7; Nanthagopan, Williams & Page, 2016:1608). Responsibilities of NPOs include obtaining necessary funding and volunteers, prioritising social initiatives and allocating funding and volunteers to those initiatives (du Plessis & Petzer, 2011:12145). As NPOs vary widely in complexity, function, operations, goals, formality and structure (Leonard, 2014:376; Wadongo, 2014:17; Batti, 2015:21), it becomes difficult to classify all NPOs into a single category. This research focuses on developmental NPOs (see section 2.2). As the name suggests, these NPOs seek to develop and improve the social, political and economic environment of developing countries (Wadongo, 2014:17; Park, Lee & Cho, 2015:32). These developmental NPOs establish projects, such as literacy projects, in disadvantaged communities to promote sustainable development. They therefore act as effective change agents in the socioeconomic sector (Mwangi, 2003:6; Wadongo, 2014:8).

This chapter begins by outlining the background to the research, which includes an overview of Rotary District 9400 (RD9400) and the role of literacy in society. It proceeds to introduce the key concepts of this study such as the role of the value chain, the triple-bottom line framework, stakeholders' roles in NPOs and the importance of measuring NPO performance in terms of delivery of its project objectives. The research problem comes next, followed by the primary and secondary research objectives and a brief overview of the methodology. The significance of the study and the ethical considerations of the research are then discussed. The chapter concludes with a summary of the study structure.

1.2 Background to the research

RD9400, a developmental NPO, has clubs locally in South Africa. The one included in this research is the Middelburg Rotary Club situated in Mpumalanga, South Africa. Rotary Clubs such as Middelburg Club, are formed by members who pay an annual membership fee to be part of the Club. These members come from various professional backgrounds and use their unique knowledge and networking capabilities to solve societal issues.

According to Rotary Bedfordview (2015), RD9400 and Rotary globally can be described as a "worldwide network of inspired individuals who translate their passions into relevant social causes to change lives in communities". Rotary International (RI) was founded in 1905 by a United States (US) businessman, Paul Harris, who wanted to bring together individuals of diverse backgrounds in order to give back to their communities (Rotary International, 2017). The first Rotary Club was opened in Chicago, where volunteers from diverse professional backgrounds came together to solve some of the world's most challenging social problems (Rotary International, 2017). By 1921, RI had clubs on six continents including Africa (Rotary Club of Johannesburg, 2018). Currently, RI has six main causes that it supports: promoting peace; fighting disease; providing clean water, sanitation and hygiene; saving mothers and children; supporting education; and growing local economies (Rotary International, 2017).

This study focuses on RD9400's educational cause, assessing the sustainability of Middelburg Rotary Club's literacy project. Middelburg Rotary Club (2015) states that its "literacy project, in conjunction with the Rotary Club of Grand Bend, Canada, aims at delivering equipment to our district's most needy schools". This equipment includes books, both educational and leisure, desks, chairs, sports equipment, musical instruments and medical equipment (Middelburg Rotary Club, 2015). Education is the backbone of a productive society; the success of society depends on its ability to maintain and improve the education levels of the population over time (Doucet, Evers, Guerra, Lopez, Soskil & Timmers, 2018:9).

Literacy plays a crucial role in political, social and economic development and participation (UNESCO, 2005:17; McCracken & Murray, 2009:33; Desai, 2012:112; Okpala & Okpala, 2014:330). It is important for developing human skills and capabilities and promotes critical thinking, improved health and poverty reduction (UNESCO, 2005:17; Dougdale & Clark, 2008:9; McCracken & Murray, 2009:33; Stephen, 2011:452; Lunze & Paasche-Orlow, 2014:15; Morrisroe, 2014:6). Improved literacy also has certain benefits for the individuals themselves such as higher self-esteem, personal empowerment and increased civic engagement (UNESCO, 2005:22; Dougdale & Clark, 2008:6; Read Educational Trust, 2017). It is widely acknowledged that improved literacy creates more educational and employment opportunities, which in turn, pull individuals out of poverty and chronic unemployment (Dougdale & Clark, 2008:12; McCracken & Murray, 2009:33; Stephen, 2011:452; Rahman, 2013:170; Morrisroe, 2014:9; Project Literacy Kelowna, 2018). Consequently, improved literacy generally results in increased individual income and economic growth (UNESCO, 2005:22; Rehman, Jingdong & Hussain, 2015:144). Furthermore, literacy spurs economic growth by enhancing the education and skills of a country's workforce. This creates economic prosperity at both the individual level and macro-economic level by, for example, increasing gross domestic product (GDP) (Akhtar, 2006; Desai, 2012:112; Rahman, 2013:170; Rehman *et al.*, 2015:141).

Traditionally, the term 'literacy' is often understood as the ability to read and write (Rahman, 2013:170; Rehman *et al.*, 2015:144; Papen, 2016:1). However, UNESCO (2005:149) broadens this definition by defining literacy as "the ability to identify, understand, interpret and communicate using printed and written materials". Given the sweeping changes ushered in by the Fourth Industrial Revolution (4IR), this definition of literacy is under intense pressure to evolve, as an education system that is unable to adapt to the speed of innovation and technology is an obsolete education system (Doucet *et al.*, 2018:9). The 4IR is characterised by technologies that are blurring the lines between the physical, digital and biological domains (Penprase, 2018:215; Butler-Adam, 2018:1). In addition, along with increasing computer power and internet connectivity, the 4IR will change the way people live, think, work, interact and relate to each other (Doucet *et al.*, 2018:9). Singapore, arguably one of the highest performing education systems in the world, advocates 'teaching less, learning more'. Teaching should guide innovation and exploration on one's own, moving away from reading and writing to the use of many digital media formats to explore learning materials (Hargreaves & Shirley, 2009). Hargreaves and Shirley (2012:78) argue that through the 4IR, technological change has led students towards traditional knowledge by transforming learning from being focused on quantity to being focused on quality. Doucet *et al.* (2018:11) contend that technology is creating more opportunities for students to become empowered problem-solvers due to the fact that knowledge is more readily available than ever before. As the 4IR has introduced technologies that have a profound impact on the lives of individuals, it is crucial that organisations and educational institutions shift their employment and education mindsets (Penprase, 2018:215). This means that the way RD9400s literacy project is delivered in terms of sustainability also needs to change. Using libraries to connect people to the world of information is one of several ways to facilitate the 4IR in communities. It is on this basis that the RD9400 literacy project is to be assessed.

According to Rotary International (2018), Rotary is made up of three parts, namely, Rotary Clubs, Rotary International and The Rotary Foundation. Rotary Clubs bring together passionate people to build relationships and take action to solve world problems. Rotary International plays a supporting role to Rotary Clubs by co-ordinating global initiatives and projects. The Rotary Foundation provides funding for these projects and initiatives, both worldwide and locally (Rotary, 2018).

The structure of RD9400 can be described as follows: several Rotary Clubs in an area form a Rotary District. From the different districts, a Rotary Zone is formed. For example, Rotary District 9400 and Rotary District 9370 are two of the 15 districts that form part of Rotary Zone 22, the African continent. All of the Rotary Zones around the world form Rotary International (du Plessis, 2018). RD9400 includes Botswana, South Africa's four northern provinces (Limpopo, Mpumalanga, Gauteng and North West Province), Swaziland and the southern parts of Mozambique (Rotary International District 9400, 2018).

Rotary District 9400's literacy project "allows people in Southern Africa access to free educational or recreational books" (Bedfordview Rotary, 2015). This project allows individuals and organisations such as schools, churches, prisons, orphanages and homes for the elderly (Bedfordview Rotary, 2015) to collect books of their own choice. By letting the beneficiaries of the project choose their own books, RD9400 ensures that these individuals select books which are culturally appropriate and useful (Bedfordview Rotary, 2015).

Rotary International is a “bottom up, non-profit service organisation that comprises of members who volunteer their time to carry out the efforts of the organisation” (du Plessis, 2018). Rotary International clubs have the autonomy to make decisions about which community projects they undertake. These projects may or may not be shared to the larger RI community i.e. all clubs may act independently of combined RI efforts (du Plessis, 2018). Although RI appears to be a bottom-up organisation, it could be better described as having a matrix organisational structure in business management theoretical terms. The matrix organisational structure is a type of cross-functional structure that brings people from different functional areas together to undertake a task or project (Schermerhorn & Chappell, 2000:128). By bringing people together to concentrate on a specific project, the matrix organisation structure helps to decrease programme coordination difficulties (Schermerhorn & Chappell, 2000:128). Additionally, the matrix organisation structure promotes better performance accountability through project managers (Schermerhorn & Chappell, 2000:128).

Rotary Clubs in RD9400 are involved in literacy projects in order to support basic education and improve adult literacy in Southern Africa. One of the largest global literacy projects undertaken by Rotary Clubs to date has been to improve literacy in under-developed communities through book distribution (Rotary, 2017). Over the years, this project has grown from initially shipping books to South Africa to shipping books all over the world, including other African countries such as Nigeria and Tanzania (The Second Wind Foundation, 2015).

Thus, sea containers of books are shipped from the United States and Canada to South Africa where the books are distributed to communities in need by local RD9400 clubs such as Middelburg Rotary Club (The Second Wind Foundation, 2015). The books and educational supplies (desks, chairs, bookcases and sports equipment) come from US and Canadian schools which have upgraded their equipment or from schools which have been closed down. Instead of sending the old equipment to landfills, it is donated to Rotary Clubs. Between July 2013 and February 2016, RD9400 shipped 25 containers (12 metres x 2.35 metres x 2.65 metres) via sea freight from the US to Johannesburg (via Durban Port). In total, these containers contained 451,232 kilograms of books (The Second Wind Foundation, 2015).

The containers containing the books and the books themselves have no commercial value, therefore they do not incur custom duties. To ensure duty-free delivery, RD9400 makes sure that none of the books or containers they receive are resold, although both can be donated to libraries or schools. The containers themselves can become small libraries or health care centres. From the port of entry, the books are delivered to RD9400 distribution centres where they are sorted according to fiction / non-fiction / age appropriateness / education subject and made available to communities in need of books.

RD9400 incurs the costs for delivery and offloading of the containers from port of entry to the various distribution centres (du Plessis, 2018). The distribution centre focused on in this study is the one run by Middelburg Rotary Club (located in Middelburg). The number of books distributed by this centre varies from recipient to recipient as some recipients collect as little as 20 books while others collect 700 or more books. This makes it difficult for RD9400 to measure the outcome in terms of improved community literacy as RD9400 is unable to determine how the collected books have been used or who exactly used them (du Plessis, 2018). Figure 1.1 displays the kilograms of books shipped by RD9400 between 2013 and 2016.

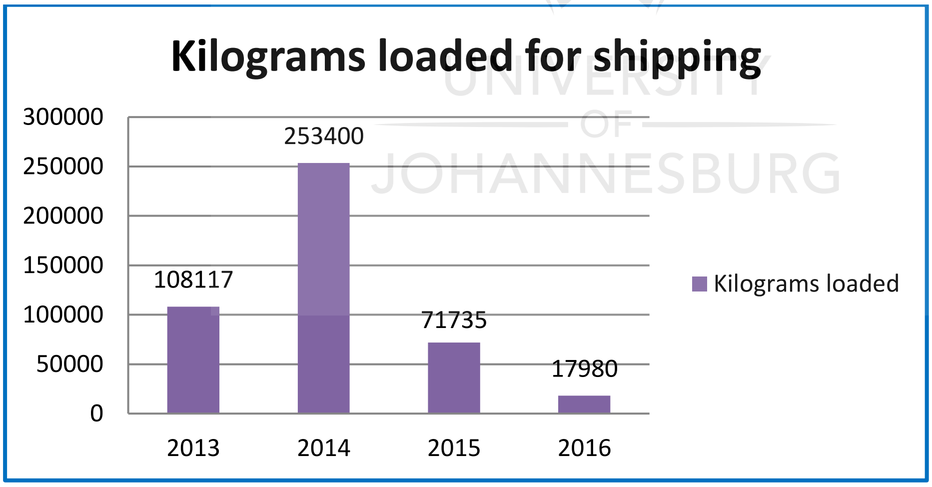

Figure 1.1 Books loaded by RD9400 for shipping to the Durban port

***Source**: Researcher's own compilation*

Figure 1.2 displays the amount of boxes of books (±40 books per box) distributed to schools, communities, charities and organisations between 2015 and 2017. As can been seen from Figure 1.2, RD9400 received the greatest amount of books in 2014 and as a result, 2015 saw the highest number of books distributed by Middelburg Rotary Club.

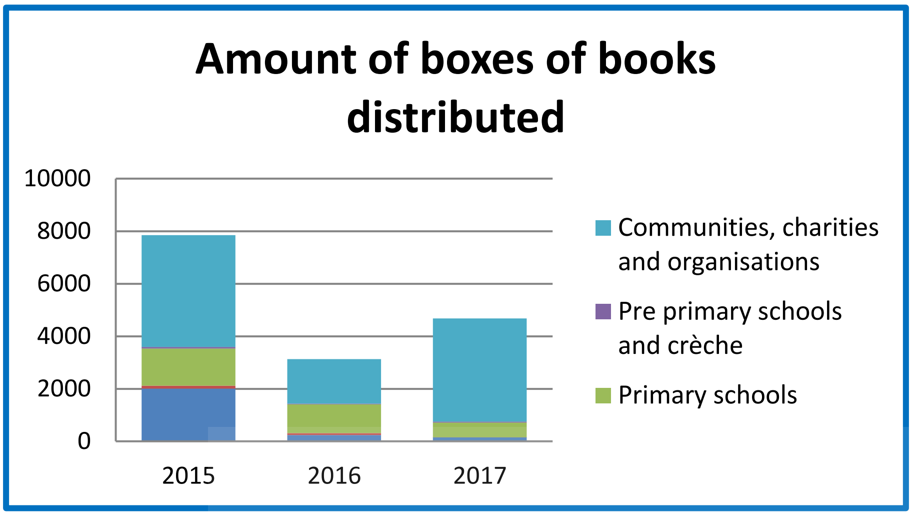

Figure 1.2 Boxes of books distributed by RD9400 between 2015 and 2017

***Source**: Researcher's own compilation*

In order to understand the impact of the literacy project, RD9400 needs to track the books it distributes and identify how these books are being applied in terms of improving literacy. RD9400 has no established standardised process nor does it have a policy on how to establish a value chain of books to improve community literacy (du Plessis, 2018). Without these processes and policies, RD9400 cannot measure the impact of the literacy project and it is therefore unable to account to stakeholders on the value of the project. This becomes a challenge as stakeholders are becoming more insistent that NPOs prove the value of their projects in the communities they serve. The importance of any business, especially an NPO, when expending resources such as financial, human, physical, legal, organisational or informational, is to ensure that waste is minimised and resource utilisation is maximised, thereby creating greater value and achieving their mission (Haeri, Rezaie & Amalnick, 2014:2815; Zhang & Swanson, 2013:113; Topaloglu, McDonald & Hunt, 2018:234). This underscores the importance of applying a value chain analysis to every project, which is discussed in section 2.4. Value chain analysis helps organisations to visualise the roles of all their stakeholders and how each stakeholder is affected by organisational decisions and outcomes (Schermerhorn & Chappell, 2000:22; du Plessis, 2014:98; Frommenwiler, 2014:24).

RD9400 also needs to understand the impact of its literacy projects in terms of the triple bottom line (TBL) framework, also known as integrated reporting in South Africa. This more holistic form of reporting includes measuring three dimensions of a project to estimate success – social, environmental (or ecological) and financial (see section 2.3) (Esser & Dekker, 2008:160; Arko-Achemfuor & Dzansi, 2015:55; Fifka, Kühn, Adaui & Stiglbauer, 2016:1097; Jacobs & Chase, 2018:13; Qeke & Dubihlela, 2018:64). Some organisations have adopted the TBL framework to evaluate their performance from a broader perspective, to create greater business value for all their stakeholders and to understand how their stakeholders can influence them (see section 2.6).

Savage, Nix, Whitehead and Blair (1990:149) classify stakeholders into three groups, namely, internal (e.g. staff and management), external (e.g. local community, government and donors) and interface (e.g. board of directors). Important stakeholders of any organisation generally include customers, suppliers, competitors, and regulators (Schermerhorn & Chappell, 2000:22). RD9400's stakeholders include (i) the US and Canadian Rotary Clubs which ship the containers to South Africa, (ii) direct beneficiaries, for example learners reading the books, (iii) indirect beneficiaries, e.g. communities around the school receiving books, (iv) sponsors, e.g. The Second Wind Foundation, Barloworld Equipment and other corporates who donate to the literacy project, (v) volunteers from outside Rotary and (vi) government. Savage *et al.* (1990:150) add that there are four different strategies (collaborate, involve, defend or monitor) that organisations should use to manage their stakeholders (see section 2.6). As RD9400 has multiple stakeholder groups, it needs to understand the value added by each group in the total value creation process, or better still, the value chain of activities of the literacy project.

The generic value chain proposed by Porter (2001) (section 2.4) represents two types of activities: (i) the primary activities (involved in the physical development/production of a product and its sales to customers and aftersales services) and (ii) the support activities (which support the primary activities) of an organisation (Porter, 2001:50).

The value chain is a useful tool in assessing the value of the RD9400 literacy project. It draws attention to organisational functions that use resources and the need to minimise waste to maximise utilisation and value created. Resources can be defined as the tangible and intangible inputs used by organisations to efficiently and effectively create value for the communities they serve (Topaloglu *et al.*, 2018:239). To assess the value chain of RD9400, it is necessary to consider the performance of each organisational function. Schermerhorn and Chappell (2000:4) state that successful organisations are those which utilise their resources well. Organisational performance can be measured by productivity, which can be broken down into two dimensions – performance effectiveness and efficiency (Schermerhorn & Chappell, 2000:4). Performance effectiveness is a measure of task output whilst performance efficiency is a measure of the resource cost associated with goal accomplishment (Schermerhorn & Chappell, 2000:4).

Primary activities of the value chain include inbound logistics, operations, outbound logistics, marketing and sales and service (Porter, 2001:52; Sun, Law & Schuckert, 2018:265). Support activities include the organisation's infrastructure, human resource management, technology development and procurement (Porter, 2001:52; Sun *et al.*, 2018:265). The value chain also represents anticipation of the margin of value that can be created from various functions (segments / departments / skills of human resources) of an organisation. The margin is the difference between the total value created and the total cost of performing the primary and support activities (Porter, 2001:52) (see section 2.4).

Rotary District 9400 tracks books collected from the centre insofar as it knows who collects the books, where the books were collected from and how many books were collected. This is done in order to track which books have left the distribution centre and to prevent the resale of the books. This information is gathered through letters provided by sponsoring Rotary Clubs and institutions which give beneficiaries permission to collect the books from the given centre (du Plessis, 2018). However, not many follow-ups are made by RD9400 as to how the books are used to improve the literacy of the community recipients. More specifically, RD9400 has no procedure for tracking the success of the intervention of these books in fostering literacy in the community, nor does it see the impact of the books on individual students and the community at large. Du Plessis (2018) indicates that across the clubs in the African RD9400 geographic region, there is no stated procedure and no policies to direct how Rotary Clubs should report on project success in terms of long-term sustainability for the recipient community.

For NPOs to understand their impact on the TBL, they need to measure performance (see section 2.8). Performance measurement is the process of defining, monitoring and evaluating the performance indicators of an organisation (Markić, 2014:22; Wadongo, 2014:20). Epstein and Yuthas (2014:93) state that “without measurement there is a real risk that money, time, and other resources are wasted”. Measuring performance allows NPOs to identify levels of performance and monitor efficiency and effectiveness in achieving organisational objectives (Gibson, Ivancevich & Donnelly, 1994:217; Kaplan, 2001:353; Larsson & Kinnunen, 2007:4; Lee & Nowell, 2015:305; Tundys & Wiśniewski, 2018:556). Effectiveness can be seen as the extent to which NPOs meet their stakeholder requirements, whereas efficiency is the extent to which the NPOs meet these stakeholder requirements considering resource utilisation (Borgström, 2005:5; Larsson & Kinnunen, 2007:12; Langer & LeRoux, 2017:462). Additionally, effectiveness is the extent to which goals have been achieved whereas efficiency concerns the resource utilisation in achieving these goals (Heckmann, Comes & Nickel, 2015:122; Govindan, Fattahi & Keyvanshokooh, 2017:117). Efficiency in a value chain refers to performing tasks throughout the value chain in a cost and waste minimal manner (Heckmann *et al*., 2015:123; Govindan *et al.*, 2017:117). Effectiveness in the value chain involves planning, monitoring and controlling available resources (Heckmann *et al.,* 2015:123).

Olujide (2005:64) adds that the best measure of an NPO’s success or failure is the extent to which the beneficiaries of a project have moved from dependency to independence or self-reliance. This statement refers to the concept developed by Vivienne Schultz known as the A2B Transformation Movement (section 2.6). This concept seeks to empower individuals to become more independent and more self-reliant.

In order to understand how the RD9400s literacy project comes together, a causal loop diagram is presented (see Figure 1.3 below). Tip (2011) states that causal loop diagrams are built by indicating the causal relationships between key variables and assist in visualising complex problems. The causal loop diagram contains four basic elements, namely, (i) the key variables, (ii) the links between the key variables, (iii) the signs on the links (opposite or same), and (iv) the sign of the loop (reinforcing or balancing) (Lannon, 2016). Causal loop diagrams form part of the bigger systems thinking which deals with problems in complex systems (Haraldsson, 2000:9, Vermaak, 2007:175). Causal loop diagrams include reinforcing and balancing systems. A reinforcing system is a system of growth, whilst a balancing system is a system that is stabilising (Haraldsson, 2000:20). Reinforcing systems or loops have an even number of opposite reactions while balancing systems or loops have an odd number of opposite reactions (Tip, 2011:7). Reinforcing systems or loops can also be referred to as positive feedback loops in a causal diagram while balancing systems or loops can be referred to as negative feedback loops (Kirkwood, 1998:1). In Figure 1.3 below, the reinforcing loops are represented by “R” and the balancing loops are represented by “B”. The links between the key variables use a “+” symbol to represent a same reaction whilst a “-” symbol is used to represent an opposite reaction.

In Figure 1.3, Loop 1 in the casual loop diagram focuses on project management and its implications. Improved project management practices will lead to an increase in books distributed, therefore a need for increased human resource capital will be seen. Improved project management practices will also result in an increase in policies that are put in place and a corresponding decrease in the risks of running the project. The improved project management will lead to greater efficiency, therefore more time will be saved and less money will be spent.

Loop 2 of the causal loop diagram begins with improved value creation. RD9400 will see an improvement in the value it creates by measuring the A2B Transformation of the beneficiaries of the literacy project. As individuals move from A to B, an increase can be seen in the community’s human resource development, which in turn would lead to an increase in donor funding as donors can better see the value being created by the literacy project.

Loop 3 begins with the sustainable outcome of the literacy project. If the project is successful in delivering a sustainable outcome, community members who have benefitted from the literacy project will have better employment opportunities and therefore greater independence which, in turn, shows that RD9400 has achieved a sustainable outcome.

Loop 4 begins with the education quality and level of literacy of the beneficiaries of the literacy project. If there is an increase in the literacy of community members, these members are more likely to matriculate and therefore attend tertiary education institutions, thereby furthering their education.

Loop 5 concerns the community involvement of the communities in which RD9400 operates. If there are high levels of community involvement, there will be an increase in stakeholder commitment, which would improve the reputation of RD9400. Loop 5 is interconnected with Loops 1 and 2 through Loop 6.

Loop 6 begins with improved stakeholder commitment. If there is greater stakeholder commitment, there will be an increase in the number of books distributed as more books would be donated and donor funding would increase. This would in turn lead to an increase in stakeholder commitment.

Loop 7 ties Loops 1 to 6 together by demonstrating that if there is an increase in the project management practices used by RD9400, there should be an increase in the value it creates, thereby leading towards a sustainable outcome. The sustainable outcome increases the quality of education and level of literacy in the communities which, in turn, increases community involvement and therefore, an improved RD9400 reputation in the communities it serves.

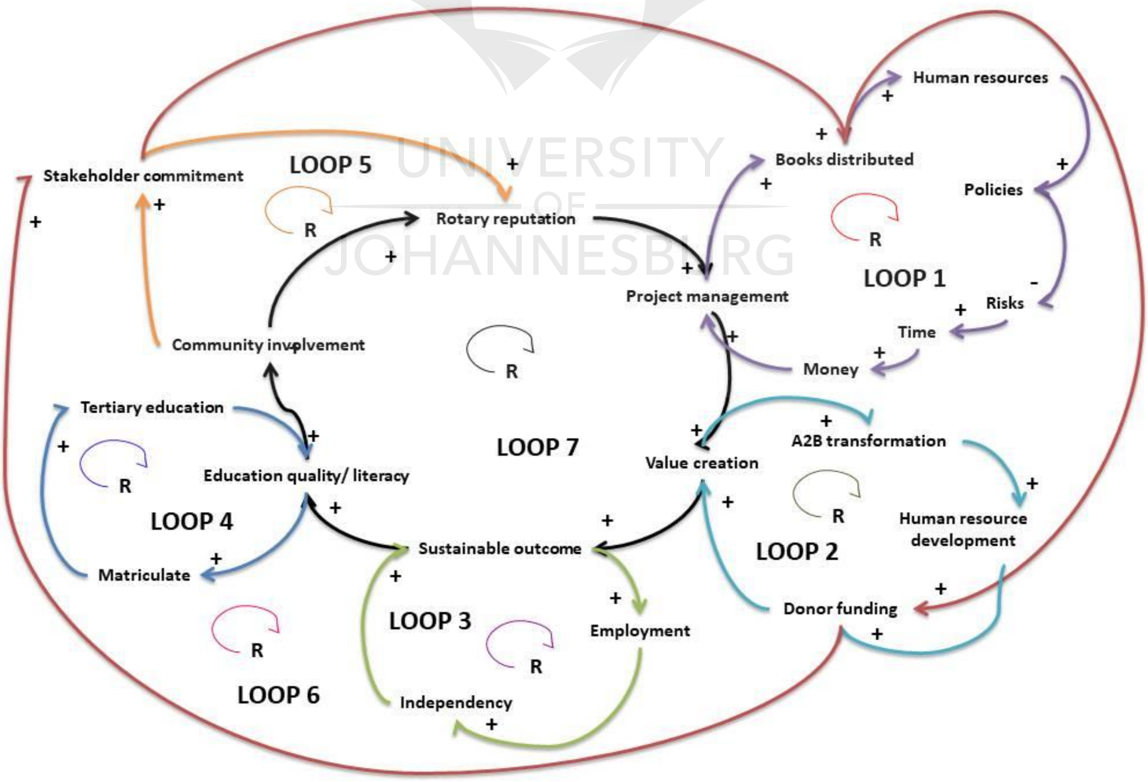

Figure 1.3 Causal loop of the Rotary District 9400 book distribution project

***Source**: Researcher's own compilation*

Sections 1.1 and 1.2 of this study have given an overview of the importance of creating a literacy project that is sustainable. In this context, the following research question is posed:

How does Rotary District 9400 measure and manage the creation of sustained value for its stakeholders in communities through its literacy project?

1.3 Problem statement

The problem identified in this study is that NPOs (such as RD9400) are facing increasing pressure from stakeholders, particularly donors and sponsors, to prove the value that their activities are adding to the development of society. These stakeholders are holding NPOs accountable for their actions, and more specifically, NPOs need to account for the resources they utilise in conducting their activities. Furthermore, these stakeholders want to see the impact of these activities, which leads to the problem of measuring performance in the non-profit sector, which typically has intangible outcomes. Intangible outcomes are more difficult to measure, and even more so, when the outcome is improved literacy from donated books.

Due to the need to demonstrate value created through its literacy project, RD9400, and by extension, Middelburg Rotary Club, need to identify policies and guidelines that they can implement to measure and further manage the impact of their literacy project. These policies and guidelines should be implemented to minimise waste and maximise resource utilisation in order to create maximal sustained value. The problem faced, specifically by Middelburg Rotary Club, is that it is not clear to what extent they have guidelines and policies in place. This suggests that they currently cannot identify how efficiently and effectively they are utilising their resources. The research problem is to identify the extent to which RD9400 is not currently accountable in terms of providing measurable performance indicators to their stakeholders and making recommendations to improve this.

1.4 Research aim and objectives

The aim of this study is to identify how RD9400, and more specifically, Middelburg Rotary Club, can measure and manage the value they add when improving literacy in the communities they serve through fiction and non-fiction book donations and deliveries.

1.4.1 Primary objective

The primary objective is of this study is:

- To evaluate how Rotary District 9400 can better measure and manage its literacy project to minimise waste and optimise resource utilisation in order to maximise the sustainable value created through the literacy project.

1.4.2 Secondary objectives

The primary objective can be broken down into secondary objectives:

- To use a mixed methods strategy to evaluate selected Rotary District 9400 community literacy projects;
- To discover gaps in the current management of Rotary District 9400's literacy projects;
- To suggest tools that NPOs such as Rotary District 9400 could use to improve the management of projects;
- To make managerial recommendations to Rotary District 9400 on how to strategically improve the community literacy project to ensure sustained value and improved resource utilisation in terms of community literacy.

1.5 Methods and tools used in the data collection

This section describes the primary and secondary data sources that were used in this study. The techniques used to capture the primary and secondary data are also explained.

Secondary data sources

According to Bryman and Bell (2014:267), secondary data analysis involves analysing existing qualitative and quantitative datasets in order to answer a different research question. Secondary data sources are beneficial to researchers as they save time and cost. Additionally, researchers can find high-quality datasets through secondary data sources (Bryman & Bell, 2014:268). In the current study, secondary data sources were used to conduct the extensive literature review of Chapter 2 that acts as an academic empirical framework.

Primary data sources

According to Quinnipiac University (2018), primary data sources “present information in its original form, neither interpreted nor condensed nor evaluated by other writers”. Primary data sources allow researchers to get as close to the event or problem they are researching as possible. For the purposes of this research, questionnaires and interviews were used to gather information about this particular literacy phenomenon from stakeholders of the Middelburg Rotary Club literacy project.

1.6 Significance of the study

This study makes a significant contribution as there is limited existing literature on the NPO sector in South Africa (du Plessis & Petzer, 2011:1152). Even with the rise of NPO activity in developing countries since 1980, research into performance management and measurement practices is limited compared to the research undertaken in the private sector (Wadongo, 2014:7). Existing literature on how NPOs can measure performance using different performance measurement tools such as the balanced scorecard is also limited (Boateng, Akamavi & Ndoro, 2016:59; Elgammal, 2016:37). In order to bridge this gap, this study identifies the types of measurement and management techniques currently used in NPOs and makes recommendations to RD9400.

In addition, there is limited literature on the effectiveness of NPOs in improving the lives of the communities they serve. Quantitative evaluations of such NPOs are virtually absent from current academic literature (Werker & Ahmed, 2008:86). Weerawardena, McDonald and Mort (2010:347) note that there is scant information on organisational sustainability, and more specifically, on the strategic decisions followed by NPOs to deliver their services more effectively to satisfy a social need whilst remaining financially viable. As a result, this study investigates how NPOs can measure their social impact in terms of improving literacy. This is done by identifying ways in which NPOs can measure the intangible value they create.

The results of this study aim to help NPOs, particularly NPOs involved in literacy, to identify the tangible and intangible outcomes of their projects, as well as their stakeholders and the role they play in the organisations' projects. The study focuses on Middelburg Rotary Club to analyse the current strategies and processes that are in place in RD9400 to minimise waste and maximise resource utilisation in value creation. The proposed framework which is the outcome of this study could be applied to the general NPO sector in terms of improving literacy in Africa.

The current research is therefore significant as it contributes to the existing global academic literature and the specific study area in a number of fields, notably, the sustainability of NPO projects in South Africa; using the value chain to identify where value is being created; project management in NPOs; stakeholder analysis; A2B Transformation; risk management; and performance measurement used in NPOs.

1.7 Ethical considerations

Ethics in research is concerned with conducting a study honestly, with integrity and without causing harm to the participants (Zikmund, 2015:39). This study was conducted in accordance with the Code of Academic and Research Ethics of the University of Johannesburg (2007). The University of Johannesburg's policies and procedures on conducting research were strictly adhered to. Form A (Research Ethics Application for Conducting Research Involving Humans) and Form B (Research Ethics Application for Conducting Research Using Secondary / Existing Data) of the College of Business and Economics were completed and submitted for ethical clearance before the study proceeded (see Appendix A for ethical clearance form).

In line with the UJ Code of Ethics:

- A letter of informed consent was obtained from RD9400 gaining permission to conduct research on its organisation (see section 3.3);
- Signed consent forms were obtained from participants before conducting interviews to inform the participants that their anonymity and confidentiality would be protected at all times. These consent forms assured the participants that any data collected from them would only be used to write the dissertation and that confidentiality and anonymity would be a top priority (see Appendix C);

- The researcher ensured that respondents to the quantitative questionnaires understood that their anonymity and confidentiality would be protected at all times; and
- The research participants' and respondents' rights to freedom, dignity, privacy and integrity were respected at all times.

1.8 Structure of the study

This study is structured into six chapters, as outlined below.

Chapter 1

This chapter introduced the study at hand, with a focus on the background of the research, the research problem and the primary and secondary research objectives. The chapter also identified the data sources used in the study, the significance of the study and the ethical considerations.

Chapter 2

This chapter conducts a literature review and lays down the theoretical and conceptual foundations of the study. The review focuses on the theories and concepts upon which the research is grounded. These concepts include NPOs in a South African context; sustainable development; the value chain; stakeholder theory; A2B Transformation movement; risk management; performance management; performance planning practices; and measuring performance of NPOs.

Chapter 3

This chapter describes the methods used to collect and analyse the data. Included in this chapter is a breakdown of the questionnaire and interview designs, sampling for both qualitative and quantitative data collection and a discussion of the study design.

Chapter 4

This chapter analyses and interprets the findings of the qualitative phase of the research. The findings are then discussed in relation to the literature review.

Chapter 5

This chapter analyses and interprets the findings of the quantitative phase of the research. The data collected from the questionnaires is examined using different analysis techniques.

Chapter 6

This chapter provides a breakdown of the research. Conclusions are drawn based on the study findings, recommendations are made for future research and managerial implications are indicated.

1.9 Chapter summary

This chapter presented the introduction to the rest of the study. It discussed the background to the research and the key terms that appear throughout the study. It outlined the research objectives, problem statement and research question. The significance of the study was then discussed, along with the ethical considerations.

The next chapter contains a comprehensive literature review that discusses the key concepts of the study.

CHAPTER 2

LITERATURE REVIEW

2.1 Introduction

Given the non-profit nature of NPOs, they often have service outputs rather than product outputs (Lagerström, 2002). These service outputs lead to non-financial outcomes that cannot be measured in monetary terms. This makes it challenging for NPOs to define and quantify performance measures (Lagerström, 2002; Olujide, 2005:67) which can be used to determine the impact their services are having not only in terms of the TBL but also on their stakeholders and the communities at large. Additionally, NPOs need to face issues of trust, accountability and effectiveness (Wadongo, 2014:10; Amagoh, 2015:221). These NPOs are being called forward to take more accountability for the funds they receive from donors and how they can improve the efficiency and effectiveness of their performance (Amagoh, 2015:221). Thus, due to the intangibility of outcomes, NPOs face major challenges in measuring performance (Amagoh, 2015:221; Topaloglu *et al.*, 2018:234). This chapter discusses the underpinning concepts on which the sequential mixed methods research strategy is based. These are as follows: NPOs in a South African context; sustainable development; the value chain in NPOs; stakeholder theory; the A2B transformation movement; risk management and challenges faced by NPOs; performance management in NPO; performance planning practices; and measuring performance of NPOs.

2.2 Non-profit organisations (NPOs) in the South African context

While this study uses the term ‘non-profit organisation’ (NPO), it is often used interchangeably with terms such as non-governmental organisations (NGOs), civil-society organisations (CSOs), community-based organisations (CBOs) and public-benefit organisations (PBOs), depending on the field of study in question (Department of Social Development, 2001:5; Larsson & Kinnunen, 2007:4; Lewis, 2010; Lecy, Schmitz & Swedlund, 2012:437; Kuruvila, 2015:20). According to Martinez (2014:5) non-profit organisations with political and/or social aspirations are often categorised as NGOs. For the purposes of this research, it is crucial to distinguish between NPOs and non-profit companies (NPCs) as Rotary District 9400 is a registered NPC. An NPC can be distinguished from an NPO on the basis that NPCs are recognised as legal entities (Forbes, 2015), giving their members limited liability. This distinction is important as RD9400 was originally registered as an NPO, however, due to legal reasons such as the District Governor (DG) and other Rotarians (Rotary members) being exposed to a personal risk should RD9400 be sued, RD9400 went through the process of registering as an NPC. Kuruvila (2015:25) offers a functional definition of NPOs as organisations that promote public good and perform activities that serve public interests.

The not-for-profit sector consists of range of organisations that have accountability relationships with a variety of important stakeholders (section 2.5) in order to achieve their social activities and objectives (section 2.9) (Crawford, Morgan & Cordery, 2018:181). Zhang and Swanson (2013:109) describe NPOs as those organisations which “pursue social objectives, engage in social activities, and strive to generate positive social outcomes”. These NPOs are third-sector actors, best known for the delivery of services to communities in need (operational) and advocacy in the pursuit of social transformation (Teegen, Doh & Vachani, 2004:5; Lewis, 2010:2; Yogarajah, 2017:39). In contrast to for-profit organisations, which exist to make a profit, NPOs exist to serve the needs of society (Larsson & Kinnunen, 2007:14).

Okorley and Nkrumah (2012:330) observe that in many developing countries, government can no longer function as the sole benefactor providing services and products to ensure sustainable development among communities and eradicating poverty. For this reason, during the 1980s, NPOs became leading actors in civil society, taking on an increasingly active role in driving national development (Finnetty, 2000:38; Okorley & Nkrumah, 2012:330; Masi, 2015:490; Martinez, 2014:31). This resulted in heightened expectations of NPOs’ accountability and the requirement to demonstrate to stakeholders that NPOs do indeed contribute to national development (Okorley & Nkrumah, 2012:331).

Accountability refers to how NPOs are held responsible for their actions and the outcomes of their actions to recognised authorities (Finnetty, 2000:47). According to Crawford *et al.* (2018:185), NPOs are held accountable by stakeholders such as beneficiaries, government, regulators and funders. Keating and Frumkin (2003:4) add that NPOs are also accountable to the communities that indirectly benefit from their activities.

NPOs collaborate with grassroots organisations through active participation in social movements (Martinez, 2014:31). Although NPOs vary widely in their purpose (Lewis, 2010:2; Kuruvila, 2015:20; Yogarajah, 2017:39), they can be broken down into having three main roles, namely, implementer, catalyst or partner (Lewis, 2010:2). The implementer role concerns the NPO gathering and mobilising resources in order to deliver a product or service to communities in need (Lewis, 2010:2). The catalyst role refers to an NPO's ability to promote social transformation through inspiring, facilitating and contributing to improved thinking (Lewis, 2010:2). Lastly, the partner role refers to the trend of NPOs working with governments, donors, the private sector and other stakeholders on joint activities to help communities in need (Lewis, 2010:2).

NPOs are established independently of government. As they are non-profit organisations, any profits which are obtained are redirected to achieve the NPO's objectives (Clarke, 1998:36; Leonard, 2014:376; Golini, *et al.*, 2015:650; Amagoh, 2015:221; Kuruvila, 2015:26). NPOs also have grassroots linkages in the communities they contribute to, which allows them to work closely and in co-ordination with these communities (Olujide, 2005:69; Werker & Ahmed, 2008:80; Banks & Hulme, 2012:4). NPOs have been described as having the following five basic features: (i) they are formal and institutionalised organisations; (ii) they are private entities separate from government; (iii) they are non-profit distributing; (iv) they are self-governing i.e. they control and manage their own operations; and (v) they are voluntary in nature (Finnetty, 2000:41; Lewis, 2010:3; Kuruvila, 2015:2). Developmental NPOs play an important role in developing countries as they can test new approaches to alleviating persistent social and political challenges (Amagoh, 2015:221; Volmink & van der Elst, 2017:7).

According to the Department of Social Development of South Africa (2001:7), NPOs have three main responsibilities: (i) they need to ensure that the services they provide meet the needs of the communities they serve; (ii) they need to ensure that they have reliable and sustainable sources of support, such as donors, in order to achieve desired outcomes; and (iii) they need to ensure that they have policies and procedures in place to guarantee the proper use and handling of resources. The managers of NPOs have a fiduciary responsibility to ensure that the resources provided by donors are used efficiently (Scholey & Schobel, 2016:3). As NPOs generally need donor funding to support their operations, they need to gain donors' confidence. This can be done through achieving measurable goals (du Plessis & Petzer, 2011:12145; Nazuk & Shabbir, 2018). In recent years, NPOs have come under increasing pressure from stakeholders to implement assessment systems to measure the social impact of their activities (Bassi & Vincenti, 2015:12). This pressure is coming to bear as stakeholders such as donors wish to understand how the NPOs are using their resources to achieve their goals and objectives. Additionally, NPOs are being requested to fulfil the requirements of a triple bottom line (section 2.3) which consists of economic feasibility, social sustainability and environmental sustainability (Bassi & Vincenti, 2015:12).

Developmental NPOs play a crucial role in supporting South African education. In 2014, developmental NPOs focusing on education accounted for 16% of NPOs in the country (StatsSA, 2015:14). As education is the foundation of a country's human development as well as its political, economic and cultural development, it plays a crucial role in the country's overall development (Park *et al.*, 2015:32; Doucet *et al.*, 2018:8). Volmink and van der Elst (2017:4) add that NPOs are essential in reaching the educational goals of South Africa's National Development Plan.

According to Legotlo (2014:6), South Africa's biggest challenge when it comes to education is providing adequate resources and quality education to learners, especially those in rural areas. These resource challenges include a shortage of instruction materials, a shortage of relevant textbooks, a shortage of classroom space and, in those schools which do have libraries, a shortage of books (Chisholm, 2011:56; Legotlo, 2014:7). Only 45% of learners in South Africa have sole use of a textbook (Chisholm, 2011:56). Community involvement in education is also seen as important in South Africa as it often leads to increased pass rates and higher attendance, with more students likely to enrol in tertiary education (Legotlo, 2014:198).

2.3 NPOs and sustainable development

The role of NPOs in improving education in South Africa is crucial as it aids development. However, these NPOs should not only aim for development but rather, for sustainable development, whilst also achieving sustainability. UNESCO (2018) explains the difference between sustainable development and sustainability as follows: sustainable development refers to the activities and pathways that lead to sustainability – a long-term goal. Sustainability, on the other hand, can be described as an organisation's activities to create value in the present without compromising the organisation's ability to create value in the future (Geurts, 2016:17; Hammer & Pivo, 2017:25; Gamble, Peteraf & Thompson, 2017:191; Dragomir & Constantinescu, 2018:21). For NPOs specifically, sustainability refers to being able to survive in order to continue serving society. In other words, the sustainability of an NPO means that it will be able to fulfil its commitments to its stakeholders, particularly its beneficiaries. This, in turn, encourages stakeholders to place their trust in those commitments (Weerawardena *et al.*, 2010:347).

NPOs in recent years have focused their attention on the sustainability of their actions due to the dynamic and complex environment in which they operate (Weerawardena & Mort, 2006:30; Al-Tabbaa, Gadd & Ankrah, 2013:590). As this operating environment becomes increasingly more dynamic and complex, NPOs must adapt their mission and strategies (section 2.9) to ensure that they can continue operating into the future (Zhang & Swanson, 2013:106). A defining characteristic of NPOs is that their social strategic objectives play an integral role in their overall mission (Weerawardena & Mort, 2006:30; Zhang & Swanson, 2013:109). Zhang and Swanson (2013:119) note that NPOs have a better chance of positively affecting their communities if they place strong emphasis on their social mission (section 2.9).

Sustainability can further be related to the effective management of NPOs' relationships with key stakeholders (Gómez-Bezares, Przychodzen & Przychodzen, 2016:2). In other words, NPOs which manage their key stakeholders effectively are more likely to achieve sustainability (section 2.5). Sustainability in essence is about the long-term and takes into consideration future generations (Fifka *et al.*, 2016:1097).

Sustainability consists of three main dimensions namely, economic, social and environmental, which relates back to the triple bottom line (Weerawardena *et al.*, 2010:347; Fifka *et al.*, 2016:1097; Geurts, 2016:16; Hammer & Pivo, 2017:25; Varga, 2018:24). Therefore, in planning their activities, NPOs need to consider how their actions will impact the economy in which they operate, the communities they serve and the environment around them. Varga (2018:24) adds that the concept of sustainable development was coined to describe the need for a balance between economic growth and environmental, social and ecological improvements.

In this study, sustainability in the communities served by NPOs is crucial for the following reasons: (i) terminating a project, such as RD9400 literacy project, in a community can lead to negative effects, not only for the community but for the NPO itself; (ii) the costs of initiating the project could have been high, thereby causing a negative financial impact; and (iii) a community that has experienced an unexpected termination of a project from an NPO may lose trust when new projects are proposed in the future (Ceptureanu, Ceptureanu, Luchian & Luchian, 2018:870). Bernardino, Santos and Ribeiro (2018:62) state that by fostering organisational sustainability, social value creation can be achieved. Social value, as defined by Singh (2016:60), is the total impact of an organisation on its beneficiaries and on society as a whole.

According to D'heur (2015:6), to ensure sustainable value creation, organisations must put plans into action which must then be supported by all levels of the organisation. Developmental NPOs in particular need to ensure that the activities they perform in helping communities are sustainable. NPOs also need to be aware of the links between these activities and other sustainable levels (Fowler, 2013:11). A large portion of sustainability that RD9400 needs to create is social sustainability as it has a high community focus.

Social sustainability in NPOs refers to the dimensions of value creation and the balancing of all stakeholder interests (Rodriguez, Gimenez & Arenas, 2016:517). Social sustainability is concerned with preserving socio-cultural traditions, i.e. preserving a preferred way of life (Vallance, Perkins & Dixon, 2011:342). When considering sustainability in a project, understanding the multiplier effect becomes important. Domański and Gwosdz (2010:27) state that the multiplier effect plays a crucial role in local and regional development as one type of economic activity can affect another. In terms of the RD9400 literacy project, the multiplier effect comes into play when a book distributed from RD9400 is passed from beneficiary to beneficiary, creating maximum value. The multiplier effect can be greater with a strong organisational value chain.

2.4 NPOs and the value chain

The value chain can be described as the sum of activities performed by organisations that add value to the organisation's main purpose (Nieuwenhuizen & Oosthuizen, 2014:21). The value chain recognises an organisation's primary and support activities which are performed to create value for the customer (Gamble *et al.,* 2017:73; Sun *et al.*, 2018:265). An organisation's value chain demonstrates how value is added from inputs, through to transformation and outputs (Cavusgil, Knight & Riesenberger, 2014:66; Rosales, Pomeroy, Calabio, Batong, Cedo, Escara, Facunla, Gulayan, Narvadez, Sarahadil & Sobrevega, 2017:11). The value chain, further, serves as a tool in understanding the relationships between supply chains, customers, service providers, functional activities and supporting institutions (Frommenwiler, 2014:29).

Since NPOs such as RD9400 focus on creating social value (Rodriguez *et al.*, 2016:517), they should strive for a sustainable value chain. D'heur (2015:18) describes a sustainable value chain as one that strives to achieve economic, ecological and societal value, added through all aspects of its core business. By creating a sustainable value chain, NPOs can ensure that they have a lasting impact on the communities they serve. NPOs supporting education in South Africa can have a long-term influence on the lives of those they create value for. An NPO's total value creation is the sum of all the value added by all stakeholders in the value chain (Tantalo & Priem, 2016:317). The typical NPO value chain often includes value added from donors, who supply the NPO with essential resources (Mwangi, 2003:8). Due to the value added by donors, NPOs are often torn between serving their grassroots beneficiaries and accounting to their donors (Banks & Hulme, 2012:12).

Organisations can gain insight into their value chains through value chain analysis, a concept developed by Porter in 1985 (Mercadal, 2017). Value chain analysis examines all parts of the value chain within which the organisation functions (Mercadal, 2017). Conducting a value chain analysis involves evaluating how the different activities in the chain operate, how the activities are linked to one another, what keeps the relationship between the different activities organised, what information is communicated between the different activities and what power relationships exist between the activities (Rosales *et al.*, 2017:12).

The primary activities in a value chain are those which are directly linked to the creation or delivery of the organisation's products or services (Mwangi, 2003:22; Koc & Bozdag, 2017:561; Sun *et al.*, 2018:265). These primary activities include inbound logistics (activities of receiving products or service inputs), operations / production, outbound logistics, marketing and sales and customer service (Nieuwenhuizen & Oosthuizen, 2014:22; Koc & Bozdag, 2017:561; Sun *et al.*, 2018:265). The support activities in the value chain are those which contribute to the improvement of the organisation's effectiveness and efficiency of the primary activities (Mwangi, 2003:23). Support activities include financial management, human resource management, communication and information management (Nieuwenhuizen & Oosthuizen, 2014:22; Koc & Bozdag, 2017:561; Sun *et al.*, 2018:265). Figure 2.1 below illustrates the generic value chain developed by Porter (1985).

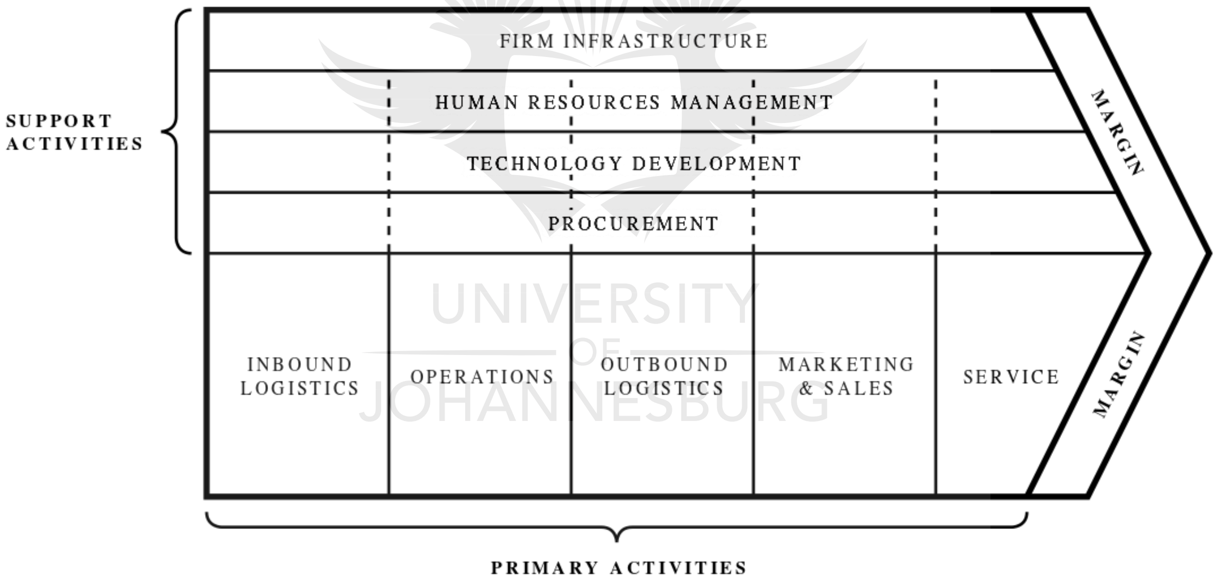

Figure 2.1 Generic value chain

***Source**: Porter (1985)*

The primary activities of RD9400's value chain could be viewed as follows:

- The inbound logistics involve RD9400 co-ordinating, with other Rotary Clubs from Canada and the US, the procurement of a shipping container containing educational supplies sourced from Canadian and US schools. The process involves obtaining the educational supplies, packing these into a shipping container and sending the container to South Africa where RD9400 will receive it.

- Operations involves RD9400 receiving the container and transporting it to the distribution centre where the container is unpacked. Once unpacked, RD9400 needs to sort through the contents of the container. This process involves, for example, sorting through books and categorising them according to different genres.
- Outbound logistics involves RD9400 identifying schools that are in need of the educational equipment and assisting them in gaining access to these items. This process involves transport of the different items to different schools.
- The marketing and sales activities involve RD9400 conducting fundraising and raising awareness of the need to improve literacy in South Africa. This is a crucial activity as RD9400 relies heavily on donations and sponsorship.
- The service activity in the RD9400 literacy project involves RD9400 going back to the schools to which equipment has been donated, identifying whether the schools have been using the donated items, deciding whether further donations are required and determining the impact of those donations.

The support activities of RD94000 can be described as follows:

- As an NPO that is run solely by volunteers, RD9400's infrastructure relies heavily on the consistent involvement of its members and communities.
- The human resource management activity involves RD9400 optimising the co-ordination and allocation of members and volunteers to efficiently achieve the project's goals.
- RD9400's technology development support activity plays a role in RD9400 developing better systems and processes in the project as well as identifying better ways to improve literacy in South Africa.
- Procurement in RD9400 is the activity of collecting donations and recruiting volunteers and other relevant stakeholders.

Lastly, the margin that is being created by the value chain of activities in the literacy project includes improved literacy in South Africa, better development opportunities, and possible economic growth.

The use of the value chain analysis helps organisations to visualise the roles of all their stakeholders and how each stakeholder is affected by organisational decisions and outcomes. Rosales *et al.* (2017:12) explain that a value chain analysis is useful in identifying how each stakeholder in the value chain benefits from the organisation's activities. Therefore, in order for NPOs such as RD9400 to increase the value they add, they must understand the different interests and needs of all their stakeholders (du Plessis, 2014:98; Frommenwiler, 2014:24). One way for organisations to understand these interests and needs is through the stakeholder theory.

2.5 The stakeholder theory

Tantalo and Priem (2016:314) point out that there is limited literature on how managers can improve their value creation strategies using the stakeholder theory. Before looking at the role of stakeholder theory in NPOs, a definition of a stakeholder should be presented. Although the definition of a stakeholder is highly debated, this study defines stakeholders as follows: any individual who is influenced by, or who influences an organisation's objectives (Schermerhorn & Chappell, 2000:22; Fassin, 2008:8; Nicholls, Lawlor, Neitzert & Goodspeed, 2009:8; Freeman, 2010:25; Miles, 2011:285; Eskerod, Jepsen & Dalcher, 2014:8; du Plessis, 2014:98; Bryson, 2017:42; Rebs, Brandenburg, Seuring & Stohler, 2018:201). Geurts (2016:29) adds that stakeholders have interests and expectations of an organisation's activities and decisions.

The stakeholder theory makes a distinction between an organisation's primary stakeholders (for example, customers, suppliers and financiers) and secondary stakeholders (for example, government, trade unions and consumer advocate groups) (Rodriguez *et al.*, 2016:516; Rebs *et al.*, 2018:201). According to stakeholder theory, organisational activities and decisions are affected by the organisation's different stakeholders and the pressures these stakeholders bring to bear on the organisation (du Plessis, 2014:98; Harangozo & Zilahy, 2015:19). Furthermore, the stakeholder theory explains how creating value for one stakeholder can positively impact other stakeholders without decreasing the value created for them (Tantalo & Priem, 2016:315). Figure 2.2 shows a graphical representation of the relationships between an organisation, its stakeholders and society.

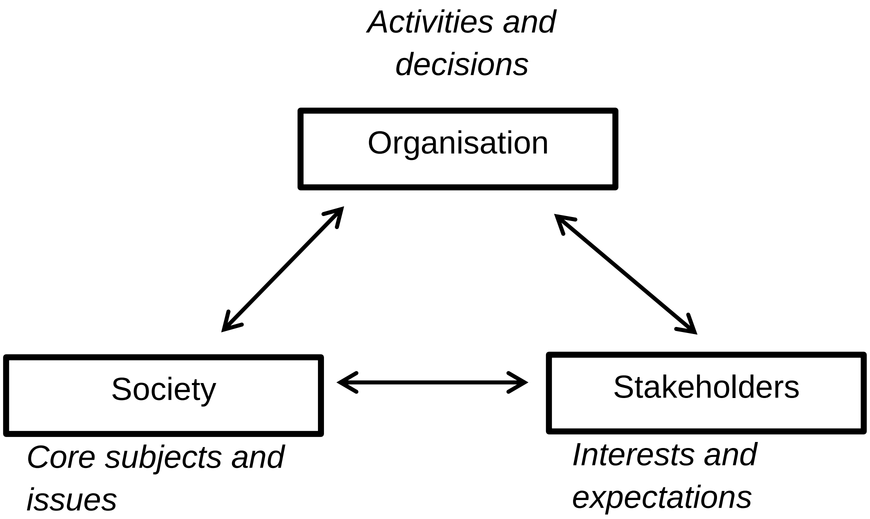

Figure 2.2 Stakeholder management

***Source**: Geurts (2016:29)*

Figure 2.2 indicates that an organisation's actions and decisions have an impact on both society and its stakeholders and *vice versa*. Additionally, an organisation's stakeholders' interests and expectations can be influenced by society and *vice versa*. With the stakeholders of an organisation in mind, community participation or engagement should be considered. Community engagement can lead the primary beneficiaries of RD9400s literacy project to have a more independent mentality and it promotes self-confidence and self-awareness (Phologane, 2014:24). Community engagement is also key to sustainable development and the successful implementation of projects (Mweene, 2006:36; Phologane, 2014:24; Mwiru, 2015:23). Community participation can benefit organisations by improving their effectiveness and efficiency in achieving objectives (Mweene, 2006:36; Mwiru, 2015:23).

When an organisation has several stakeholders, it can become challenging to reach consensus among stakeholders on what the current needs of the organisation are (Frommenwiler, 2014:23). In addition, the diverse needs of the various stakeholders may differ and these stakeholders may have competing goals (Yang & Wall, 2009:561; Tantalo & Priem, 2016:314). For this reason, it is important that NPOs maintain mutually beneficial relationships with their various stakeholders. In order to do so, stakeholder synergy must be created whereby value creation efforts positively impact multiple stakeholders simultaneously (Tantalo & Priem, 2016:315).

Stakeholder synergy can be achieved using three fundamental steps (Tantalo & Priem, 2016:321). Firstly, value can be created by providing extra support for an essential stakeholder without impacting the value created for the other stakeholders. Secondly, stakeholder synergy can be achieved by identifying identical or similar stakeholder needs presented by different stakeholders. Lastly, stakeholder synergy can be achieved when the NPO creates value for a stakeholder through innovations, leading those stakeholders to become more motivated. This results in positive outcomes such as stronger commitment and trust from the stakeholders (Tantalo & Priem, 2016:323).

Savage, Nix, Whitehead and Blair (1991:65) propose a framework for organisations to identify the different types of stakeholders involved in their organisation and the strategies the organisation should use to manage these stakeholders. The framework evaluates stakeholders against two dimensions, which allows managers to classify stakeholders into four types, as shown in Figure 2.3 below. The two dimensions evaluated are (i) stakeholders' potential for threat, which refers to the power a stakeholder may wield over an organisation when it is confronted with a challenge or risk; and (ii) stakeholders' potential for cooperation, whereby the greater the dependence of a stakeholder on an organisation, the greater the chances that they will cooperate with the organisation.

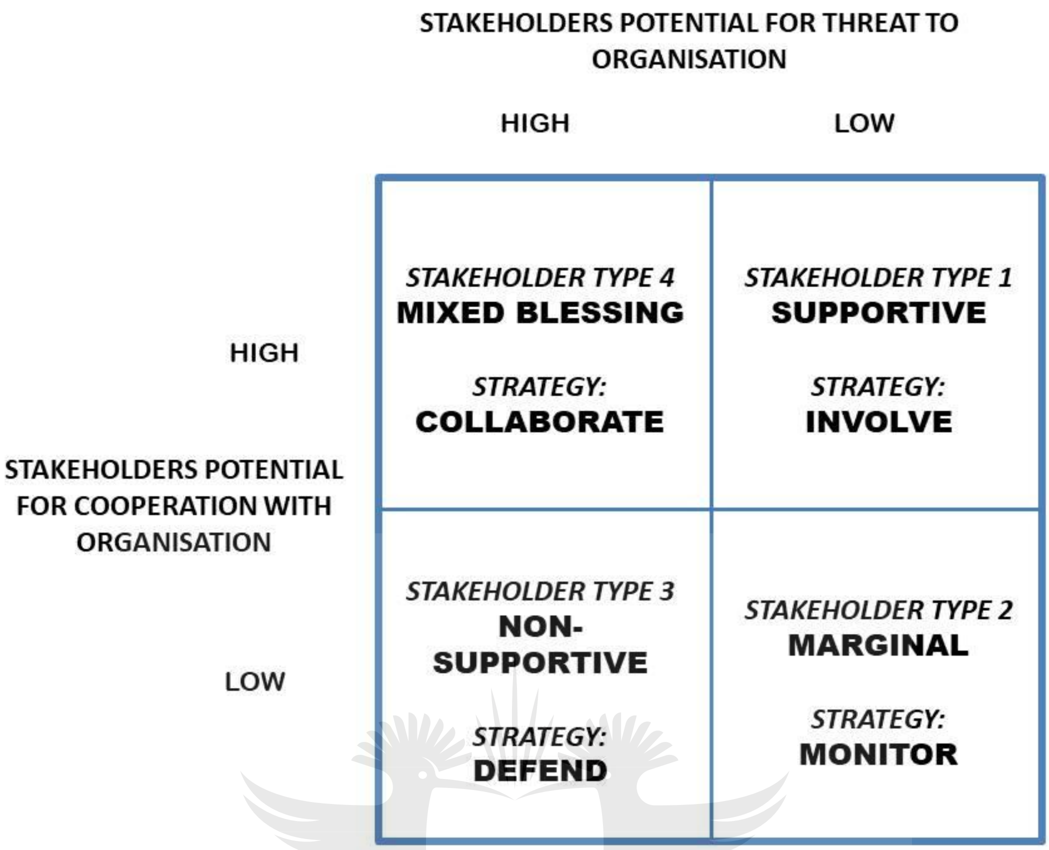

Figure 2.3 Stakeholder analysis framework

Source: *Savage, Nix, Whitehead & Blair (1991:65)*

As depicted in Figure 2.3, the four types of stakeholders proposed by Savage *et al.* (1991:65) are the (i) supportive stakeholder, (ii) marginal stakeholder, (iii) non-supportive stakeholder, and (iv) mixed blessing stakeholder.

- *Supportive stakeholders* can be described as those who support the organisation's decisions, goals and objectives. Supportive stakeholders are very likely to be cooperative and are unlikely to become a threat. These stakeholders normally include the organisation's board of directors, employees, managers and sometimes suppliers (Savage *et al.*, 1990:150; Savage *et al.*, 1991:65).
- *Marginal stakeholders* are similar to supportive stakeholders insofar as they are unlikely to become a threat, however, they differ from supportive stakeholders as they are unlikely to cooperate. Marginal stakeholders can be defined as those who have an interest in the organisation but are not concerned with its

every decision. These stakeholders can include consumer interest groups, stockholders and unions (Savage *et al.*, 1990:150; Savage *et al.*, 1991:66).

- *Non-supportive stakeholders* are the most threatening to an organisation as they have a high potential for threat and low potential for cooperation. These stakeholders often include national and local government, news media, competing organisations and employee unions (Savage *et al.*, 1990:151; Savage *et al.*, 1991:66).
- *Mixed blessings stakeholders* play a crucial role in any organisation as their potential to threaten is equal to their potential to cooperate. These stakeholders generally include the organisation's employees, customers / beneficiaries and organisations with complimentary offerings. The mixed blessings stakeholder carries the risk that, at any given moment, they could become either non-supportive or supportive (Savage *et al.*, 1990:151; Savage *et al.*, 1991:66).

Now that the four types of stakeholders identified by Savage *et al.* (1991) have been discussed, the strategies that can be used to manage these different types of stakeholders needs to be explored.

- *Supportive stakeholders*: The best strategy to manage supportive stakeholders is to involve them in the organisation's decision-making and organisational activities. By involving these stakeholders, managers can be more confident that the stakeholders will maintain high cooperation and low potential for threat (Savage *et al.*, 1990:150; Savage *et al.*, 1991:65).
- *Marginal stakeholders*: The strategy suggested for marginal stakeholders involves monitoring them. This means managers can identify in advance whether the stakeholder is more inclined towards potential cooperation or potential threat. Organisations should only act when a decision is made that is relevant to its stakeholder's potential for threat or cooperation (Savage *et al.*, 1990:150; Savage *et al.*, 1991:65).
- *Non-supportive stakeholders*: In order to manage non-supportive stakeholders, organisations should begin with a defensive strategy, however, it is important that whilst applying this strategy, organisations attempt to change the status of these stakeholders to any one of the other three types of strategies. With the defensive strategy, an organisation attempts to reduce the dependence that

forms the basis of the stakeholders' interest in the organisation itself (Savage *et al.*, 1990:151; Savage *et al.*, 1991:66).

- *Mixed blessing stakeholders*. The best strategy to manage these stakeholders is to collaborate with them. Doing so would create higher potential for cooperation, thereby making it more difficult for potentially threatening stakeholders to oppose the organisation (Savage *et al.*, 1990:151; Savage *et al.*, 1991:67).

Now that we have an understanding of the types of stakeholders an organisation may have, we can introduce the A2B transformation movement. This concept plays an important role in any NPO as it could be said that it is one of the reasons NPOs, particularly educational NPOs, exist.

2.6 The A2B transformation movement

The A2B transformation movement was first proposed by Schultz (2011) in an attempt to decrease the community disempowerment that results from having too little involvement from recipient stakeholders in the delivery of socio-economic development such as NPOs commonly deliver (Schultz, 2011). The A2B transformation process can be used to measure human development and more specifically, the volition of individuals in the social environment.

This study applies the A2B transformation process proposed by Schultz (2011) to the communities that Rotary District 9400 serves with its literacy project. This is done to gain greater insights into how the value created by RD9400 is affected by the stage of development of the individuals to whom books are distributed and how RD9400 sets out to encourage the movement from A2B.

The A2B transformation movement is concerned with getting individuals from being dependent on an external locus of control (such as the NPO that delivered a project) to being independent with their own internal locus of control by owning and taking over the management of their projects in a manner that ensures the project's sustainability (Tselepis, 2018). This essentially means empowering individuals who receive some sort of NPO support to become independent and self-sustaining. The A2B transformation movement states that individuals go through six stages of occupational intelligence (the ability to move from being dependent to independent) (Schultz, 2011:119).

The six stages identified by Schultz (2011:119) are: A1 where the individual is completely dependent on the provider of support and unaware of their lack of skill; A2 where the individual is still dependent but aware of their lack of skill; A3 where the individual is dependent but moving closer towards independence from the provider and becoming more competent in completing tasks. Once individuals adapt to being A3, the next stage is transforming to B. B1 is the level where the individual becomes independent in thought and enjoys challenges given to them; B2 is where the individual has surpassed independency in thought and has become entrepreneurial in their activities; and lastly B3 is where the individual has become a social entrepreneur and works for the benefit of others (Schultz, 2011:119). Social entrepreneurs differ from commercial entrepreneurs in that they are more motivated by social aims, such as making a difference in underdeveloped communities (Tkacz, 2016:27). Social entrepreneurs also play a role as change agents in the social sector (Öztürk, 2013:46).

Since NPOs such as RD9400 work with under-developed communities and individuals who are mostly dependent on external support, they need to understand the risks and challenges of serving these communities. Moreover, they need to not only understand those risks but also to actively manage them, to prevent them from becoming a threat.

2.7 Risk management and challenges faced by NPOs

Stepanyan (2013) argues that the success of NPOs' developmental projects is dependent on the organisation's ability to face uncertainties and manage risk. Risk management, as defined by Hillson (2003:86), aims to minimise threats and the impact of negative occurrences whilst maximising opportunities and/or the impact of positive occurrences. This balance must occur while sustaining focus on achieving the organisation's objectives (section 2.9) (Stepanyan, 2013). Effective management of projects requires oversight and quality management of risk factors related to all project activities (Hillson, 2003:86). In order to manage risk, managers' first need to understand the risk, and in order to do that, they need to identify and analyse the risk (Hillson, 2003:86). Fisher and Robson (2006:197) identified an objective process of risk management, as shown in Figure 2.4.

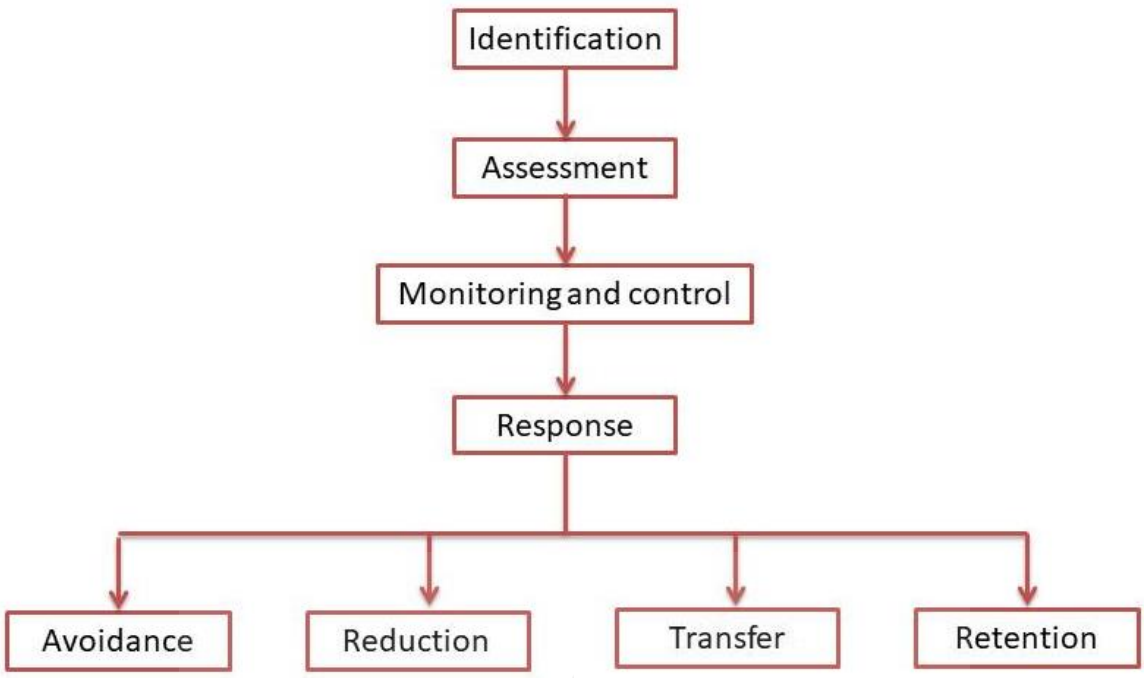

Figure 2.4 Risk management process

Source: *Fisher & Robson (2006:137)*

The first step of the risk management process is to identify all possible risks to the organisation. Hopkin (2018:2) identifies four broad categories of risk, namely, (i) hazard risk (where certain events may compromise an organisation's ability to achieve its objectives); (ii) opportunity risk (which arises when an organisation attempts to improve its objectives); (iii) control risk (which arises when there is uncertainty about an organisation's objectives); (iv) compliance risk (which arises from compulsory obligations of the organisation such as policies).

Baydoun (2010:242) approaches the risk identification step differently and categorises projects risks into three levels, namely, (i) project environment, (ii) institutional arrangement, and (iii) external environment. Gao (2018:2) adapted these three levels of risk to be (i) the micro environment, (ii) the macro environment and (iii) the subject's capacity and cooperation relationship. Micro environment, or project environment, risks include: market, financial, technological, management and operational risk (Baydoun, 2010:242; Mustapha, 2012:32; Gao, 2018:3). The factors that should be considered in the macro environment, or external environment, include political variables, social variables, economic variables, legal variables and natural variables (Baydoun, 2010:242; Gao, 2018:3). Lastly, the subject capacity and cooperation, or institutional arrangements, factors to be considered include political conflicts, lack of approvals facilitation, the multidisciplinary nature of projects and behaviour ability (Baydoun, 2010:242; Ogano, 2016:16; Gao, 2018:3).

The second step in the process shown in Figure 2.4 above involves assessing the risks that have been identified. Risk assessment involves determining the value of a risk quantitatively and / or qualitatively (Ristić, 2013:121). This means risks need to be classified according to two variables – the probability of the risk occurring and the consequence or severity of the risk occurring – in order to identify the degree of threat (Fisher & Robson, 2006:137; Ristić, 2013:121).

The third step described in Figure 2.4 involves the monitoring and controlling of risks. This is done by monitoring any changes that the identified and assessed risks may have in relation to the probability of the risk occurring and the severity of the risk occurring (Fisher & Robson, 2006:137; Ristić, 2013:121; Ogano, 2016:20).

The final step in the risk management process involves responding to the identified risks. The four main responses to risk include (i) risk avoidance, (ii) risk reduction, (iii) transferring the risk, and (iv) risk retention (Fisher & Robson, 2006:137; Jones & Robinson, 2012:346; Ogano, 2016:20). Risk avoidance occurs when an organisation refrains from activities that carry risks. Risk reduction occurs when an organisation reduces the probability of the risk occurring. Risk transfer occurs when an organisation places the risk on a third party; that way, if the risk should occur, its consequences will impact the third party rather than the organisation itself. Lastly, risk retention occurs when an organisation decides to accept a risk (Fisher & Robson, 2006:137; Jones & Robinson, 2012:346).

2.8 Performance management in NPOs

Performance management, as described by Poister, Hall and Aristigueta (2015:35), is the use of measurable performance indicators to support management decisions that result in the achievement of organisational goals and objectives (section 2.9). Performance management uses performance measures and data analysis as well as other management tools to lead management from the mindset of simply reporting to the mindset of learning and improving outcomes (Poister *et al.*, 2015:36). Performance management also involves defining, assessing and reinforcing organisational outcomes (du Plessis, 2014:391). According to Wadongo (2014:10) performance management enables NPOs to focus on their purpose and goals, allowing them to measure performance in the development and social context.

As NPOs typically provide support to developing countries and communities through projects (Golini *et al.*, 2015:650), it is crucial to understand how these projects are managed. NPO projects seek to improve the standard of living of the intended beneficiaries of the project in terms of education, health and the economy (Golini *et al.*, 2015:650). A project includes a set of organised tasks which have a defined timeline, clear budget and a desirable outcome (Wysocki, 2012:6; Kazovic & Valencic, 2013:681; Project Management Institute, 2013:2; Wienclaw, 2013:8). Projects involve a set of activities that are performed in a sequence whereby the output of one activity turns into the input of the next activity (Wysocki, 2012:6). Wysocki (2012:11) explains that every project faces the same five constraints of quality, time, cost, scope and resources. Change in any one of these elements will affect at least one of the other four elements (Batti, 2015:22). In order to manage these constraints, organisations can use project management.

According to Meredith and Mantel (2011:2), project management helps organisations to improve their ability to plan, implement and control activities through the use of tools, skills and techniques (Richman, 2011:2). Project management can also be seen as the application of tools, knowledge and skills necessary to realise a project's goals (Kerzner, 2017:21; Kazovic & Valencic, 2013:682). One way in which organisations can become more sustainable is through the use of project management (Silvius, 2017:1). In planning a project, greater stakeholder involvement and more consideration for social and environmental issues is crucial in order to take the perspectives and interests of all the organisation's stakeholders into account and create a balance (Yang & Wall, 2009:562; Tantalo & Priem, 2016:316). In project management, NPOs should provide opportunities for their different stakeholders to participate in the planning process regardless of their level of education or social background (Yang & Wall, 2009:568; du Plessis, 2014:98).

Projects must deliver intangible outputs such as training and education or social empowerment. They could also attempt to achieve intangible outcomes such as alleviating poverty, improving standards of living or protecting basic human rights

(Golini *et al.*, 2015:651). It is vital that project management be used to balance out time, finances and human resources (Kazovic & Valencic, 2013:682). The main purpose of project management is to ensure that projects are completed on time, within the set budget and scope (Richman, 2011:2).

In order to carry out a project, NPOs require resources. In order to obtain these resources, they will have to demonstrate their ability to produce results and be accountable for the project (Batti, 2015:22). As many donor stakeholders are becoming more insistent in demanding that the projects they fund have a sustainable impact or produce a desired outcome (Batti, 2015:22), NPOs need to ensure that they have some form of project management in place. A part of project management involves stakeholder management (section 2.5). Without careful consideration of stakeholders, a project may not be established or accomplished and may ultimately not meet its goals (Eskerod *et al.,* 2014:7). Therefore to manage stakeholders, organisations need to (i) identify the individuals who will be affected by a project; (ii) assess how different stakeholders will be involved in a project; and (iii) decide which stakeholders will need more attention given the project in question (Eskerod *et al.*, 2014:7).

2.9 Performance planning practices

Performance planning practices are crucial for NPOs as they provide the organisation with long-term direction, help to identify its strengths, weaknesses, opportunities and threats and contribute to its accountability (Bennett, Cheverton, Creighton, Knight, Morgan, Hood, Paxton-Hall, Turnour & McGregor-Lowndes, 2008; Bryson, 2017:36). In essence, performance planning practices concern an organisation's strategy – the reason the organisation exists and the plan that it intends to follow when allocating resources to achieve goals and objectives (Schermerhorn & Chappell, 2000:90; de Bruyn, 2010:3). Consequently, strategic performance planning practices involve an NPO developing and implementing a mission and vision, goals and objectives, core values and performance indicators (Bennett *et al.*, 2008).

Strategic planning in NPOs could lead to improved decision-making, closer relationships with key stakeholders, and enhanced resource utilisation (Hu, Kapucu & O'Byrne, 2014:85). According to Bennett *et al*. (2008), the key elements of a good strategic plan include the participation of key stakeholders (Bryson, 2017:35; Schermerhorn & Chappell, 2000:90); a long-term focus; establishing a clear vision (Blackmon, 2008:16); defining the core values that the organisation will uphold; consideration of political and legal requirements (Bryson, 2017:35); and the formulation of a plan that could be monitored and evaluated over time.

Core values are defined as the attitudes and beliefs of an organisation towards aspects such as integrity, honesty and loyalty (Nieuwenhuizen & Oosthuizen, 2014:308). Schermerhorn and Chappell (2000:91) define core values as an organisation's overall belief of what is appropriate and what is not. The core values of an organisation enforces its mission and ultimately guide its employees and volunteers in their behaviour (Schermerhorn & Chappell, 2000:91).

The mission of an NPO describes its overall purpose and should be the focus of the organisation's performance planning practices to ensure a long-term outlook (Blackmon, 2008:15; de Bruyn, 2010:19; Nieuwenhuizen & Oosthuizen, 2014:26). Further, an NPO's mission could be considered as the driving force behind its performance. This is because success is measured as the NPO's ability to achieve its stated mission (Blackmon, 2008:36). According to de Bruyn (2010:25), an organisation's mission statement summarises the broad direction it intends to follow and its rationale for following that direction. The mission statement is used by organisations to describe to stakeholders what the organisation stands for in terms of core values, goals and objectives.

While the mission statement describes the reason for an organisation's existence, the vision of the organisation could be described as the organisation's dream, i.e. what the NPO would like to achieve in terms of its service delivery to society (de Bruyn, 2010:19; Nieuwenhuizen & Oosthuizen, 2014:26). The vision of a NPO also acts as a guideline to volunteers and employees as to what the organisation is striving to achieve through its goals and objectives (de Bruyn, 2010:19).

Goals can be defined as the end result that an organisation aspires to accomplish, whereas an objective is the means through which the goal is to be achieved (Bennett *et al.*, 2008). Furthermore, objectives focus on achieving shorter-term targets, whereas goals are the long-term targets of an organisation (Schermerhorn & Chappell, 2000:92; Nieuwenhuizen & Oosthuizen, 2014:26). Goals and objectives are developed through the process of strategic planning, once the NPO has decided upon its strategies, mission and vision (Blackmon, 2008:17). According to de Bruyn (2010:100), objectives assist in focusing management on achieving certain outcomes that the organisation is attempting to achieve through its mission. These outcomes relate to the organisation's performance and therefore, key performance areas need to be identified with key performance indicators that will measure performance in these areas.

Performance indicators are required by organisations to measure the outcomes of their goals and objectives in pursuit of their mission and vision (Bennett *et al.*, 2008). For this reason, NPOs must have performance measures in place that are tailored to their own strategy. One approach NPOs could use to plan their performance practices is the balanced scorecard developed by Kaplan and Norton (1996) (see section 2.10.2) (Blackmon, 2008:10; Bennett *et al.*, 2008).

2.10 Measuring performance of NPOs

Tundys and Wiśniewski (2018:556) state that performance measures should measure both the tangible and intangible outcomes of a system or project; they should also be able to measure the output at different levels of an organisation. The intangible outcomes of RD9400's literacy project could include a higher employment rate, better wages, improved health, more involvement in democratic processes, increased community participation and helping individuals become more self-reliant (Dougdale & Clark, 2008:6; Morrisroe, 2014:10). According to the National State Auditors Association (2004:1), measuring performance is crucial for NPOs to demonstrate accountability for their resource utilisation. The next section of the literature review identifies the role of performance measurement in NPOs; the tools and techniques managers of NPOs can use to measure performance; and some of the key performance indicators of NPOs.

2.10.1 The role of performance measurement

Although the topic of measuring performance in NPOs has been extensively debated over the past two decades (Cordery & Sinclair, 2013:3; Wadongo, 2014:39), there is still a gap in the literature on how to define and measure the performance of NPOs (Boateng *et al.*, 2016:59). Poister *et al.* (2015:1) define performance measurement as “the systematic, orderly collection of quantitative data along a set of key indicators of organisational (or programme) performance”. NPOs can also measure performance through social impact measurements. Social impact is the combined impact an NPO has on all its stakeholders (Dillenburg, Greene & Erekson, 2003:167; Polonsky, Grau & McDonald, 2016:81; Singh, 2016:54). Social impact measurement is the process of defining, monitoring and implementing performance measures to validate the value or benefit created for beneficiaries through evidence of social impacts (McLoughlin, Kaminski, Sodagar, Khan, Harris, Arnaudo & Sinéad, 2009:155; Ebrahim & Rangan, 2010:10; Nguyen, Szkudlarek & Seymour, 2015:224; Poister *et al.*, 2015:1). Gibbon and Dey (2011:3) add that the purpose of impact measurement is to understand, in triple bottom line terms, the difference an organisation is making for its stakeholders, communities and ultimately, the world.

Using performance measurement can benefit NPOs insofar as this helps to build legitimacy and accountability; improve organisational learning and organisational efficiency; and demonstrate to donors the outcome of their investments (Nicholls *et al.*, 2009:766; Gibbon & Dey, 2011:5; Barraket & Yousefpour, 2013:454; Amagoh, 2015:221; Nguyen *et al.*, 2015:224). Amagoh (2015:221) maintains that performance measurement helps NPOs assure transparency and achieve organisational outcomes by improving performance. Additionally, performance measurement helps NPOs better understand and evaluate their financial and social returns (Nguyen *et al.*, 2015:224). Performance measures also help NPOs to overcome the challenge of providing evidence of the value they create to stakeholders (Carman, 2007:72; Millar & Hall, 2013:924; Polonsky *et al.*, 2016:81; Topaloglu *et al.*, 2018:234). The use of performance measures enables NPOs to benchmark their performance against similar organisations, thus guiding their decision-making to improve their operations and overall social impact (Lavy, Garcia & Dixit, 2010:411; Cordery & Sinclair, 2013:4; Polonsky *et al.*, 2016:81).

Given the nature of NPOs, they need to overcome certain challenges that arise from using performance measures. Frumkin and Keating (2010:9) identify three such challenges: (i) as NPOs have no owner with an equity stake in the organisation, there may be no-one demanding measurement of performance; (ii) as there is no ownership, the challenge of building a system of accountability arises; and (iii) as NPOs are service-oriented, they face uncertainty of funding and difficult to measure outcomes

(Frumkin & Keating, 2010:9; Carman, 2007:72; Millar & Hall, 2013:924; Boateng *et al.*, 2016:60). Additionally, NPOs face challenges in measuring performance as they mostly focus on outputs rather than on outcomes (Polonsky *et al.*, 2016:81). Other challenges that NPOs face in measuring performance are access to time, money and the required expertise to carry out these measurements (Ebrahim & Rangan, 2010:13; Polonsky *et al.*, 2016:81). As a result of the limited time, money and expertise, most NPOs do not have the necessary systems in place to collect the information needed to measure performance (Polonsky *et al.*, 2016:81).

Before attempting to understand how NPOs can use performance measurement to assess the value they create, the concept of performance should be described. Performance can be defined as an NPO's ability to acquire the resources necessary for organisational survival (Boateng *et al.*, 2016:61). Performance should measure organisational effectiveness of project or operational outcomes (Boateng *et al.*, 2016:62). Although financial and economic performance indicators are of importance in NPOs, non-monetary indicators are debatably more important as NPOs are more focused on achieving their mission than earning a profit (Nguyen *et al.*, 2015:224; Topaloglu *et al.*, 2018:258; Tundys & Wiśniewski, 2018:556). Some financial performance measures that could be used include financial indicators such as fundraising efficiency, absence of financial deficits, cost and growth positions and fiscal performance (Aldrich, 2009:353; Boateng *et al.*, 2016:61). Performance measures can also be objective such as input effectiveness measures which measure an organisation's success in obtaining essential resources, or throughput effectiveness measures which measure the efficiency of the use of organisational resources (Aldrich, 2009:353; Boateng *et al.*, 2016:61).

For NPOs to implement performance measurement tools and techniques, they need to develop management control processes (Schermerhorn & Chappell, 2000:248; Nieuwenhuizen & Oosthuizen, 2014:268). The control process involves the following four steps: (i) developing performance standards; (ii) measuring actual performance; (iii) comparing performance with standards; and (iv) taking corrective action against deviations in performance (Schermerhorn & Chappell, 2000:248; Nieuwenhuizen & Oosthuizen, 2014:268). This process highlights the importance of developing performance standards that the organisation wishes to achieve and measuring actual performance against these standards to identify deviations in order to either take corrective action or reinforce current performance to meet standards.

Performance standards are set based on the goals and objectives identified through performance planning practices (see section 2.9). Considering Step 2 of the process, measuring actual performance, there are five sets of criteria that the performance measures should meet (Nieuwenhuizen & Oosthuizen, 2014:272). The first criterion is that the performance measure should be reliable, meaning there would be no deviation in the results obtained under different conditions. The second criterion, validity, relates to the measure measuring what it is meant to. The third criterion, link to objectives, relates to how this performance measure will measure the objectives set by the organisation. The fourth criterion, which concentrates on key performance areas, requires that the performance measures only focus on areas of the organisation that will impact the organisation's ability to achieve its goals and objectives. The last criterion, leading to reinforcement or corrective action, requires that the results of the performance measure be analysed to identify gaps in performance and act to manage those gaps. Performance gaps occur when there is a perceived difference between the current performance and the desired performance in terms of achieving goals and objectives (Schermerhorn & Chappell, 2000:248; de Bruyn, 2010:225). The following section describes some the tools and techniques that management of NPOs can use to measure performance (Step 2 of the control process).

2.10.2 Management tools and techniques for measuring performance

Current literature suggests that NPOs can use the four following approaches to measure their social impact and ultimately, the value they are creating: (i) the social return on investment approach (SROI) (Ebrahim & Rangan, 2010:33; Millar & Hall, 2013:924; Polonsky *et al.*, 2016:81; Nguyen *et al.*, 2015:224); (ii) cost-benefit analysis; (iii) balanced scorecard; and (iv) social accounting and auditing model (Ebrahim & Rangan, 2010:33; Polonsky *et al.*, 2016:81; Nguyen *et al.*, 2015:224; Boateng *et al.*, 2016:61; Watson & Whitley, 2017:876).

The SROI approach to measuring social value creation in NPOs has been widely advocated in the past decade (Ebrahim & Rangan, 2010:8; Millar & Hall, 2013:924; Watson & Whitley, 2017:879). SROI is designed to "understand, manage and report on the social, environmental and economic value created by an organisation" (Millar

& Hall, 2013:924; Epstein & Yuthas, 2014). The SROI approach helps NPOs to assign monetary values to social and environmental returns in order to determine total value creation, although this is not always a simple task (Millar & Hall, 2013:926; Sillanpää, 2013:476 Polonsky *et al.*, 2016:81). The SROI framework originally had six dimensions, namely, enterprise value, blended value, social purpose value, social purpose index of return, enterprise index of return and blended index of return (Epstein & Yuthas, 2014). By using the SROI approach, NPOs can identify the impact they are having relative to the cost of making that impact (Sillanpää, 2013:476). The SROI approach to measuring performance involves six stages (Nicholls *et al.*, 2009:8).

Stage 1: Establishing scope and identifying key stakeholders. At this stage, it is important for the NPO to identify what the analysis will measure, which stakeholders will be involved in this analysis and how these stakeholders will take part in the analysis (Nicholls *et al.*, 2009:8, Gibbon & Dey, 2011:10).

Stage 2: Mapping outcomes. By involving stakeholders in the SROI analysis, NPOs can develop a chain of value, which identifies the relationships between inputs, outputs and outcomes (Nicholls *et al.*, 2009:8, Gibbon & Dey, 2011:10).

Stage 3: Evidencing outcomes and giving them a value. This stage involves the process of selecting performance indicators and metrics and placing a monetary value on them in order to identify whether organisational objectives are being achieved (Nicholls *et al.*, 2009:8, Gibbon & Dey, 2011:10).

Stage 4: Establishing impact. After monetisation of performance indicators, organisations need to identify aspects of change that have influenced the social impact, which would have occurred regardless of performance level. These aspects are then removed from consideration, thus leaving the actual impact as the only factor in consideration (Nicholls *et al.*, 2009:8, Gibbon & Dey, 2011:10).

Stage 5: Calculating the SROI. The result of the SROI of NPOs is calculated at this stage by adding the benefits created and subtracting negatives undertaken and comparing the outcome to the investment (Nicholls *et al.*, 2009:8, Gibbon & Dey, 2011:10).

Stage 6: Reporting, using and embedding. The final stage of the SROI approach includes reporting the findings of the SROI analysis to stakeholders, using the results of the analysis to make improvements for the future and assuring stakeholders of accountability through transparency and verification of the report (Nicholls *et al.*, 2009:8, Gibbon & Dey, 2011:10).

The SROI approach was built on from the cost-benefit analysis approach which assigns monetary values to social returns using financial proxies (Millar & Hall, 2013:924; Watson & Whitley, 2017:876). The cost-benefit approach generally makes use of preference-based valuation methods (Watson & Whitley, 2017:876). The main difference between the cost-benefit analysis and SROI is that SROI was designed as a practical management tool (Nicholls *et al.*, 2009:8, Gibbon & Dey, 2011:10).

The Balanced Scorecard approach developed by Kaplan and Norton (1996:2) can be used by NPOs to translate their mission and objectives into performance measures. The Balanced Scorecard approach not only considers the financial aspect of NPOs but it also takes into consideration non-financial measures such as key performance indicators that include measure of customer satisfaction (Boateng *et al.*, 2016:61; Poister *et al.*, 2015:67).

The balanced scorecard focuses on four perspectives to measure performance: the internal processes perspective, the learning perspective, the financial perspective and the customer perspective. These four perspectives have elements of tangible and intangible resource input and value creation as outcomes (Kaplan & Norton, 1996:2; Ebrahim & Rangan, 2010:4). The balanced scorecard is an internal management tool that represents the strategic objectives of an organisation from the triple bottom line perspective i.e. economic, social and environmental impact (Gunarsih, Saleh, Nur Syukron & Deros, 2016:66; Watson & Whitley, 2017:876). Additionally, the balanced scorecard can be used by NPOs to align their strategic objectives with their performance measures (Boateng *et al.*, 2016:61). Figure 2.5 below demonstrates how the balanced scorecard can be used by NPOs to measure performance based on the four perspectives discussed.

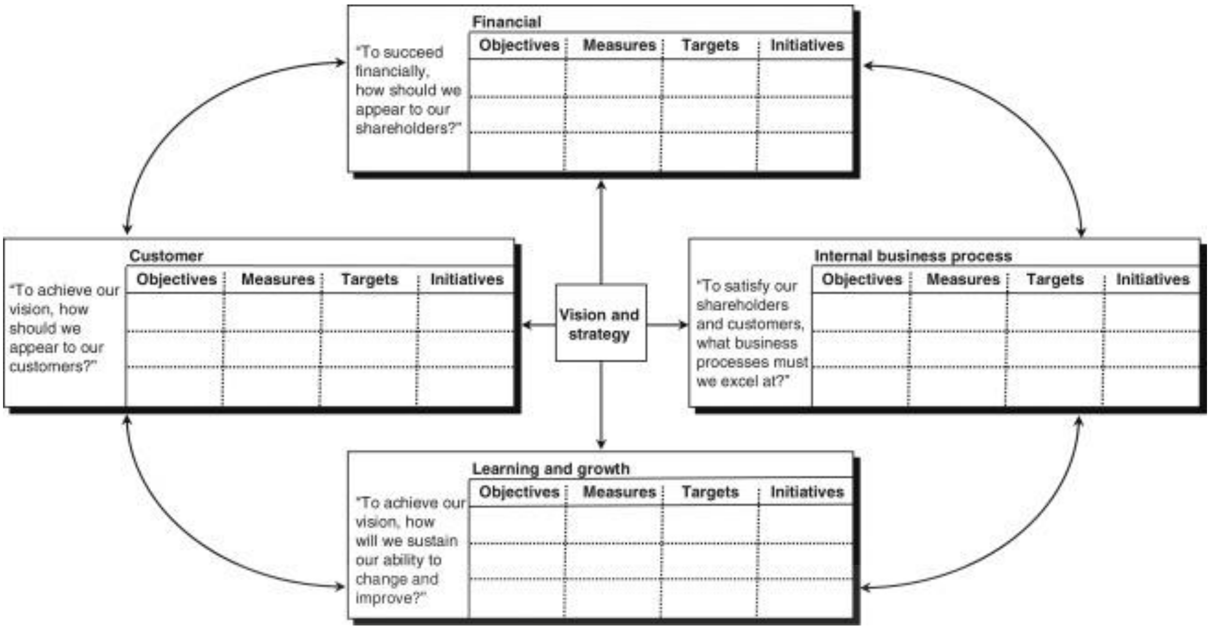

Figure 2.5 The balanced scorecard original structure

***Source**: Kaplan & Norton (1996)*

In addition to helping organisations measure performance with the use of multiple dimensions, the balanced scorecard assists organisations to clarify and translate organisational vision and strategy; communicate and link strategic objectives and measures; plan, set targets and align strategic initiatives; and enhance strategic feedback and learning (Kaplan & Norton, 1996). By planning and setting targets, NPOs can identify short-term goals for financial and non-financial performance measures, quantify the long-term outcomes they want to achieve and identify the resources they need to achieve these outcomes (Kaplan & Norton, 1996).

The social accounting and auditing (SAA) model is an organisational framework for monitoring and evaluating accountability (Watson & Whitley, 2017:878). NPOs can use the SAA model to place a monetary value on a social activity (Polonsky *et al.*, 2016:81). A social audit focuses on impact measurement through the use of accounting for specific or descriptive outcomes (Nicholls *et al.*, 2009:761). SAA allows NPOs to account for their social performance, report on that performance and understand the impact of that performance on the community. The SAA also helps NPOs to be accountable to their stakeholders (Gibbon & Dey, 2011:5). The SAA model consists of three stages:

Stage 1: Triple-bottom line planning / integration. The first stage of the framework involves examining an organisation's mission, core values, objectives, activities and stakeholders (Gibbon & Dey, 2011:5).

Stage 2: Triple bottom line accounting. During this stage, organisations need to define and manage the scope of their activities. Once the scope has been defined, the organisation then needs to identify the indicators it will use to measure these activities. Thereafter, the organisation will need to collect the data and report on social, environmental and economic impacts. Using this information, organisations can develop and implement a Social Accounting Plan (Gibbon & Dey, 2011:5).

Stage 3: Triple bottom line reporting and auditing. The last stage of the SAA model involves drafting Social Accounts, creating a Social Audit panel and releasing a Social Audit statement (Gibbon & Dey, 2011:5).

Boateng *et al.* (2016:69) note that there are five broad sets of indicators that can be used to measure the performance and social impact of NPOs: financial measures; customer satisfaction; management effectiveness; stakeholder involvement; and benchmarking. Some researchers argue that the best approach to measuring organisational performance is through the use of a framework that captures multiple dimensions of a NPO's activities (Boateng *et al.*, 2016:61).

Polonsky *et al.* (2016:81) suggest that SROI, cost-benefit analysis, the balanced scorecard and SAA can be categorised into four approaches, namely, operating efficiency, achievement of organisational objectives, return on investment and social outcomes. Operational efficiency identifies how much money NPOs have allocated to their operations, thereby indicating the amount used for their social objectives (Polonsky *et al.*, 2016:81). Operational efficiency focuses on how much inputs an organisation requires to produce its outputs (Poister *et al.*, 2015:68). Achievement of organisational objectives focuses on whether the NPO achieved its social goals (Polonsky *et al.*, 2016:81).

2.10.3 Some key performance indicators for NPOs

Lavy *et al.* (2010:409) state that key performance indicators in performance measurement assist management to make strategic decisions. Thus, performance indicators can be used by organisations to analyse the extent to which the goals and objectives of their strategic plan (section 2.9) are being achieved (Queensland Government, 2017:8). Poister *et al.* (2015:67) mention output measures, service quality, outcomes and cost-effectiveness as other relevant approaches to performance measurement. Output measures are the direct products or services of NPOs and they are commonly measured in terms of the volume of effort that is attained (Poister *et al.*, 2015:68). Service quality measures can be based on indicators such as turnaround time, accuracy of service, accessibility to the service, courtesy and safety of the service, convenience of the service and the thoroughness of the service (Poister *et al.*, 2015:70). Outcome measures are used to identify the degree to which NPOs are achieving their objectives and their desired results by producing their intended outcomes (Poister *et al.*, 2015:71). Lastly, NPOs can use cost-effectiveness measures to relate organisational costs to outcome measures (Poister *et al.*, 2015:70).

Table 2.1 Key performance indicators defined

Indicator	Definition	Authors
Input	Measures the resources utilised in conducting a project.	• NSAA (2004:4) • National Treasury (2007:6) • Queensland Government (2017:11)
Process or activity	Measures the action / process that utilises different inputs to produce the desired outputs.	• National Treasury (2007:6) • Queensland Government (2017:11)
Output	Measures the number of products / services delivered to consumers.	• NSAA (2004:4) • National Treasury (2007:6)
Outcome or impact	Assesses whether the outputs of a project have the desired impact.	• NSAA (2004:4) • Wadongo (2014:345)
Revenue	Assesses income from donors or other internally generated income.	• Wadongo (2014:345)
Effectiveness	Measures the extent to which the outputs of a project accomplished the desired outcomes (objectives).	• National Treasury (2007:6) • Queensland Government (2017:11) • Wadongo (2014:345)
Efficiency	Assesses the extent to which resources were used (inputs) to achieve the desired outcomes (objectives).	• National Treasury (2007:6) • Queensland Government (2017:11)
Productivity	Measures the direct relationship between inputs used and outputs generated.	• Wadongo (2014:345)
Beneficiary satisfaction / quality	Assesses the effectiveness of project outputs in meeting the needs of stakeholders, beneficiaries and consumers.	• NSAA (2004:4) • Wadongo (2014:345)
Sustainability outcomes	Measures the extent to which project outcomes extend beyond the project's formal life.	• Wadongo (2014:345)

***Source**: Researcher's own compilation*

Although the selection of performance indicators is dependent on the organisation, its users and its strategic direction (Lavy *et al.*, 2010:411), this study attempts to provide an overview of the performance indicators that NPOs can implement. Table 2.1 above presents the key performance indicators identified through the literature review, gives an explanation of each indicator and the authors who identified the indicators.

2.11 The study's conceptual framework

Figure 2.6 below displays this study's conceptual framework. The framework was developed from the key concepts discussed in the literature review. The role of the conceptual framework is to describe how the different concepts relate to each other.

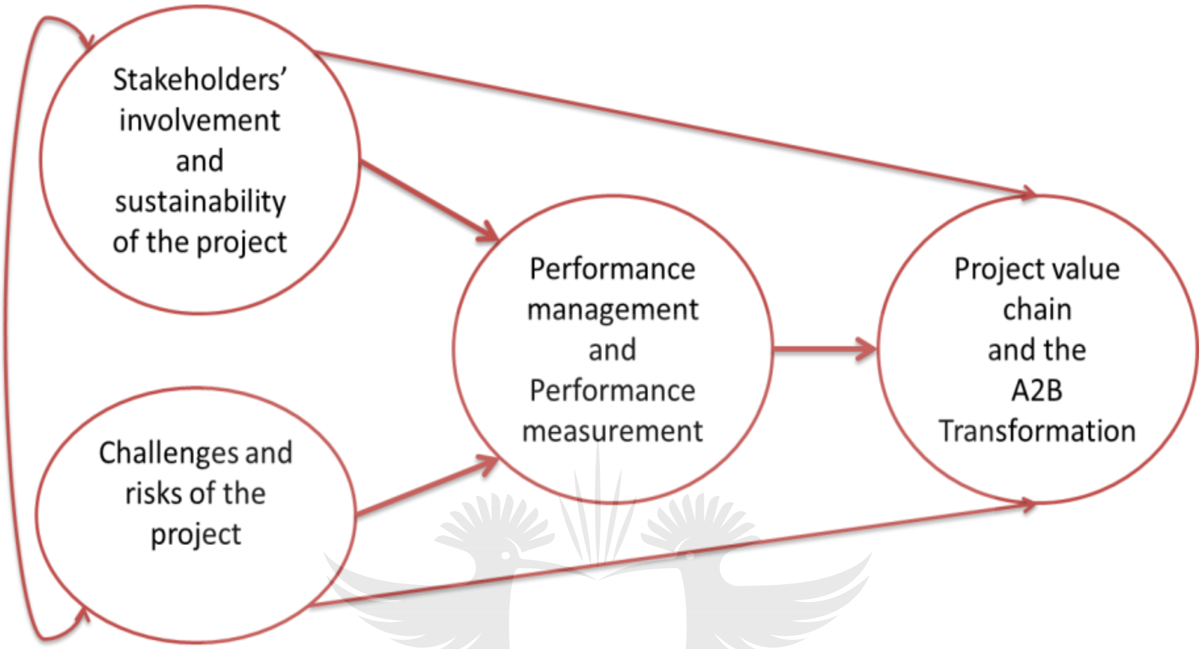

Figure 2.6 Conceptual framework of the study

***Source**: Researcher's own compilation*

2.12 Chapter summary

The literature review discussed key concepts that NPOs need to consider when evaluating their performance to identify where waste can be minimised and social impact maximised. NPOs need to consider their stakeholders at all times in order to create maximum value and to take advantage of the opportunities that stakeholders offer. With stakeholders firmly in mind, NPOs also need to consider the value chain of their operations in order to understand what value is created, when and by whom. As can be seen from the discussion above, NPOs face numerous challenges when it comes to measuring their performance and ultimately, the impact they have on the communities they serve. Most of these challenges arise as NPOs are not profit oriented and therefore, their performance cannot be measured solely on financial measures which have a monetary value attached to them.

The next chapter of this research focuses on methodology, which lays out the data collection and data analysis methods.

CHAPTER 3

RESEARCH METHODOLOGY

3.1 Introduction

Research, as an academic activity, involves "defining and redefining problems, formulating hypotheses or suggested solutions; collecting, organising and evaluating data; making deductions and reaching conclusions; and at last carefully testing the conclusions to determine whether they fit the formulating hypotheses" (Kothari, 2004:1). D'Allura (2016:311) explains that the process of collecting and analysing data is carried out in order to make new intellectual discoveries. This chapter outlines the sequential mixed methods research strategy adopted in this study. The chapter justifies the case study research approach and discusses the research design, the sample and sampling procedure as well as the methods and tools used in the data collection and analysis process. The issue of trustworthiness for qualitative primary data collection and reliability and validity for quantitative primary data collection are also discussed.

3.2 Research design

This study adopts an exploratory, sequential mixed methods approach. There is scant literature on the role of NPOs, specifically RD9400, in the development of sustainable community projects (Creswell, 2014:16) which Creswell (2014) suggests supports the need for exploratory research. Mixed methods research in this case is defined by the use of both qualitative and quantitative research methods to gain a depth of understanding of the topic at hand (Molina-Azorin, 2016:339). The exploratory sequential approach allowed the researcher to first gain insights from participants using qualitative research methods, which were then analysed and built into a quantitative questionnaire (Creswell, 2014:16; Lin, 2015:4; Molina-Azorin, 2016:339). Limited research is available on the success of Rotary projects internationally, and none for the RD9400 area, which justifies the choice of an exploratory approach. Overall, this study adopts a positivist stance because, while little is known about RD9400 concerning the sustainability of its projects, a great deal is known about the principles of attaining quality in project management that should be apparent in RD9400 projects. Additionally, an exploratory research design is applied in order to gain greater insight into a problem rather than to offer final and conclusive solutions to the problem (Dudovskiy, 2016). The benefits of using exploratory research are that it is flexible and adaptable to change; as little is known about Rotary projects, these attributes were considered important (Dudovskiy, 2016).

A case study research strategy was used to conduct this study which focused on a single organisation in depth (Bryman & Bell, 2014:110; Creswell, 2014:14; Saunders, Lewis & Thornhill, 2015:185; Yin, 2016:68). A case study strategy seeks to understand the dynamics of the subject being studied within its own environment (Saunders *et al.*, 2015:185; Yin, 2016:68). This research also took the form of an exploratory case study. An exploratory case study gathers research in advance on a topic (usually from secondary data such as that presented in Chapters 1 and 2). Then, questionnaires are used to further identify the themes pinpointed to explore the context of the research problem (Bryman & Bell, 2014:112).

Phase 1: Qualitative research

Qualitative research seeks to make connections and understand how one element in the social world can affect another (Bryman & Bell, 2014:31; Creswell, 2014:4; Roller & Lavrakas, 2015:2). Qualitative research is used to develop new insights into a problem or phenomenon whereas quantitative research attempts to confirm existing theories (Chiliya, 2016:138; Kuada, 2012:94; Bryman & Bell, 2014:31). According to Stringer (2007:19), the purpose of a qualitative research design is to gain greater insight into a problem at hand. Qualitative research focuses on words and meaning rather than numeric data, therefore it is more subjective in nature (Quinlan, 2011:286). The qualitative research approach was deemed appropriate for this study as there is limited literature on how RD9400, including Middelburg Rotary Club, measure and manage the value they create through their community projects. Therefore rich, descriptive data was essential to establish what RD9400 thought it was achieving. It was also deemed necessary to interview the recipient community to discover what community members felt had been achieved through the literacy project. The qualitative stage of this research made it possible to identify gaps in existing knowledge about this process, which could then be further investigated by the quantitative questionnaire (Garbarino & Holland, 2009:12).

Phase 2: Quantitative research

Quantitative research attempts to define, measure and analyse the relationship between a group of distinct variables (Stringer, 2007:19). Quantitative research places emphasis on the quantification of the data collected through the study (Quinlan, 2011:286; Bryman & Bell, 2014:31). According to Wadongo (2014:66), quantitative research analyses the relationships between different variables objectively. Quantitative research was necessary for this study as existing knowledge about relationships within the topic context of RD9400 and Southern Africa, is limited. Therefore, the study used qualitative interviews to help with themes found in literature, to develop the quantitative questionnaires to test the primary data inferences collected from the qualitative research and the literature review.

The process followed by the study is outlined in Figure 3.1.

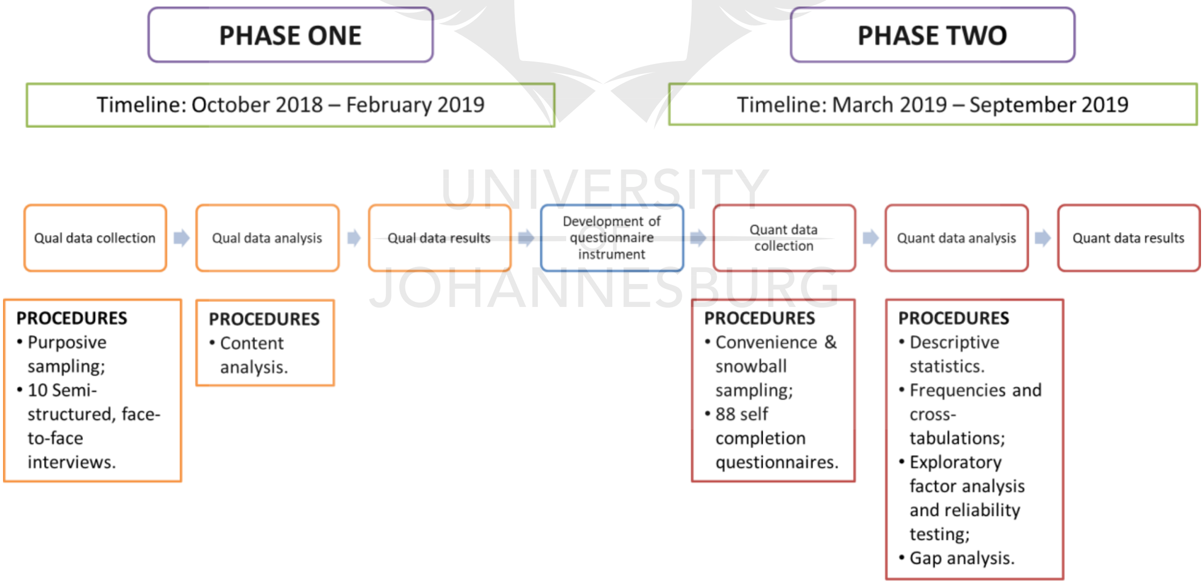

Figure 3.1: Sequential mixed methods research process

***Source**: Adapted from Berman (2017:6)*

Triangulation of data

Triangulation is the use of two or more methodological approaches, data sources, investigators' theoretical perspectives or analytical methods within the same study (Thurmond, 2001:253; Quinlan, 2011:42). Triangulation helps with research validity as it leads to a better understanding, thanks to the use of different methods (Quinlan, 2011:70; Vogt, Gardner & Haeffele, 2012:111). The first triangulation of this research involved the use of two or more methodological approaches. This study was completed using a sequential qualitative approach, followed by a quantitative approach. The combination of these approaches is referred to as a mixed methods approach. According to Bryman and Bell (2014:62), by using the mixed methods approach, the strengths of one method are used to balance the weaknesses of the other method (Molina-Azorin, 2016:339).

Mixed methods also offer several perspectives from which to answer the research question (Creswell & Clark, 2011:4; Finch, 2013:68; Morse, 2017:26). Mixed methods can improve research with triangulation (using qualitative findings supported by existing academic literature and the findings from the quantitative phase of the research) which allows for a more comprehensive research outcome (Bryman & Bell, 2014:62; Molina-Azorin, 2016:339; Morse, 2017:26).

In order to increase the validity and reliability of this study it was necessary to first collect qualitative data from a field study to inform a quantitative questionnaire instrument (Wadongo, 2014:75; Morse, 2017:26). By using triangulation, the qualitative research phase supported the quantitative research phase (Bryman & Bell, 2014:62). The second triangulation used by this research concerned the data sources. The study used three data sources, namely, primary data (qualitative data and quantitative data) and secondary data (Chapter 2 Literature Review). The third type of triangulation, investigator's theoretical perspectives as a bias or an approach, was not applicable to this research because only one researcher conducted the entire study.

The fourth triangulation – analytical methods – refers to the different methods used to analyse the data. This study began with a qualitative analysis, using content analysis to identify key themes of the research. The quantitative analysis implemented these themes to explore a larger population. An exploratory factor analysis was then conducted to summarise the data, which was then linked back to the literature review.

Figure 3.2 below identifies the different data sources which were triangulated in this study.

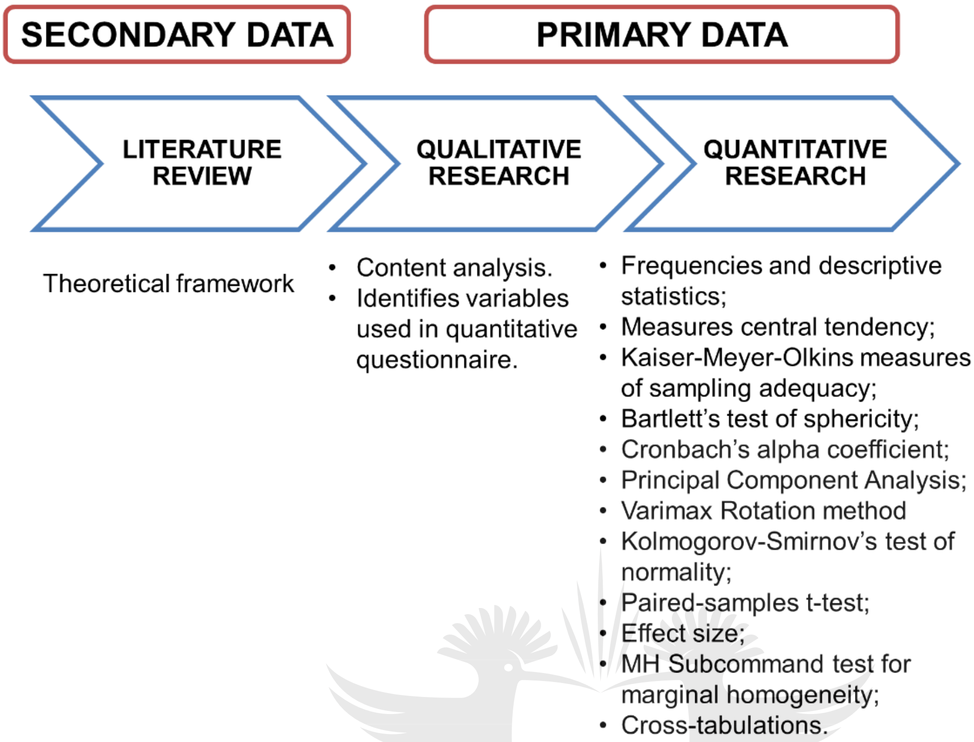

Figure 3.2: Triangulation of research

***Source**: Researcher's own compilation*

3.3 Phase 1: Qualitative research

As previously discussed, the first phase of the study involved a qualitative research approach. The details of the first phase are explained below.

The sample size for the qualitative interviews

According to Flick (2009), sampling is the selection of individuals or groups for study from a larger population. Prior to deciding on a sample, it is necessary to identify a sampling frame. The sampling frame or working population is a list of elements from which a researcher may draw a sample (Zikmund, 2015:171; Hair, Samouel, Page, Celsi & Money, 2016:174). The sampling frame used for the current research was RD9400 clubs which played a role in Rotary's literacy project, with a focus on Middelburg communities.

Given the use of a mixed methods approach, it was necessary to employ two different sampling techniques in order to ensure that appropriate samples were selected for both the qualitative and quantitative research phases. The two populations that this research focused on in both phases were the key stakeholders involved in operating the literacy project and the beneficiaries of the literacy project, firstly specific to the RD9400 literacy project in Middelburg, and secondly in the quantitative phase a broader range of literacy projects run by RD9400.

Non-probability sampling techniques were used to identify participants for the first phase of this research. Participants were selected based on the value they could add in terms of insights specific to managing the Middelburg literacy project. Non-probability sampling does not use random selection but rather participants are selected based on the requirements of the researcher (Bryman & Bell, 2014:171). This was deemed purposive sampling as the researcher made contact with a small group of individuals involved in the Middelburg literacy project (in this case RD9400 Middelburg Rotary Club) and then used these individuals to establish contact with key community stakeholders involved in the same project (Bryman & Bell, 2014:179).

Purposive sampling was used to identify participants who were considered relevant in answering the research question (Bryman & Bell, 2014:186). Non-probability sampling allows the researcher to select a sample that represents the population, however, this sample cannot be said to be representative of the population in a statistical sense (Krishnaswami & Satyaprasad, 2010:51; Zikmund, 2015:180). Non-probability sampling is a sampling technique used to select units of a population based on the researcher's personal judgment, based on a set of criteria (in this case, knowledge of the literacy project) (Kothari, 2004:59; Zikmund, 2015:178).

According to Saunders *et al.* (2015:185), the minimum non-probability sample size when using semi-structured and in-depth interviews, should be between 5 and 25 sample units or until saturation has been reached. Ten sample units were used in this research as by the tenth interview, saturation had been reached. Saturation in qualitative research occurs when no new data can be extracted from the sample (Saunders, Sim, Kingstone, Baker, Waterfield, Bartlam, Burroughs & Jinks, 2017:1893).

The participants chosen for this phase of the research were the key stakeholders of RD9400 Middelburg Rotary Club literacy project. These stakeholders were grouped into four categories based on their role in the project. The categories used were as follows: (i) literacy project managers; (ii) literacy committee members; (iii) literacy project recipients; and (iv) community members. The first category, the literacy project managers, were those who played a role in managing the literacy project on a day-to-day basis, for example, managing the warehouse where the books were stored. The second category, the literacy committee members, were those participants who were part of the RD9400 Literacy Committee. These individuals oversaw the operations of the literacy project, including organising containers of books from Canada and the US and raising funds for the project. The third category, the literacy project recipients, referred to those participants who had received books from the literacy project for schools and communities. Lastly, the fourth category, the community members, consisted of those participants who were not directly involved in the literacy project, i.e. they did not manage it nor were they recipients of the project, however they were aware of the project and its purpose. These individuals were interviewed as they also had perspectives as members of a recipient community as to how they saw the project in terms of community value. All of these participants were interviewed so that the researcher could gain in-depth insights into the project, its operations, purpose and value it created. Table 3.1 identifies the participants interviewed in the study.

Table 3.1 Participants in the qualitative research phase

KEY STAKEHOLDERS	ROLE IN LITERACY PROJECT	REASON FOR PARTICIPATION
Participant 1 M62PM-W	Project manager	• Implemented the literacy project. • Involved in the management of the literacy project.
Participant 2 M71PM-W	Project manager	• Involved in the management of the literacy project. • Worked closely with the literacy project beneficiaries.
Participant 3 M65LCM-W	Literacy committee member	• Involved in the management of the literacy project. • Oversaw the operations of the literacy project.
Participant 4 M58LCM-I	Literacy committee member	• Involved in the management of the literacy project. • Oversaw the operations of the literacy project.
Participant 5 M50LPR-B	Literacy project recipient (principle at local high school)	• Key stakeholder in the literacy project. • Able to identify the impact of the literacy project.
Participant 6 F63LPR-B	Literacy project recipient (principle at local primary school)	• Key stakeholder in the literacy project. • Able to identify the impact of the literacy project.
Participant 7 F52LPR-W	Literacy project recipient (community leader)	• Key stakeholder in the literacy project. • Able to identify the impact of the literacy project.
Participant 8 M56LPR-B	Literacy project recipient (community leader)	• Key stakeholder in the literacy project. • Able to identify the impact of the literacy project.
Participant 9 M27CM-W	Community member	• Key stakeholder in the literacy project. • Able to identify the impact of the literacy project.
Participant 10 M29CM-W	Community member	• Key stakeholder in the literacy project. • Able to identify the impact of the literacy project.

***Source**: Researcher's own compilation*

Data collection procedure

Before beginning the data collection, permission was obtained from RD9400 to conduct the study (see Appendix B). This permission allowed the researcher to interview Middelburg Rotary Club members and the other individuals involved in the literacy project.

Bryman (2016:198) states that a common data collection strategy in both quantitative and qualitative research is the structured interview. Structured interviews entail the use of a set of structured questions, in the form of a schedule or guide, used by the researcher in the interviews (Finch, 2013:79; Bryman & Bell, 2014:216; Bryman, 2016:198). Semi-structured interviews were selected as they are more flexible than structured interviews (Finch, 2013:79). The semi-structured nature of the interviews allowed the researcher freedom to change the sequence of questions or to ask additional probing questions that were not on the interview schedule/guide (Finch, 2013:79; Bryman & Bell, 2014:216; Bryman, 2016:201).

The interviews contained open-ended questions designed to encourage one-on-one discussions with the researcher to capture each participant's perceptions, judgements and constructions (Garbarino & Holland, 2009:7; Braun & Clarke, 2013:81). Open-ended questions "allow complex analyses of often non-quantifiable cause-and-effect processes" (Garbarino & Holland, 2009:7). This was beneficial to the current study as many of RD9400's inputs, processes and outputs could be explored in Phase 1 and then investigated further, as to cause and effect, in Phase 2.

The qualitative interviews were conducted in a face-to-face, one-on-one manner, in a quiet environment in Middelburg, Mpumalanga, where the literacy project is situated. Table 3.2 outlines the interview questions and how they relate to the conceptual themes identified in the literature review.

Table 3.2 Interview questions and literature themes

Interview question	Underpinning theory from Chapters 1 and 2
Q1 Performance measurement	Performance measurement can benefit NPOs as it assists the NPOs to build legitimacy and accountability; improve organisational learning and organisational efficiency; and demonstrate to donors the outcome of their investments (Nicholls *et al.,* 2009:766; Gibbon & Dey, 2011:5; Barraket & Yousefpour, 2013:454; Amagoh, 2015:221; Nguyen *et al.*, 2015:224)
Q2 Project management	According to Meredith and Mantel (2011:2), project management helps organisations to improve their ability to plan, implement and control activities through the use of management tools, skills and techniques (Richman, 2011:2).
Q3 Stakeholder involvement	The stakeholder theory states that organisational activities and decisions are affected by the organisation's different stakeholders and the pressures these stakeholders bring to bear upon the organisation (Harangozo & Zilahy, 2015:19).
Q4 Value chain	An organisation's value chain demonstrates how value is added from inputs, through to transformation and outputs (Cavusgil *et al.,* 2014:66).
Q5 A2B Transformation	The A2B transformation movement states that individuals go through six stages of occupational intelligence (the ability to develop from being dependent to independent) (Schultz, 2011:119).
Q6 Sustainable development	Sustainability can be described as an organisation's activity in creating value in the present without compromising the organisation's ability to create value in the future (Geurts, 2016:16-17; Hammer & Pivo, 2017:25; Gamble *et al.,* 2017:191).

***Source**: Researcher's own compilation*

Participant types

Three different categories of participants were interviewed in this research, using three different sets of semi-structured interview guides. Three interview schedules were used asking very similar questions but adjusting the questions to each participant's knowledge of the RD9400 Middelburg project. Accordingly, interviews were conducted with two literacy committee members (Interview Guide 1 – Appendix D), two literacy project managers (Interview Guide 2 – Appendix E), and six external stakeholders

(Interview Guide 3 – Appendix F). Table 3.4 relates the questions mentioned in Table 3.3 to the three different interview guides.

Section A of the interview collected the demographics of the participants. According to Yusuf, Martins and Swanson (2014:7), demography is “concerned with the size and composition of populations, as well as changes and factors influencing them”. Carmichael (2016:1) adds that demographics refers to the study of the characteristics of the human population. Demographic information also provides researchers with insights into whether participants of the study are representative of the target population (Lee & Schuele, 2010).

The demographics examined in this study include the age of the participants, their gender, ethnicity, employment status, highest education level and their role in the literacy project. Using demographic analysis allowed the researcher to analyse relationships between the population structures and key movements of RD9400s literacy projects (Yusuf *et al.,* 2014:7). Gathering the participants’ demographic information proved to be crucial to determining the relationships between the participants’ responses (see section 4.2).

Section B contained the open-ended questions of the interview schedule. A typical interview lasted between 30 minutes to one hour, with ten interviews successfully completed. Overall, this research was cross-sectional in nature as it was designed to obtain information on multiple variables (see Table 3.2 interview questions column) in different contexts (different stakeholder groups such as project managers and project beneficiaries simultaneously [see second column in Table 3.1]) (Collis & Hussey, 2003:61; Bryman & Bell, 2014:106). Cross-sectional studies are carried out when the researcher has limited time or resources. They therefore cover a short period of time, where data is collected only once, without any repeat studies (Collis & Hussey, 2003:61). This study was thus conducted over a period of ten months, from August 2018 to May 2019.

Table 3.3 Themes interrogated in each interview guide

QUESTIONS	INTERVIEW GUIDE 1	INTERVIEW GUIDE 2	INTERVIEW GUIDE 3
Sustainable development			X
Value chain		X	X
Stakeholder involvement	X		X
A2B Transformation			X
Performance management	X	X	
Performance measurement	X	X	X

***Source**: Researcher's own compilation*

Interview Guide 1 (see Appendix D) was used for the Rotary Literacy Committee members. The reason behind excluding the questions on sustainable development, the value chain and A2B transformation was that these participants were closely involved with the literacy project and their perceptions on the need for performance measurement and management and stakeholder involvement were more important that their opinions on the other three themes.

Interview Guide 2 (see Appendix E) was designed for the literacy project managers who were involved in the day-to-day activities of the project.

Interview Guide 3 (see Appendix F) was designed for the individuals who benefitted from the project. The reason behind excluding questions on performance management to this group of participants was because they were not directly involved in the project and therefore would have been unaware of how the literacy project was run.

Research ethics

Following ethical procedures in research is crucial for three reasons: (i) it helps the researcher to navigate topics of a sensitive nature, (ii) it helps to improve the outcomes of the research, and (iii) it ensures that the research is conducted in a professional manner (Richards, Wimalasena & MacLean, 2015:197). This study followed the ethical guidelines set by the University of Johannesburg (see Chapter 1 section 1.7 for more details on the ethical procedure followed in this research). These guidelines require researchers to obtain ethical clearance from their faculty – in this case, the College of Business and Economics. The researcher thus first obtained ethical clearance (see Appendix A) before collecting data from the research participants.

In accordance with UJ's ethical guidelines, the researcher requested that the participants sign a consent form (Appendix C) prior to conducting any interviews. This was done in order to ensure that the participants gave informed consent. Informed consent implies that the researcher gives the prospective participants all the information they need to know to enable them to decide if they would like to participate in the study (Richards *et al.,* 2015:197). For informed consent to be considered valid, the participants must understand the information given to them, they must give consent voluntarily and they must be in a capable state to give the consent (Salkind, 2010).

A consent form was used to introduce the study to the participants, indicate why the study was being conducted and explain their role in the research. The consent form also set out the ethical standards followed in the study in order to ensure the participants' anonymity as well as the confidentiality of the study. The role of anonymity in research is to keep participants safe from any harm (Richards *et al.,* 2015:197). Anonymity was ensured through the use of code names in place of the participants' real names. The consent form also made it clear to participants that they could opt out of the study at any point should they feel uncomfortable. Once participants had signed the consent form, the researcher requested permission to audio record the interviews for later transcription.

Qualitative data analysis procedure

In order to analyse the qualitative data collected, each interview was transcribed verbatim, into a Microsoft Word™ document. Content analysis was used to analyse the aggregated transcripts of the qualitative interviews. Elo and Kyngäs (2008:108) explain that content analysis can be used to gain a better understanding of data by testing theoretical issues. Content analysis permitted the researcher to descriptively code the data (Drisko & Maschi, 2016:83) and to identify emergent themes or patterns (Elo & Kyngäs, 2008:108; Finch, 2013:86; Bryman & Bell, 2014:350).

The researcher first read the interview transcripts several times in order to gain a broad understanding of the participants' responses. Next, each interview transcript was read individually to ensure a thorough understanding of each participant's response. The researcher then worked through each transcript, highlighting statements and key phrases relevant to the identified themes. This was done in order to identify categories and themes that summarise the data collected and to highlight key content (Drisko & Maschi, 2016:88). Once all relevant phrases and statements were highlighted, the researcher reread the transcripts as a whole a last time in order to ensure no important statements had been missed.

The next phase of the analysis involved open-coding the highlighted statements and phrases. Open-coding is the process of writing down headings and key words in the text being analysed (Elo & Kyngäs, 2008:109). Once all key statements and phrases were coded, the researcher began to cross-reference similar codes between each transcript in order to identify recurring patterns – axial coding. These patterns were then cross-referenced with the literature review in Chapter 2 to identify key themes (Elo & Kyngäs, 2008: 109).

Appendix K shows a graphical representation of the coding process, beginning with the key phrases and terms identified from the analysis of the transcripts. The 'open-coding' column of the table in Appendix K identifies these key phrases and the number of participants who used the phrase in the interviews. This can be seen by the number shown in brackets, for example "progress **(3)**" means three participants used the word 'progress' to describe performance measures. In this case, performance measures were identified as an overarching recurring pattern, and therefore, this pattern was presented as an axial code (Column 2 – Appendix K). The third column of the table identifies the recurring theme of the axial coding and open coding. For example, the theme "measuring performance" was developed from three axial codes, namely, understanding of performance measures, importance of performance measures, and measuring project outcomes. These axial codes were developed from 24 recurring phrases and statements used by the participants.

Trustworthiness in qualitative research

Credibility, transferability, dependability and confirmability are four types of criteria that need to be satisfied to establish trustworthiness in qualitative research (Lincoln & Guba, 1985; Anney, 2015:273). Trustworthiness refers to the detail with which the results of the research were described in order to give readers a clear understanding of how the data process was carried out (Elo & Kyngäs, 2008:109). Trustworthiness can be demonstrated through the use of authentic citations (themes in existing empirical literature pertinent to the research, as happened here with Chapters 1 and 2 and as highlighted in Figure 3.2) which illustrate where the original data categories came from (Elo & Kyngäs, 2008:109).

Credibility is concerned with the confidence that can be placed in the truthfulness of research findings in qualitative research (Anney, 2015:276). Credibility was ensured in this study by adopting well established research instruments, using themes from empirical past research and methods to build a qualitative questionnaire (Shenton, 2004:64). Credibility also refers to the researcher's confidence that the qualitative phase helps to delve truthfully into the research context and problem. As the participants were purposefully chosen for their roles in the literacy project, the design provided credible findings.

Transferability implies that the findings have applicability in other research (Lincoln & Guba, 1985). Transferability can be ensured by providing a clear description of the context of the research; the selection and characteristics of the participants; the data collection process; and the data analysis procedure (Elo & Kyngäs, 2008:112). Although this research was a case study of Rotary District 9400, transferability was ensured insofar as the conclusions could be applicable to other Rotary literacy projects in other geographic regions of RD9400 district and in a Rotary African context.

Dependability can be ensured through a detailed description of the research design. This indicates that a study is reliable and that the design can be repeated in other research. Dependability was ensured in this study as the steps and methods followed in the data collection and analysis processes were detailed in a step-by-step manner. Thus, a thorough description was provided of the research design, its implementation, the method of data gathering and a comprehensive review of the research (Shenton, 2004:72).

Confirmability refers to the extent to which the findings of a study are a true reflection of the participants, rather than the researcher's bias (Lincoln & Guba, 1985). To this end, the interview questions were informed by the themes identified through the literature review (Chapter 2) that had relevance to an NPO.

Table 3.4 identifies how each theme used in the qualitative interviews relates to the quantitative latent variables (variables that are not directly observed).

Table 3.4 Link between research themes and latent variables of the questionnaire

Interview Themes	Questionnaire latent variables
Performance measurement	Performance indicators
Project management	Performance planning practices
Stakeholder involvement	Stakeholder accountability demands
Value chain	Role of performance measurement
A2B transformation	Project impact assessment
Sustainable development	Role of strategic objectives

Source*: Researcher's own compilation*

3.4 Phase 2: Quantitative research

The second phase of this research involved the application of a quantitative research approach.

Sample size for the quantitative research

A research sample can be defined as a sub-set of a larger population, with a population being a target group of individuals who have common characteristics (Kothari, 2004:152; Krishnaswami & Satyaprasad, 2010:51; Zikmund, 2015:169; Hair *et al.* 2016:171). A sample population can be further defined as a group of people who are knowledgeable about a specific topic under investigation (Hair *et al.*, 2016:172). According to Krishnaswami and Satyaprasad (2010:51), one of the main purposes of sampling is to draw inferences from the sample to the entire population. Thus is important for the sample to be representative of the population (Kothari, 2004:152; Hair *et al.*, 2016:172). A representative sample also limits sampling errors (Hair *et al.*, 2016:173).

For the purposes of this research, non-probability convenience sampling and snowball sampling techniques were used during the quantitative phase. Non-probability sampling gives the researcher the discretion of deciding which elements of a sample to include and which elements to exclude (Hair *et al.*, 2016:174). Convenience sampling allows the researcher to select respondents who are readily available to participate in the study and who are knowledgeable about the topic at hand (Fox & Bayat, 2014:59). Convenience sampling was used during this phase initially as it allowed the researcher to identify and target key individuals involved in RD9400s literacy projects, including the Middelburg literacy project. These individuals were then asked to refer other individuals involved in an RD9400 literacy project to complete the questionnaire. This latter method of non-probability sampling is known as snowball sampling. According to Hair *et al.* (2016:184), snowball sampling is the process of identifying an initial respondent to recruit other suitable respondents (Fox & Bayat, 2014:59). Snowball sampling was advantageous as it helped the researcher to locate a population where a sampling frame did not exist. This is because RD9400 had no comprehensive list at the time of this research, of literacy project members across their geographic region. Additionally, RD9400 did not know how many Rotarians were working on literacy projects in their districts nor how many community members made use of their literacy efforts. As such, no population size could be established.

Consequently, the quantitative sample consisted of collecting 88 completed questionnaires from community members, Rotary members, RD9400 stakeholders, and other individuals involved in RD9400 literacy projects. These 88 respondents were over the age of 18 and identified through RD9400 channels. Of the 88 responses, 61 were obtained through face-to-face, paper-based questionnaires, while the remaining 27 were from responses to the online questionnaire.

Prior to collecting the data the researcher anticipated that most of the responses would come from the online questionnaire, however, this was not the case. Due to the sample population being drawn mostly from the Baby Boomer generation (age 55-73) and Generation X (age 39-54) (Dimock, 2019), not all respondents knew how to use the online platform, thereby requiring paper-based questionnaires.

Data collection procedure

Data collection in quantitative research involves the use of survey questionnaires to gather numerical data from selected individuals (Hair *et al.*, 2016:208). In developing the quantitative self-administered questionnaire, the researcher consulted the University of Johannesburg's Statistical Consulting Services (STATKON) in order to identify the best research design, methodology and survey item completeness for the quantitative questionnaire. STATKON was used to ensure that the data collection instrument was appropriate for the study.

Furthermore, the researcher designed the research instrument based on existing, empirically tested questionnaires (see Appendix I). Table 3.5 shows from which authors the researcher adopted items that described each higher-order, latent variable and how these variables relate back to the literature reviewed.

Table 3.5 Higher-order variables adopted from other questionnaires

Higher-order latent variable	Author / authors	Literature review
Stakeholder accountability demands	Chiliya, 2016 Wadongo, 2014 Elgammal, 2016	2.2 NPOs in a South African context
Role of strategic objectives	Chiliya, 2016 Wadongo, 2014	2.9 Performance planning practices
Planning performance measurement practices	Wadongo, 2014 Nanthagopan, Williams & Page, 2016	2.4 NPOs and the value chain
Performance indicators	Wadongo, 2014	2.9.3 Identifying performance indicators
Role of performance measurement	Wadongo, 2014	2.9.1 The role of performance measurement
Project impact assessment	Krishna, 2012 Elgammal, 2016	2.6 The A2B transformation movement

***Source**: Researcher's own compilation*

Once the questionnaire was approved by STATKON, a pilot study was conducted to ensure that the research instrument was appropriate for the research objectives. Fox and Bayat (2014:102) define pilot studies as, "a trial run of an investigation conducted on a small scale to determine whether the research design and methodology are relative and effective". According to Bryman and Bell (2014:209), pilot studies are especially crucial for self-administered questionnaires where the researcher is not present to help respondents address any confusion or respond to any questions.

Six respondents took part in the pilot study. These individuals were a part of the sample population but were not included in the final respondent sample. The participants were requested to take part in the pilot study (see Appendix G) and to provide feedback to the researcher on the ease of use of the questionnaire and their understanding of the questions. The six respondents were selected as they were familiar with RD9400's literacy projects. The feedback from the pilot study was generally positive insofar as five of the respondents had no issues in answering the questionnaire and considered its items appropriate to the research objectives. One respondent commented that none of the options provided for the answer to the question, "What is your role in the Rotary literacy project?" that described their role. Therefore the researcher added an option, "Other (specify)". The respondents who took part in the pilot study were not included in the final quantitative research sample.

The quantitative questionnaires took two forms: paper-based self-administered questionnaires and online self-administered questionnaires. Although self-administered questionnaires often come in the form of mail or postal questionnaires, this study used face-to-face and online questionnaires as this was considered the best way to ensure a high response rate given the community sampled. The online questionnaires were created through Google Forms™.

The motivation behind using online questionnaires was that they generally provide quick responses and high quality data that can be directly exported into a database for analysis (Hair *et al.*, 2016:213). Respondents who took part in the online questionnaire were sent an email (Appendix H), with a link to the questionnaire, asking them to participate in the study. Both the online questionnaire and the paper-based questionnaires began by giving the respondents an explanation of the study and the reason why it was being conducted (Appendices I and J). The paper-based questionnaires asked respondents to sign a form stating that they gave consent to participate in the research (Appendix I). The online survey asked the respondents to either accept or decline the terms of participating in the research, thereby either giving their consent or declining to take part in the questionnaire (Appendix J). If consent was given, the respondents were taken to the next section of the online survey. If they declined, they were blocked from moving to the next section.

The questionnaire consisted of two open-ended questions that allowed the respondents to specify what community project they were involved in other than The Link (a large RD9400 literacy project run in coordination with another NPO) or the Middelburg Literacy Project, and to describe their role in their particular literacy project. The rest of the questionnaire consisted of closed-ended questions as they were deemed easier for respondents to respond to. These questions were based on a scale, which made it easier for the researcher to compare answers during analysis (Bryman & Bell, 2014:200). Closed-ended questions gave the respondents a set of fixed alternatives, in scales, to choose from in order to give the most appropriate answer to the question (Bryman & Bell, 2014:216; Fox & Bayat, 2014:91; Zikmund, 2015:271).

Section A of the questionnaire (Appendix I) captured the respondents' demographical information. The section contained seven questions on the respondents' gender, age, ethnicity, employment status, highest qualification, role in the Rotary book distribution project and the name of the community literacy project they were involved in.

Section B of the questionnaire explored the respondents' attitudes and perceptions of RD9400's literacy projects regarding stakeholder accountability demands, the role of strategic objectives, planning of performance measurement practices, performance indicators, the role of performance measurement and project impact assessment. Each question in Section B created a gap analysis, which had two five-point Likert scales to measure the responses (Hair *et al.*, 2016:237). The first scale was used to identify the respondents' opinion on the current situation of a project. This scale used the following five points: (1) strongly disagree, (2) disagree, (3) neutral, (4) agree and (5) strongly agree. The second scale was used to identify the respondents' opinion on what the ideal situation in a literacy project should be. This scale used the following five points: (1) totally unimportant, (2) unimportant, (3) neutral, (4) important and (5) very important.

Data analysis procedure

In order to analyse the data collected from the quantitative questionnaires, the data was captured into a Microsoft Excel™ spreadsheet by the researcher. The Statistical

Package for Social Sciences™ (SPSS) [version 15] was used by STATKON to analyse the data. SPSS allowed for both descriptive and inferential statistical analysis. The descriptive analysis provided the means and standard deviations for the variables (Pallant, 2016:55; Creswell, 2014:163). Inferential statistics were used to compare variables so that inferences could be drawn from the sample to the population (Chiliya, 2016:144; Creswell, 2014:163; Babbie, 2015:475).

The following tests were used in the data analysis: frequencies and descriptive statistics (section 5.3); measures of central tendency (section 5.3 and 5.5); Kaiser-Meyer-Olkin measures of sampling adequacy (section 5.4); Bartlett's test of sphericity (section 5.4); Cronbach's alpha coefficient (section 5.4); Principal Component Analysis (section 5.4); Varimax Rotation method (section 5.4); Kolmogorov-Smirnov's test of normality (section 5.5.1); paired samples t-test (section 5.5.1); effect size (section 5.5.1); MH Subcommand test for marginal homogeneity (section 5.5.2); and cross-tabulations (section 5.5.2). Each of these tests is discussed in detail in Chapter 5.

Validity and reliability of quantitative research

Reliability in quantitative research refers to whether or not the study is repeatable. In other words, reliability refers to the consistency of the research findings (Quinlan, 2011:42; Chiliya, 2016:145; Bryman & Bell, 2014:24; Fox & Bayat, 2014:145; Hair *et al.*, 2016:252). Reliability can be described as the extent to which a measuring procedure would achieve the same results in repeated studies. In this study, reliability was tested through the use of coefficient alpha, also known as Cronbach's alpha (Hair *et al.*, 2016:255) (see section 5.4). Pallant (2016:101) suggests that the values obtained through Cronbach's alpha coefficient should be greater than 0.7 to ensure reliability. The reliability tests resulted in Cronbach's alpha coefficient values of between 0.707 and 0.918, which proves the reliability of the research instrument.

Validity is concerned with the integrity of the conclusions drawn from parts of the research (Quinlan, 2011:42; Bryman & Bell, 2014:25). Validity is therefore the extent to which the data collection instrument measures what it is supposed to measure (Chiliya, 2016:146; Bryman & Bell, 2014:25; Fox & Bayat, 2014:144; Hair *et al.*, 2016:257). Both internal and external validity needs to be considered. Internal validity refers to the absence of errors in the design of the research being conducted (Fox &

Bayat, 2014:80). External validity refers to how representative the results are of the population at large (Fox & Bayat, 2014:80). In this study, internal validity was ensured through the use of empirically tested items in the research instrument. These items were selected from numerous studies which had already tested the research instrument (Table 3.5). External validity was ensured as the researcher identified a sample population (RD9400) which represented the whole population of RD9400. The demographics of the participants (qualitative phase) and the respondents (quantitative phase) were representative of the Rotary International population (see sections 4.2 and 5.2).

3.5 Chapter summary

This chapter described the methodology used in the present study. The methodology first gave an outline of the case study location and then detailed the research design. The research design followed a mixed methods approach, balancing qualitative and quantitative research. The sample, sample size and sampling procedure were then described, followed by the methods and tools used to collect the data. The primary data sources came from qualitative interviews and quantitative questionnaires. The validity, credibility and trustworthiness of the research were discussed next. Lastly, the chapter outlined the data analysis procedure. In the following chapter, the data which was captured is presented and interpreted in relation to literature.

CHAPTER 4

QUALITATIVE RESULTS AND DISCUSSION

This chapter discusses the results of the qualitative primary data collection through the semi-structured interviews described in Chapter 3. Thematic content analysis (open, axial, and selective) was used to identify key themes recurring in statements made by participants. This analysis provided valuable insights into the perceptions of the participants about the literacy project. The findings presented in this chapter were used to inform the quantitative survey (Table 3.5), the results of which are discussed in Chapter 5.

4.1 Introduction

The first step in analysing the qualitative data was to examine the demographic profiles of the research participants. This step was conducted in order to identify any key factors which could influence the participants' views on the literacy project.

4.2 Socio-demographic profiles of the research participants

Ten participants were selected to take part in the qualitative interviews, based on their involvement in RD9400 Middelburg Rotary Club literacy project. Each participant was given a unique identifier to indicate their gender, age, role in the literacy project and ethnic group. The first letter in the identifier tells us the participants gender [M = male, F = female]. The number in the identifier represents the participant's age. The next set of letters represents the participant's role in the literacy project [PM = project manager; LCM = literacy committee member; LPR = literacy project recipient; CM = community member]. The last letter in the identifier represents the participant's ethnic group [W = White; B = Black; I = Indian; C = Coloured]. For example, participant M62PM-W was a male, 62 years old, project manager, and White. Whereas participant F63LPR-B was a female, 63 years old, literacy project recipient, Black. Although there was an option for Coloured, none of the participants were of this ethnicity. The reason for using these identifiers, apart from ensuring anonymity, was to make it easier to identify whether the participant's demographic background played a role in their responses.

Gender of participants

As can be seen from Table 4.1 below, 80% of the participants were male and only 20% were female. Although the sample was skewed in this regard, this was expected due to the lower percentage of female Rotarians to male Rotarians. Rotary International President Elect, Ian Riseley, stated that female Rotarians only accounted for 20% of the total Rotary International membership (Bhagat, 2017). Of the Rotarians interviewed (project managers and literacy committee members), all were male.

Table 4.1 Gender of participants

	Project manager	Literacy Committee member	Literacy project recipient	Community member	Total (%)
Male	2	2	2	2	80
Female			2		20

Source*: Researcher's own compilation*

Of the literacy project recipients, there was one female school principal and one male school principal. The two community members were also male.

Age of participants

The age of the participants ranged between 27 and 71 years old. As can be seen from Table 4.2, only 20% of the participants were younger than 40, whereas 40% were between the ages of 40 and 59. The remaining 40% were older than 60 years. This sample correlates with the statistics of Rotary International age groups as only 5% of Rotarians are below the age of 40 (Bhagat, 2017). Of the four participants identified as Rotarians, all were above the age of 50.

Wills (2016:24) notes that statistics from 2012 indicate that of the principals in South African schools, 97% were 40 years or older. This correlates with the sample as the two principals interviewed were both above the age of 50.

Table 4.2 Age of the participants

	Project manager	Literacy Committee member	Literacy project recipient	Community member	Total (%)
20-29				2	20
30-39					0
40-49					0
50-59	1	1	3		50
60-69		1	1		20
70+	1				10

***Source**: Researcher's own compilation*

The researcher opted to interview two community member participants below the age of 40 in order to gain insights into the opinions of younger participants compared to older participants.

<u>Ethnic group of participants</u>

It was deemed necessary to determine the ethnic group of the participants, in terms of race, in order to gain greater insight into the dynamics between the different stakeholders of the literacy projects. According to StatsSA (2016), Middelburg's population, with regards to ethnicity, consists of 41.6% Black Africans, 48.5% White, 5.5% Coloured and 3.8% Indian.

Table 4.3 Ethnic group of participants

	Project manager	Literacy Committee member	Literacy project recipient	Community member	Total (%)
White	2	1	1	2	60
Black			3		30
Indian		1			10
Coloured					0

***Source**: Researcher's own compilation*

As can be seen from Table 4.3, 60% of the participants were White, 30% Black and 10% Indian. Although, Coloured was an ethnic option, none of the participants were a part of this ethnic group, which could be related back to the low percentage of Coloureds in Middelburg. The reason for the predominance of Whites in the sample is due to the fact that Rotary comprises mostly White males. This correlates with the sample as of the four Rotarians interviewed (project managers and literacy committee members), three were White and only one was Indian. On the other hand, three of the four literacy project recipients were Black and only one was White.

Highest education level

The level of education is included in this analysis in order to identify whether the participants' level of education played any role in their responses.

Table 4.4 Highest education level of participants

	Project manager	Literacy Committee member	Literacy project recipient	Community member	Total (%)
Matric / Grade 12				1	10
Post-Matric Diploma	1		1		20
Baccalaureate Degree	1			1	20
Postgraduate Degree		2	3		50

***Source**: Researcher's own compilation*

Table 4.4 shows that 90% of the participants had a degree or higher qualification. Of these, 20% had a post-matric diploma, 20% had a baccalaureate degree and 50% had a post-graduate qualification. This shows that the participants mostly had some form of tertiary education.

Role in the literacy project

As previously discussed, the participants of this research were categorised into four categories: project managers, Literacy Committee members, literacy project recipients and community members. The study aimed to get a balanced amount of participants involved in running the project, participants who were recipients of the project and participants who were neither.

Table 4.5 Role of participants in the literacy project

	Participant	Total (%)
Project manager	2	20
Literacy Committee member	2	20
Literacy project recipient	4	40
Community member	2	20

***Source**: Researcher's own compilation*

As shown in Table 4.5, 40% of participants were recipients of the literacy project, 20% were community members, 20% were project managers, and the last 20% were Literacy Committee members.

Although participants were purposively selected, the demographics of the participants were representative of the sample population. The following section uses thematic content analysis to examine the responses of the participants during the interviews.

4.3 Thematic content analysis and discussion of the interviews

The next step in analysing the qualitative data was to code the interview transcripts in order to identify any recurring patterns, words or statements. Once the transcripts had been coded, the codes were placed into categories using axial coding. The codes developed for the axial coding were then used to identify key themes of the research (section 3.3 describes this process in detail). The identified themes are as follows:

THEME 1: Performance measurement

THEME 2: Stakeholder involvement

THEME 3: Value chain of the literacy project

THEME 4: A2B Transformation Movement

THEME 5: Sustainable development and sustainability

THEME 6: Constraints and risks of the literacy project.

The content analysis is structured as follows: first, an introduction to the theme is given; next relevant quotes from the participant interviews are presented in relation to the question. A discussion of the responses follows. Once all the key themes have been discussed, a general discussion of the recommendations made by the participants is presented.

THEME 1: Performance Measurement

As performance of the literacy project is one of six key factors examined in this research (see section 3.3), it was considered important to establish the participants' understanding of the concept and their opinions as to whether or not performance measurement was used by the literacy project. The questions used to gain this insight are now presented and discussed.

What does performance measurement mean to you? *(Appendices C, D and E – question 1)*

Participants were asked this question in order to gain insight into their understanding of the term 'performance measurement'.

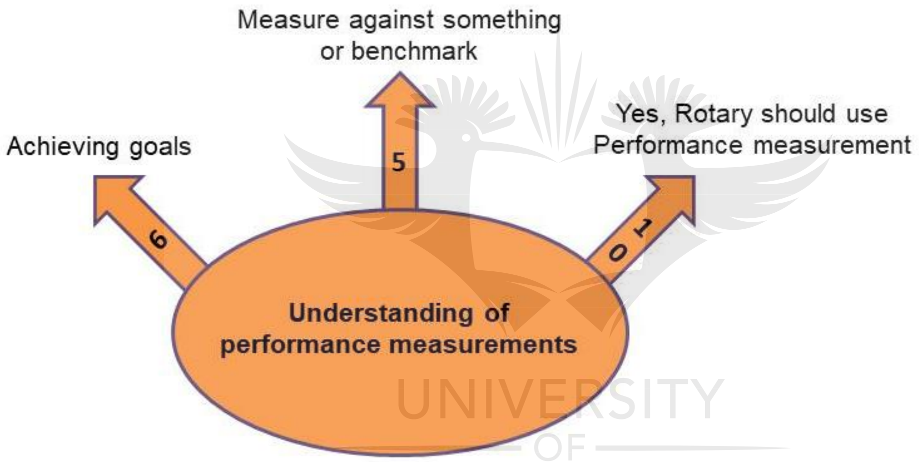

Figure 4.1 Participants' perceptions of performance measurement

***Source**: Researcher's own compilation*

Figure 4.1 displays the three most commonly recurring answers with regards to performance measurement and the amount of participants who answered the question as such. The first common response to the question was that performance measurement was about having goals in place and achieving those goals. This could be seen from the following statement:

Participant M62PM-W "performance measurement is: are you achieving your goals".

Five other participants used similar wording to participant M62PM-W to describe performance measurement as achieving goals.

The next common response to this question related to benchmarking and measuring performance against something that was already established. Five of the participants, participant M62PM-W included, used the term 'benchmarking' or a phrase similar to the concept to describe performance measurement, as stated by the following participant:

Participant M58LCM-I "performance measurement is: you measure performance of whatever you have done against something, against a certain norm".

These responses are in line with the literature review where it was noted that performance measurement helps NPOs to achieve their goals and objectives (Amagoh, 2015:221). Additionally, performance measurement can be used to benchmark performance against similar organisations in order to improve operations and outcomes (Cordery & Sinclair, 2013:4; Polonsky *et al.*, 2016:81).

Four participants (project managers and literacy committee members) were asked if RD9400 used performance measurements in the literacy project. All participants replied 'no'.

M62PM-W "No, it's just not being done".

M58LCM-I "I don't think so".

When participants were asked if RD9400 should use performance measurements in its literacy project, all ten replied in the affirmative. This is an interesting finding because RD9400 does not use performance measurements even though all the participants believe they should be used.

Participant M56LPR-B "Yeah, it would benefit them".

Participant F63LPR-B "Definitely because, I mean, it is senseless in just providing all the time, you must at least know that, I mean, there is a goal, we must work towards a specific goal".

Why are performance measurements important? *(Appendices C, D and E – question 1)*

Participants were asked this question to identify reasons why RD9400 should use performance measurements in its literacy project.

Figure 4.2 Importance of performance measurements

Source*: Researcher's own compilation*

Figure 4.2 identifies the three most common responses. Eight of the ten participants stated that measuring performance was important because without it, it was impossible to gauge the impact of a project. This can be seen from the following quotes:

Participant F63LPR-B "if there are no measurements in place, how will you know that you have achieved your goals?"

Participant M50LPR-B "there is no way one can be able to assess and check whether they are achieving if there is no performance measurement".

These responses agree with the literature review which states that performance measurements help NPOs to identify the impact of their projects in relation to the resources required to make the impact (Sillanpää, 2013:476).

Another recurring response to this question was that using performance measurements could help NPOs obtain funding for their projects. Seven of the ten participants made this statement, as can be seen from the following quotes:

Participant M27CM-W "It's much easier to convince someone to give you money if you have empirical proof that that money goes somewhere and matters".

Participant M58LCM-I "If funders know what's going on, they can see how we are measuring our results, they can see the entire reaction we are having".

This concurs with the literature which states that NPOs could build donor confidence in a project through achieving measurable goals (du Plessis & Petzer, 2011:12145; Nazuk & Shabbir, 2018).

The last recurring answer to this question was that performance measurement could help NPOs with accountability towards stakeholders.

Participant M27CM-W "when it comes to companies, they like deliverables, you know, and they like to know that their money is being spent well".

Participant M65LCM-W "There has to be some form of accountability that makes them (stakeholders) realise it (the project) has been worthwhile".

As stated in the literature, accountability plays an important role in the operations of NPOs as they rely heavily on donor funding and sponsorship. The participants who identified accountability as a key part of performance measurement were in line with the literature review. The review found that performance measurements could assist NPOs to boost accountability to stakeholders and to demonstrate to donors the outcome of their investments (Nicholls *et al.*, 2009:766; Gibbon & Dey, 2011:5). Further, Batti (2015:22) found that in order for NPOs to obtain funding, they need to be able to demonstrate to funders their ability to produce the desired results.

Other key reasons presented by the participants included increased community involvement; reporting and feedback; planning and evaluating; and guiding fundraising efforts and decision-making.

THEME 2: Stakeholder involvement

The importance of this theme stems from the fact that RD94000 is an NPO that relies on donors and sponsorships to deliver its literacy project to disadvantaged communities and schools. Given this fact, it is clear that stakeholders play an important role in the literacy project and therefore their involvement is of the utmost importance. This theme consists of six questions that were used to gain insights into the participants' thoughts on stakeholder involvement.

<u>How would you define the term 'stakeholder'?</u> *(Appendices C and E – question 3)*

The intention of this question was to identify whether the participants could define the term 'stakeholder' or if they simply knew what a stakeholder was in general. Of the eight participants who were asked this question, six were able to define the term adequately.

Participant M29CM-W "A stakeholder is a person that has an active role in a project, particularly of a certain interest, and that the project itself might influence the person themselves".

Participant M56LPR-B "Someone who has or benefits, something that benefits the people around your area".

These responses are in agreement with the literature review which defined a stakeholder as someone who influences or is influenced by a project (Freeman, 2010:25; du Plessis, 2014:98). These responses are further in line with Geurts (2016:29), who stated that stakeholders have certain expectations of an organisation's activities and decisions (section 2.5).

<u>Who are the stakeholders of the literacy project?</u>

Based on the responses of the participants, Figure 4.3 displays an overview of the stakeholders involved in the literacy project.

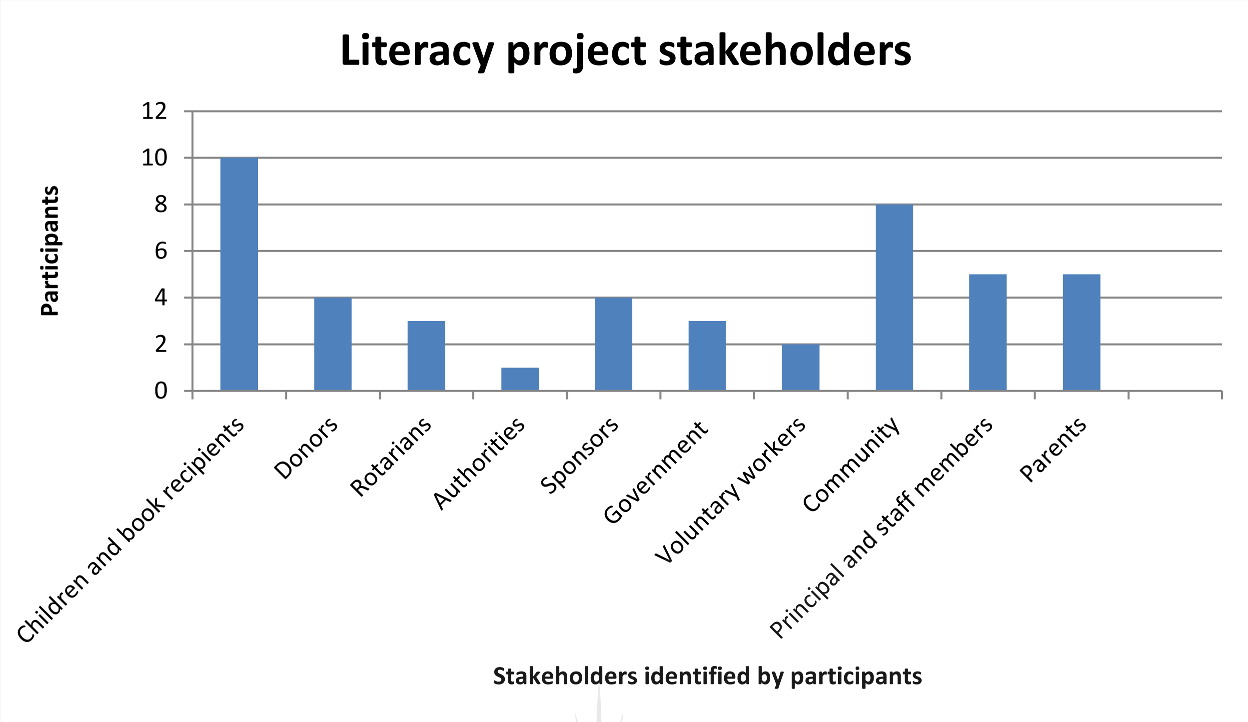

Figure 4.3 Literacy project stakeholders as identified by participants

Source*: Researcher's own compilation*

An interesting finding from this question was that the three participants (M58LCM-I; M65LCM-W; M71PM-W) who identified Rotarians as stakeholders of the literacy project were Rotarians themselves. However, none of the other participants identified Rotarians as stakeholders, although two of the recipients (M56LPR-B and F52LPR-W) identified voluntary workers as stakeholders of the literacy project. Identifying Rotarians as stakeholders is crucial as they are the internal stakeholders of the literacy project. This was pointed out by Savage *et al.* (1990:149), who explained that the internal stakeholders of an organisation are its staff and management (section 1.3).

Participant M58LCM-I "The primary stakeholders are the Rotary Club themselves".

Additionally, all participants identified the children and other recipients of the literacy project as key stakeholders. Although children were identified as stakeholders, they were not interviewed in this study as the ethics of the study allowed the researcher to only interview participants over the age of 18 (see section 1.7). Eight of the ten participants identified as other stakeholders the communities to which the literacy project delivered books. Five of the ten participants also identified school principals and teachers as key stakeholders, as they were the ones who facilitated the literacy project.

Participant M50LPR-B "All the participants of a school community - that would be your parents, your learners, the private sector - they are called the community at large, those who have interest into education, then I will regard them as stakeholders".

Other key stakeholders included donors, sponsors, government, authorities and parents of the children receiving books from the literacy project. This shows that the participants understood, to a certain extent, the different kinds of stakeholders involved in the literacy project. There is, however, a gap insofar as most participants except for one, were unable to identify all the stakeholders of the literacy project. They were also unaware which stakeholders were primary and which were secondary.

<u>What drives community stakeholder engagement in RD9400?</u> *(Appendices C and E – question 3)*

This question sought to elicit different perspectives on how RD9400 could improve its stakeholder involvement in the literacy project.

Figure 4.4 Driving forces of community stakeholder engagement

***Source**: Researcher's own compilation*

Figure 4.4 identifies the three most frequently recurring responses. Of these three, the two most common answers were through building Rotary's reputation and creating awareness of the literacy project. The third response referred to accountability, which relates back to the reason why performance measurements should be used.

Participants who believed creating awareness was important said:

Participant M50LPR-B "Awareness that through literacy the community or country at large stands to benefit"

Participant M27CM-W "Awareness is number one".

These participants believed that RD9400 needed to create more awareness of the literacy project so that more communities, schools and other organisations could know that this book donation service was available. Participants believed that RD9400 needed to create awareness, specifically in the rural communities and farm schools where government involvement had been particularly low. Those schools lacked the necessary resources to help their students gain extra knowledge or improve their literacy and English skills.

Participants who believed that Rotary's reputation played a role in community stakeholder engagement said:

Participant M29CM-W "Reputation is an important thing, because people rely sometimes on the visual logo or brand".

Participant F63LPR-B "the Rotary brand too, makes people aware that there is help, understand, and this help comes without any strings attached to it".

These participants believed that Rotary's reputation played an important role in helping communities identify RD9400 as a reliable source of help.

Four participants also believed that accountability played a role in community stakeholder engagement:

Participant M65LCM-W "When you are in a position where you can show that you are, I'm going to call it accountable, it is a different way of actually promoting your project".

Accountability in terms of improving stakeholder involvement relates to the NPO's ability to prove to its stakeholders that its project is having an impact on national development (section 2.2) (Masi, 2015:490; Martinez, 2014:31). The participants believed that if RD9400 could prove to its stakeholders that the project was delivering the desired outcomes, they could get greater involvement from all stakeholders. Some of the participants also believed that if the recipients of the literacy project could see the value of the project, they would be more inclined to become involved and create awareness for more people to get involved.

Three participants also believed that if an NPO could prove the sustainability of its project, it could improve community stakeholder engagement. This belief supports the literature reviewed, as Gómez-Bezares *et al.* (2016:2) maintain that sustainability can be better achieved through proper stakeholder management.

<u>What role do stakeholders play in decision-making and organisational activities?</u> *(Appendices C and E – question 3)*

This question sought to identify the different roles performed by the identified stakeholders.

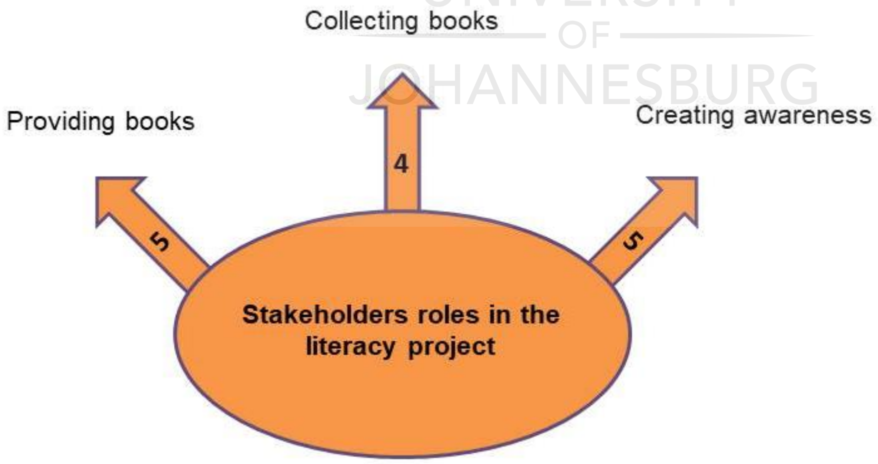

Figure 4.5 Roles of stakeholders in the literacy project

Source*: Researcher's own compilation*

Figure 4.5 displays the three most common responses to the question asked. The two main roles identified by the participants were providing resources for the literacy project and collecting resources from the literacy project. Participants identified these two activities through the following statements.

Participant F63LPR-B "Rotary provides, especially books to our learners, and those books mostly come from Canada".

Participant M27CM-W "I would say overall it is to deliver educational supplementaries to those in need, so particularly students that have been disadvantaged".

As can be seen from the statements above, participants believed that the main role of stakeholders was to provide books and ensure that books were available for the recipients when they were required. Another role of the stakeholders was to collect the equipment and supplies from the distribution centre managed by RD9400. As discussed in Chapter 1, this is an important role of stakeholders as it allows the project recipients to select books that are appropriate for their learners. This could be seen from the following literacy project recipient responses.

Participant M50LPR-B "When it comes to the issue of collection of the relevant resources, I play a pivotal role, I personally visit the resource centre to go and check what kind of the literature that should come to our institution".

Participant F63LPR-B "I went there with some of our teachers and we of course selected the books which are appropriate for our learners".

Other participants added that stakeholders needed to play a role in creating awareness of the literacy project so that more people could become aware that such services existed and were beneficial.

Participant F52LPR-W "I am making the people aware that there is Rotary, if you need books, go get books and stuff".

What role does management play in the literacy project? *(Appendices C and D – question 2)*

The purpose of this question was to gain insight into the role of management in managing the literacy project. Only asked four participants were asked this question – the project managers and the Literacy Committee Members.

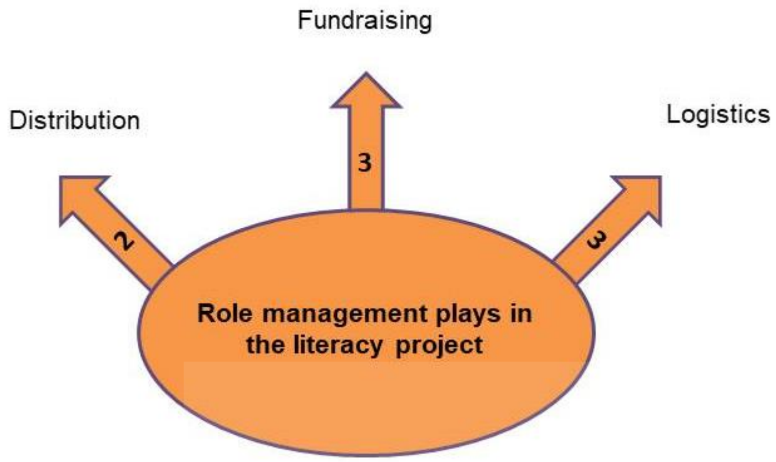

Figure 4.6 Role management plays in the literacy project

***Source**: Researcher's own compilation*

As shown in Figure 4.11, the four participants found that management played a role in the distribution of books, fundraising and the logistics of the project.

Participant M71PM-W "They manage it, they manage the container, the whole edu-project. Rotary here manages that. And there's a committee of three men, I believe that do that and they manage it come funding, come organising the containers, when the containers are coming, when they you know what I'm saying?".

Participant M62PM-W "Accurate distribution of products and fundraising".

From the responses, it appears that the literacy project managers are responsible for ensuring the containers from Canada and the US arrive in the port of entry in South Africa, and from there, to the distribution centre. Managers are also responsible for handling the container at the port, which involves customs and tax deductions, as well as raising the funds to transport the container to the distribution centre.

THEME 3: Value chain of the literacy project

The value chain of the literacy project was identified as a key theme as the project involves multiple stakeholders who add value in different ways. This theme emerged from the participants' understanding of the value chain and their perceptions of the outcomes of the chain. This theme was derived from two questions.

What is your understanding of an organisations value chain? *(Appendix E – question 3, Appendix F – question 2)*

This question sought to identify whether participants understood the concept of a value chain and its importance in the literacy project. Of the eight participants, only one had an understanding of a value chain and was able to describe it. The other participants either needed an explanation before being able to discuss this concept or they only had a vague understanding of it. The following participant understood the value chain best and gave the following description:

Participant M27CM-W "starts with an initiator for a project then it is a team that assembles to push the project, then it's fundraising, then it's gathering or collecting resources using that fundraising usually, then it is somewhere along there should've been identifying the recipients and then finding the best way to distribute it to the recipients".

Other participants described the value chain as a chain that has multiple effects on multiple individuals.

Participant M29CM-W "is where you start having one thing starting to have multiple effects with a lot of people".

This response recognised the multiplier effect of the literacy project (section 2.3). Another participant explained that true value was only created once the books had gone into the schools and libraries. This participant described the literacy project's value chain as follows:

Participant M62PM-W "If you have to look at the value chain you're taking it from a zero value, or actually a cost value to get rid of it to Landfill, bringing it here and suddenly you changing it from a by-product into an absolute essential,

whether it be a chair, a desk, a book, a wheelchair or whatever we getting, it is being transformed from a landfill to a… Now if we look at that value chain, and we say to ourselves okay 'how are we moving up'. We would be adding value to a point, distributing it, and only once it gets to the school, would there be a true value to it."

Thus, even though most participants were not familiar with the term 'value chain', they did understand that it referred to the value being created by the literacy project. Further, even though they could not describe the value chain of the literacy project, they were able to identify the value being created as part of the literacy project, which led the researcher to the next question.

<u>What value do you believe is being created by RD9400's literacy project?</u> *(Appendix E – question 3, Appendix F – question 2)*

This question intended to identify the outcomes of the value chain of the literacy project, which ultimately show the total value created by the chain. Figure 4.7 shows a graphical representation of the participants' responses, displaying the different outcomes of the project and the number of participants who identified each outcome.

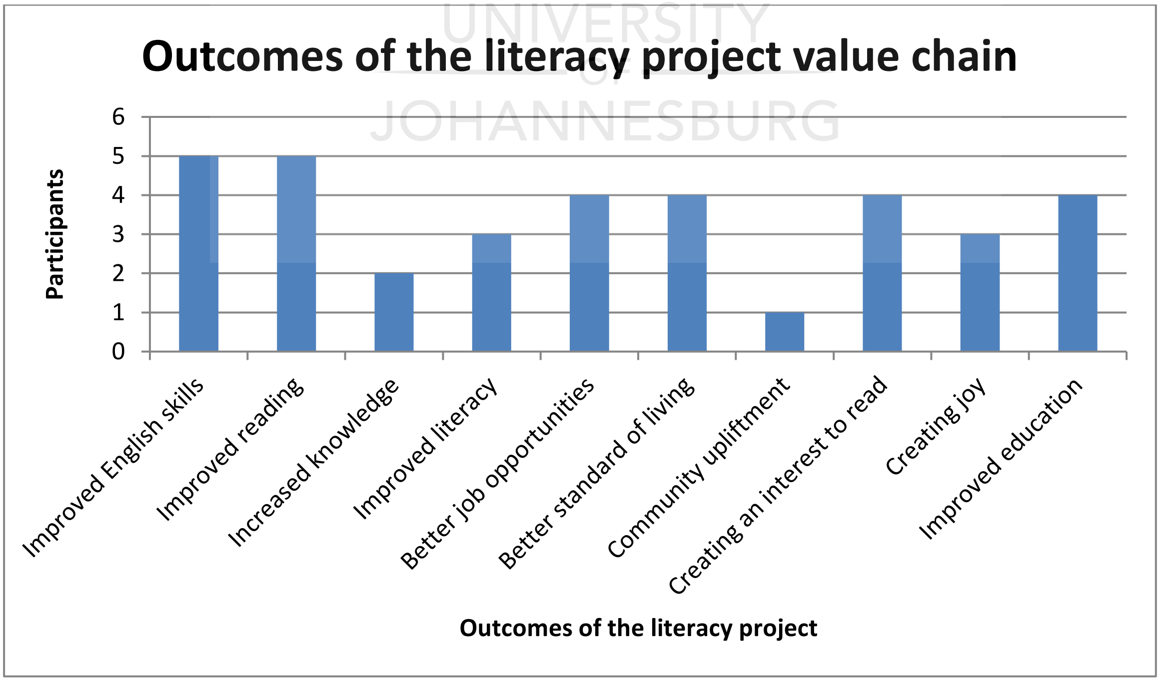

Figure 4.7 Outcomes of the literacy project's value chain

Source: *Researcher's own compilation*

As can be seen in Figure 4.7, the top two recurring responses were that the value chain of the literacy project led to improved English skills and improved reading. An unexpected outcome of the literacy project, as identified by participants, was that the project created an interest in reading.

Participant M56LPR-B "Even their English, it is becoming better unlike before they had the books, they were just students, but now they can read and they are thinking, it's boosts a lot of interest".

Participant F52LPR-W "I think education, and especially our children where English is not their first language, they are learning so many words and so many things through various English books".

<u>Do you think it would be beneficial for RD9400 to map out its value chain?</u> *(Appendix E – question 3, Appendix F – question 2)*

Six of the eight participants who were asked this question responded by saying 'Yes'.

Participant M62PM-W "We need to see what the benefits are because if we don't map it we are not going to be able to measure. And by mapping it we will be able to put in key performance areas to monitor, and at this stage, I don't even know if you know what KPIs we should be putting into place".

The affirmative responses of the participants highlight the value they accorded to mapping out the literacy project's value chain. By doing so, RD9400 would be able to identify key areas where value is added and would better understand the role of each stakeholder in creating that value (section 2.4).

THEME 4: The A2B transformation movement

This was identified as a key theme as it links back not only to the value chain, but also to sustainability and the literacy project stakeholders. The A2B transformation movement plays a role in the literacy project insofar as it emphasises the long-term value created through book donations. This theme was based on the following two questions.

Do you think that the literacy project is leading community members towards an independent locus of control? *(Appendix F – question 4*)

Participants were asked this question to gauge the extent to which the literacy project was helping beneficiaries become more independent and self-reliant. Participants mostly responded optimistically to this question. However, some added that the literacy project only played a partial role in this movement and was not the main driving force leading students to becoming independent.

Participant F52LPR-W "Definitely it is contributing, it is not only that, but it is definitely contributing to reaching that".

Participant M27CM-W "I don't think that is actually planned out, it is more like getting someone to maybe a B1 but not all the way to B3".

From the responses, it could be said that the literacy project was enabling the beneficiaries to move from A1 towards B1, which is classified as being independent (section 2.6).

How is the literacy project benefitting community members? *(Appendix F – question 4)*

This question sought to gain insight into how the literacy project was helping recipients become more independent. The participants were also asked if they believed the project was helping students to move from A1 to B3.

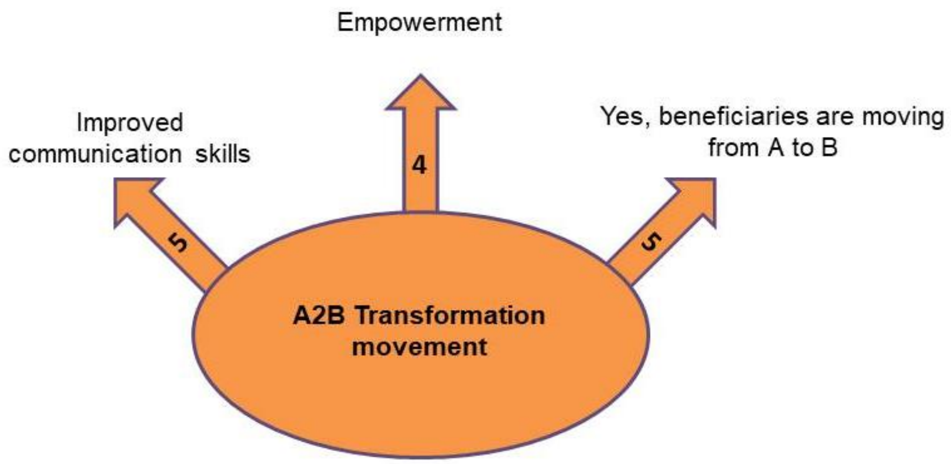

Figure 4.8 How the A2B transformation is achieved

Source*: Researcher's own compilation*

Figure 4.8 identifies the three most common answers provided by participants. Participants believed that the transformation was happening through empowerment and improved communication skills.

Participant M50LPR-B "they are able to articulate what they have learned (from the books)".

Participant F63LPR-B "they were able to at least stand up in a group and of course use the language and that was, I mean, the positive out of the whole thing".

This shows that although there was movement from A to B, no one could say for sure to what extent the recipients had moved from A to B nor how much of the movement was created by the literacy project. Although the participants were unable to pinpoint the extent to which movement had taken place, they nonetheless believed that the project was empowering individuals, which is the aim of Schultz's (2011) A2B transformation movement (section 2.6).

THEME 5: Sustainable development and sustainability

Sustainable development and sustainability emerged as a key theme as achieving sustainability in the literacy project could lead to social value creation (Bernardino *et al.,* 2018:62). This theme was identified through two questions.

What is your understanding of the concepts of 'sustainability' and 'sustainable development'? *(Appendix F – question 5)*

Six participants were asked this question to gauge their understanding of the terms 'sustainability' and 'sustainable development'. None of the participants could differentiate between the two terms although four of the participants described sustainability as being able to continue in the long term, as could be deduced from the following statement:

Participant M50LPR-B "That concept says how do you start the project and make sure that it lives forever, sustainability is having this thing, being able to take care of itself and then it becomes productive going forward".

These participants' understanding of sustainability was in accordance with the literature review, which states that sustainability in NPOs refers to performing value creation activities in the present without compromising the organisation's ability to create value in the future (Geurts, 2016:17; Hammer & Pivo, 2017:25) (section 2.3).

The other two participants stated that sustainability sought to improve on what one had and to keep on improving. A literacy project recipient described sustainability as follows:

Participant F63LPR-B "to sustain, it means that you must improve and then of course try to even keep that and even improving better on what you have, what you have achieved and whatever".

Although the two participants believed that sustainability meant to improve, this did not accord with the literature review.

Is sustainable development being achieved through the literacy project? *(Appendix F – question 5)*

Participants were asked this question to provide insights into the sustainability of the literacy project.

Participant F52LPR-W "If you learn new stuff, the value of learning stories and learning those things, they carry on, a cumulative effect".

This participants' responses referred to sustainability being reached insofar as once the beneficiaries of the literacy project had learned something new from the books, they would be able to hold on to that knowledge indefinitely. Other participants also responded in a similar vein, stating that once knowledge was gained, it would continue forever.

Participants did not, however, state whether the literacy project itself was sustainable. Nonetheless, since the project was highly dependent on donations and sponsorships, it can be said that if those donations were to come to an end, so would the literacy project.

THEME 6: Constraints and risks

This theme emerged as participants mentioned the different risks and constraints of the literacy project. The importance of this theme was that the risks and constraints need to be identified by RD9400 in order for them to be managed accordingly. This theme is broken down into two sections: risks and constraints. The constraints of the literacy project are discussed first, followed by the risks of the project.

<u>Constraints of the literacy project</u>

The constraints of the literacy project are those factors that affect the operations of the literacy project. Figure 4.9 demonstrates the most recurring constraints of the literacy project as identified by the participants.

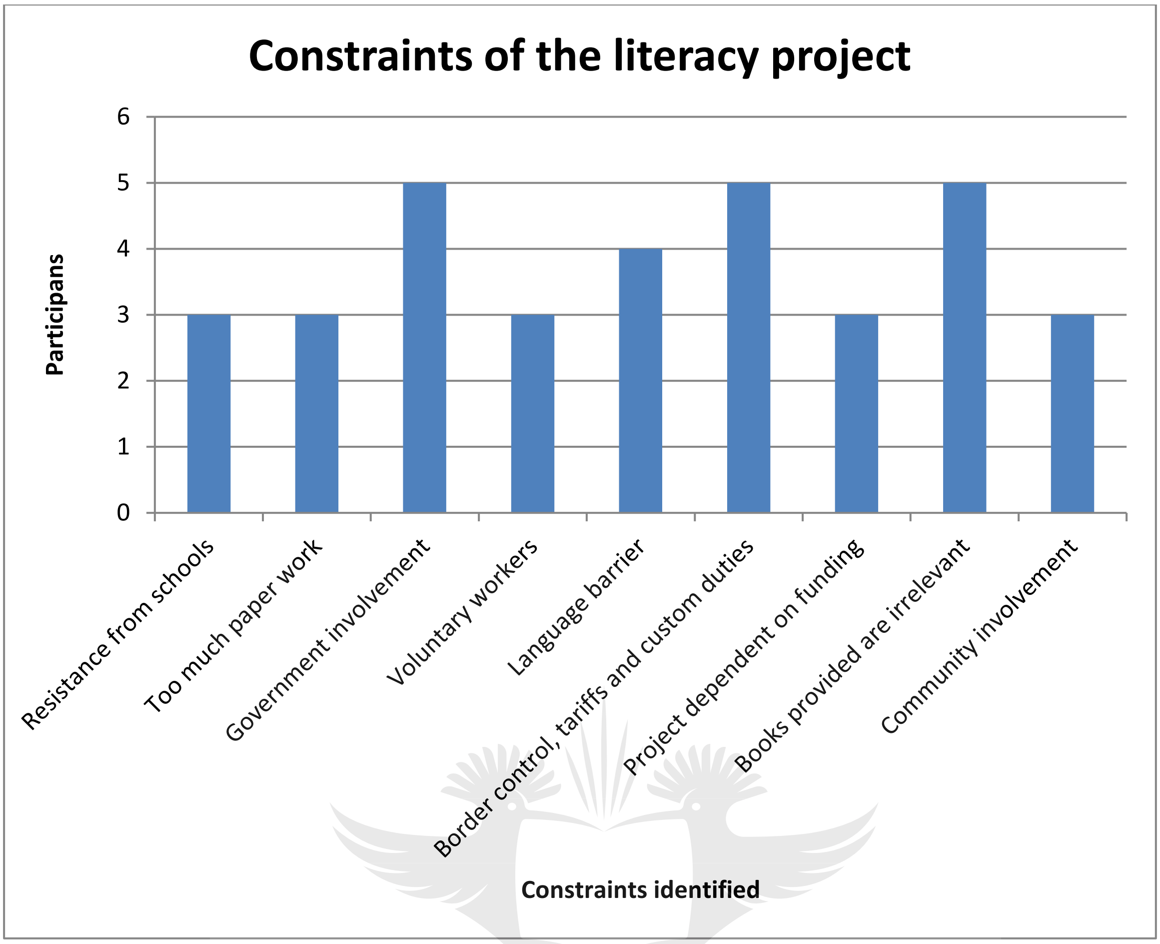

Figure 4.9 Constraints of the literacy project

***Source**: Researcher's own compilation*

The highest recurring constraints included government involvement, border control, tariffs and customs and language barriers. Government involvement referred to the lack of any government support. Five of the participants stated that the lack of government presence in the literacy project was a constraint as RD9400 does not get the support it needs.

Participant M62PM-W "The one is the buy-in from your provincial Education Department, I think governments buy-in has been non-existent".

Participant M65LCM-W "So definitely from a perspective of government they can change their way and become more supportive. If you look at it from a perspective of the Department of Education it's vital that they get involved".

The participants who believed government involvement was essential also stated that the only time government seemed to get involved was when there were municipal or presidential elections. Identifying government as a constraint relates back to Savage *et al.* (1990:150) and their classification of government as a non-supportive stakeholder with a high potential for threat and a low potential for cooperation (section 2.5).

Another constraint identified by participants was the language barrier, which refers to the fact that most of the project recipients did not have an English home language but rather, an African language. This could be seen as a constraint as the RD9400 members cannot communicate with these recipients. Furthermore, the language barrier also played a role insofar as the books received from Canada and the US may use different English expressions than those used in South Africa.

Participant M65LCM-W "Well firstly language can be wrong and language can be wrong in different sense".

Participant F63LPR-B "In our case, our learners, look English was not their first language, their first language, was in fact, they had an African home language".

Although the different types of English used in the books donated could be seen as a constraint, an even bigger constraint was the language barrier in terms of the recipients not understanding English. The following participant described the language barrier as follows:

Participant M62PM-W "for me, the biggest thing is I don't understand the language, I would love to have been able to interact in the language that is understood, whether it be Swazi or Ndebele, Sepedi, Tswana, whatever the languages are that they speak. If I could have understood that, I think I might have been able to make a more significant contribution now. Because you are getting translations and things are getting lost in the translation".

Border control, tariffs and custom duties were also identified as a major constraint for the literacy project as every container of books shipped to South Africa needed to go through border control and obtain tax clearance.

Participant M62PM-W "the Durban harbour itself has been a challenge, customs has been a, very often they make it just more difficult for you than need be".

Participant M65LCM-W "What happens is they would pull of a container at the Durban harbour, for example, and say they're going to look at it. So it has to be open so that they can come and look at. It sometimes has to be unpacked and repacked for them to look if there's not other stuff in there. The problem is say for a month, 4 weeks, they don't even come and look at it, it has to be standing there in a position where it's costing money. That can cost you R25000 per week easy"

These responses show that border control can play a prohibiting role in the project as a container could sit in the port for weeks, costing RD9400 thousands of rands, which could have been spent on collecting more resources for the literacy project.

A further constraint of the literacy project, according to five participants, was that the books provided were irrelevant. This constraint posed a significant problem for RD9400 because if the books could not be used by the recipients, they were worthless and become a waste product rather than a valuable item. The participants who identified this as a constraint said the following:

Participant M65LCM-W "You can also have a situation where for instance what you receive are not necessary books that actually fit in with what you require".

Participant F52LPR-W "Because I want to say, one big problem, for example, we have got all these Canadian textbooks and the French books and a lot of Canadian history, that we can't really use".

This constraint can, however, be argued against, as some of the participants believed that it did not matter where the books came from because they could still be read for entertainment or to gain extra knowledge.

Participant M62PM-W "I had one of the educators, senior inspector, telling me he doesn't want Canadian books about polar bears and ice, he wants English books, and that's when I said to him 'you need to read these books so that you can understand Canadian's English'. Just a book read is knowledge gained and I think that is the motto of our project".

Participant M29CM-W "The one, unfortunately, negative aspect is that unfortunately the Canadian curriculum standard with, in terms of, your

schoolbooks is not on the same level as with South Africa, but knowledge is never wasted".

These opinions can further be argued against in that some of the participants believed the books needed to be more relevant to South Africa so that the beneficiaries could relate to the books.

Participant M50LPR-B "In fact we need more current literacy literature books and the ones that can be more relevant to various areas. When I go to, most of their books, some I personally deem them obsolete and not relevant to the environment".

Participant F52LPR-W "And I don't think textbooks from Canada. There is so many textbooks coming here and nobody uses it".

It can be seen that there was a divergence of opinion between the project recipients and the project managers and community members in terms of the books sent from Canada. The recipients believed that the project would add more value if the books were more relevant whereas the project manager and community member felt that the books provided knowledge irrespective of where they come from.

<u>Risks of the literacy project</u>

Understanding the risks of the literacy project is an important factor as the success of NPO projects is dependent on their ability to manage risks. Figure 4.15 displays the risks of the literacy project as identified by the research participants.

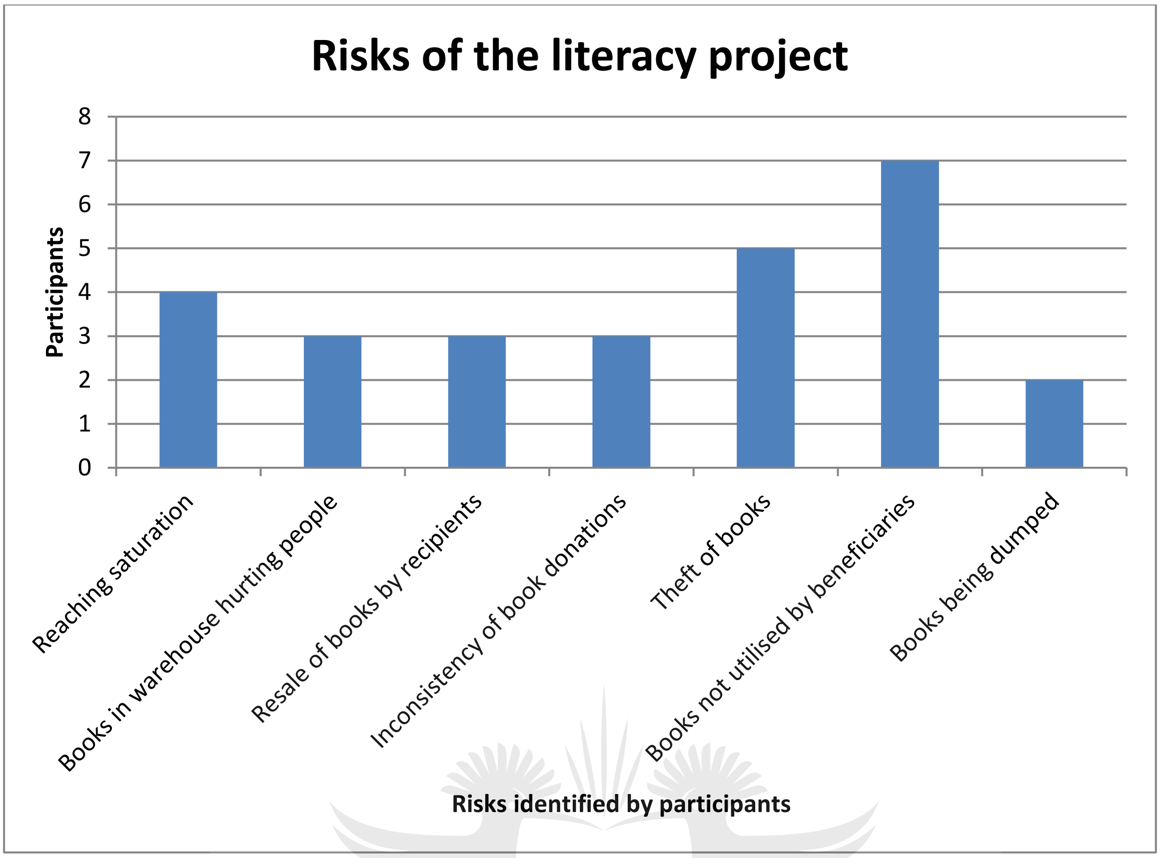

Figure 4.10 Risks of the literacy project

***Source**: Researcher's own compilation*

As shown in Figure 4.10, the most common risks are: (1) books donated not being utilised by the recipients, (2) the theft of the books and (3) reaching saturation (i.e. over supplying communities with books).

The risk of the books donated not being utilised by beneficiaries was mentioned by seven participants as there have been instances in the past where the recipients collected books and then simply left them in boxes or storerooms.

Participant M62PM-W "Unless you've got a teacher that is, or a media centre, or a librarian that is committed to doing it, too many of the schools the books are there, they locked in a store room".

Participant M65LCM-W "If I can call it risks, are that you would for instance have your books that could go to an area, and just stay in boxes and not actually be utilised".

This risk appears to be a hazard risk (Hopkin, 2018:2) as the books could have gone to a different school or community where they would have been used by the recipients to create genuine value and serve the purpose of the literacy project (section 2.7).

The theft of books poses as a threat as RD9400 is unable to distribute the books if they are stolen. Participants identified the key points of theft as being theft of books from the distribution centre, theft of books being transported and theft of books in the schools.

Participant M50LPR-B "Sometimes the risk may be one of theft or vandalism".

Participant M56LPR-B "You have to make sure they (the books) are conveyed to a certain point otherwise people steal them".

This risk could also be seen as a hazard risk as the theft of books from the literacy project could influence RD9400's ability to achieve its objectives (section 2.7).

This risk of reaching saturation was identified by four participants, who believed that maybe it was time for RD9400 to move to new communities which had not previously received the donated books.

Participant M62PM-W "Have we reached saturation. The question in the back of my mind is that perhaps we reached the point that we've now whet the appetite, exposed the corrupt education system, exposed the story that people are now taking cognisance, maybe it's time to move to other communities".

The risk of reaching saturation could be seen as an opportunity risk, as noted by Hopkin (2018:2), as it arises from wanting to improve the objectives of the literacy project by reaching more communities and schools, thereby creating more value.

Analysis and discussion of recommendations provided by participants

During the interviews, the recipients were asked what recommendations they would make to improve the literacy project. Figure 4.11 identifies the most frequently recurring opinions of the participants.

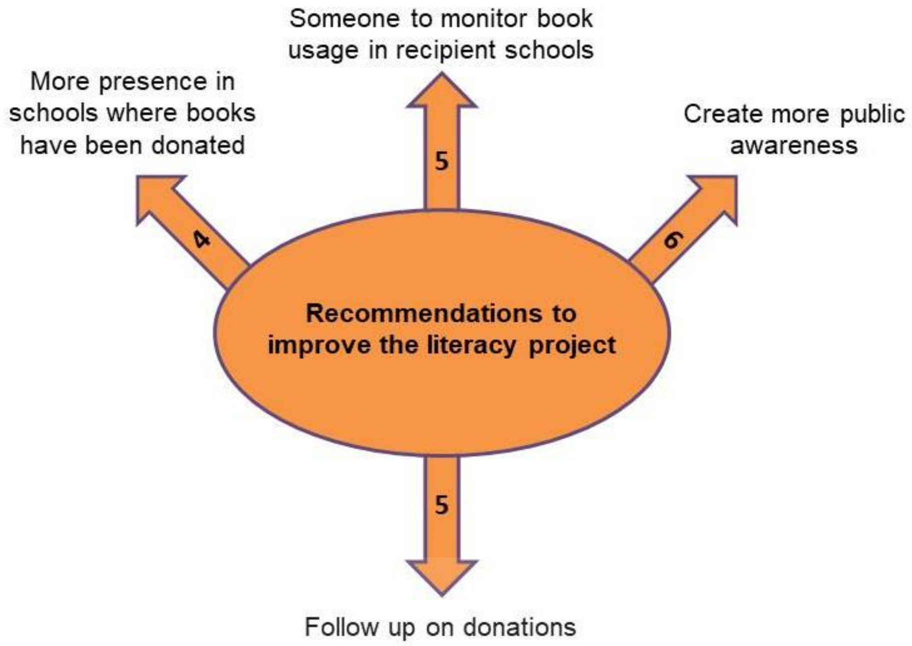

Figure 4.11 Recommendations to improve the literacy project

***Source**: Researcher's own compilation*

More presence in schools where books have been donated

Four participants recommended that RD9400 should have a greater presence in the schools to which books have been donated. These participants believed that by having more presence in the schools RD9400 could better engage with their stakeholders.

Participant F63LPR-B "Maybe schools must have representation or they must send a representative to their meetings and whatever so that they become more aware of the need in the communities and whatever".

Participant M50LPR-B "They need to be more visible, let them visit these institutions more, they must explain themselves".

The participants who made these recommendations were those who were literacy project recipients. This suggests that they may feel that RD9400 does not have enough presence in the schools other than for the initial donation.

Someone to monitor book usage in recipient schools

Some participants recommended that schools should have a teacher or librarian who is committed to the literacy project and who would monitor the usage of the books donated through the project.

Participant M62PM-W "Unless you've got a teacher that is, or a media centre, or a librarian that is committed to doing it, too many of the schools the books are there, they locked in a store room".

This recommendation was made by five participants who believed that it would assist RD9400 to measure book usage and at the same time encourage reading in the schools.

<u>Create more public awareness</u>

Six participants recommended that RD9400 should create more awareness of themselves and the literacy project through marketing in order to inform people of their services in case there were other communities which required assistance.

Participant M62PM-W "By getting into new communities to actually awaken people to the, that there are other options, and I think also draw in local community".

Participant M27CM-W "Awareness is number one, I speak from personal experience, the only reason I know about Rotary is because I am family friends with the DG (district governor), otherwise I wouldn't have known about Rotary".

These participants believed that by promoting the Rotary brand, RD9400 could reach more people and make them aware of the literacy project.

<u>Follow-up on donations</u>

Five participants recommended that RD9400 should follow up on their donations to better understand the impact of the project on beneficiaries.

Participant M29CM-W "Also then follow up, follow up on the community project to see what it looks like after".

Participant M27CM-W "Follow up afterwards".

These participants believed that in order for RD9400 to understand and see the results of the literacy project, they should follow up on book donations made at the community level. By doing so, RD9400 could ensure that the recipients of the book donations were utilising the books instead of storing them in boxes. Alternatively, if the recipients were simply storing the books, RD9400 could consider a method of encouraging the use of the books in the community.

4.4 Qualitative findings linked to quantitative questionnaire

As described in Chapter 3, this research used a sequential mixed methods approach, whereby the findings from the qualitative data analysis were used to develop the quantitative questionnaire. Therefore, this section describes how the quantitative questionnaire was developed using both the qualitative findings and the literature reviewed. Table 4.6 below identifies the key findings of each theme discussed above, how these findings were used to inform the questionnaire and how both the findings and the questionnaire link back to the reviewed literature.

Table 4.6 Link between qualitative findings, quantitative questionnaire and the literature review

THEMES AND KEY FINDINGS	QUESTIONNAIRE	LITERATURE REVIEW
Role of performance measurement • Achieving goals • Benchmarking • Accountability	**Role of performance measurement** • Inform strategic decisions • Take corrective action • Demonstrate accountability	**2.10.1)** Role of performance measurement
Stakeholder involvement • Children and book recipients • Donors and sponsors • Community • Accountability drives stakeholder engagement	**Stakeholder accountability demands** From the qualitative data, the researcher identified the three main stakeholder groups (donors, beneficiaries, community) of RD9400's literacy project. The questionnaire aimed to identify to which of these stakeholder groups RD9400 was most accountable.	**2.5)** The stakeholder theory
Value chain of the literacy project • Value created by the literacy project	The researcher excluded this theme from the questionnaire as participants did not know much about the subject.	**2.4)** NPOs and the value chain
The A2B transformation movement • Improved communication skills • Empowerment	**Project impact assessment** In order to assess how the literacy project led to these outcomes, the researcher used the questions based on project impact assessment.	**2.6)** A2B Transformation Movement
Sustainable development and sustainability • Project continues infinitum	**Role of strategic objectives** Although the questionnaire did not refer directly to sustainability, the literature reviewed identified strategic objectives as a crucial element of sustainability (Zhang & Swanson, 2013:109). Therefore respondents were asked to identify the role of strategic objectives in RD9400's literacy project.	**2.3)** NPOs and sustainable development **2.9)** Performance planning practices
Constraints and risks	**Performance planning practices** Although the interviews identified the main risks and constraints of the literacy project, the questionnaires attempted to identify how performance planning practices could be used to reduce these risks.	**2.7)** Risk management and challenges faced by NPOs **2.9)** Performance planning practices
The interview guides did not include performance indicators, however, the researcher felt it was important to identify key indicators of the literacy project.	**Performance indicators**	**2.10.3)** Performance indicators

***Source**: Researcher's own compilation*

As can be seen from Table 4.6, the findings from the theme 'role of performance measurement', informed the items used in the role of performance measurement from the questionnaire. The theme 'stakeholder involvement' identified some of the key stakeholders in RD9400's literacy project, and thus the questionnaire sought to identify which of these groups RD9400 was most accountable to. The findings from the interviews found that the research participants were unsure of what a value chain entailed. For this reason, the theme 'value chain of the literacy project' was excluded as there was a concern that respondents would leave the question blank, making the data invalid. The next theme, A2B Transformation Movement, was used to identify how RD9400 had impacted its projects recipients. The participants identified improved communication skills and empowerment as the outcomes of the literacy project. The questionnaire was then used to identify the means through which these outcomes were achieved. The theme 'sustainable development and sustainability' found that participants believed sustainability was about the long term. Thus, the questionnaire sought to identify the role of strategic objectives in developing sustainability. The final theme, 'constraints and risks', identified the risks and challenges RD9400 faced in conducting the literacy project. In order for the project to be a success, RD9400 needed to manage those risks. To do so, it should include risk management in its strategic plan. Therefore, the questionnaire focused on how performance planning practices could be used in managing these risks.

4.5 Chapter summary

This chapter analysed the data collected through the face-to-face interviews. The data was analysed through thematic content analysis and six themes were identified. These were discussed in relation to participants' responses. The data analysis linked each theme back to the literature review to identify similarities and differences between the existing secondary data and the newly gathered primary data. Lastly, this chapter provided an overview of how the qualitative findings were used to inform the questionnaire used in the second stage of the research, which will now be discussed in Chapter 5.

CHAPTER 5

QUANTITATIVE RESULTS AND DISCUSSION

5.1 Introduction

The purpose of the current chapter is to analyse the results of the quantitative stage of this research. According to Albers (2017:5), good quantitative data analysis involves more than just calculating statistical values such as *p* values and standard deviations; it also involves interpreting these statistical values with respect to the overall research context. This chapter analyses the demographic profiles of the respondents, provides descriptive statistics and frequencies of the data collected, examines the data through exploratory factor analysis, tests the reliability of the scales and identifies the gaps between the current and ideal situations of RD9400's literacy project. Figure 5.1 illustrates the steps followed in this chapter.

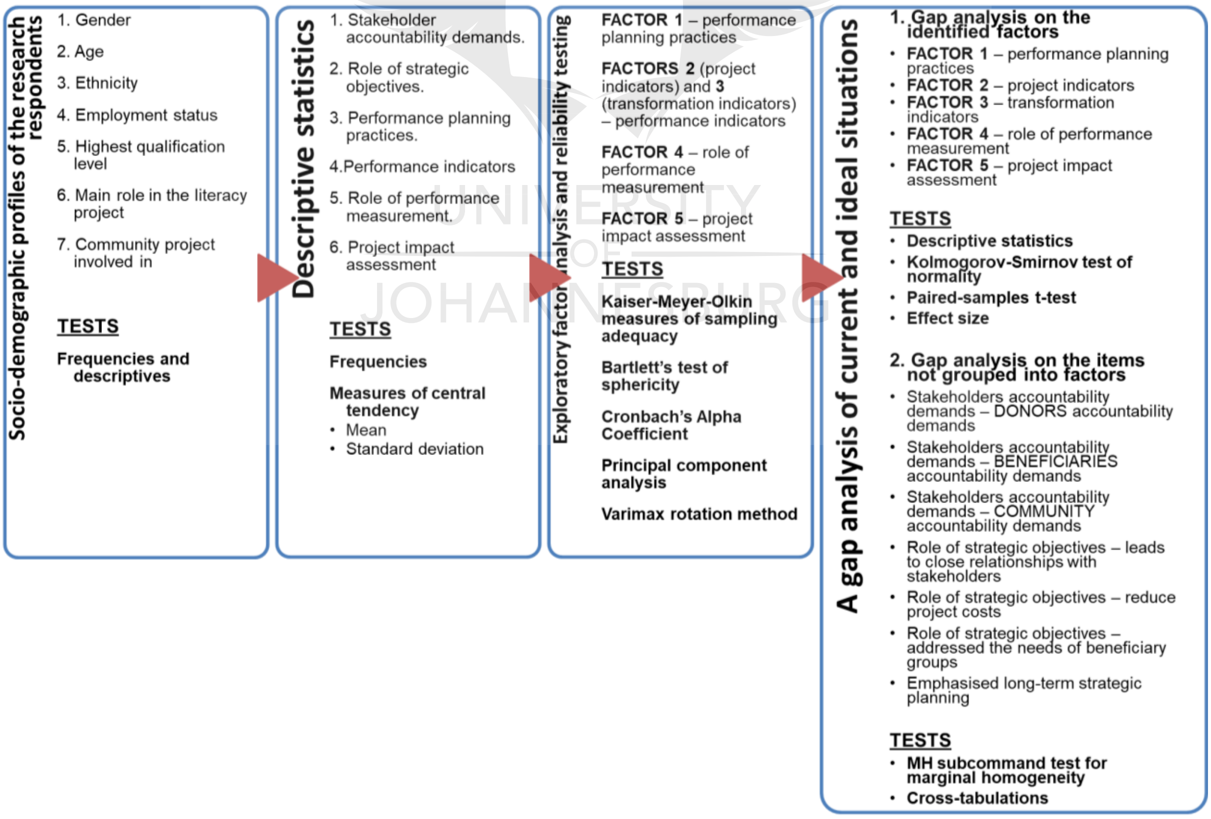

Figure 5.1 Procedure followed by the quantitative data analysis
***Source**: Researcher's own compilation*

5.2 Socio-demographic profiles of the respondents

The socio-demographic profiles of the respondents were collected through the questions in Section A of the quantitative questionnaire (Appendix I). The information gathered included the respondents' gender, age, ethnicity, employment status, highest qualification level, role in the literacy project and literacy project they were involved in. The frequencies and percentages of the data will now be discussed.

<u>Gender</u>

With regards to gender, 39.8% of the quantitative research respondents were male whereas 60.2% were female. Unlike with the qualitative research participants, the gender of these respondents was skewed towards female. This is due to the fact that of the 88 respondents, only 37.5% were Rotarians. Additionally, 29 responses came from individuals involved in The Link Literacy Project. Of these responses, 28 were females and only one was male.

Table 5.1 Gender of research respondents

	Frequency	Percent (%)
Male	35	39.8
Female	53	60.2
Total	**88**	**100.0**

***Source**: Researcher's own compilation*

<u>Age</u>

As can be seen from Table 5.2, 21.6% of the respondents were younger than 45 years, 37.5% were between the ages of 45 and 54, 25% were between the ages of 55 and 64, and 15.9% were older than 65. In total, more than 78% of the respondents were above the age of 45, indicating an older sample group.

Table 5.2 Age of the research respondents

	Frequency	Percent (%)
18 – 24	3	3.4
25 – 34	6	6.8
35 – 44	10	11.4
45 – 54	33	37.5
55 – 64	22	25.0
65 +	14	15.9
Total	**88**	**100.0**

***Source**: Researcher's own compilation*

<u>Ethnicity</u>

In terms of ethnicity, 50% of the respondents were White, 32.8% were Black, 10.2% were Coloured and 8% were Indian or Asian. These percentages were similar to those of the qualitative research participants where 60% were White, 30% were Black and 10% were Indian or Asian. The most significant difference between the quantitative respondents and qualitative participants was that there was 10% Coloured quantitative respondents, whereas there were 0% Coloured qualitative participants.

Table 5.3 Ethnicity of research respondents

	Frequency	Percent (%)
Black	28	31.8
White	44	50.0
Coloured	9	10.2
Indian or Asian	7	8.0
Total	**88**	**100.0**

***Source**: Researcher's own compilation*

<u>Employment status</u>

The employment status of the respondents shows that 38.6% were employed full-time, 10.2% were employed part-time and 30.7% were self-employed. Respondents who were currently not working i.e. respondents who were retired, students or unemployed, accounted for 20.4% of the sample.

Table 5.4 Employment status of respondents

	Frequency	Percent (%)
Employed full-time	34	38.6
Employed part-time	9	10.2
Self-employed	27	30.7
Student	1	1.1
Unemployed	4	4.5
Retired	13	14.8
Total	**88**	**100.0**

***Source**: Researcher's own compilation*

<u>Highest qualification level</u>

The highest qualification level reflected that of the 88 respondents, 85.9% had some level of tertiary education. Furthermore, 31.8% of these respondents had post-graduate degrees. This indicates that the quantitative research sample consisted of respondents with higher education levels.

Table 5.5 Highest qualification level of respondents

	Frequency	Percent (%)
Matric / Grade 12	8	9.1
Post-matric diploma or certificate	22	25.0
Baccalaureate degree	30	34.1
Post-graduate degree	28	31.8
Total	**88**	**100.0**

***Source**: Researcher's own compilation*

<u>Role in the literacy project</u>

Of the research respondents involved in the quantitative research stage, 37.5% were internal stakeholders i.e. Rotarians, and 62.5% were external stakeholders i.e. community members, community leaders and school principals.

Table 5.6 Respondents' role in the literacy project

	Frequency	Percent (%)
Rotary member	33	37.5
School principal	3	3.4
Community leader	12	13.6
Community member	35	39.8
Other	**5**	**5.7**
Education Department Official	1	1.1
US visitor	4	4.5
Total	**88**	**100.0**

Source: *Researcher's own compilation*

Community project involved in

Table 5.8 below identifies the different literacy projects that the respondents were involved in. Of the 88 respondents, 33% were involved in the Link Literacy Project, 45.5% in the Middelburg Literacy Project and 21.6% in other RD9400 literacy projects.

Table 5.7 Community project research respondents are involved in

	Frequency	Percent (%)
The Link Literacy Project	29	33.0
Middelburg Literacy Project	40	45.5
Other	**19**	**21.6**
Club to schools	1	1.1
HDCSA	12	13.6
Light Project	1	1.1
MUSE Literacy Project	1	1.1
Read to lead Government Campaign	1	1.1
Other Rotary literacy projects	3	3.4
Total	**88**	**100.0**

Source: *Researcher's own compilation*

The following section of the quantitative data analysis involves descriptive statistics. These statistics were obtained using IBM SPSS version 25.

5.3 Descriptive analysis

Argyrous (2006:14) explains that the process of analysing data begins with the calculation of descriptive statistics. Descriptive statistics, also known as exploratory data analysis, not only provide a description of the data collected but also summarise the data (Argyrous, 2006:14) which enables researchers to discern patterns and relationships amongst the raw data (Collis & Hussey, 2003). Fox and Bayat (2014:111) add that descriptive statistics are used by researchers to make data interpretation easier by reducing the sets of data (Argyrous, 2006:14). Descriptive statistics involve measures of central tendency, which include the mean, standard deviation, range of scores, skewness and kurtosis of the data (Pallant, 2016:53). For the purposes of this research, the descriptive statistics included the means and standard deviations of the data. The descriptive statistics concerning Section B of the questionnaire (Appendix I) will be discussed in the following order: (i) stakeholder accountability demands; (ii) role of strategic objectives; (iii) performance planning practices; (iv) performance indicators; (v) role of performance measurement; and (vi) project impact assessment.

5.3.1 Stakeholder accountability demands

According to Finnetty (2000:47), stakeholder accountability demands refers to how organisations such as RD9400 are held responsible for their actions and for the outcomes of their actions. These organisations are accountable to stakeholders such as beneficiaries, government, donors and the communities that indirectly benefit from their actions (Brown & Moore, 2001:570; Keating & Frumkin, 2003:4; Crawford *et al.*, 2018:185).

Three statements were used to identify respondents' opinions as to which stakeholder groups RD9400 currently focused on (CURRENT SITUATION) and which stakeholder groups RD9400 should focus on in an IDEAL situation. In terms of the CURRENT SITUATION (Table 5.8), respondents believed that RD9400 focused more on "beneficiary accountability demands" (3.9) than on "donors' accountability demands" (3.77) and "community accountability demands" (3.67) based on the mean value of 3.9. In terms of donors' accountability demands, 69.3% of the respondents believed that RD9400 focused on the accountability demands of its donors while only 2.3% believed that they did not. The remaining 28.4% opted for neutral, neither agreeing nor disagreeing with the statement.

Interestingly, none of the respondents believed that RD9400 did not focus on their beneficiary accountability demands while 70.4% believed that they did, with the remaining 29.5% neither agreeing nor disagreeing with the statement.

Community accountability demands had the highest percentage of neutral responses with 37.5%. It also had the highest percentage (8%) of disagreement with the statement that RD9400 focused on community accountability demands. As a result, community accountability demands also had the lowest percentage (54.6%) of responses in agreement with the statement.

Table 5.8 CURRENT: Stakeholder accountability demands

CURRENT SITUATION (n = 88, in %)	SD	D	N	A	SA	M	STD
Donors' accountability demands	0.0	2.3	28.4	59.1	10.2	**3.77**	**0.656**
Beneficiaries' accountability demands	0.0	0.0	29.5	51.1	19.3	**3.9**	**0.695**
Community accountability demands	0.0	8.0	37.5	34.1	20.5	**3.67**	**0.893**

Key: SD = strongly disagree; D = disagree; N = neutral; A = agree; SA = strongly agree; M = mean; STD = standard deviation

***Source**: Researcher's own compilation*

In terms of the IDEAL SITUATION (Table 5.9), the respondents believed that RD9400's donor accountability demands (mean = 4.05) were more important than their beneficiary (mean = 3.98) or community accountability demands (mean = 3.99).

Of the respondents, 72.8% believed that RD9400's donor accountability demands were important while only 1.1% of respondents believed they were unimportant. The remaining 26.1% of respondents believed that donor accountability demands were neither important nor unimportant. Of the respondents, 69.3% believed that beneficiary accountability demands were important while 5.7% believed they were unimportant. Lastly, 68.2% of respondents believed that community accountability demands were important while 2.3% believed they were unimportant.

Table 5.9 IDEAL: Stakeholder accountability demands

IDEAL SITUATION (N = 88, in %)	TU	U	N	I	VI	M	STD
Donors' accountability demands	0.0	1.1	26.1	39.8	33.0	**4.05**	**0.801**
Beneficiaries' accountability demands	0.0	5.7	25.0	35.2	34.1	**3.98**	**0.909**
Community accountability demands	0.0	2.3	29.5	35.2	33.0	**3.99**	**0.851**

Key: TU = totally unimportant; U = unimportant; N = neutral; I = important; VI = very important; M = mean; STD = standard deviation

***Source**: Researcher's own compilation*

Comparing the data between the CURRENT SITUATION (Table 5.8) and the IDEAL SITUATION (Table 5.9), respondents conveyed that RD9400 currently focused more on beneficiaries' accountability demands (mean = 3.9), whereas they believed RD9400 should focus more on donors' accountability demands (mean = 4.05). Additionally, opinions of which stakeholder group RD9400 currently focused on had standard deviations varying from 0.656 to 0.893, whereas the standard deviations of the ideal situation ranged from 0.801 to 0.909. This indicates that respondents were in more agreement with the current situation than the ideal situation. This could be a result of the current situation being the actual extent that RD9400 focused on its stakeholder accountability demands, whereas the ideal reflected what respondents would hope to see concerning RD9400's focus on accountability demands, thus it would differ from respondent to respondent.

Respondents who believed that it was important for RD9400 to focus on each of their stakeholder groups' accountability demands were in agreement with the literature. According to Brown and Moore (2001:572), NPOs are accountable to many different stakeholders, which makes it difficult for them to decide which stakeholder group should be given the highest priority. For this reason, RD9400 should create stakeholder synergy (section 2.5) to ensure mutually beneficial relationships with various stakeholders (Tantalo & Priem, 2016:315).

5.3.2 Role of strategic objectives

According to the literature (section 2.9), strategic objectives help management to achieve their predefined goals and realise their stated mission (de Bruyn, 2010:100). With regards to the role of strategic objectives, respondents were presented with four statements that evaluated the role that strategic objectives CURRENTLY played in

RD9400's literacy projects, and what role strategic objectives should play in its literacy projects (IDEAL).

In terms of the CURRENT SITUATION (Table 5.10), 80.7% of respondents agreed that the use of strategic objectives forged closer relationships with RD9400's stakeholders. Meanwhile, 17% of respondents neither agreed nor disagreed with the statement and 2.3% of respondents believed that strategic objectives did not lead RD9400 to closer relationships with stakeholders.

Of the respondents, 75% agreed that strategic objectives helped RD9400 to reduce costs while 22.7% were undecided and opted for neutral. The remaining 2.3% believed that strategic objectives did not help RD9400 to reduce literacy project costs.

A high percentage of 81.8% respondents believed that by using strategic objectives, RD9400 would be able to address the needs of its different beneficiary groups. The remaining 18.2% neither agreed nor disagreed.

Lastly, 78.4% of respondents agreed that the use of strategic objectives enabled RD9400 to better emphasise long-term strategic planning, 3.4% felt that strategic objectives did not help RD9400 in this regard while the remaining 27.3% remained neutral.

Table 5.10 CURRENT: Role of strategic objectives

CURRENT SITUATION (n = 88, in %)	SD	D	N	A	SA	M	STD
Led to close relationships with stakeholders	0.0	2.3	17.0	59.1	21.6	**4.00**	**0.695**
Reduced costs	0.0	2.3	22.7	45.5	29.5	**4.02**	**0.788**
Addressed the needs of beneficiary groups	0.0	0.0	18.2	63.6	18.2	**4.00**	**0.606**
Emphasised long-term strategic planning	1.1	2.3	27.3	51.1	18.2	**3.83**	**0.791**

Key: SD = strongly disagree; D = disagree; N = neutral; A = agree; SA = strongly agree; M = mean; STD = standard deviation

***Source**: Researcher's own compilation*

In terms of the IDEAL SITUATION (Table 5.11), 71.6% of respondents believed that strategic objectives were important for forging closer relationships with stakeholders, 25% felt it was neither important nor unimportant while 3.4% believed that strategic objectives were unimportant in this regard.

Of the respondents, 69.3% believed that strategic objectives played an important role in reducing costs of the literacy project, 27.3% felt strategic objectives were neither important nor unimportant in reducing costs while 3.4% believed that strategic objectives were unimportant in this regard.

A high proportion (89.7%) of respondents believed that strategic objectives played an important role in addressing the needs of RD9400's different beneficiary groups. The remaining 10.2% opted for neutral and no respondents believed that strategic objectives were unimportant for addressing the needs of communities.

Lastly, 84.1% of respondents believed that strategic objectives were important for long-term strategic planning, 13.6% thought that strategic objectives were neither important nor unimportant while 2.3% believed that strategic objectives were unimportant in this regard.

Table 5.11 IDEAL: Role of strategic objectives

IDEAL SITUATION (N = 88, in %)	TU	U	N	I	VI	M	STD
Led to close relationships with stakeholders	0.0	3.4	25	31.8	39.8	**4.08**	**0.887**
Reduced costs	0.0	3.4	27.3	40.9	28.4	**3.94**	**0.835**
Addressed the needs of beneficiary groups	0.0	0.0	10.2	51.1	38.6	**4.28**	**0.642**
Emphasised long-term strategic planning	0.0	2.3	13.6	47.7	36.4	**4.18**	**0.751**

Key: TU = totally unimportant; U = unimportant; N = neutral; I = important; VI = very important; M = mean; STD = standard deviation

***Source**: Researcher's own compilation*

Respondents who placed high importance on the role of strategic objectives in forging closer relationships with stakeholders were in agreement with the literature. According to Hu *et al.* (2014:85), one of the benefits of strategic planning, and by extension strategic objectives, is enhanced relationships with stakeholders. These enhanced relationships could be developed by involving key stakeholders in the development of the organisation's goals and objectives (Bennett *et al.*, 2008; Bryson, 2017:35).

5.3.3 Performance planning practices

Performance planning practices involve the development and implementation of an organisation's mission, vision, goals and objectives, core values and performance indicators (Bennett *et al*., 2008). Six statements were used to establish how respondents believed RD9400 currently used performance planning practices and how it should use performance planning practices in an ideal situation. The three statements with the highest mean values for both the current and ideal situations were: RD9400 emphasised its core values (current mean = 4.05, ideal mean = 4.23); key success factors were identified by RD9400 (current mean = 4.01, ideal mean = 4.23); and strategic planning involved stakeholders (current mean = 4.14, ideal mean = 4.24). By comparing these current and ideal means, it could be said that respondents believed RD9400 should place more importance on its performance planning practices than it currently does.

Concerning the CURRENT SITUATION (Table 5.12), 79.5% of respondents agreed that RD9400 emphasised its core values through its literacy projects whereas 4.5% of disagreed with this statement. Of respondents, 79.6% agreed that RD9400 identified the key success factors of its literacy project, 0% disagreed and 20.5% neither disagreed nor agreed. Lastly, 77.2% of respondents agreed that RD9400 involved its stakeholders in the strategic planning of its literacy projects, 2.3% disagreed with this statement while 20.5% remained neutral.

Table 5.12 CURRENT: Performance planning practices

CURRENT SITUATION (n = 88, in %)	SD	D	N	A	SA	M	STD
RD9400 communicated its vision and mission	2.3	1.1	35.2	48.9	12.5	**3.68**	**0.796**
RD9400 emphasised its core values	0.0	4.5	15.9	50.0	29.5	**4.05**	**0.801**
RD9400's goals and objectives were well communicated	1.1	5.7	28.4	44.3	20.5	**3.77**	**0.881**
Key success factors were identified by RD9400	0.0	0.0	20.5	58.0	21.6	**4.01**	**0.652**
Actions of RD9400 reflected mission and vision	0.0	2.3	25.0	56.8	15.9	**3.86**	**0.698**
Strategic planning involved stakeholders	0.0	2.3	20.5	38.6	38.6	**4.14**	**0.819**

Key: SD = strongly disagree; D = disagree; N = neutral; A = agree; SA = strongly agree; M = mean; STD = standard deviation

***Source**: Researcher's own compilation*

With respect to the IDEAL SITUATION (Table 5.13), 87.5% of respondents felt that it was important for RD9400 to emphasise its core values when conducting a literacy project and none of the respondents felt that this was unimportant. Next, 87.5% of respondents believed that it was important for RD9400 to identify the key success factors of its literacy project and none thought it was unimportant. Lastly, 85.3% of respondents believed that it was important for RD9400 to include stakeholders in the literacy project strategic planning while 1.1% believed that it was not important to involve stakeholders in strategic planning.

Table 5.13 IDEAL: Performance planning practices

IDEAL SITUATION (N = 88, in %)	TU	U	N	I	VI	M	STD
RD9400 communicated its vision and mission	0.0	0.0	20.5	46.6	33.0	**4.13**	**0.724**
RD9400 emphasised its core values	0.0	0.0	12.5	52.3	35.2	**4.23**	**0.656**
RD9400's goals and objectives were well communicated	0.0	0.0	25.0	43.2	31.8	**4.07**	**0.755**
Key success factors were identified by RD9400	0.0	0.0	12.5	52.3	35.2	**4.23**	**0.656**
Actions of RD9400 reflected its mission and vision	0.0	1.1	19.3	45.5	34.1	**4.13**	**0.755**
Strategic planning involved stakeholders	0.0	1.1	13.6	45.5	39.8	**4.24**	**0.727**

Key: TU = totally unimportant; U = unimportant; N = neutral; I = important; VI = very important; M = mean; STD = standard deviation

Source*: Researcher's own compilation*

Comparing the mean values of the CURRENT and IDEAL situations, it is obvious that respondents placed higher importance on the role of performance planning practices than was currently occurring at RD9400. This signifies that respondents understood the importance of using performance planning practices in NPO projects. According to Bennett *et al.* (2008), some of the key elements of performance planning practices were clearly communicating the organisation's vision and mission to all stakeholders; identifying core values that the organisation believed in; and involving stakeholders in decision-making (Schermerhorn & Chappell, 2000:90; Blackmon, 2008:16; Bryson, 2017:35). Respondents mostly agreed that RD9400 incorporated these key elements into its performance planning practices, however, they placed higher importance on these key elements, signifying that RD9400 could improve its planning practices.

5.3.4 Performance indicators

Performance indicators are needed by organisations to measure the outcomes of their goals and objectives (Bennett *et al.*, 2008). In order to identify the main performance indicators used by RD9400, and the ideal performance indicators that RD9400 should use, ten different types of performance indicators were presented.

With regards to the CURRENT SITUATION (Table 5.14), the five performance indicators that had the highest mean values were: process or activity indicators (mean = 3.95), effectiveness indicators (mean = 3.91), productivity indicators (mean = 4.02), beneficiary satisfaction (mean = 3.99) and sustainability outcomes (mean = 4.06).

Of the respondents, 76.1% agreed that process or activity indicators should be used by RD9400 to measure performance, 3.4% disagreed while 20.5% neither agreed nor disagreed.

In terms of effectiveness indicators, 70.4% of respondents agreed that these should be used by RD9400 to measure the performance of its literacy projects, 27.3% remained neutral while 2.3% believed that effectiveness indicators should not be used by RD9400.

Of the respondents, 83% agreed that the relationship between inputs and outputs i.e. productivity indicators, should be used by RD9400 to measure performance, 14.8% neither agreed nor disagreed while 2.3% disagreed.

Interestingly, 76.1% of respondents agreed that RD9400 should measure performance by assessing how project outputs corresponded to beneficiary needs. None of the respondents disagreed with the importance of these beneficiary satisfaction indicators. The remainder (23.9%) neither agreed nor disagreed.

As with the beneficiary satisfaction indicators, none of the respondents disagreed with the use of sustainability outcomes to measure performance, 79.5% agreed that RD9400 should use sustainability outcomes to measure performance while 23.9% neither agreed nor disagreed.

Table 5.14 CURRENT: Performance indicators

CURRENT SITUATION (n = 88, in %)	SD	D	N	A	SA	M	STD
Input indicators (measure of quantities of resources provided to the project)	0.0	1.1	26.1	54.5	18.2	**3.90**	**0.695**
Process or activity indicators (measures of what happens during project implementation)	0.0	3.4	20.5	53.4	22.7	**3.95**	**0.757**
Output indicators (measures of immediate project results)	1.1	4.5	25.0	44.3	25.0	**3.88**	**0.882**
Outcome / impact indicators (effect of project outputs on beneficiaries and society)	0.0	6.8	28.4	43.2	21.6	**3.80**	**0.860**
Revenue indictors (income from donors or internally generated)	2.3	1.1	33.0	40.9	22.7	**3.81**	**0.882**
Effectiveness indicators (measures of achievement of results as planned)	0.0	2.3	27.3	47.7	22.7	**3.91**	**0.768**
Efficiency indicators (the relationship between project costs and outputs)	2.3	1.1	35.2	36.4	25.0	**3.81**	**0.908**
Productivity indicators (relationship between inputs and outputs)	0.0	2.3	14.8	61.4	21.6	**4.02**	**0.678**
Beneficiary satisfaction (project outputs correspond to beneficiary needs)	0.0	0.0	23.9	53.4	22.7	**3.99**	**0.686**
Sustainability outcomes (results to extend beyond the project's formal life)	0.0	0.0	20.5	53.4	26.1	**4.06**	**0.684**

Key: SD = strongly disagree; D = disagree; N = neutral; A = agree; SA = strongly agree; M = mean; STD = standard deviation

Source: *Researcher's own compilation*

With regards to the IDEAL SITUATION (Table 5.15), respondents were asked to identify the importance of each performance indicator. Similarly to the current situation, the performance indicators with the highest mean values were: productivity indicators (mean = 4.22), beneficiary satisfaction (mean = 4.26) and sustainability outcomes (mean = 4.3). In contrast to the current situation, input indicators (mean = 4.24) and efficiency indicators (mean = 4.24) had higher mean values than process indicators (mean = 4.20) and effectiveness indicators (mean = 4.22). Although the mean values of the effectiveness indicators and the productivity indicators were the same, the standard deviation of productivity indicators (0.669) was lower than that of the effectiveness indicators (0.765).

A high percentage of respondents (86.4%) believed that input indicators were important in measuring the performance of RD9400's literacy projects, 13.6% of respondents were neutral in this regard and none of the respondents believed that input indicators were unimportant.

Next, 86.4% of respondents believed that beneficiary satisfaction was an important indicator of RD9400's performance in its literacy projects, 13.6% believed that beneficiary satisfaction was neither important nor unimportant and none believed it was unimportant.

In terms of sustainability outcomes, 88.6% of respondents identified these as important indicators of RD9400's performance. The remaining 11.4% of respondents felt that this indicator was neither important nor unimportant.

Efficiency indicators were seen as important for the measurement of RD9400's performance by 89.8% of respondents while 10.2% believed that these indicators were neither unimportant nor important.

Concerning productivity indicators, 86.3% of respondents felt that these were important, 13.6% felt they were neither important nor unimportant and none believed they were unimportant.

Table 5.15 IDEAL: Performance indicators

IDEAL SITUATION (N = 88, in %)	TU	U	N	I	VI	M	STD
Input indicators (measure of quantities of resources provided to the project)	0.0	0.0	13.6	48.9	37.5	**4.24**	**0.678**
Process or activity indicators (measures of what happens during project implementation)	0.0	0.0	13.6	52.3	34.1	**4.20**	**0.664**
Output indicators (measures of immediate project results)	0.0	1.1	19.3	42.0	37.5	**4.16**	**0.771**
Outcome / impact indicators (effects of project outputs on beneficiaries and society)	0.0	3.4	26.1	37.5	33	**4.00**	**0.858**
Revenue indictors (income from donors or internally generated)	0.0	0.0	27.3	40.9	31.8	**4.05**	**0.772**
Effectiveness indicators (measures of achievement of results as planned)	0.0	0.0	20.5	37.5	42.0	**4.22**	**0.765**
Efficiency indicators (the relationship between project costs and outputs)	0.0	0.0	10.2	53.4	36.4	**4.26**	**0.634**
Productivity indicators (relationship between inputs and outputs)	0.0	0.0	13.6	51.1	35.2	**4.22**	**0.669**
Beneficiary satisfaction (project outputs correspond to beneficiary needs)	0.0	0.0	13.6	46.6	39.8	**4.26**	**0.686**
Sustainability outcomes (results to extend beyond the project's formal life)	0.0	0.0	11.4	47.7	40.9	**4.30**	**0.664**

Key: TU = totally unimportant; U = unimportant; N = neutral; I = important; VI = very important; M = mean; STD = standard deviation

***Source**: Researcher's own compilation*

Unlike Wadongo's study in Kenya (2014:169) which found that respondents rarely used sustainability outcomes indicators in their NPOs, this research found that RD9400 placed considerable emphasis on these indicators, as respondents believed that the use of sustainability outcomes was crucial in measuring performance of the literacy project. Another significant difference between the current findings and Wadongo's study (2014:169) was that Wadongo found that respondents utilised outcome/impact indicators more than any other indicator, whereas this study found that the project outcome/impact indicators had the lowest mean values for both the current (mean = 3.8) and ideal (mean = 4) situations. These differences could be attributed to Wadongo (2014) using a larger sample size (247), the location of the study (Kenya) and the variety of NPOs (Wadongo's study was not literacy-specific). Furthermore, whereas this research focused on one NPO (RD9400) and different types of stakeholders within RD9400, Wadongo's study focused on leaders of NPOs in Kenya.

5.3.5 Role of performance measurement

In order to identify respondents' beliefs about how measuring performance could benefit RD9400's literacy projects, four statements were given.

With regards to the CURRENT SITUATION (Table 5.16), 84.1% of the respondents agreed that the use of performance measurements could better inform RD9400's strategic decisions, 2.3% believed that performance measures would not be useful in this regard while 13.6% remained undecided.

In terms of performance measurements helping RD9400 to take corrective action against deviations from desired performance, 78.4% agreed with this statement, 21.6% neither agreed nor disagreed and none of the respondents disagreed.

A high percentage of 80.7% agreed that the use of performance measurements could help RD9400 to demonstrate accountability to stakeholders, 2.3% disagreed and 17% neither agreed nor disagreed.

Only 59.1% of respondents agreed that the use of performance measurements could help RD9400 to comply with legal reporting standards, 36.4% neither agreed nor disagreed while the remaining 4.5% disagreed in this regard.

Table 5.16 CURRENT: Role of performance measurement

CURRENT SITUATION (n = 88, in %)	SD	D	N	A	SA	M	STD
Inform strategic decisions	0.0	2.3	13.6	60.2	23.9	**4.06**	**0.684**
Take corrective action against deviations from desired performance	0.0	0.0	21.6	50.0	28.4	**4.07**	**0.708**
Demonstrate accountability to stakeholders	0.0	2.3	17.0	48.9	31.8	**4.10**	**0.759**
Comply with legal reporting standards	0.0	4.5	36.4	34.1	25.0	**3.80**	**0.873**

Key: SD = strongly disagree; D = disagree; N = neutral; A = agree; SA = strongly agree; M = mean; STD = standard deviation

***Source**: Researcher's own compilation*

Regarding the IDEAL SITUATION (Table 5.17), 84.1% of respondents believed that it was important for RD9400 to use performance measurements to inform strategic decisions, 1.1% believed that this was unimportant while 14.8% felt it was neither important nor unimportant.

A very high proportion of respondents (93.1%) identified performance measurements as important for RD9400 to take corrective action against deviations from desired performance, 6.8% remained neutral and none of the respondents felt it was unimportant.

Less than half of the respondents (42%) felt that performance measurements played a very important role in RD9400's ability to demonstrate accountability to stakeholders, 36.4% felt it was important while 3.4% felt it was unimportant. The remaining 18.2% believed it was neither important nor unimportant.

Lastly, 86.4% of respondents believed that performance measurements played an important role in RD9400's ability to comply with legal reporting standards while 13.6% felt it was neither important nor unimportant.

Table 5.17 IDEAL: Role of performance measurement

IDEAL SITUATION (N = 88, in %)	TU	U	N	I	VI	M	STD
Inform strategic decisions	0.0	1.1	14.8	47.7	36.4	**4.19**	**0.725**
Take corrective action against deviations from desired performance	0.0	0.0	6.8	54.5	38.6	**4.32**	**0.598**
Demonstrate accountability to stakeholders	0.0	3.4	18.2	36.4	42.0	**4.17**	**0.847**
Comply with legal reporting standards	0.0	0.0	13.6	50.0	36.4	**4.23**	**0.673**

Key: TU = totally unimportant; U = unimportant; N = neutral; I = important; VI = very important; M = mean; STD=standard4.35 deviation

***Source**: Researcher's own compilation*

Both the current and ideal situation illustrate how respondents believed performance measurement played a crucial role in informing RD9400's strategic decisions . This is in agreement with the literature (section 2.10.1) where authors contend that performance measures are critical for informing strategic decisions with regards to goals and objectives (Lavy *et al.*, 2010:411). Furthermore, performance measurement assists NPOs to identify gaps in performance, thereby allowing corrective action to be taken (Schermerhorn & Chappell, 2000:248; Nieuwenhuizen & Oosthuizen, 2014:268). Respondents further believed that performance measurement was important for demonstrating accountability and complying with legal reporting standards. The National State Auditors Association (NSAA) (2004:1) stresses the importance of using performance measures to demonstrate accountability of resource utilisation. Moreover, participants involved in the interviews identified performance measurement as playing an important role in achieving an organisation's goals and objectives, demonstrating accountability, and benchmarking performance against a set standard. This signifies that the questionnaire respondents were in agreement with the interview participants.

5.3.6 Project impact assessment

In order to identify how RD9400's literacy project impacted target communities, four statements were given.

Regarding the CURRENT SITUATION (Table 5.18), 59.1% of respondents agreed that RD9400's literacy project addressed the immediate needs of communities while 35.2% neither agreed nor disagreed. The remainder of respondents (5.7%) believed that RD9400's literacy projects did not address the immediate issues of their community.

RD9400's literacy project was seen to have a positive impact on community development by 69.3% of respondents, 1.1% of respondents disagreed with this statement while 29.5% remained undecided.

In terms of conducting a needs assessment to identify issues in RD9400's communities, 56.8% of respondents agreed, 38.6% of respondents neither agreed nor disagreed while 4.5% of respondents disagreed.

Lastly, 62.5% of respondents agreed that RD9400's literacy projects placed recipient needs first, 5.7% disagreed while 31.8% remained neutral.

Table 5.18 CURRENT: Project impact assessment

CURRENT SITUATION (n = 88, in %)	SD	D	N	A	SA	M	STD
Addressing the immediate issues in the community	0.0	5.7	35.2	36.4	22.7	**3.76**	**0.871**
Having a positive impact on community development	0.0	1.1	29.5	38.6	30.7	**3.99**	**0.809**
Conducting a needs assessment to identify problems in the community	0.0	4.5	38.6	37.5	19.3	**3.72**	**0.830**
Placing recipients' needs first	3.4	2.3	31.8	35.2	27.3	**3.81**	**0.981**

Key: SD = strongly disagree; D = disagree; N = neutral; A = agree; SA = strongly agree; M = mean; STD = standard deviation

***Source**: Researcher's own compilation*

Concerning the IDEAL situation (Table 5.19), 90.9% of respondents felt that it was important for RD9400 to address the immediate needs of its communities while the remaining 9.1% felt it was neither important nor unimportant.

A very high percentage of 94.4% considered RD9400's ability to have a positive impact on community development to be important, whereas only 5.7% of respondents felt it was neither important nor unimportant.

Next, 88.6% of respondents believed that it was important for RD9400 to conduct a needs assessment to identify problems in its community, 3.4% believed this was unimportant while 8% though this was neither important nor unimportant.

Lastly, 90.9% of respondents believed that it was important for RD9400 to place recipient needs first, 2.3% thought this was unimportant while 6.8% believed it was neither important nor unimportant.

Table 5.19 IDEAL: Project impact assessment

IDEAL SITUATION (N = 88, in %)	TU	U	N	I	VI	M	STD
Addressing the immediate issues in the community	0.0	0.0	9.1	46.6	44.3	**4.35**	**0.644**
Having a positive impact on community development	0.0	0.0	5.7	45.5	48.9	**4.43**	**0.603**
Conducting a needs assessment to identify problems in the community	0.0	3.4	8.0	37.5	51.1	**4.36**	**0.776**
Placing recipients' needs first	0.0	2.3	6.8	44.3	46.6	4.35	0.712

Key: TU = totally unimportant; U = unimportant; N = neutral; I = important; VI = very important; M = mean; STD=standard4.35 deviation

***Source**: Researcher's own compilation*

Comparing the current and ideal situations, respondents agreed that RD9400's literacy project impacted recipient communities by: addressing the communities' immediate needs (improved education) through a needs assessment; having a positive impact on community development; and placing recipient needs first in the literacy project. They also believed that it was important for the project to impact the community in this way. An interesting finding was that the mean values for the project having a positive impact on community development were the highest for both the current (mean = 3.99) and ideal (mean = 4.43) situations. This signifies the importance of NPOs using their projects to aid not only the development of their direct communities but national development as well.

According to Okorley and Nkrumah (2012:331), an NPO's ability to prove a project's value in supporting national development is a crucial element of demonstrating accountability. National development is the overall advancement of a nation's social, economic and environmental foundations. Thus, given RD9400's literacy project, it is imperative that the outcomes of the project support the development of literacy in South Africa. RD9400's literacy project should ultimately lead to an increase in national development through the triple bottom line (see section 1.2). It should also contribute to national development as improved literacy leads to greater economic growth by enhancing the education and skills of a country's workforce. This creates economic prosperity at both the individual level and the macro-economic level (for example, an increase in GDP) (Akhtar, 2006; Desai, 2012:112; Rahman, 2013:170; Rehman *et al.*, 2015:141). RD9400 could improve the impact of its literacy project by ensuring the sustainability of the project through a long-term strategic plan that aims to get all clubs in RD9400 to implement their own literacy projects.

The preceding section provided an in-depth discussion of the descriptive statistics and frequencies of the data gathered from the quantitative questionnaire. The descriptive statics involved a description of the current and ideal situations, providing means and standard deviations for all items analysed, and a discussion of the findings gathered from each current and ideal situation. The next section uses these descriptive statistics to identify relevant factors and test the reliability of the scales of these factors.

5.4 Exploratory factor analysis and reliability testing

Exploratory factor analysis is used to summarise a large set of variables into a smaller set of factors or components (Pallant, 2016:182). The purpose of using exploratory factor analysis in this research was to evaluate the scales used in the quantitative questionnaire. According to Pallant (2016:182), exploratory factor analysis is conducted in the early stages of data analysis to identify relationships between different sets of variables. In order to conduct exploratory factor analysis, the factorability of the correlation matrix should be examined. This can be done through the Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy and Bartlett's test of sphericity. The KMO value, according to Pallant (2016:184), should have 0.6 as the minimum value for a good analysis whereas Bartlett's test of sphericity should have a statistical significance of $p < 0.05$ to consider factor analysis.

In order to test for construct validity, 23 items of the 31 Likert scale statements were factor-analysed. From the quantitative questionnaire (Appendix I), sections B1 (stakeholder accountability demands) and B2 (role of strategic objectives) were not factor-analysed as commonality was not expected due to the items measuring different constructs and having too few common factors. Additionally, the first item (RD9400 communicates its vision and mission) from section B3 (performance planning practices) was omitted as the commonality exceeded 1. The remaining items were successfully categorised into five factors, namely:

1. *Performance planning practices;*
2. *Project indicators;*
3. *Transformation indicators;*
4. *Role of performance measurement; and*
5. *Project impact assessment.*

Table 5.20 below displays the KMO values, Bartlett's test of sphericity and Cronbach's alpha coefficient values for these five factors. Cronbach's alpha coefficient was used in order to test the reliability of the scales used in this study. Cronbach's alpha coefficient refers to the internal consistency of a scale and was used to determine whether the items in the scales were measuring the same underlying construct (Pallant, 2016:101). The recommended value for Cronbach's alpha coefficient of a scale is > 0.7.

Table 5.20 Factor analysis and reliability results

FACTOR	E values	KMO	*p value*	CA(C)	CA(I)
Performance planning practices	2.341	0.713	0.000	0.707	0.918
Project indicators	4.475	0.830	0.000	0.859	0.829
Transformation indicators	1.514	0.830	0.000	0.742	0.864
Role of performance measurement	2.587	0.782	0.000	0.800	0.867
Project impact assessment	2.596	0.657	0.000	0.813	0.864

Key: E values = Eigenvalues; KMO = Kaiser-Meyer-Olkin measure of sampling adequacy; p value = Bartlett's test of sphericity; CA(C) = Cronbach's alpha (current situation); CA(I) = Cronbach's alpha (ideal situation).

***Source**: Researcher's own compilation*

As can be seen from Table 5.20, the five factors had KMO values ranging from 0.657 to 0.830 which, according to Kaiser (1974:35), is mediocre to meritorious. This meets the minimum requirement of 0.6 as stated by Pallant (2016:184). With regards to Bartlett's test of sphericity, the five factors all had *p* values of less than 0.05, meaning that the data fell within the range of what would happen 95% of the time. This indicates that factor analysis could be conducted on these factors. Cronbach's alpha coefficient values for the five factors indicate that the scales used by the questionnaire had internal consistency as they all had values above 0.7. Internal consistency, as an element of reliability, identifies the extent to which every item analysed correlates with every other item analysed (Collis & Hussey, 2003:187). In other words, internal consistency is concerned with the extent to which values obtained from the data collected are consistent with one another and the extent to which the data is error free (Morgan, Leech, Gloeckner & Barrett, 2013:112).

FACTOR 1 – Performance planning practices

The first factor identified through exploratory factor analysis – performance planning practices – consisted of six items: RD9400 emphasised its core values; RD9400's goals and objectives were well communicated; key success factors were identified by RD9400; actions of RD9400 reflected its mission and vision; and strategic planning involved stakeholders. In order to extract the factor from these items, Principle Component Analysis was used. Using Kaiser's criterion, the total initial eigenvalues of a factor must exceed 1 to be considered a factor (Pallant, 2016:194). Table 5.21

displays the initial eigenvalues and extraction sums of squared loadings. The factor identified by using Principle Component Analysis had an eigenvalue of 2.341, which exceeds Kaiser's criterion of one.

The KMO value attained by this factor was 0.713 (see Table 5.21), which is middling according to Kaiser (1974:35), but exceeds the recommended value of 0.6 by Pallant (2016:184). The factor also tested statistically significant through Bartlett's test of sphericity as the *p* value was below 0.05, as recommended by Pallant (2016:184). Cronbach's alpha coefficient, tested on both current and ideal scales, was above the recommended 0.7 for the current situation scale, and extremely high for the ideal situation scale, indicating that the scales used had internal consistency.

Table 5.21 Total variance explained – Performance planning practices

Factor	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	**2.341**	46.819	**46.819**	1.702	34.030	34.030
2	0.965	19.302	66.120			
3	0.681	13.622	79.742			
4	0.581	11.616	91.359			
5	0.432	8.641	100.000			

Source*: Researcher's own compilation*

FACTORS 2 (Project indicators) AND 3 (Transformation indicators) – Performance indicators

The second and third factors identified through exploratory factor analysis came from section B4 (performance indicators) of the questionnaire (see Appendix I). By conducting Principle Component Analysis, two factors were identified from the ten items included in the scale (Table 5.22). These items were: input indicators, process or activity indicators, output indicators, outcome / impact indicators, revenue indicators, effectiveness indicators, efficiency indicators, productivity indicators, beneficiary satisfaction indicators and sustainability outcomes indicators.

The eigenvalues obtained from these two factors were 4.475 and 1.514 (Table 5.22). These two factors accounted for 59.893% of the total variance. In order to interpret the two factors identified, an orthogonal rotation approach was used with the Varimax method of rotation. The Varimax rotation method was used to reduce the amount of variables that had high loadings on the two factors identified.

The KMO values for these two factors (Table 5.22) exceeded the recommended value of 0.6 with a value of 0.830, which is considered meritorious by Kaiser (1974:35). Further, these factors were statistically significant with a *p* value of 0.000.

Table 5.22 Total variance explained – Project indicators and transformation indicators

Factor	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	**4.475**	44.749	44.749	4.029	40.286	40.286	3.030	30.299	30.299
2	**1.514**	15.144	**59.893**	1.032	10.318	50.605	2.031	20.306	**50.605**
3	0.971	9.706	69.600						
4	0.686	6.862	76.462						
5	0.547	5.469	81.931						
6	0.472	4.718	86.649						
7	0.434	4.338	90.987						
8	0.369	3.688	94.675						
9	0.340	3.402	98.077						
10	0.192	1.923	100.000						

Source: *Researcher's own compilation*

Table 5.23 presents the two factors identified, and how each item was rotated through the Varimax rotation method. By identifying how each item was rotated, the two factors identified were classified as project indicators and transformation indicators.

Table 5.23 Rotated factor matrix for project indicators and transformation indicators

	FACTORS	
	1 Project indicators	**2 Transformation indicators**
Output indicators	**0.838**	0.251
Outcome / impact indicators	**0.798**	0.215
Revenue indicators	**0.756**	0.026
Efficiency indicators	**0.561**	0.298
Effectiveness indicators	**0.552**	0.439
Process or activity indicators	**0.542**	0.173
Beneficiary satisfaction indicators	0.272	**0.750**
Productivity indicators	0.167	**0.730**
Sustainability outcomes indicators	0.317	**0.508**
Input indicators	0.041	**0.506**

***Source**: Researcher's own compilation*

The reliability of the scales used by these two factors was tested through Cronbach's alpha coefficient. Project indicators had a Cronbach's alpha value of 0.859 for the current situation scale, and 0.829 for the ideal situation scale (Table 5.20), which indicates internal consistency as it was above the recommended value of 0.7 (Pallant, 2016:101). Further, transformation indicators had a Cronbach's alpha value of 0.742 for the current situation scale, and 0.864 for the ideal situation scale. Both these scales had Cronbach's alpha coefficient values of above 0.7 indicating reliability and internal consistency.

FACTOR 4 – Role of performance measurement

The fourth factor identified (Table 5.24) (role of performance measurement), consisted of four items: inform strategic decisions; take corrective action against deviations from desired performance; demonstrate accountability to stakeholders; and comply with legal reporting standards. The KMO value of 0.782 (Table 5.20) exceeded the recommended value of 0.6 by Pallant (2016:184), and rated as middling by Kaiser (1974:35). Bartlett's test of sphericity was statistically significant ($p>0.05$), allowing factor analysis to be conducted. Cronbach's alpha coefficient for the current situation scale equalled 0.800, and for the ideal scale, it equalled 0.867. Although the ideal scale had a higher Cronbach's alpha coefficient than the current scale, both scales had a high internal consistency (above 0.7), meaning the scales were reliable.

The eigenvalue obtained by this factor was 2.587, which exceeds the lowest value allowed of 1. The factor identified also accounted for 64.672% of the cumulative variance between the items. Table 5.24 below displays the initial eigenvalues and the extraction sums of the squared loadings.

5.24 Total variance explained – Role of performance measurement

Factor	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	**2.587**	64.672	**64.672**	2.191	54.766	54.766
2	0.727	18.175	82.846			
3	0.367	9.185	92.031			
4	0.319	7.969	100.000			

***Source**: Researcher's own compilation*

FACTOR 5 – Project impact assessment

The final factor identified by the exploratory factor analysis was project impact assessment (Table 5.25). This factor consisted of four items: addressing the immediate issues in the community; having a positive impact on community development; conducting a needs assessment to identify problems in the community; and placing recipients' needs first. The KMO value of 0.657 was low even though it met the minimum requirement of 0.6 by Pallant (2016:184). The scale tested statistically significant through Bartlett's test of sphericity as it had a *p* value of under 0.05, indicating that factor analysis was appropriate. Cronbach's alpha coefficient test returned high values for both the current situation scale (0.813) and the ideal situation scale (0.864). This indicated that the items in the scale measured the same underlying construct, meaning the scale was reliable.

The Principle Component Analysis identified a single factor from the items in the scale. The factor had an initial eigenvalue of 2.596, accounting for 64.909% of the cumulative variance. Table 5.25 illustrates the initial eigenvalues of the factor identified and the extraction sums of the squared loadings.

Table 5.25 Total variance explained – Project impact assessment

Factor	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	**2.596**	64.909	**64.909**	2.152	53.811	53.811
2	0.698	17.449	82.357			
3	0.484	12.089	94.446			
4	0.222	5.554	100.000			

***Source**: Researcher's own compilation*

The factor analysis above, tested the reliability of the scales used by the factors identified through an exploratory factor analysis method. These factors were identified using The Principle Component Analysis, and the reliability of the scales was tested using Cronbach's Alpha coefficient. The tests proved that all the scales analysed had internal consistency and were therefore reliable. The following section further analyses this data in order to identify any gaps between the current and ideal situations.

5.5 A gap analysis of the current and ideal situations

Gap analysis was used to identify the difference between RD9400's actual literacy project performance and resource utilisation, and the performance that was expected from the literacy project. To identify this gap, Section B of the questionnaire (Appendix I) used two different five-point Likert scales. The first scale measured the current or actual performance of RD9400's literacy projects. This scale measured respondents' agreement with statements, ranging from strongly disagree (1) to strongly agree (5). The second scale measured the respondents' belief of the importance RD9400 should place on each statement i.e. what the respondents expected (ideal) from the literacy project. This five-point Likert scale ranged from totally unimportant (1) to very important (5). First is the gap analysis of the factors identified through the exploratory factor analysis; this is followed by a gap analysis of the items not grouped into factors by the exploratory factor analysis.

5.5.1 *Gap analysis on the identified factors*

To perform the necessary gap analysis of RD9400's literacy project's current and ideal performance, three statistical tests were conducted on each of the factors identified through the exploratory factor analysis (section 5.4). The first test, descriptive statistics, was conducted to provide a summary of the data identified through the factor analysis through measures of central tendency and variation (Mishra, Pandey, Singh, Gupta, Sahu & Keshri, 2019:67). The measures of central tendency identified the mean values, minimum values and maximum values of the factors. The measures of variation identified the standard deviation of the factors identified. The descriptive statistical tests were conducted to give the researcher an overview of the difference between the current and ideal situations of RD9400's literacy projects.

The second test, Kolmogorov-Smirnov, tests the normality of the data distribution (Pallant, 2016:63; Mishra *et al.*, 2019:70). The importance of testing the normality of data distribution is that normal distribution is an underlying assumption in parametric testing. In other words, parametric testing assumes that there is no correlation between the data sets. Therefore, by conducting the Kolmogorov-Smirnov test of normality, it is possible to identify the difference (if any) between the current and ideal situations of the factors. According to Pallant (2016:63), if Kolmogorov-Smirnov's test of normality has a significance of $p > 0.05$, the data is normally distributed. As a result, this research requires a p value of less than 0.05 in order to violate the assumption of normality, and assume a gap between the current and ideal situations. The Kolmogorov-Smirnov test of normality was deemed appropriate for this research as the sample size was larger than 50 (Mishra *et al.*, 2019:70).

The third test conducted was a paired samples t-test. This test analyses the mean of differences between two dependent samples (Argyrous, 2006:280; Pallant, 2016:109; Emerson, 2017:194), in this case, the current and ideal situations of RD9400's literacy projects performance. The paired samples t-test was used as respondents were given the same statement on two different scales. By conducting the paired samples t-test, the researcher was able to identify statistically significant differences between the mean values for the current and ideal situations presented to the respondents. The values presented and discussed in this section include the 2-tailed significance (p value) and the effect size. The 2-tailed significance value represents the probability of statistical significance between RD9400's current and ideal performance. According to Pallant (2016:251), a p value of less than 0.05 represents a significant difference between the two samples. Therefore, for there to be a gap between RD9400's actual performance and expected performance the p value of the factors identified needed to be less than 0.05. Although the 2-tailed significance test identifies the probability of statistical significance not occurring by chance, it does not give an indication of the ‘strength of association’ between the current and ideal situations (Pallant, 2016:212). For this reason, the effect size was calculated to help the researcher understand the degrees to which the current and ideal situations differed. The effect size was calculated for each factor using the following formula (Pallant, 2016:253):

$$Eta\ squared = \frac{t^2}{t^2 + (N - 1)}$$

t = t-test value
N = sample size

Cohen (1988:284) proposes the following guidelines for interpreting the effect size value: 0.01 = small effect, 0.06 = moderate effect and 0.14 = large effect.

The analysis of the results of these tests is now discussed in relation to each of the factors identified in section 5.4.

FACTOR 1 – Performance planning practices

The gap analysis conducted on the first factor – performance planning practices – aimed to identify whether RD9400 could improve their performance through better planning. Concerning the descriptive statistics, Table 5.26, there was a slight difference between the importance participants accorded to performance planning practices (ideal mean = 4.18) and the actual use of performance planning practices (current mean = 3.97) by RD9400. Although the difference was minor, it suggests that there is possibility for improvement concerning how RD9400 practices performance planning.

Kolmogorov-Smirnov’s test of normality revealed a non-significant result (sig. > 0.05) for both the current and ideal situations (Pallant, 2016:63). This indicates that the variables were not normally distributed, i.e. there was correlation, suggesting that there was a gap between the current and ideal performance.

The next test, the paired samples t-test, was conducted to identify the statistical significance of the factor’s current and ideal performance and its relative effect size. The test resulted in a 0.008 2-tailed significance, indicating a statistically significant difference between the current and ideal situations of RD9400’s performance planning practices. This proves that there was no correlation between RD9400's current performance planning practices and the ideal practices, meaning there is room for improvement. The effect size was calculated as 0.078, which according to Cohen's (1988:284) guidelines, is a moderate effect.

$$Eta\ squared = \frac{(-2.707)^2}{(-2.707)^2 + (88-1)} = 0.078$$

Table 5.26 Gap analysis on Factor 1 – Performance planning practices

STATISTICAL TEST (N = 88)		CURRENT	IDEAL
Descriptive	Mean	3.97	4.18
	Standard deviation	0.525	0.617
	Minimum	2.80	2.80
	Maximum	5.00	5.00
Kolmogorov-Smirnov	Statistic	0.115	0.147
	Sig.	0.006	0.000
Paired samples test	t-test value	-2.707	
	2-tailed significance (*p* value)	0.008	
	Effect size	0.078	

***Source**: Researcher's own compilation*

The three tests proved that there was a gap between RD9400's current and ideal situations concerning their performance planning practices. This signifies that RD9400 could improve its decision-making with regards to strategic direction. Improved performance planning practices could lead RD9400 to closer relationships with stakeholders and ultimately, it could improve resource utilisation in the long-term (Hu *et al.*, 2014:85).

FACTOR 2 – Project indicators

The descriptive statistics (Table 5.27) for the second factor – project indicators – indicates that, on average, respondents placed higher importance (ideal mean = 4.15) on project indicators than they agreed RD9400 currently uses (current mean = 3.86). A mean of 4.15 indicates that respondents mostly believed that project indicators were 'important', whereas a mean of 3.86 indicates that respondents were 'neutral' in agreement with RD9400 currently using project indicators. It was interesting to see that the minimum value for the current situation (1.83) was much lower than for the ideal situation (3). This indicates that the lowest level of importance that respondents placed on the ideal situation was neutral, meaning there was no respondent who believed project indicators were unimportant.

Kolmogorov-Smirnov's test of normality (Table 5.27) revealed a *p* value of 0.000 for the current situation and 0.035 for the ideal situation, both of which were below 0.05, indicating that the variables were not normally distributed (Pallant, 2016:66). This signifies a statistical difference between the current and ideal situations, implying room for improvement concerning how RD9400 uses project indicators in its literacy projects.

The paired samples t-test (Table 5.27) calculated a 2-tailed significance of 0.001, which is less than the specified alpha value of 0.05 (Pallant, 2016:251). This signifies a statistically significant difference between the current and ideal project indicator variables. As with Kolmogorov-Smirnov's test, the paired samples t-test also indicates space for improvement with RD9400's project indicators. The final test, effect size, was calculated as follows:

$$Eta\ squared = \frac{(-3.510)^2}{(-3.510)^2 + (88-1)} = 0.124$$

The effect size test signifies a moderate to large effect size (closer to large = 0.14) (Cohen, 1988:284). This indicates a strong association between the current and ideal project indicators.

Table 5.27 Gap analysis on Factor 2 – Project indicators

STATISTICAL TEST (N=88)		CURRENT	IDEAL
Descriptive	Mean	3.86	4.15
	Standard deviation	0.647	0.549
	Minimum	1.83	3.00
	Maximum	5.00	5.00
Kolmogorov-Smirnov	Statistic	0.152	0.098
	Sig.	0.000	0.035
Paired samples test	t-test value	-3.510	
	2-tailed significance (p value)	0.001	
	Effect size	0.124	

***Source**: Researcher's own compilation*

The descriptive statistics, Kolmogorov-Smirnov's test and the paired samples t-test all proved that there was a gap between RD9400's current and ideal situations concerning project indicators. This signifies that RD9400 could improve the ways in which it implements these indicators in measuring performance. This could be done by ensuring that the project indicators are in line with the organisation's strategy and that they measure a key activity of RD9400's literacy project (Bennett *et al.*, 2008).

FACTOR 3 – Transformation indicators

The third factor, transformation indicators, was also analysed to identify any potential gaps between RD9400's actual transformation indicators and the expected transformation indicators of the literacy project. By analysing the descriptive statistics (Table 5.28), it appears that respondents, on average, believed that the use of transformation indicators was important (ideal mean = 4.25). However, when analysing respondents' responses to the current use of transformation indicators, the average was 3.99, signifying that RD9400 currently does not use transformation indicators as it should. Further, the minimum value for the current situation (2.75) was slightly less than that of the ideal situation (3.00). These two factors – mean and minimum value – suggest that there is room for improvement concerning RD9400's use of transformation indicators.

The test of normality, or Kolmogorov-Smirnov's test (Table 5.28), revealed a significance value of 0.000 for both the current and ideal situations. According to Pallant (2016:63), this indicates a violation of the assumption of normality as $p < 0.05$. This indicates a significant result as the variables are not normally distributed, signifying correlation between the current and ideal situations. Further, from analysing the significance through Kolmogorov-Smirnov's test of normality, a deduction can be made that there is a gap between the current and ideal performance of RD9400's transformation indicators, suggesting that improvements could be made.

The final test completed on the transformation indicators was the paired samples t-test (Table 5.28), to investigate the difference between the mean values of the current and ideal situations. The test revealed a 2-tailed significance of 0.002, which is substantially less than the requirement of $p < 0.05$, indicating a statistically significant difference between the current and ideal situations (Pallant, 2016:251). Although, this indicates a difference between the current and ideal situation, it does not indicate the strength of association between the two situations. Therefore, the following effect size calculation is presented to identify the strength of association between the current and ideal situations.

$$Eta\ squared = \frac{(-3.191)^2}{(-3.191)^2 + (88-1)} = 0.105$$

As be seen from the calculation above, the effect size between the current and ideal situations was 0.105. This value according to Cohen (1988:284) indicates a moderate effect to large effect (moderate = 0.06; large = 0.14) (Pallant, 2016:251).

Table 5.28 Gap analysis on Factor 3 – Transformation indicators

STATISTICAL TEST (N = 88)		CURRENT	IDEAL
Descriptive	Mean	3.99	4.25
	Standard deviation	0.515	0.568
	Minimum	2.75	3.00
	Maximum	5.00	5.00
Kolmogorov-Smirnov	Statistic	0.152	0.146
	Sig.	0.000	0.000
Paired samples test	t-test value	-3.191	
	2-tailed significance (p value)	0.002	
	Effect size	0.105	

***Source**: Researcher's own compilation*

Concerning the transformation indicators, respondents believed that the current situation was not as it should be (ideal). This indicates a gap between the current and ideal situations, thereby signifying a need for improvement. As with the project indicators, this could be done by better aligning the literacy's projects transformation indicators to the project's goals and objectives.

FACTOR 4 – Role of performance measurement

The descriptive statistics (Table 5.29) used to analyse the fourth factor – role of performance measurement – revealed similar results for both the current and ideal situations. By interpreting the mean results, it could be said that respondents, on average, agreed that performance measurement currently played an important role in RD9400's literacy projects (current mean = 4.01). Further, respondents also believed that the role of performance measurement was important in conducting the literacy project (ideal mean = 4.23). Interestingly, both the current and ideal situations had the same minimum values (2.50) and maximum values (5.00). This could imply that there was no gap between the current and ideal situations.

Kolmogorov-Smirnov's test of normality (Table 5.29) revealed a significance value of 0.003 for the current situation. This value was less than 0.05, indicating that there was no normal distribution. The significance value for the ideal situation was less than the current situation with a score of 0.000, which was also less than 0.05, signifying that the data was not normally distributed. As both the current and ideal situations were not normally distributed, it could be deduced that there is a gap between the current and ideal performance, suggesting a need for improvement.

The paired samples t-test (Table 5.29) resulted in a 2-tailed significance of 0.001. This value was less than 0.05, meaning it could be concluded that there was a statistically significant difference between the current and ideal situations (Pallant, 2016:251). Further, the effect size of the paired samples t-test was calculated as follows:

$$Eta\ squared = \frac{(-3.431)^2}{(-3.431)^2 + (88-1)} = 0.119$$

The effect size value of 0.119 indicates a moderate to large effect, as it is between the following guidelines: 0.06 = moderate effect and 0.14 = large effect (Cohen, 1988:284).

This indicated that there was a moderate to large effect, with a considerable difference between the current and ideal situations of the role that performance measurement plays in RD9400's literacy projects.

Table 5.29 Gap analysis on Factor 4 – Role of performance measurement

STATISTICAL TEST (N = 88)		CURRENT	IDEAL
Descriptive	Mean	4.01	4.23
	Standard deviation	0.601	0.606
	Minimum	2.50	2.50
	Maximum	5.00	5.00
Kolmogorov-Smirnov	Statistic	0.121	0.172
	Sig.	0.003	0.000
Paired-samples test	t-test value	-3.431	
	2-tailed significance (p value)	0.001	
	Effect size	0.119	

***Source**: Researcher's own compilation*

Of the five factors analysed, the role of performance measurement had the smallest gap between the current and ideal situations (comparing mean values). Although the gap identified was small, it was a gap in performance nonetheless. RD9400 could rectify this gap by better utilising the information gained from performance measurements (section 2.10.1).

FACTOR 5 – Project impact assessment

The final factor to be analysed for gaps between the current and ideal situations was project impact assessment. The purpose of the gap analysis here was to identify if RD9400 could improve the impact of its literacy projects. The descriptive statistics (Table 5.30) indicate at a glance that there was a slight difference between the ideal and current situations as there was a difference between the mean values of the two situations. The mean value for the current situation (3.82) was less than that of the ideal situation (4.38). This indicates that respondents leaned more towards neutral for the current situation and more towards important for the ideal situation. Further, the standard deviation for the current situation was much larger (0.701) than for the ideal situation (0.579), signifying that respondents were more dispersed over the current situation scale than they were for the ideal situation scale. The minimum value for the current situation was also lower than that of the ideal situation. This implies that some respondents 'disagreed' with the current situation, whereas the minimum value for the ideal situation was neutral, meaning no respondents believed that project impact assessment was unimportant.

Kolmogorov-Smirnov's test of normality (Table 5.30) resulted in a *p* value of 0.036 for the current situation and 0.000 for the ideal situation. The significance of both situations was less than 0.05, indicating no normal distribution. This signifies a difference between the current and ideal situation, thereby suggesting that improvement is needed.

The final test, the paired samples t-test (Table 5.30), resulted in a 2-tailed significance of 0.000. According to Pallant (2016:251), this indicates that there was a significant difference between the current and ideal situations. In order to understand the magnitude of this difference, an effect size test was conducted using the following calculation:

$$Eta\ squared = \frac{(-6.783)^2}{(-6.783)^2 + (88-1)} = 0.346$$

The eta squared calculation resulted in a 0.346 effect size. According to Cohen (1988:284), this is a large effect as it is greater than 0.14. This indicates that there was a strong association between the current and ideal situations. Of all the factors analysed, project impact assessment had the largest effect size.

Table 5.30 Gap analysis on Factor 5 – Project impact assessment

STATISTICAL TEST (N = 88)		CURRENT	IDEAL
Descriptive	Mean	3.82	4.38
	Standard deviation	0.701	0.579
	Minimum	2.25	3.00
	Maximum	5.00	5.00
Kolmogorov-Smirnov	Statistic	0.098	0.173
	Sig.	0.036	0.000
Paired-samples test	t-test value	-6.783	
	2-tailed significance (p value)	0.000	
	Effect size	0.346	

***Source**: Researcher's own compilation*

The gap analysis on Factor 5 identified a gap between the current and ideal situations of RD9400's project impact assessment. This signifies that RD9400 needs to improve its ability to address the immediate needs of recipient communities. This could be done by conducting a better needs assessment and placing the recipients' needs first.

The next section of the gap analysis investigates the items not grouped into factors by the exploratory factor analysis in section 5.4.

5.5.2 Gap analysis on the items not grouped into factors

To analyse the data not grouped into factors by the exploratory factor analysis, the MH subcommand test was conducted through IBM SPSS to identify marginal homogeneity. According to IBM SPSS (2017:1327), the MH subcommand test "tests whether combinations of values between two paired ordinal variables are equally likely". For this reason, the MH subcommand was used to identify the relationship between what respondents believed RD9400's current performance was to what they expected it to be. Cross-tabulations were also used to analyse the items not grouped into factors. Cross-tabulations allow researchers to investigate the relationship between two variables by calculating the joint frequency distribution of the variables (Argyrous, 2006:71).

The MH subcommand test and the cross-tabulations were conducted on the following seven items from the quantitative questionnaire (Appendix I):

1. *Stakeholder accountability demands* – Donors' accountability demands
2. *Stakeholder accountability demands* – Beneficiaries' accountability demands
3. *Stakeholder accountability demands* – Community accountability demands
4. *Role of strategic objectives* – Forging close relationships with stakeholders
5. *Role of strategic objectives* – Reducing costs
6. *Role of strategic objectives* – Addressing the needs of beneficiary groups
7. *Role of strategic objectives* – Emphasising long-term strategic planning

Table 5.31 below illustrates the results of the MH subcommand test for these seven items. The 'Distinct Values' column identifies the number of values (from the Likert scale) that respondents selected from both the current and ideal scales. For example, the items, Donors' Accountability Demands has four distinct values. This means that from the five-point Likert scale, respondents only chose four of the points i.e.

‘disagree’, ‘neutral’, ‘agree’ and ‘strongly agree’ for current, and ‘unimportant’, ‘neutral’, ‘important’ and ‘very important’ for ideal. The ‘Off Diagonal Cases’ column identifies the number of respondents who did not select the same value for the current and ideal situations, i.e. if the respondent said ‘agree’ for the current situation, they did not say ‘important’ for the ideal situation. The third column, ‘Asymp. Sig. (2-tailed)’, identifies the statistical significance (*p* value) between the current and ideal situations. If the *p* value is less than 0.05, a relationship exists between the current and ideal situation. If the *p* value is greater than 0.05, there is no relationship between the current and ideal situation (IBM SPSS, 2017:1327).

Table 5.31 Results of the MH subcommand test for marginal homogeneity

	Distinct Values	Off-Diagonal Cases	Asymp. Sig. (2-tailed)
Donors’ accountability demands	4	48	**0,005**
Beneficiary accountability demands	4	56	0,495
Community accountability demands	4	53	**0,004**
Forged close relationships with stakeholders	4	51	0,399
Reduced costs	4	56	0,514
Addressed the needs of beneficiary groups	3	38	**0,001**
Emphasised long-term strategic planning	5	45	**0,002**

***Source**: Researcher’s own compilation*

The seven items identified above will now be presented with a discussion of Table 5.31 and the items’ cross-tabulations.

Stakeholder accountability demands – Donors’ accountability demands

As can be seen from Table 5.32, donors’ accountability demands had four distinct values, with 48 off-diagonal cases. This indicates that 55% of respondents did not give the current and ideal situations the same rating. Further, the *p* value was less than 0.05, signifying statistical significance. This means that RD9400 should focus more on donors’ accountability demands than is done currently.

Table 5.32 Cross-tabulation of donors' accountability demands

		IDEAL				
CURRENT	**% (N = 88)**	**Unimportant**	**Neutral**	**Important**	**Very important**	**Total**
	Disagree	**0**	0	1	1	**2**
		0.0	0.0	50.0	50.0	**100.0**
	Neutral	1	**10**	10	4	**25**
		4.0	**40.0**	40.0	16.0	**100.0**
	Agree	0	12	**23**	17	**52**
		0.0	23.1	**44.2**	32.7	**100.0**
	Strongly agree	0	1	1	**7**	**9**
		0.0	11.1	11.1	**77.8**	**100.0**
	Total	**1**	**23**	**35**	**29**	**88**
		1.1	**26.1**	**39.8**	**33.0**	**100.0**

Source*: Researcher's own compilation*

The cross-tabulation (Table 5.33) illustrates the relationship between the current and ideal situations of RD9400's focus on donor accountability demands. As can be seen, 40 cases were on the diagonal, 15 cases were below the diagonal, and 33 cases were above the diagonal. This indicates that 45% of respondents believed RD9400 was focused sufficiently on donors' accountability demands (on diagonal cases), 17% believed RD9400 was focusing too much on donors' accountability demands (below diagonal), and 38% believed RD9400 should place greater emphasis of donors' accountability demands (above diagonal).

Stakeholder accountability demands – Beneficiaries' accountability demands

With regards to Table 5.32, the MH subcommand test for marginal homogeneity, identified four distinct values from the beneficiaries' accountability demands. These values included: CURRENT (neutral [3], agree [4], strongly agree [5]); IDEAL (unimportant [2], neutral [3], important [4], very important [5]) (Table 5.33). Of the 88 cases analysed, 56 were off-diagonal, signifying that the level of agreement with the current situation differed most to the level of importance placed on the ideal situation. Further, the MH subcommand test revealed a *p* value of 0.495, which is greater than 0.05. This signifies no statistical significance, meaning there was no relationship between how respondents believed RD9400 currently focused on beneficiary accountability demands and how it should focus on these demands.

Table 5.33 Cross-tabulation of beneficiaries' accountability demands

		IDEAL				
CURRENT	% (N = 88)	Unimportant	Neutral	Important	Very important	Total
	Neutral	1	**10**	8	7	**26**
		3.8	**38.5**	30.8	26.9	**100.0**
	Agree	2	10	**16**	17	**45**
		4.4	22.2	**35.6**	37.8	**100.0**
	Strongly agree	2	2	7	**6**	**17**
		11.8	11.8	41.2	**35.3**	**100.0**
	Total	**5**	**22**	**31**	**30**	**88**
		5.7	**25.0**	**35.2**	**34.1**	**100.0**

***Source**: Researcher's own compilation*

Referring to the cross-tabulation (Table 5.33), it can be seen that respondents did not disagree with the statement that RD9400 currently focused on beneficiary accountability demands, however, one participant believed that these demands were unimportant. Furthermore, of the 88 respondents, 36.4% believed that RD9400 focused sufficiently on beneficiary accountability demands (on-diagonal cases), 27.2% believed too much focus was placed on these demands (below diagonal cases) while 36.4% believed there should be greater focus on beneficiary accountability demands (above diagonal cases).

Stakeholder accountability demands – Community accountability demands

The MH subcommand test, conducted through IBM SPSS (Table 5.32), identified four distinct values between the current and ideal situations in terms of how much RD9400 currently focuses on community accountability demands, and how much it should ideally focus on these demands. The four distinct values were as follows: CURRENT (disagree [2], neutral [3], agree [4], and strongly agree [5]; IDEAL (unimportant [2], neutral [3], important [4], and very important [5]) (Table 5.34). Of the 88 cases analysed, 53 were off-diagonal, whilst 35 were on the diagonal. Further, the test for statistical significance revealed a p value of 0.004, signifying a relationship between the current and ideal situations.

Table 5.34 Cross-tabulation of community accountability demands

	IDEAL					
CURRENT	**% (N = 88)**	**Unimportant**	**Neutral**	**Important**	**Very important**	**Total**
	Disagree	**2**	4	0	1	**7**
		28.6	57.1	0.0	14.3	**100.0**
	Neutral	0	**11**	13	9	**33**
		0.0	**33.3**	39.4	27.3	**100.0**
	Agree	0	9	**12**	9	**30**
		0.0	30.0	**40.0**	30.0	**100.0**
	Strongly agree	0	2	6	**10**	**18**
		0.0	11.1	33.3	**55.6**	**100.0**
	Total	**2**	**26**	**31**	**29**	**88**
		2.3	**29.5**	**35.2**	**33.0**	**100.0**

***Source**: Researcher's own compilation*

With regards to the cross-tabulation (Table 5.34), 17 cases (19%) were below the diagonal, signifying that these respondents believed RD9400 focused more on community accountability demands than necessary. Further, 35 cases (40%) were on the diagonal, indicating that these respondents believed RD9400 focused sufficiently on community accountability demands. Lastly, 36 cases (41%) were above the diagonal, suggesting that these respondents believed that RD9400 should place greater emphasis on community accountability demands.

Role of strategic objectives – Forging closer relationships with stakeholders

With regards to the role of strategic objectives in RD9400's ability to forge closer relationships with stakeholders, an MH subcommand test was conducted to identify the relationship between the current and ideal situations (Table 5.32). The MH subcommand test revealed four distinct values as follows: CURRENT (disagree [2], neutral [3], agree [4], and strongly agree [5]; IDEAL (unimportant [2], neutral [3], important [4], and very important [5]) (Table 5.35). Further, the marginal homogeneity test resulted in a p value of 0.399, which is greater than 0.05, thus signifying no statistical significance between the current and ideal situations. This indicates that there was no relationship between the current and ideal situations.

Table 5.35 Cross-tabulation of the role of strategic objectives in forging closer relationships with stakeholders

	IDEAL					
CURRENT	**% (N = 88)**	**Unimportant**	**Neutral**	**Important**	**Very important**	**Total**
	Disagree	**0**	0	2	0	**2**
		0.0	0.0	100.0	0.0	**100.0**
	Neutral	1	**6**	6	2	**15**
		6.7	**40.0**	40.0	13.3	**100.0**
	Agree	2	16	**16**	18	**52**
		3.8	30.8	**30.8**	34.6	**100.0**
	Strongly agree	0	0	4	**15**	**19**
		0.0	0.0	21.1	**78.9**	**100.0**
	Total	**3**	**22**	**28**	**35**	**88**
		3.4	**25.0**	**31.8**	**39.8**	**100.0**

Source*: Researcher's own compilation*

Table 5.35 above illustrates the cross-tabulation between the current and ideal situations of RD9400's use of strategic objectives to forge closer relationships with stakeholders. From the cross-tabulation, 26% of the cases fell below the diagonal, indicating that these respondents believed that RD9400 placed too much importance on using strategic objectives to forge closer relationships with stakeholders. Further, 42% of the cases were on the diagonal, signifying that these respondents believed that RD9400 used strategic objectives sufficiently in this regard. Lastly, 32% of the cases were above the diagonal, suggesting that there was room for improvement in this particular use of strategic objectives.

Role of strategic objectives – Reducing costs

This section analyses the role strategic objectives played in RD9400's literacy projects to reduce the costs of the project. Referring to the marginal homogeneity test above (Table 5.32), four distinct values were identified. These values are as follows: CURRENT (disagree [2], neutral [3], agree [4], and strongly agree [5]; IDEAL (unimportant [2], neutral [3], important [4], and very important [5]) (Table 5.36). Of the 88 cases analysed, 56 were off the diagonal, indicating that 64% of the respondents did not believe that RD9400's adequately used strategic objectives to reduce the costs of the literacy project. Further, the MH subcommand test revealed a statistical significance result of 0.514, which is greater than 0.05, signifying no relationship between the current and ideal situations.

Table 5.36 Cross-tabulation of the role of strategic objectives in reducing project costs

		IDEAL				
CURRENT	% (N = 88)	Unimportant	Neutral	Important	Very important	Total
	Disagree	**0**	2	0	0	**2**
		0.0	100.0	0.0	0.0	**100.0**
	Neutral	0	**6**	6	8	**20**
		0.0	**30.0**	30.0	40.0	**100.0**
	Agree	2	9	**19**	10	**40**
		5.0	22.5	**47.5**	25.0	**100.0**
	Strongly agree	1	7	11	**7**	**26**
		3.8	26.9	42.3	**26.9**	**100.0**
	Total	**3**	**24**	**36**	**25**	**88**
		3.4	**27.3**	**40.9**	**28.4**	**100.0**

***Source**: Researcher's own compilation*

The cross-tabulation (Table 5.36) identifies the relationship between the current and ideal situations of the role played by strategic objectives in reducing costs of RD9400's literacy projects. The cross-tabulation identified 30 cases (34%) that were below the diagonal. This indicates that 34% of the respondents believed that RD9400 used strategic objectives to reduce the costs of their literacy project more than necessary. Of the 88 cases analysed, 36% were on the diagonal, indicating that these respondents believed RD9400 placed sufficient importance on using strategic objectives in this regard. The last 26 cases (30%) were above the diagonal, signifying that these respondents believed RD9400 should improve the role of strategic objectives in reducing costs of the literacy project.

Role of strategic objectives – Addressing the needs of beneficiary groups

The following section analysed respondents' beliefs as to how RD9400 used strategic objectives to better address the needs of beneficiary groups. Of the seven items analysed through the MH subcommand marginal homogeneity test (Table 5.32), this was the only item with less than four distinct values, indicating the least amount of standard deviation between respondent responses. The MH subcommand test revealed three distinct values as follows: CURRENT (neutral [3], agree [4], and strongly agree [5]; IDEAL (neutral [3], important [4], and very important [5]) (Table 5.37). Further, not only did this item have the least amount of distinct values, it also had the lowest amount off-diagonal cases, with only 38 cases off the diagonal.

Additionally, the test for statistical significance resulted in a *p* value of 0.001, indicating the highest statistical significance of all the items. The *p* value of 0.001 is significantly less than 0.05, signifying a strong relationship between respondents' beliefs of how RD9400 currently uses strategic objectives to address the needs of beneficiary groups, and how they should do so in an ideal situation.

Table 5.37 Cross-tabulation of the role of strategic objectives in addressing the needs of beneficiary groups

	IDEAL				
	% (N=88)	**Neutral**	**Important**	**Very important**	**Total**
CURRENT	**Neutral**	**2**	8	6	**16**
		12.5	50.0	37.5	**100.0**
	Agree	6	**35**	15	**56**
		10.7	**62.5**	26.8	**100.0**
	Strongly agree	1	2	**13**	**16**
		6.3	12.5	**81.3**	**100.0**
	Total	**9**	**45**	**34**	**88**
		10.2	**51.1**	**38.6**	**100.0**

Source*: Researcher's own compilation*

The cross-tabulation above (Table 5.37) illustrates the relationship between how RD9400 used strategic objectives to address the needs of beneficiary groups and how respondents believe it should use these strategic objectives. Of the 88 cases, only 10% were below the diagonal, signifying that these nine respondents believed that the importance that should be placed on using strategic objectives to address the needs of beneficiary groups was less than what they believed RD9400 was currently doing. More than half of the respondents (57%) believed that the current and ideal situations were equal in this regard. Lastly, only 29 of the 88 cases (33%) were above the diagonal. This suggests that only 33% of respondents believed RD9400 could improve its use of strategic objectives to better address the needs of their beneficiary groups.

Role of strategic objectives – Emphasising long-term strategic planning

The last item analysed through the MH subcommand marginal homogeneity test was the role of strategic objectives in emphasising RD9400's long-term strategic planning. The MH subcommand test revealed five distinct values (Table 5.32), as follows: CURRENT (strongly disagree [1], disagree [2], neutral [3], agree [4], and strongly agree [5]; IDEAL (totally unimportant [1], unimportant [2], neutral [3], important [4], and very important [5]) (Table 5.38). Of the seven items analysed through the MH subcommand test, this item had the most distinct values. Additionally, the item had the second lowest *p* value of 0.002, which is less than 0.05, signifying statistical significance. The *p* value suggests that there was a strong relationship between how respondents perceived the current role of strategic objectives in emphasising RD9400's long-term strategic planning and the ideal role. Further, the marginal homogeneity test revealed 45 (51%) off-diagonal cases, indicating that more than half of the respondents believed that RD9400's current use of strategic objectives to emphasise long-term planning was not in accordance with the ideal situation.

Table 5.38 Cross-tabulation of the role of strategic objectives in emphasising long-term strategic planning

		IDEAL				
	% (N = 88)	**Unimportant**	**Neutral**	**Important**	**Very important**	**Total**
CURRENT	**Strongly disagree**	0	0	1	0	**1**
		0.0	0.0	100.0	0.0	**100.0**
	Disagree	**0**	0	1	1	**2**
		0.0	0.0	50.0	50.0	**100.0**
	Neutral	1	**7**	7	9	**24**
		4.2	**29.2**	29.2	37.5	**100.0**
	Agree	1	2	**28**	14	**45**
		2.2	4.4	**62.2**	31.1	**100.0**
	Strongly agree	0	3	5	**8**	**16**
		0.0	18.8	31.3	**50.0**	**100.0**
	Total	**2**	**12**	**42**	**32**	**88**
		2.3	**13.6**	**47.7**	**36.4**	**100.0**

***Source**: Researcher's own compilation*

In the cross-tabulation above (Table 5.38), 13.6% of the cases were below the diagonal, indicating that these 12 respondents believed that the importance of using strategic objectives to emphasise long-term strategic planning was less than was currently being done by RD9400. The majority of the respondents (48.9%) believed that RD9400 was using its strategic objectives sufficiently in this regard. The remaining 37.5% of respondents believed that RD9400 could improve its use of strategic objectives to achieve long-term planning.

5.6 Chapter summary

This chapter analysed the data collected through the quantitative phase of this research (Phase 2). The first part of the analysis began by providing the demographic profile of the research respondents. This involved analysing the gender, age, ethnicity, employment status, highest qualification level, role in the literacy project and the community project the respondents were involved in. The second part of the analysis focused on the descriptive statistics of the data. Frequencies, means and standard deviations were used to analyse the data. The third section of the quantitative analysis involved an exploratory factor analysis to identify factors; the reliability of the scales used by these factors was also tested. The following tests were used: Kaiser-Meyer-Olkin measures of sampling adequacy, Bartlett's test of sphericity, Cronbach's alpha coefficient, Principal Component Analysis and the Varimax rotation method. The final part of the quantitative analysis involved a gap analysis of the factors identified and on the items not grouped into factors. The gap analysis of identified factors involved the use of descriptive statistics, Kolmogorov-Smirnov's test of normality, the paired samples t-test and effect size calculations. The gap analysis of items not grouped into factors used cross-tabulations and the MH subcommand test for marginal homogeneity. The following chapter (Chapter 6) will provide the final conclusions and recommendations for the study.

CHAPTER 6

CONCLUSION AND RECOMMENDATIONS

6.1 Introduction

The previous two chapters, Chapter 4 and Chapter 5, analysed the data collected in Phase 1 (qualitative research) and Phase 2 (quantitative research). This chapter draws conclusions and makes recommendations for both phases of the study. The conclusions relate back to the secondary objectives identified in Chapter 1. The recommendations specifically relate to the NPO sector and the role of performance planning practices in enhancing resource utilisation. The limitations of the study and future research opportunities are then discussed. Lastly, the entire study is summarised.

6.2 Conclusions based on research objectives

The objectives identified in Chapter 1 guide the conclusions presented in this chapter. The following section provides a conclusion for each of the four secondary objectives that guided the study, namely:

- To use a mixed methods strategy to evaluate selected Rotary District 9400 community literacy projects;
- To discover gaps in the current management of Rotary District 9400's literacy project;
- To suggest tools that NPOs, such as Rotary District 9400, could use to improve the management of projects;
- To make managerial recommendations to Rotary District 9400 on how to strategically improve the community literacy project to ensure sustained value in terms of community literacy.

These secondary objectives were set in order to achieve the primary objective of this study (section 1.4.1): *To evaluate how Rotary District 9400 can better measure and manage its literacy project to minimise waste and optimise resource utilisation in order to maximise the sustainable value created through the literacy project*. The following sections explain how the primary objective was achieved through the secondary objectives.

6.2.1 Conclusions based on the first secondary objective

Objective: *To use a mixed methods strategy to evaluate selected Rotary District 9400 community literacy projects*

This first secondary objective was met through the use of sequential qualitative and quantitative research methods. The qualitative research phase focused exclusively on RD9400's Middelburg Rotary Club's literacy project, and involved face-to-face, semi-structured interviews. The interviews were transcribed in order to conduct a thematic content analysis. The content analysis identified six key themes which were used to inform the quantitative questionnaire. The quantitative questionnaires were administered using a paper-based format and an online survey via Google Forms™. The quantitative questionnaire included other RD9400 literacy projects such as The Link Literacy Project.

The conclusion drawn from the first secondary objective is that the mixed method research methodology enabled the researcher to discover gaps in the current management of RD9400's literacy projects.

6.2.2 Conclusions based on the second secondary objective

Objective: *To discover gaps in the current management of Rotary District 9400's literacy project*

In order to achieve this research objective, a gap analysis was conducted, through the quantitative research phase, to identify the gaps between RD9400's current management practices and ideal management practices. The gap analysis was achieved through the use of two five-point Likert scales that measured the "CURRENT" situation of RD9400's literacy projects and the "IDEAL" situation as indicated by the respondents.

The gap analysis identified areas in which RD9400 could improve management practices, and ultimately, performance. Concerning performance planning practices, the gap analysis identified a gap between the current and ideal situations of RD9400's literacy project (section 5.51). The descriptive statistics of the items analysed in section 5.3 for performance planning practices identified the biggest difference between the mean values of the current and ideal situations for the item, 'RD9400 communicated its vision and mission'. This signifies that RD9400 should improve the communication of its vision and mission to relevant stakeholders. By doing so, RD9400 could build greater synergy between different stakeholders, both internal (i.e. Rotarians) and external (e.g. donors and beneficiaries). Furthermore, RD9400 could reduce the gap between current and ideal performance planning practices by communicating goals and objectives more clearly. As the biggest gaps in the performance planning practices originated from poor communication of RD9400's strategy, RD9400 should improve communication within the organisation and with external stakeholders.

Another gap identified through the gap analysis concerns the role of performance measurement in RD9400's literacy project (section 5.5.1). Although this gap was minor, RD9400 should nonetheless consider the role of performance measurement in complying with legal reporting standards. This is because respondents believed that currently, inadequate emphasis was placed on performance measurement (section 5.3). Further, RD9400 could decrease the size of the gap by using performance measurements to identify deviations in performance from the goals and objectives set through performance planning practices (Schermerhorn & Chappell, 2000:248; Nieuwenhuizen & Oosthuizen, 2014:268).

Another gap identified concerned RD9400's literacy project impact assessment. Of all the identified gaps, project impact assessment had the largest effect size of 0.346, which is much greater than Cohen's (1988:284) classification of a large effect size (0.14). The effect size indicates a strong association between the current and ideal situation, signifying a statistical significance. By analysing the descriptive statistics for project impact assessment (section 5.3), and the gap analysis (section 3.5.1), it was clear that project impact assessment showed the greatest room for improvement, with a mean value difference of 0.56 between the current and ideal situations (current mean = 3.82; ideal mean = 4.38). The descriptive statistics provided an overview of the reasoning for this gap. Both respondents and participants believed that RD9400 should conduct a needs assessment in the different communities to identify the immediate needs of RD9400's beneficiaries. Furthermore, respondents believed that RD9400 should improve how issues are addressed in communities.

RD9400 should further consider the gap between the current and ideal management of strategic objectives to address beneficiary needs. This signifies that RD9400 may need to re-align strategic objectives to better fit the needs of the beneficiary groups. This could be done by redesigning the mission, core values, goals, objectives or the performance measures used in assessing project impact.

The gap analysis conducted in Chapter 5 (section 5.5) led to the conclusion that RD9400 had gaps in the current management practices of the literacy projects. By identifying these gaps, the researcher was able to recommend tools that RD9400 could use to improve the management practices of its literacy projects, thereby reducing the identified gaps.

6.2.3 Conclusions based on the third secondary objective

Objective: *To suggest tools that NPOs, such as Rotary District 9400, could use to improve the management of projects*.

The literature review in Chapter 2 identified some of the key management tools that NPOs such as RD9400 could use to improve the management of literacy projects. The first tool identified, the value chain analysis (section 2.4), should be used by RD9400 to improve the management and impact of the literacy projects. Participants in the qualitative research phase jointly agreed that RD9400 should map out its value chain of the literacy project as this had never been done before.

By mapping out the value chain, RD9400 could evaluate how different activities performed in the delivery of the literacy project are linked to one another, how the different activities are organised and the power relationship between these activities (Rosales *et al.*, 2017:12). Furthermore, RD9400 could use the value chain analysis to identify the value each stakeholder was adding to the delivery of the literacy project.

The next tool identified – the stakeholder analysis framework (see section 2.5) – was developed by Savage *et al*. (1991:65) to identify the different types of stakeholders in an organisation. By using this framework, RD9400 would be able to classify its different stakeholder groups based on their potential for cooperation or threat to RD9400's literacy project (Savage *et al.*, 1991:65). By doing so, RD9400 would be in a better position to decide which strategies to use to manage these stakeholders.

Lastly, RD9400 should utilise the balanced scorecard developed by Kaplan and Norton (1996) to measure the performance of the literacy project. The balanced scorecard is an internal management tool that examines an organisation's performance from the perspective of the triple bottom line in relation to strategic objectives set through performance planning (Gunarsih *et al.,* 2016:66; Watson & Whitley, 2017:876). As RD9400 is an NPO, the balanced scorecard is a suitable tool for measuring performance as it not only focuses on financial measures but also on non-financial measures such as internal processes (Boateng *et al.*, 2016:61; Poister *et al.*, 2015:67). The balanced scorecard could also help RD9400 to clarify and translate its vision and strategy into performance measures; communicate and link strategic objectives and performance measures; plan, set targets and align strategic initiatives; and enhance feedback and learning (Kaplan & Norton, 1996).

The use of the abovementioned management tools could assist RD9400 to reduce gaps in current management practices. It would also assist RD9400 to increase value created by minimising resource utilisation and optimising performance through better performance planning practices. The conclusion drawn from this objective enabled the researcher to develop a framework of recommendations that RD9400 could use in the future.

6.2.4 Conclusions based on the fourth secondary objective

Objective: *To make managerial recommendations to Rotary District 9400 on how to strategically improve the community literacy project to ensure sustained value and improved resource utilisation in terms of community literacy*

The final objective, making managerial recommendations, was achieved by developing a framework based on the qualitative and quantitative findings. The aim of the framework was to indicate how management of RD9400 could improve value created by optimising resource utilisation. Figure 6.1 provides a graphical representation of the framework.

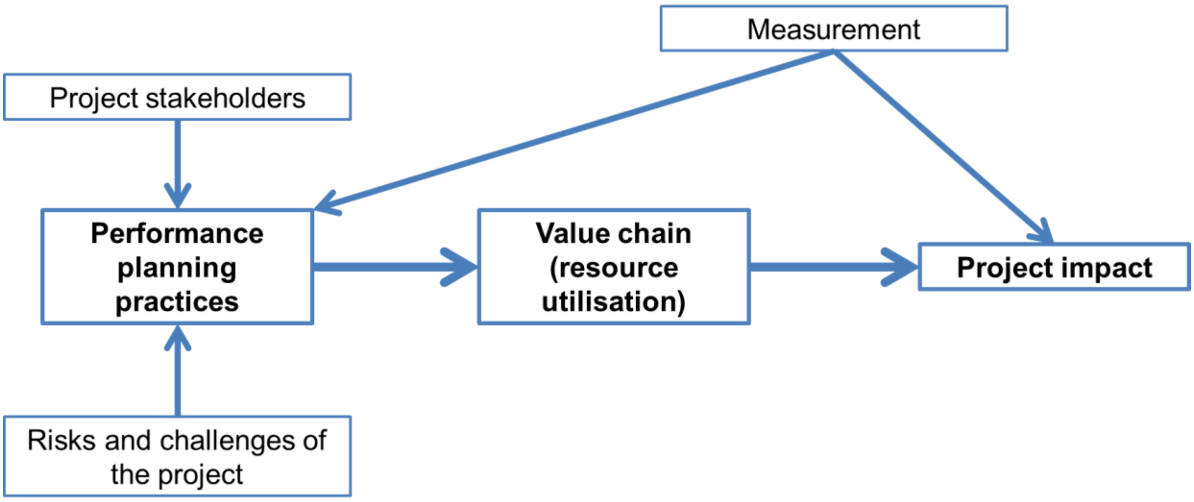

Figure 6.1 Framework of managerial recommendations for RD9400

***Source**: Researcher's own compilation*

The framework above could be used by NPOs such RD9400 to improve its literacy project in terms of sustained value. The figure begins with performance planning practices, which involves establishing the organisation's mission, vision, goals, objectives and key performance indicators (Bennett *et al.*, 2008). In developing these performance planning practices, RD9400 should consider the role played by stakeholders in the literacy project. According to Bryson (2017:35), a key element of performance planning practices is involving key stakeholders in strategic decision-making (Schermerhorn & Chappell, 2000:90). Further, through the use of performance planning practices NPOs could improve their relationships with key stakeholders and enhance their resource utilisation (Hu *et al.*, 2014:85). Performance planning practices should also take into account the risks of the project, and how these potential risks could be managed.

The next part of the framework concerns the organisation's value chain. The value chain of NPOs demonstrates how value is created from inputs to produce outputs that add value to the end user (Cavusgil *et al.*, 2014:66). By analysing its value chain, RD9400 can identify the total value being created by the literacy projects through primary and secondary activities (Nieuwenhuizen & Oosthuizen, 2014:21). Further, the value chain helps organisations to identify the roles of their different stakeholders in creating value for the end user (Rosales *et al.*, 2017:12). By conducting value chain analysis, NPOs such as RD9400 could identify how efficiently resources are being transformed from inputs into outputs.

Once a value chain has been established, NPOs need to measure the outcome of their projects. This could be done through performance measurement. NPOs should measure the outcome of their performance against the goals and objectives they set during the performance planning stage. By measuring actual performance against planned performance, organisations can identify any gaps in their performance. A performance gap occurs when an organisation does not meet the goals and objectives it set out in its strategic plan. A useful tool for NPOs to utilise in measuring performance is the balanced scorecard developed by Kaplan and Norton (1996) (Bennett *et al.*, 2008; Blackmon, 2008:10). The balanced scorecard focuses on four elements of an organisation, namely, (i) financial, (ii) customer, (iii) learning and growth, and (iv) internal processes (Kaplan & Norton, 1996:2; Ebrahim & Rangan, 2010:4). Lastly, the balanced scorecard helps organisations to translate their strategy into performance measures (Kaplan & Norton, 1996:2).

The final conclusion identified a framework which NPOs such as RD9400 could implement to enhance their value creation activities. This would be done through the use of performance planning practices to identify a value chain of activities, aimed at maximising resource utilisation in creating a social impact.

The conclusions drawn from the secondary objectives ultimately lead to the following conclusion for the primary objective:

→ RD9400 should use the identified management tools [value chain (section 2.4), stakeholder analysis (section 2.5) and the balanced scorecard (section 2.10.2)], to minimise waste and maximise resource utilisation in order to create a sustainable impact on the literacy of South Africa.

The next section makes recommendations that RD9400 could implement to improve the overall performance and subsequent impact of its literacy projects.

6.3 Recommendations

Based on the findings from the qualitative and quantitative phases of the study, the recommendations in this section focus on: RD9400's performance planning practices; RD9400's value chain; and RD9400's project impact as identified in the framework of managerial recommendations (Figure 6.1 above).

6.3.1 Performance planning practices

For RD9400's performance planning practices, the following recommendations are made:

1. Strategic direction
   - Concerning RD9400's strategic direction, management needs to ensure that the vision and mission of the literacy projects are communicated clearly to both Rotarians and external stakeholders.
   - RD9400 also needs to set clear goals and objectives that are measurable and achievable.
   - RD9400 needs to ensure that its actions reflect its core values and social mission.

2. Performance indicators
   - RD9400 needs to identify key performance areas and implement performance measurement in the literacy project as the qualitative data revealed that this was currently not in place.
   - RD9400 needs to ensure that the performance indicators selected are in line with its stated goals and objectives.

6.3.2 RD9400's value chain

The following recommendations are made concerning RD9400's value chain.

- As established in the interviews, RD9400's literacy project does not currently use value chain analysis.
- By mapping out a value chain, RD9400 could better understand where and how value is added in the literacy project.
- RD9400 should also map out its value chain to identify the value added by each stakeholder and to indicate the relationships between these stakeholders.
- Lastly, by mapping out its value chain, RD9400 could help all its stakeholders to understand where they fit in with the project's value creation.

6.3.3 Project impact

The final recommendation concerns the impact of the literacy project. The recommendations offered here are based on the interviews conducted with RD9400's different stakeholders.

1. Recommendations concerning value added
    - According to the external stakeholders of RD9400's literacy project, RD9400 should reconsider the books that are currently being distributed to recipients. The participants believed that some of the books were irrelevant and a waste of resources. Participants felt that the textbooks from the US and Canada did not meet the requirements of the South African schooling curriculum. The participants therefore believed that RD9400 should offer more African-centric books or books that were more modern.
    - RD9400 could improve the value added by dedicating volunteers to communities which receive the books as this would facilitate the project in a more sustainable manner.
    - Further, RD9400 could consider sponsoring a book reading competition in communities where literacy levels were low, as this could encourage recipients to make use of the books.
    - The final recommendation concerning the value added by RD9400's literacy project is to implement a management system in schools where the books have been distributed. This would help RD9400 to assess the value being added as RD9400 would be able to see how many children have read the donated books and which books they have read. This data could assist RD9400 to deliver more appropriate books.

2. Project recommendations concerning improved literacy
    - As RD9400 has no measurement system in place to measure the impact of the literacy project, it is not possible to state how the distributed books have helped to improve education in impoverished areas. One way in which this measurement could be conducted is through a literacy test at the beginning of the year, followed by another test at the end of the year. Although this would not pinpoint the extent to which the books helped to improve literacy, it would give an indication of any improvement.

6.4 Limitations of the study

Although the study used mixed methods and included different stakeholder groups of an NPO's literacy project, there were still some limitations. One of these limitations is that the study focused on a single NPO (RD9400) and not on multiple NPOs involved in literacy projects. Therefore, caution must be taken when generalising the findings to a broader population. Future research could apply the current study to another NPO involved in literacy projects to test the generalisability of the research findings. Further, the framework of recommendations (section 6.2.4) could be further tested to either build upon or improve. One of the study's largest limitations was the fact that the direct beneficiaries of the literacy project were not involved in the research. By involving these direct beneficiaries, future researchers could gain a better understanding of the beneficiaries' perceived value of the literacy project.

6.5 Contributions of the study

This study contributes to the body of knowledge and to the industry by offering methodological, empirical and practical ways to make managerial recommendations. These are discussed below.

6.5.1 Empirical contribution

The findings derived from this research helped to fill a gap in the current literature, notably, on management and measurement of NPO performance in South Africa. By investigating the case of RD9400, this study produced a framework (section 6.2.4) which can be used to assist management of NPOs, including RD9400, to improve the management practices of their projects and ultimately, to maximise resource utilisation and create a greater social impact. Additionally, this study addressed the gap in literature by exploring performance management practices from the perspective of project managers, volunteers and beneficiaries. This was done through a field study carried out in Middelburg, Mpumalanga, where the researcher interviewed RD9400's literacy projects managers, committee members and beneficiaries. To date, this research is the only such study that has been conducted on RD9400 literacy projects. As a result, it forms a building block for future research into RD9400 literacy projects.

The research instrument used in the quantitative phase used two scales (current and ideal). By using both these scales, the findings reflected the respondents' perceptions of RD9400's current literacy project management practices as well as their opinions on what RD9400's ideal management practices should be. This approach provided empirical evidence of the importance of performance planning practices and subsequently, strategic planning, in the design and adoption of an effective performance measurement tool in NPOs.

6.5.2 Practical contribution

This study has articulated the benefits of identifying and managing different project stakeholders in NPOs. The findings indicate that NPOs such as RD9400 should focus on their different stakeholder accountability demands and involve these stakeholders in strategic decision-making, as this is likely to improve project outcomes.

The gap analysis conducted in Chapter 5 (section 5.5), identifies gaps in RD9400's literacy project management practices. This represents a practical contribution for RD9400 as it indicates the areas in which RD9400 should improve performance. Another practical contribution concerns RD9400's book selection. The qualitative findings identified the need for RD9400 to distribute more locally relevant books in terms of language and content.

6.5.3 Managerial contribution

The managerial contributions of this study relate back to RD9400 not having any procedure or method in place to measure or manage the outcome of its literacy project. One of the managerial contributions of this study is the recommendations framework. RD9400 could use this framework to develop its own performance planning practices – not only for its literacy projects but all its projects. The study also identified three managerial tools that RD9400 could implement in the literacy project. These tools should be used in unison by RD9400 to ensure the greatest impact.

Lastly, the study recommendations (section 6.3) identify means through which RD9400 could improve the literacy project in terms of enhanced performance planning practices and the development of a value chain for the literacy project. Through these recommendations, RD9400 could increase the project's overall impact on literacy in South Africa.

6.6 Recommendations for future research

As this research focused on a single NPO, future research is required to test the findings of this study on a different NPO. This is necessary as the framework of recommendations was developed based on the findings of RD9400 literacy project's management practices. Thus, although the framework is appropriate for RD9400, it may not be appropriate for a different NPO which serves a different social purpose.

Furthermore, this research excluded individuals under the age of 18 thus, future research is necessary to understand the value the direct beneficiaries (i.e. the children reading the books) believe the literacy project is creating. This is important as the children are RD9400's main literacy project beneficiary, consequently, if they do not see any value in the project, RD9400 would be wasting resources. Additionally, by including these individuals, future research could identify the extent to which the books distributed by RD9400 are actually being used. This is necessary as the results from the qualitative research indicated that RD9400 has no means of identifying whether the books it distributes are being used or not. This presents a challenge for RD9400 as any books which are distributed but not used result in wasted resources.

Lastly, as this study focused on a literacy project that only distributes books and does not follow up on these distributions, future research could be conducted on the efficiency of this method compared to a literacy project that interacts directly with children by teaching them how to read the books. This would be necessary to identify the most efficient way RD9400 could improve literacy in the communities it serves. Thus, future research could identify additional means through which RD9400 could maximise its resource utilisation for maximum social impact.

6.7 Chapter summary

This study analysed an NPO's literacy project and its management. This was done through secondary data analysis, in the form of a literature review (Chapter 2), and primary data analysis using mixed methods, through interviews and questionnaires (Chapter 3). The data gathered through interviews was analysed using thematic content analysis (Chapter 4). The data collected through the questionnaires was analysed using descriptive statistics, exploratory factor analysis and a gap analysis (Chapter 5).

The final chapter (Chapter 6) provided conclusions based on the research objectives set in Chapter 1. Subsequently, recommendations were made concerning RD9400's performance planning practices, value chain and project impact. The limitations of the study were then discussed, followed by the contribution of the study. Lastly, recommendations for future research were presented.

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APPENDICES

APPENDIX A: University of Johannesburg Ethical Clearance

CBEREC and SUBCOMMITTEES 2017

UNIVERSITY OF JOHANNESBURG

CBE RESEARCH ETHICS COMMITTEE

ETHICAL CLEARANCE REPORT

Applicant	N Kristen Mitchley
Supervisor	Dr P Thomas
Student/staff number	201474887
Title	Strategic management to assure literacy: The case of Rotary Middleburg
Decision date at meeting	12 August 2018
Decision at Department / School **Decision at College Meeting** **Decision at CBE REC**	Approved
Reviewers	
Ethical clearance code	2018BM30
Rating of most recent application	01

CODE 01 - Approved; CODE 02 - Approved with suggestions without re-submission

CODE 03 - Not approved, may re-submit; CODE 04 - Not approved, no re-submission allowed

RESEARCH COMPLIES WITH	COMPLIANCE	NON-COMPLIANCE / DETAILS / RECOMMENDATIONS / CONDITIONS OF APPROVAL
The right to privacy, confidentiality and anonymity	Yes	
The right to equality, justice, human dignity/life and protection against harm	Yes	
The right to freedom of choice, expression and access to information	Yes	
Right of the community and science community	Yes	
The researcher will not experience any harm in conducting the research	Yes	
Informed consent/letters of request	Yes	

APPENDIX B: Request to Conduct Research within Rotary District 9400

UNIVERSITY OF JOHANNESBURG

RESEARCH REQUEST LETTER

Ms. Nadine Kirsten Mitchley
Department of Business Management
Johannesburg Business School
College of Business and Economics
University of Johannesburg

REF: Formal request to undertake research within D9400 Rotary Middleburg

We are currently undertaking our Masters of Commerce in Strategic Management at the University of Johannesburg. We would like to request your permission to conduct research on your literacy project and children's home Rotary projects in Middleburg.

In addition we would like to request your consent to use D9400 Rotary's name in reporting our research. Rotary D9400 would appear as the name in our theses in the public domain and in research articles and conference papers resulting from this research. However, all people interviewed would be anonymous in this reporting referred to only by nom de plumes such as Rotary project manager 1 or, Librarian 2.

The title of Ms Mitchley's study is: **A gap analysis for NPO resource utilisation in a community literacy project.**

Our **Research supervisor is (contactable with any concerns at any time):**

Dr Peta Thomas
Department of Business Management
Johannesburg Business School
College of Business and Economics
University of Johannesburg
Phone: 011 559 4341
Email: pthomas@uj.ac.za

LETTER OF CONSENT Ms Mitchley

On behalf of D9400 Rotary Literacy committee, I ACW DEINER, hereby give consent to Nadine Mitchley to conduct research the on D9400 Rotary literacy project and to use Rotary's name in reporting the above mentioned research.

Charles Deiner: ______________________

Date: 10/10/18 Signature: ALEXANDER CHARLES CLARK DEINER

APPENDIX C: Participant Request Form to Participate in the Qualitative Research

UNIVERSITY OF JOHANNESBURG

DEPARTMENT OF BUSINESS MANAGEMENT

JOHANNESBURG BUSINESS SCHOOL

COLLEGE OF BUSINESS AND ECONOMICS

REQUEST TO CONDUCT RESEARCH QUESTIONNAIRE

Dear potential research participant

My name is Nadine Mitchley and I am a registered student studying towards a Master's degree in Strategic Management at the University of Johannesburg (UJ). This research project will be conducted under the supervision of Dr. Peta Thomas of the Department of Business Management, Johannesburg Business School, College of Business and Economics at UJ. The research I wish to conduct involves investigating how value delivery from Rotary District 9400s (RD 9400) literacy project can be measured and managed in order to create maximum impact (both tangibly, in terms of improved literacy, and intangibly, in terms of sustainable initiatives for the community and reputational value for RD 9400). I would like to hear your views of the management and measurement of the literacy project to maximise the value received by communities. You are one of several stakeholders who are involved in this project, therefore you are ideal to help me understand your perspective of the value of the project. Furthermore, I am seeking your permission for an interview regarding the literacy project, its operation, and its current role in the communities it serves. Your participation will be greatly valued!

The ethics of my study have been informed by the following:

- Participants' identities will be kept anonymous and confidential throughout the study and in any resulting reports and papers generated from the study;
- The data collected will be used for report purposes, appearing only in an academic thesis, research articles, and conference papers and will be destroyed three years after completion of the dissertation;
- Participation in this study is voluntary;
- Participants can withdraw from the study at any point should they feel uncomfortable;
- The final dissertation will be made available electronically to participants on request;
- The final dissertation will be in the public domain in the University of Johannesburg library e-repository;
- There are no physical risks associated with participation in this study;
- There is no reward for participation in this study;
- The interview is approximately 40-60 minutes in length, thereafter I may contact you with an additional question or to clarify a given answer;
- Data collected from this study will be kept on my personal laptop in a secure folder, and will only be reviewed by me and my supervisor; and
- Generic names will be assigned to each participant, thereby ensuring anonymity throughout the study.

I have read the above text and agree to participate in this study and I understand that my participation is voluntary.

Name: ____

Signature: _________________________ Date: _______________

Nadine K. Mitchley
M.Com student
Email: 201474887@student.uj.ac.za
Department of Business Management
Johannesburg Business School
College of Business and Economics
University of Johannesburg

Dr. P. Thomas
Supervisor
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APPENDIX D: Interview Guide 1 Literacy Committee Members

DEPARTMENT OF BUSINESS MANAGEMENT

JOHANNESBURG BUSINESS SCHOOL

COLLEGE OF BUSINESS AND ECONOMICS

REQUEST TO CONDUCT RESEARCH QUESTIONNAIRE

This research is being conducted in order to understand the value added by Rotary District 9400 through their book distribution project to a community. The aim of this study is to identify how Rotary District 9400 can better manage the book distribution project to minimise waste and maximise resource utilisation in order to improve literacy in communities. All participants' personal information and responses will be kept anonymous and confidential.

A semi-structured interview guide will be used for the face-to-face interviews in the study to understand RD 9400s performance measurement and management and the role of stakeholders in the literacy project.

<u>SECTION A – DEMOGRAPHICS</u>

<u>Date of interview</u>

1. Nationality______________________________
2. Gender______________________________
3. Age______________________________
4. Highest educational qualification______________________________
5. Job title______________________________
6. Description of role______________________________
7. Number of years with the organisation______________________________
8. Cell number______________________________

Section B – Questions related to the Rotary D9400 literacy project

Interview questions:

Performance measurement

1. What does performance measurement mean to you?

2. In your opinion, do you believe that performance measurement should be used in NPOs?

3. Does your organisation currently use performance measurement?
    a. If yes, what were the driving forces in your organisation that led to the performance measures being used?
    b. If no, what are the driving forces preventing the organisation from using performance measures?
    c. What risks do you think were highlighted in this project?

4. How is performance measurement used in your organisation? Please explain your answers.
    a. Planning, evaluating, rewards?
    b. Benchmarking?
    c. Donor related?
    d. Other?

5. What tangible and intangible performance measures do you use to measure whether you are achieving your objectives? Why?
    a. What performance indicators do you think are most important to measure?
    b. How do you choose performance measures?

6. Which performance measurement frameworks, if any, do you know about? (expand on what you know about this framework)
    a. Balanced scorecard?
    b. Social return on investment?
    c. Cost-benefit analysis
    d. Social accounting and auditing

7. Has your organisation implemented, or attempted to implement, any performance measurement framework?

8. What problems and risks has your organisation faced with the use of performance measurement frameworks?

9. What opportunities have risen with the use of performance measurement framework?

10. Are there any changes you would make to the current framework or measures used by your organisation and why?

Project management

1. What role does management play in the literacy project? What policies / processes guide this project?
    a. Improve ability to plan, implement and control projects;
    b. Use of management tools and techniques.

2. What are some constraints faced by the literacy project?
    a. Quality of service
    b. Time constraints
    c. Cost
    d. Scope of the project
    e. Limited resources (human, financial, physical)

Stakeholder involvement

1. How would you define the term ‘stakeholder’?

2. Who are your primary and secondary stakeholders?
    a. What are their expectations of the literacy project?

3. What role do stakeholders play in decision-making and organisational activities? How do you involve them?

4. What drives community stakeholder engagement in RD 9400?
    a. What role does RD 9400s reputation play in stakeholder involvement?

5. How does Rotary District 9400 engage specifically with host community stakeholders to ensure A2B?

6. What criteria does Rotary District 9400 use in determining which stakeholder communities to give priority attention to?
    a. What resources might the primary/ key stakeholder be able and willing to mobilise?

(adapted from: Waritimi, 2012)

Closing question

1. What challenges / risks has this project had?

2. How can RD 9400 overcome these challenges?

3. What recommendations would you make to improve the sustainability of the literacy project?

4. What would you recommend to make this project more valuable than it already is?

5. Has sustainability been reached in terms of moving from A1 to B3 in the A2B transformation?

6. Please tell me what recommendations for learning from and always improving project management and project management audit trails for Rotary projects you would now make having been involved in this project we have discussed today.

Thank you for your support of my research.

APPENDIX E: Interview Guide 2 Literacy Project Managers

DEPARTMENT OF BUSINESS MANAGEMENT

JOHANNESBURG BUSINESS SCHOOL

COLLEGE OF BUSINESS AND ECONOMICS

REQUEST TO CONDUCT RESEARCH QUESTIONNAIRE

This research is being conducted in order to understand the value added by Rotary District 9400 through its book distribution project. The aim of this research is to identify how Rotary District 9400 can better manage its book distribution project in order to minimise waste and maximise resource utilisation to improve literacy in communities. All participants' personal information and responses will be kept anonymous and confidential.

SECTION A – DEMOGRAPHICS

Date of interview

1. Nationality____
2. Gender____
3. Age____
4. Highest educational qualification______________________________________
5. Job title____
6. Description of role____
7. Number of years with the organisation_________________________________
8. Cell number____

Section B – questions related to the Rotary D9400 literacy project

Performance measurement

1. What does performance measurement mean to you?
2. In your opinion, do you believe that performance measurement should be used in NPOs?

3. Does your organisation currently use performance measurement?
    a. If yes, what were the driving forces in your organisation that led to the performance measures being used?
    b. If no, what are the driving forces preventing the organisation from using performance measures?
    c. What risks do you think were highlighted in this project?
4. How is performance measurement used in your organisation? Please explain your answer
    a. Planning, evaluating, rewards?
    b. Benchmarking
    c. Donor related
    d. Other

5. What tangible and intangible performance measures do you use to measure whether you are achieving your objectives?
    a. What performance indicators do you think are most important to measure?
    b. How do you choose performance measures?

6. Which performance measurement frameworks, if any, do you know about?
    a. Balanced scorecard?
    b. Social return on investment?
    c. Cost-benefit analysis
    d. Social accounting and auditing

7. Has your organisation implemented, or attempted to implement, any performance measurement framework?

8. What problems has your organisation faced with the use of performance measurement frameworks?

9. What opportunities have risen with the use of performance measurement framework?

10. Are there any changes you would make to the current framework or measures used by your organisation and why?

Project management

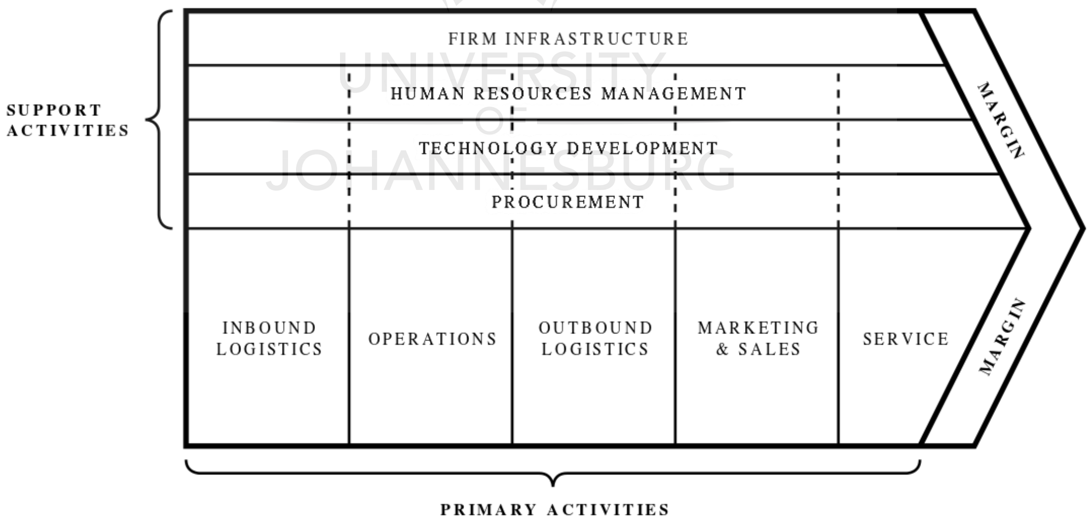
1. What role does management play in the literacy project? What policies / processes guided this project?
    a. Improve ability to plan, implement and control projects;
    b. Use of management tools and techniques.

2. What are some constraints faced by the literacy project?
    a. Quality of service
    b. Time constraints
    c. Cost
    d. Scope of the project
    e. Limited resources (human, capital, physical)

Value chain

1. What is your understanding of an organisation's value chain?

2. The value chain demonstrates how and where value is created through inputs, transformation and outputs. What would RD9400's value chain demonstrate?



3. What value do you believe is being created by RD9400's literacy project?

4. What role do stakeholders play in RD9400's value chain?

5. Do you think it would be beneficial for RD9400 to map out its value chain?

Closing questions

1. What challenges has this project had?

2. How can RD 9400 overcome these challenges?

3. What recommendations would you make to improve the sustainability of the literacy project?

4. What would you recommend to make this project more valuable than it already is?

5. Has sustainability been reached in terms of moving from A1 to B3 in the A2B transformation?

6. Please tell me what recommendations for learning from and always improving project management and project management audit trails for Rotary projects you would now make having been involved in this project we have discussed today.

Thank you for your support of my research

APPENDIX F: Interview Guide 3 Key Literacy Project Stakeholders

DEPARTMENT OF BUSINESS MANAGEMENT

JOHANNESBURG BUSINESS SCHOOL

COLLEGE OF BUSINESS AND ECONOMICS

REQUEST TO CONDUCT RESEARCH QUESTIONNAIRE

SECTION A – DEMOGRAPHICS

Date of interview

1. Nationality____
2. Gender____
3. Age____
4. Highest educational qualification____
5. Job title____
6. Description of role____
7. Number of years with the organisation______________________________________
8. Cell number____

Section B – questions related to the literacy Rotary D9400 project

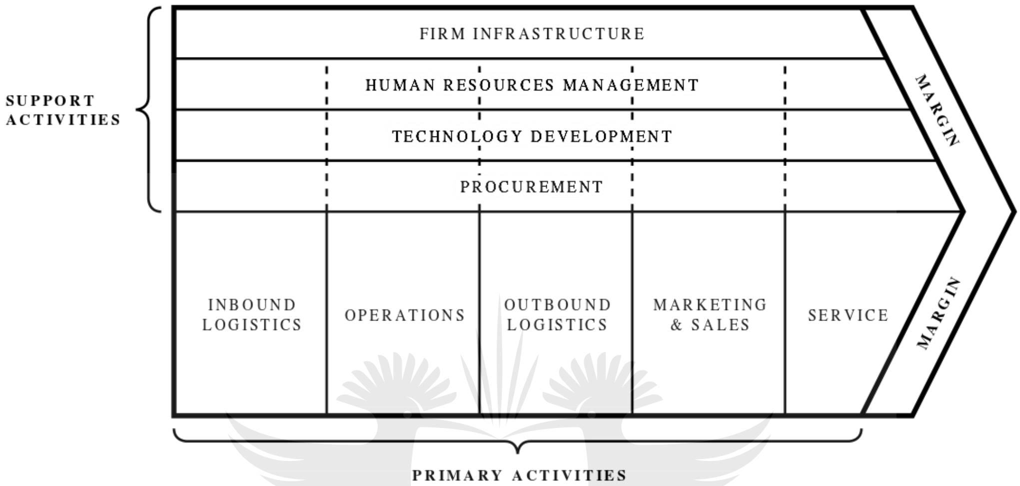
Stakeholder involvement

1. How would you define the term ‘stakeholder’?
2. What are stakeholders’ expectations of the literacy project?
3. Do you play any role in RD 9400s decision-making and organisational activities regarding the literacy project?
4. What do you believe drives community stakeholder engagement in RD 9400?
   a. What role does RD 9400’s reputation play in stakeholder involvement?
   b. What risks do you think were highlighted in this project?
5. How does Rotary District 9400 engage with host community stakeholders?

(adapted from: Waritimi, 2012)

Value chain

1. What is your understanding of an organisation's value chain?
2. The value chain demonstrates how and where value is created through inputs, transformation, and outputs. What would RD 9400's value chain demonstrate?



3. What value do you believe is being created by RD 9400's literacy project?
4. What role do stakeholders play in RD 9400's value chain?
5. Do you think it would be beneficial for RD 9400's to map out its value chain?

A2B transformation

1. Do you think that the literacy project is leading community members toward an independent locus of control (i.e. they are independent and self-sustaining)?
2. How is the literacy project benefiting community members?
3. In your opinion can the literacy project lead to a better standard of living for its beneficiaries?

Sustainable development

1. What is your understanding of the concepts of 'sustainability' and 'sustainable development'?

2. What are the three main dimensions of sustainability that relate back to the triple bottom line?
3. When considering sustainability, what role do stakeholders play?

Performance measurement

1. What does performance measurement mean to you?
2. In your opinion, do you believe that performance measurement should be used by Rotary District 9400?
3. What tangible and intangible performance measures do you believe Rotary District 9400 should consider when measuring the value it creates through its literacy project?
4. What problems and risks do you believe Rotary District 9400 would face with the use of performance measurement frameworks?
5. What opportunities do you believe should arise with the use of a performance measurement framework?

Closing question

1. What challenges has this project had?
2. How can RD 9400 overcome these challenges?
3. What recommendations would you make to improve the sustainability of the literacy project?
4. What would you recommend to make this project more valuable than it already is?
5. Has sustainability been reached in terms of moving from A1 to B3 in the A2B transformation?
6. Please tell me what recommendations for learning from and always improving project management and project management audit trails for Rotary projects you would now make having been involved in this project we have discussed today.

Thank you for your support of my research.

APPENDIX G: Pilot Study Request

Good day all

I am at a stage in my research where I am ready to send out surveys. Before I do this, I would like to ask each of you to please take part in my pilot study. The pilot study is just a test run for my survey to ensure that respondents will understand how to complete the survey. Please, if you do not mind, complete the survey by clicking on the orange "Fill out form" button. Once you have completed the survey, please send me feedback with any notes you may have.

Kind regards,

Nadine

Google Forms

I've invited you to fill in a form:

Rotary literacy project survey

Dear potential research respondent

My name is Nadine Mitchley, I am a registered student studying towards a Master's degree in Strategic Management at the University of Johannesburg (UJ). The research I wish to conduct involves investigating a means through which the value created by Rotary District 9400s (RD9400), Middelburg Rotary Club, literacy project can be measured and managed in order to create maximum impact (both tangibly, in terms of improved literacy, and intangibly, in terms of sustainable initiatives for the community and reputational value for RD9400 as a whole). This research is being conducted under the supervision of Dr. Peta Thomas of the Department of Business Management, Johannesburg Business School, College of Business and Economics at UJ.

Please will you kindly fill out the survey by clicking on the orange "Fill out form" button below. The survey will take you roughly 20 minutes to complete.

The survey is built from three sections; the first section is a consent form. The second section, Section A, has questions relating to your demographic information. The third section, Section B, consists of questions relating to your understanding and opinions of performance in a community literacy project. Section B's questions are set out to identify the CURRENT and the IDEAL situations of each question. This was done so that the researcher could identify any gaps between the ideal situations and actual situations of the literacy project.

Please also forward this email to other Rotarians and other individuals involved in similar literacy projects, for example, The Link.

Thank you for your participation in this research.

(Please read the consent form on the next page before continuing).

FILL OUT FORM

APPENDIX H: Request to take part in the online questionnaire

Good day recipient

My name is Nadine Mitchley, I am a Master's student at the University of Johannesburg. I am conducting research on the value of the literacy projects carried out by Rotary District 9400. I would like to ask you to complete an online survey that has been set up to measure the gap between current performance and ideal performance of a literacy project. The online survey will take around 15-20 minutes to complete. The survey will only be open until 30 April, all responses need to be submitted before then.

Thank you for your participation in my research project!

Kind regards,

Nadine

Google Forms

I've invited you to fill in a form:

Dear potential research respondent

My name is Nadine Mitchley, I am a registered student studying towards a Master's degree in Strategic Management at the University of Johannesburg (UJ). The research I wish to conduct involves investigating a means through which the value created by Rotary District 9400s (RD9400), Middelburg Rotary Club, literacy project can be measured and managed in order to create maximum impact (both tangibly, in terms of improved literacy, and intangibly, in terms of sustainable initiatives for the community and reputational value for RD9400 as a whole). This research is being conducted under the supervision of Dr. Peta Thomas of the Department of Business Management, Johannesburg Business School, College of Business and Economics at UJ.

Please will you kindly fill out the survey by clicking on the orange "Fill out form" button below. The survey will take you roughly 20 minutes to complete.

The survey is built from three sections; the first section is a consent form. The second section, Section A, has questions relating to your demographic information. The third section, Section B, consists of questions relating to your understanding and opinions of performance in a community literacy project. Section B's questions are set out to identify the CURRENT and the IDEAL situations of each question. This was done so that the researcher could identify any gaps between the ideal situations and actual situations of the literacy project.

Please also forward this email to other Rotarians and other individuals involved in similar literacy projects, for example, The Link.

Thank you for your participation in this research.

(Please read the consent form on the next page before continuing).

FILL OUT FORM

APPENDIX I: Paper-based Quantitative Questionnaire

UNIVERSITY OF JOHANNESBURG

DEPARTMENT OF BUSINESS MANAGEMENT

JOHANNESBURG BUSINESS SCHOOL

COLLEGE OF BUSINESS AND ECONOMICS

REQUEST TO CONDUCT RESEARCH

Dear potential research respondent

My name is Nadine Mitchley, I am a registered student studying towards a Master's degree in Strategic Management at the University of Johannesburg (UJ). The research I wish to conduct involves investigating a means through which the value created by Rotary District 9400s (RD9400), Middelburg Rotary Club, literacy project can be measured and managed in order to create maximum impact (both tangibly, in terms of improved literacy, and intangibly, in terms of sustainable initiatives for the community and reputational value for RD9400 as a whole). This research is being conducted under the supervision of Dr. Peta Thomas of the Department of Business Management, Johannesburg Business School, College of Business and Economics at UJ.

The ethics of my study have been informed by the following:

<u>I, the respondent, have been informed about my involvement in the research, and what is required of me. I understand that:</u>

- My participation in the research study is voluntary;
- My answers will not be used if I do not provide this written, informed consent;
- I may withdraw from the research at any time with no negative consequences for myself;
- My answers will be kept confidential and my anonymity assured in the reporting;
- The data and results may be used for an MCOM thesis, journal publications and / or conference presentations, and, in the University library in the public e-files;

- The raw data (the questionnaires) will be stored in a secure location on the University of Johannesburg campus and the data will be safely stored on password protected computers;
- The data may also be used in related studies in future;
- Other researchers may have access to the data but my name will not appear on any of the data base that is sent to other researchers;
- I will not receive any reports on individual results, but I can request feedback on the overall findings of the study;
- I can contact the researchers, whose details have been provided above, if I have any uncertainties or concerns that relate to the study and/or the items in the questionnaire;
- I have received the contact details of the researcher on the participant information sheet;
- All my questions about the research have been answered and I agree that my responses from the questionnaires can be used for the research;
- I have read the abovementioned information and agree to participate as per the above conditions. I understand everything and consent voluntarily to participate in this study.

Thank you for your participation in this study.

Nadine K. Mitchley
M.Com student
Email: 201474887@student.uj.ac.za

Dr. P. Thomas
Supervisor
Email: pthomas@uj.ac.za

Department of Business Management
Johannesburg Business School
College of Business and Economics
University of Johannesburg

Signature: ____________________________ Date: ___________________

DEPARTMENT OF BUSINESS MANAGEMENT

JOHANNESBURG BUSINESS SCHOOL

COLLEGE OF BUSINESS AND ECONOMICS

QUESTIONNAIRE

The results of this questionnaire will form part of the data that is required for the researcher to obtain a Master's degree at the University of Johannesburg. The research is aimed at analysing the value creation process of Rotary District 9400's Middelburg Rotary Club literacy project. You are kindly requested to participate in the study. The information gathered will remain confidential and anonymous. The data collected will only be used for research purposes.

PLEASE ANSWER THE FOLLOWING QUESTIONS BY PLACING AN (X) THE RELEVANT BLOCK.

EXAMPLE of how to complete this questionnaire:

<u>Gender</u>
If you are female

Male	1
Female	2

Section A

This section consists of questions relating to respondents' background or biographical information. Although we are aware of the sensitivity of the questions in this section, the information will allow the researcher to compare groups of respondents. Your responses will remain confidential and anonymous. Your participation is sincerely appreciated.

1. Gender

Male	1
Female	2

2. Age

18 – 24	1
25 – 34	2
35 – 44	3
45 – 54	4
55 – 64	5
65 +	6

3. Ethnicity

Black	1
White	2
Coloured	3
Indian or Asian	4

4. Employment status

Employed full-time	1
Employed part-time	2
Self employed	3
Student	4
Unemployed	5
Retired	6

5. Highest qualification

Grade 11 or lower	1
Matric / Grade 12	2
Post-matric diploma or certificate	3
Baccalaureate degree	4
Post-graduate degree	5

6. What is your main role in the Rotary literacy project? (Select one)

Rotary member	1
School principle	2
Library representative	3
Community leader	4
Community member	5
Other (specify)	6

7. Name of community project you are involved in

The Link	1
Middelburg literacy project	2
Other (specify)	3

Section B

This section explores your attitudes and perceptions regarding Rotary District 9400s Middelburg Rotary Clubs literacy project. Please think of a community project where there is a relationship between yourself and the project. You can be a Rotarian or a key stakeholder of a Rotary Literacy project.

Each question has been set up to identify what your belief of the current situation is and what the ideal situation should be. The first column indicates your agreement with the statement on a scale of strongly disagree to strongly agree with regards to the current situation. The second column indicates how important you believe each statement is on a scale of totally unimportant to very important, this column is based on what you believe the ideal situation of each statement is.

For the current situation, please indicate your level of agreement with each statement provided on the following scale, where:

(1) Strongly disagree

(2) Disagree

(3) Neutral

(4) Agree

(5) Strongly agree.

For the ideal situation, please indicate the level of importance of each statement on the following scale, where:

(1) Totally unimportant

(2) Unimportant

(3) Neutral

(4) Important

(5) Very important

1. Stakeholder accountability demands

		CURRENT						IDEAL				
1.	I feel project managers focused sufficiently on: *(Adapted from: Chiliya, 2016; Wadongo, 2014; Elgammal, 2016)*	**Strongly disagree**	**Disagree**	**Neutral**	**Agree**	**Strongly agree**		**Totally unimportant**	**Unimportant**	**Neutral**	**Important**	**Very important**
1.1	Donors' accountability demands	1	2	3	4	5	**1.2**	1	2	3	4	5
2.1	Beneficiaries' accountability demands	1	2	3	4	5	**2.2**	1	2	3	4	5
3.1	Community accountability demands	1	2	3	4	5	**3.2**	1	2	3	4	5

2. Role of strategic objectives

		CURRENT						IDEAL				
2.	I believe the strategic objectives of the literacy project: *(Adapted from: Chiliya, 2016; Wadongo, 2014)*	**Strongly disagree**	**Disagree**	**Neutral**	**Agree**	**Strongly agree**		**Totally unimportant**	**Unimportant**	**Neutral**	**Important**	**Very important**
1.1	Led to close relationships with stakeholders	1	2	3	4	5	**1.2**	1	2	3	4	5
2.1	Focused on reducing costs	1	2	3	4	5	**2.2**	1	2	3	4	5
3.1	Addressed the needs of beneficiary groups	1	2	3	4	5	**3.2**	1	2	3	4	5
4.1	Emphasised long-term strategic planning	1	2	3	4	5	**4.2**	1	2	3	4	5

3. Performance planning practices

		CURRENT						IDEAL				
3.	In conducting the literacy project, I feel that: *(Adapted from: Wadongo, 2014; Nanthagopan, Williams & Page, 2016)*	**Strongly disagree**	**Disagree**	**Neutral**	**Agree**	**Strongly agree**		**Totally unimportant**	**Unimportant**	**Neutral**	**Important**	**Very important**
1.1	RD9400 communicated its vision and mission	1	2	3	4	5	**1.2**	1	2	3	4	5
2.1	RD9400 emphasised its core values	1	2	3	4	5	**2.2**	1	2	3	4	5
3.1	RD9400's goals and objectives were well communicated	1	2	3	4	5	**3.2**	1	2	3	4	5
4.1	Key success factors were identified by RD9400	1	2	3	4	5	**4.2**	1	2	3	4	5
5.1	Actions of RD9400 reflected their mission and vision	1	2	3	4	5	**5.2**	1	2	3	4	5

6.1	Strategic planning involved stakeholders	1	2	3	4	5	**6.2**	1	2	3	4	5

4. Performance indicators

		CURRENT						IDEAL				
4.	I believe that RD9400 should use the following performance indicators: *(Adapted from: Wadongo, 2014)*	**Strongly disagree**	**Disagree**	**Neutral**	**Agree**	**Strongly agree**		**Totally unimportant**	**Unimportant**	**Neutral**	**Important**	**Very important**
1.1	Input indicators (measure of quantities of resources provided to the project)	1	2	3	4	5	**1.2**	1	2	3	4	5
2.1	Process or activity indicators (measures of what happens during project implementation)	1	2	3	4	5	**2.2**	1	2	3	4	5
3.1	Output indicators (measures of immediate project results)	1	2	3	4	5	**3.2**	1	2	3	4	5
4.1	Outcome/ impact indicators (effects of project outputs to beneficiaries and society)	1	2	3	4	5	**4.2**	1	2	3	4	5
5.1	Revenue indictors (income from donors or internally generated)	1	2	3	4	5	**5.2**	1	2	3	4	5
6.1	Effectiveness indicators (measures of achievement of results as planned)	1	2	3	4	5	**6.2**	1	2	3	4	5
7.1	Efficiency indicators (the relationship between project costs and outputs)	1	2	3	4	5	**7.2**	1	2	3	4	5
8.1	Productivity indicators (relationship between inputs and outputs)	1	2	3	4	5	**8.2**	1	2	3	4	5
9.1	Beneficiary satisfaction (project outputs correspond to beneficiary needs)	1	2	3	4	5	**9.2**	1	2	3	4	5

10.1	Sustainability outcomes (results to extend beyond the projects formal life)	1	2	3	4	5	**10.2**	1	2	3	4	5

5. Role of performance measurement

		CURRENT						IDEAL				
5.	I think that measuring performance could help the literacy project to: *(Adopted from: Wadongo, 2014)*	**Strongly disagree**	**Disagree**	**Neutral**	**Agree**	**Strongly agree**		**Totally unimportant**	**Unimportant**	**Neutral**	**Important**	**Very important**
1.1	Inform strategic decisions	1	2	3	4	5	**1.2**	1	2	3	4	5
2.1	Take corrective action against deviations from desired performance	1	2	3	4	5	**2.2**	1	2	3	4	5
3.1	Demonstrate accountability to stakeholders	1	2	3	4	5	**3.2**	1	2	3	4	5
4.1	Comply with legal reporting standards	1	2	3	4	5	**4.2**	1	2	3	4	5

6. Project impact assessment

		CURRENT						IDEAL				
6.	I believe the literacy project impacted recipient communities by: *(Adapted from: Krishna, 2012; Elgammal, 2016).*	**Strongly disagree**	**Disagree**	**Neutral**	**Agree**	**Strongly agree**		**Totally unimportant**	**Unimportant**	**Neutral**	**Important**	**Very important**
1.1	Addressing the immediate issues in the community	1	2	3	4	5	**1.2**	1	2	3	4	5
2.1	Having a positive impact on community development	1	2	3	4	5	**2.2**	1	2	3	4	5

3.1	Conducting a needs assessment to identify problems in the community	1	2	3	4	5	**3.2**	1	2	3	4	5
4.1	Placing recipients needs first	1	2	3	4	5	**4.2**	1	2	3	4	5

Thank you for your participation in this research!

APPENDIX J: Online Quantitative Questionnaire

Rotary literacy project survey

Dear potential research respondent

My name is Nadine Mitchley, I am a registered student studying towards a Master's degree in Strategic Management at the University of Johannesburg (UJ). The research I wish to conduct involves investigating a means through which the value created by Rotary District 9400s (RD9400), Middleburg Rotary Club, literacy project can be measured and managed in order to create maximum impact (both tangibly, in terms of improved literacy, and intangibly, in terms of sustainable initiatives for the community and reputational value for RD9400 as a whole). This research is being conducted under the supervision of Dr. Peta Thomas of the Department of Business Management, Johannesburg Business School, College of Business and Economics at UJ.

Please will you kindly fill out the survey by clicking on the orange "Fill out form" button below. The survey will take you roughly 20 minutes to complete.

The survey is built from three sections, the first section is a consent form. The second section, Section A, has questions relating to your demographic information. The third section, Section B, consists of questions relating to your understanding and opinions of performance in a community literacy project. Section B's questions are set out to identify the CURRENT and the IDEAL situations of each question. This was done so that the researcher could identify any gaps between the ideal situations and actual situations of the literacy project.

Please also forward this email to other Rotarians and other individuals involved in similar literacy projects, for example, The Link.

Thank you for your participation in this research.

(Please read the consent form on the next page before continuing).

*Required

Consent form

The ethics of my study have been informed by the following terms:

I, the respondent, have been informed about my involvement in the research, and what is required of me. I understand that:

- My participation in the research study is voluntary;
- My answers will not be used if I do not provide this written, informed consent;
- I may withdraw from the research at any time with no negative consequences for myself;
- My answers will be kept confidential and my anonymity assured in the reporting;
- The data and results may be used for an MCOM thesis, journal publications and/or conference presentations, and, in the University library in the public e-files;
- The raw data (the questionnaires) will be stored in a secure location on the University of Johannesburg campus and the data will be safely stored on password protected computers;
- The data may also be used in related studies in future;
- Other researchers may have access to the data but my name will not appear on any of the data base that is sent to other researchers;
- I will not receive any reports on individual results, but I can request feedback on the overall findings of the study;
- I can contact the researchers, whose details have been provided above, if I have any uncertainties or concerns that relate to the study and/or the items in the questionnaire;
- I have received the contact details of the researcher on the participant information sheet;
- All my questions about the research have been answered and I agree that my responses from the questionnaires can be used for the research;
- I have read the above mentioned information and agree to participate as per the above conditions. I understand everything and consent voluntarily to participate in this study.

If you wish to continue answering this survey please accept the terms given above. If you would like to withdraw, please indicate that you do not accept the terms given above and exit the survey.

1. **Do you accept the terms of the research?** *

Mark only one oval.

- ◯ Yes
- ◯ No *Stop filling out this form.*

Section A

This section consists of questions relating to respondents background or biographical information. Although we are aware of the sensitivity of the questions in this section, the information will allow the researcher to compare groups of respondents. Your responses will remain confidential and anonymous.

2. **What is your gender?** *

Mark only one oval.

- ◯ Male
- ◯ Female

3. **What is your age?** *

Mark only one oval.

- ◯ 18 - 24
- ◯ 25 - 34
- ◯ 35 - 44
- ◯ 45 - 54
- ◯ 55 - 64
- ◯ 65 +

4. **What is your ethnicity?** *

Mark only one oval.

- ◯ Black
- ◯ White
- ◯ Coloured
- ◯ Indian or Asian

5. **What is your current employment status?** *

Mark only one oval.

- ◯ Employed full-time
- ◯ Employed part-time
- ◯ Self employed
- ◯ Student
- ◯ Unemployed
- ◯ Retired

6. **What is your highest qualification level?**

Mark only one oval.

- ◯ Grade 11 or lower
- ◯ Matric / Grade 12
- ◯ Post-matric Diploma or Certificate
- ◯ Baccalaureare Degree
- ◯ Post-graduate Degree

7. **What is your main role in the Rotary literacy project?** *

Mark only one oval.

- ◯ Rotary member
- ◯ School principle
- ◯ Library representative
- ◯ Community leader
- ◯ Community member
- ◯ Other:

8. **What is the name of the community project you are involved in?** *

Mark only one oval.

- ◯ The Link Literacy Project
- ◯ Middleburg Literacy Project
- ◯ Other:

Section B

This section explores your attitudes and perceptions regarding Rotary District 9400s Middleburg Rotary Clubs literacy project. Please think of a community project where there is a relationship between yourself and the project. You can be a Rotarian or a key stakeholder of a Rotary Literacy project.

Each question has been set up to identify what your belief of the current situation is and what the ideal situation should be. Each question has been presented twice, the first part of a question indicates your agreement with the statement given on a scale of strongly disagree to strongly agree, with regards to the current situation. The second part of a question indicates how important you believe each statement is on a scale of totally unimportant to very important, this is based on what you believe the ideal importance of each statement is.

9. **CURRENT: I feel project managers focused sufficiently on:** *

Mark only one oval per row.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Donors accountability demands	◯	◯	◯	◯	◯
Beneficiaries accountability demands	◯	◯	◯	◯	◯
Community accountability demands	◯	◯	◯	◯	◯

10. **IDEAL: I feel project managers should focus on:** *

Mark only one oval per row.

	Totally unimportant	Unimportant	Neutral	Important	Very important
Donors accountability demands	◯	◯	◯	◯	◯
Beneficiaries accountability demands	◯	◯	◯	◯	◯
Community accountability demands	◯	◯	◯	◯	◯

11. **CURRENT: I believe the strategic objectives of the literacy project:** *

Mark only one oval per row.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Led to close relationships with stakeholders	◯	◯	◯	◯	◯
Focused on reducing costs	◯	◯	◯	◯	◯
Addressed the needs of beneficiary groups	◯	◯	◯	◯	◯
Emphasised long-term strategic planning	◯	◯	◯	◯	◯

12. **IDEAL: I believe the strategic objectives of the literacy project should:** *

Mark only one oval per row.

	Totally unimportant	Unimportant	Neutral	Important	Very important
Lead to close relationships with stakeholders	◯	◯	◯	◯	◯
Focus on reducing costs	◯	◯	◯	◯	◯
Address the needs of beneficiary groups	◯	◯	◯	◯	◯
Emphasise long-term strategic planning	◯	◯	◯	◯	◯

13. **CURRENT: In conducting the literacy project I feel that:** *

Mark only one oval per row.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
RD9400 communicated their vision and mission					
RD9400 emphasised core values					
RD9400s goals and objectives were well communicated					
Key success factors were identified by RD9400					
Actions of RD9400 reflected their mission and vision					
Strategic planning involved stakeholders					

14. **IDEAL: In conducting the literacy project I feel RD9400 should:** *

Mark only one oval per row.

	Totally unimportant	Unimportant	Neutral	Important	Very important
Communicate their vision and mission					
Emphasise core values					
Communicate goals and objectives					
Identify key success factors					
Reflect their mission and vision throuh their actions					
Involve stakeholders in their strategic planning					

15. **CURRENT: I understood that RD9400 used the following performance indicators:** *

Mark only one oval per row.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Input indicators (measure of quantities of resources provided to the project)					
Process or activity indicators (measures of what happens during project implementation)					
Output indicators (measures of immediate project results)					
Outcome/ impact indicators (effects of project outputs to beneficiaries and society)					
Revenue indictors (income from donors or internally generated)					
Effectiveness indicators (measures of achievement of results as planned)					
Efficiency indicators (the relationship between project costs and outputs)					
Productivity indicators (relationship between inputs and outputs)					
Beneficiary satisfaction (project outputs correspond to beneficiary needs)					
Sustainability outcomes (results to extend beyond the projects formal life)					

16. **IDEAL: I believe that RD9400 should use the following performance indicators:** *

Mark only one oval per row.

	Totally unimportant	Unimportant	Neutral	Important	Very important
Input indicators (measure of quantities of resources provided to the project)					
Process or activity indicators (measures of what happens during project implementation)					
Output indicators (measures of immediate project results)					
Outcome/ impact indicators (effects of project outputs to beneficiaries and society)					
Revenue indictors (income from donors or internally generated)					
Effectiveness indicators (measures of achievement of results as planned)					
Efficiency indicators (the relationship between project costs and outputs)					
Productivity indicators (relationship between inputs and outputs)					
Beneficiary satisfaction (project outputs correspond to beneficiary needs)					
Sustainability outcomes (results to extend beyond the projects formal life)					

17. **CURRENT: Measuring performance helped the project to:** *

Mark only one oval per row.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Inform strategic decisions					
Take corrective actions against deviations from desired performance					
Demonstrate accountability to stakeholders					
Comply with legal reporting standards					

18. **IDEAL: I think that measuring performance should help the project to:** *

Mark only one oval per row.

	Totally unimportant	Unimportant	Neutral	Important	Very important
Inform strategic decisions					
Take corrective actions against deviations from desired performance					
Demonstrate accountability to stakeholders					
Comply with legal reporting standards					

19. **CURRENT: I believe the project impacted recipient communities by:** *

Mark only one oval per row.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Addressing the immediate issues in the community	⬭	⬭	⬭	⬭	⬭
Having a positive impact on community development	⬭	⬭	⬭	⬭	⬭
Conducting a needs assessment to identify problems in the community	⬭	⬭	⬭	⬭	⬭
Placing recipients needs first	⬭	⬭	⬭	⬭	⬭

20. **IDEAL: I believe the project should impact recipient communities by:** *

Mark only one oval per row.

	Totally unimportant	Unimportant	Neutral	Important	Very important
Addressing the immediate issues in the community	⬭	⬭	⬭	⬭	⬭
Having a positive impact on community development	⬭	⬭	⬭	⬭	⬭
Conducting a needs assessment to identify problems in the community	⬭	⬭	⬭	⬭	⬭
Placing recipients needs first	⬭	⬭	⬭	⬭	⬭

APPENDIX K: Qualitative Analysis Coding

OPEN CODING	AXIAL CODING	THEME
Progress **(3)**	Understanding of performance measures	Measuring performance
Achieving goals **(6)**		
Most effective way **(1)**		
Set targets **(2)**		
Improvement **(3)**		
Has there been an impact? **(4)**		
Indicators or standards **(3)**		
Measure against something or benchmark **(5)**		
PM can be used to improve on shortcomings **(2)**		
Yes, performance measures should be used **(10)**		
Harvest funding and resources **(7)**	Why are performance measures important	
More involvement **(4)**		
Accountability **(6)**		
Reporting and feedback **(4)**		
Planning and evaluating **(3)**		
Guide funding and decision-making **(3)**		
Without measuring you don't know the impact **(8)**		
Level of education **(2)**	Measuring project outcomes	
Matric pass rate **(2)**		
Literacy rate **(2)**		
Improved literacy **(3)**		
Improved English skills **(3)**		
Job opportunities **(4)**		
Recipients going to university **(4)**		

OPEN CODING	AXIAL CODING	THEMES
Distribution **(2)**	The role of project management in the literacy project	**Project management**
Fundraising **(3)**		
Manage the containers **(1)**		
Logistics **(3)**		
Customs **(2)**		
Allocating resources **(2)**		

OPEN CODING	AXIAL CODING	THEMES
Buy-in from schools (school governing boards, principals and teachers) **(2)**	Defining stakeholder involvement	**Stakeholder involvement**
Buy-in from parents **(2)**		
Buy-in from government **(2)**		
Community expectation **(2)**		
Buy-in from community **(3)**		
Children and book recipients **(10)**	Stakeholders of the literacy project	
Donors **(4)**		
Rotarians **(3)**		
Authorities **(1)**		
Sponsors **(4)**		
Government and the Department of Education **(3)**		
Voluntary workers **(2)**		
Community **(8)**		
Principal and staff **(5)**		
Parents **(5)**		
Accountability **(4)**	How to get stakeholder involvement	
Sustainability **(3)**		
Ensure project running correctly **(1)**		
See results **(3)**		
Rotary's reputation **(5)**		
Creating awareness **(5)**		
Providing books **(5)**	Stakeholders roles	
Collecting books **(4)**		
Creating awareness **(5)**		
Keep resources coming **(1)**		
Say in the matter **(1)**	What is a stakeholder?	
Participate **(1)**		
Provide support **(2)**		
Interest in the project **(3)**		
Someone who benefits **(1)**		
Active role in the organisation **(1)**		
Project influences the person **(1)**		

OPEN CODING	AXIAL CODING	THEMES
Improved English skills **(5)**	Outcomes of the value chain	Value chain
Improved reading **(5)**		
Increased knowledge **(2)**		
Improved literacy **(3)**		
Better job opportunities **(4)**		
Better standard of living **(4)**		
Community upliftment **(1)**		
Creating an interest to read **(4)**		
Creating joy **(3)**		
Improved education **(4)**		
Adding value to a point **(1)**	Describing the value chain	
Receiving and distributing **(3)**		
Links all stakeholders along the project **(1)**		
Any person who adds value is a part of the value chain **(1)**		
Initiator –identifying recipients – gathering resources – fundraising – distribution **(1)**		
Multiple effects with a lot of people **(3)**		
Stakeholders are involved at every stage **(2)**		
Rotary should map out their value chain **(6)**		

OPEN CODING	AXIAL CODING	THEMES
Students graduated **(2)**	Role of the A2B transformation movement	**A2B Transformation**
Empowerment **(4)**		
Community upliftment **(1)**		
Yes, moving from A2B **(5)**		
Able to articulate what they have learned **(3)**		
Improvement / enrichment **(3)**		
Increased knowledge **(3)**		
Improved communication skills **(5)**		
Broadened scope of thinking **(3)**		
Better job opportunities **(3)**		

OPEN CODING	AXIAL CODING	THEMES
Sustainability **(4)**	Ensuring sustainable development	**Sustainable development**
Must be measured **(3)**		
Keep an account of activities **(1)**		
Need for time workers **(2)**		
Dependant on funding and sponsors **(4)**		
Well planned **(1)**		
Able to continue in the long run **(4)**	Sustainability	
To sustain is to improve **(2)**		
Moving forward **(1)**		
Empowerment **(1)**		

OPEN CODING	AXIAL CODING	THEMES
Resistance from schools **(3)**	Constraints	**Risks and constraints**
Too much paper work **(3)**		
Government involvement **(5)**		
Costs **(2)**		
Authorities **(1)**		
Voluntary workers/ man power **(3)**		
Language barrier **(4)**		
Boarder control, tariffs and custom duties **(5)**		
Warehouse space **(1)**		
Dependant on funding **(3)**		
Books provided are inappropriate or non-applicable **(3)**		
Community involvement **(3)**		
Reaching saturation **(4)**	Risks	
Books in warehouse hurting people **(3)**		
Resale of books by beneficiaries **(3)**		
Inconsistency of book donations **(3)**		
Theft of books **(5)**		
Books not utilised by beneficiaries **(7)**		
Books being dumped **(2)**		

OPEN CODING	AXIAL CODING	THEMES
Recipients don’t want Canadian books **(4)**	Comments on books received	Other comments and recommendations
Canadian books are irrelevant **(4)**		
A book read is knowledge gained **(3)**		
Need more current literature/ relevant **(2)**		
Recipients scared the project will end or the books will be taken away **(3)**		
Need more Rotary presence in the schools receiving books **(4)**	Recommendations	
Need a teacher/ librarian at the school to monitor book usage and influence reading **(5)**		
Invest in a warehouse **(2)**		
Create more public awareness **(6)**		
Pack books at the warehouse onto shelves **(3)**		
Hold reading competitions between schools to encourage reading **(3)**		
Follow up on donations **(5)**		

APPENDIX L: Language Editor Report

GRAMMAR GIRL

LANGUAGE & TECHNICAL EDITING

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9 October 2019

TO WHOM IT MAY CONCERN

I would like to confirm that I edited the document of Ms Nadine Mitchley entitled **A Gap Analysis of NPO Resource Utilisation in a Community Literacy Project.**

Camilla Smolicz

Member, Professional Editors' Guild

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