MANAGEMENT OF HUMANITARIAN INGOS IN JORDAN

How country directors view relationship with the headquarters

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Abstract

This thesis seeks to understand how country directors in humanitarian international non-governmental organizations view the management of their country offices, in relation to the headquarters. For this purpose, I conducted interviews with country directors in nine such organizations in Jordan, to understand their perspectives on the relationship. I used Charmaz's constructivist grounded theory approach; I did preliminary research on the topic but did not apply any existing framework or literature in my questions, instead I allowed the interviewees to point me towards the direction of the areas with which they were most concerned. I started the analysis from the first interview using different grounded theory methods. After finalizing the data analysis, the answer to the main question of "how country directors perceive relationship between headquarters and country offices" resulted in four areas of concern: 1. The importance of the autonomy of the country office from the headquarters, 2. The relationship between country offices and donors as regulated by headquarters, 3. The effects of the hiring practices regarding local and expat staff, and 4. The accountability measures of country offices towards headquarters, donors, staff, and beneficiaries. This topic is relevant today because of sexual abuse scandals in prominent INGOs in recent years, the spillover of the #metoo movement into the aid sector, the shifting dynamics of the North-South relations in INGOs, as donations from non-western countries are rising, and headquarters of large INGOs moving to the South.

Key words: Humanitarian INGOs, field office, country office, headquarters, tension, donors.

Acknowledgement

Before starting the thesis, I must first thank the many people who made this task possible for me. First and foremost, my thesis supervisor, Professor Teppo Eskelinen, for his incredible support and guidance. I was hesitant in taking many steps while writing the thesis, and had many questions along the way, and without Professor Teppo's patience and thorough response to my never-ending uncertainty, I would have never been able to finish.

I also would like to thank all the interviewees, not only for volunteering their time and contributing their honest opinions, but also for encouraging me, stressing the importance of this research to their field, and expressing their desire to read the full thesis and see how they can use it to gain perspective on their work and improve it. This helped keep me motivated to present solid findings that faithfully represent the data collected.

Of course, I extend my utmost appreciation to my wonderful family and friends. Writing the thesis while having a full-time job was quite difficult, but their unconditional moral support and love through the hard times helped keep me on track. I dedicate this work to my amazing parents, who were very understanding and encouraging throughout the process of writing

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Acronyms & Abbreviations

NGO	Non-governmental organization
INGO	International non-governmental organization
M&E	Monitoring and evaluation
HQ	Headquarters
CO	Country office
FO	Field office
IO	International organization
GT	Grounded theory
CD	Country director
LGBT	Lesbian, gay, bisexual, transgender
UNRWA	United Nations Relief and Works Agency for Palestine Refugees in the Near East
UNHCR	United Nations High Commissioner for Refugees
ISIS	Islamic State in Iraq and Syria
UN	United Nations
UNDP	United Nations Development Program
JRPSC	Jordan Response Platform to the Syria Crisis
JORISS	Jordan Response Information System for the Syria Crisis
JIF	Jordan INGO Forum
MOPIC	Ministry of planning and international cooperation
ECHO	European Civil Protection and Humanitarian Aid Operation
DFID	Department for International Development
HR	Human resources
RO	Regional office
UNICEF	United Nations International Children's Emergency Fund
PSEA	Protection against sexual exploitation and abuse

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1. Introduction

This thesis aims to answer the question of how country directors of humanitarian international non-governmental organizations (INGOs) in Jordan view their relationship with the headquarters (HQ). Despite their mission being clear -providing humanitarian assistance to vulnerable refugees and host communities- there is still a lot of confusion in the role these INGOs play as dictated by HQ. Through interviews with country directors, the thesis attempts to understand what country directors are most concerned with in regards to HQ, what the current situation is, its effect on organizational performance, and how the interaction between country offices (COs) and HQ should look like ideally. The discussion surrounding this issue can't be complete without discussing other parties involved, such as local governments, donors, and beneficiaries; these aspects are also covered through the examination of HQ-CO relationship. In this chapter, I will provide my reason for choosing this topic, explain briefly the context of the thesis, and guide the reader through its chapters.

I've long had an interest in the work of NGOs especially after the Syrian crisis and the flood of humanitarian INGOs into Jordan that followed. I aimed to work at such an INGO, and eventually interned at one in their Monitoring & Evaluation (M&E) department. Being in this particular department, I was close to the process of reporting to HQ, it was then that I witnessed the tension between CO and HQ. At the very beginning of the master's program, I was focused on effectiveness of development and humanitarian aid in general without giving much thought to the implementing units on the ground; the internship grew my interest in INGOs and their internal operations, as they are quite unique in their structure and have many aspects from organizational and developmental perspectives that could be explored. However, most of the literature treats this very complex entity where the top management is in the global North and the implementers in the South, which also relies solely on funding by mostly Northern governments, and has a very diverse staff as one simple unit. This is when I decided that I should try to fill that gap by focusing my research on examining the relationship between HQ and CO.

NGO is an umbrella term for many types of organizations, so it is important to distinguish exactly which type the thesis will examine. In order to do so, I go through different definitions of NGOs throughout history and choose one, customizing it further to suit the thesis. Once the NGO is defined, I look at the history of INGO; from the very beginning dating back to the 18th century, to humanitarian relief efforts after the Second World War, and finally the exponential rise in the eighties and nineties of the twentieth century. It is then time to explore the history of INGOs in Jordan; a country that has faced many refugee crises, and has experience with humanitarian relief efforts. I elaborate further on the Syrian crisis in particular, which started in 2011 and is not showing signs of ending any time soon. The response of the international community was big, and short- and long-term national response plans were established.

The literature on this topic is lacking immensely. As mentioned earlier, most researchers view INGOs as one player in the development scene and do not delve into the elaborateness of such organizations. The only piece of literature that dissects the relationship between HQ and field offices (FO) I found was "Inside NGOs" (1998) by Naoki Suzuki. The book is a very comprehensive study of the topic and tackles the problems and solutions imposed in such a relationship, I provide a summary of Suzuki's findings. Another more recent research I found is a case study by Eschenbacher in 2011, where she examined this issue in one INGO implementing an educational program in South Sudan. I also add some research from the International Organization theory (IO) as it provides an interesting perspective on organizational behavior under the reality of working in an international environment. At times I was tempted to add more research but it would have been too far from my topic and I would have had to compromise on my focus. I decided that what I had was enough especially because I was applying the grounded theory approach.

Grounded Theory (GT) has developed a lot from its first inception by Glaser and Strauss in 1965. It had a huge impact on social sciences, especially because of its validation of qualitative analysis. Today, GT has several forms, some have won the approval of its original creators, and others were heavily criticized. I explain the forms, including their rules on coding, use of literature, theory formation, etc., and choose the form that is most suitable for my research. I

interviewed nine Country Directors (CD) of INGOs in Jordan, so I will go through the process and circumstances of the data collection, and explain why I decided to interview the ones I did. Then I will clarify the data analysis that followed, which is based on the GT approach I chose.

The findings of this research are presented in the fifth chapter. They are divided into four categories, each one representing a general area of concern that impacts the relationship between CO and HQ. Each part of the four shows the findings, and quotes from the interviews to further validate the findings. Going back to the literature, I integrate it into each area of concern, examining my own findings and how they test against it. Although there is little literature as it is, the consistency of the results across it including my research, in addition to the contradictions, are thought-provoking and do beget further research into the matter.

I conclude the thesis with first discussing how this research fits into the current world of INGO; there have been some new trends and challenges that have a strong relevance to the findings and it is interesting to go over what this means for the future of INGOs and the research surrounding them. Of course this thesis doesn't come without some hurdles, so it is important to note the different limitations I had, their impact on my research, and how I chose to handle them. Building on that, I recommend what further research could be done to add to this topic and attempt to fill the glaring gap in the literature. Finally, I provide a brief but thorough conclusion to summarize the aim and findings of this research to the reader.

As a development studies student with a background in business, this research fulfilled two deep interests of mine. INGOs have a unique operating model as an organization that is guided by higher values of helping humankind in times of need. Tackling the topic from both perspectives allowed better consideration and sensitivity of the particular traits of humanitarian INGOs.

2. Context

2.1. Defining NGOs

The term non-governmental organizations (NGOs) encompasses many definitions and is often times used interchangeably with non-profits, civil society, and third sector in general. Moreover, while there are different definitions for each of these terms, they are usually used within the same context of development and human rights. The term NGO was first used by the United Nations in 1945 for international non-state organizations. It is also worth noting that the standard name differs from one country to another. For example, in the United States of America, the term non-profit is more prevalent as those organizations get fiscal benefits if they prove they are not commercial. While in the UK, charity is a more common name as it is an extension of the tradition of volunteering, associated with Christianity and charity law development. (Lewis, 2010)

While NGOs' activities usually were seen as either providing service to people in need or advocating for justice, Lewis (2007) presented another categorization ,according to the components of their work: implementer, catalyst, or partner. Services and implementer both mean NGOs that provide logistical support for their target beneficiaries; for example, food, medicine, shelters, etc.… Public advocacy or catalyst is concerned with the NGOs' role in working towards spreading certain ideologies, values, practices, and the sort. Finally, partner represents the new trend of NGOs partnering with governments, donors, and the private sector. In the light of the Syrian crisis for example, the government of Jordan had to rely heavily on NGOs to support in providing essential services and goods to the refugees. Those NGOs sometimes acted as the donor itself, and other times as a partner with big donors. NGOs' areas of focus can vary greatly, it could be concerned with urgent humanitarian relief, advocacy for a marginalized group pf people (women, children, LGBT, racial or religious minorities), environmental activism, democracy, etc...

Vakil (1997) defined NGOs as ''self-governing, private, not-for-profit organizations that are geared to improving the quality of life for disadvantaged people.'' This is the definition I will

be using for the purposes of this thesis, as I am focused on international NGOs that do humanitarian work in one area or another for people in need, and not for example any non-governmental organizations that are not operating in relief work (sports organizations, trade unions). More specifically, I will focus on international NGOs in Jordan headquartered in the global North.

2.2.   Internationalization of NGOs

To get a better understanding of my target NGOs, I will explain in the next section the history of phenomena of NGOs internationalization. Going by Vakil's definition, and more specifically humanitarian INGOs, the history of international NGOs dates back to the 18th century. Some of the earliest examples include humanitarian organizations such as the Society for the Recovery of the Drowned, established in Amsterdam with many cities following suit soon after. Another is the Royal Jennerian Society, established in 1803 to help eradicate chicken pox by promoting vaccinations, which became so popular internationally and won the support of many important figures in Europe, the US, the Middle East, The Ottomans, and even the pope. Most literature credits the Anti-Slavery movements as being one of the earliest major international humanitarian organizations. Anti-Slavery International is the oldest international human rights organization, founded in 1839 by Thomas Clarkson as Anti-Slavery Society. Some of the older international NGOs which have lasted till today were established in response to different humanitarian crises in the early and mid-20th century; Save the Children after World War I in 1919, Oxfam to provide relief for the Greek famine during the civil war in 1942, and CARE after World War II in 1946. (Nothias, 2016)

While most of the humanitarian assistance today takes place in Africa and the Middle East (Development Initiatives, 2017), the origin of our modern understanding of it is European. Davey, Borton, and Foley (2013) present the different ways researchers have tried to categorize the history of humanitarian INGOs, but suggest their own timeline "from the mid-nineteenth century until the end of the First World War in 1918, when nineteenth-century conceptions drove humanitarian action; the 'Wilsonian' period of the interwar years and the Second World War, when international government was born and then reasserted; the Cold War period, when

humanitarian actors turned more concertedly towards the non-Western world and the development paradigm emerged; and the post-Cold War period, when geopolitical changes again reshaped the terrain within which humanitarians worked".

More recently, the wars in Syria and Yemen resulting from the Arab Spring saw a second major shift of humanitarian financing from Africa to the Middle East. A look at the ten largest recipients of international humanitarian assistance in 2015 shows that six of them are countries in the Middle East, with Syria taking the top place, followed by Yemen, and Jordan placing third. Jordan is currently host to millions of refugees, mainly Syrian, but also Palestinians, Iraqi, Sudanese, and a few other nationalities (Nothias, 2016).In the next section I will go through Jordan's history with humanitarian work and the recent impact of the Syrian crisis in particular.

2.3.   History of humanitarian crises in Jordan

The Hashemite Kingdom of Jordan is a small country in the Middle East, and despite being in the middle of a highly troubled region, it has remained relatively stable and peaceful. Not long after its independence from the British mandate in 1946, Jordan faced the first of many refugee crises to come. In 1948, the first wave of Palestinian refugees arrived to the country; more than 700,000 people were displaced after the Israeli war, of which around 500,000 fled to Jordan. Several international humanitarian organizations responded to the crisis such as the International Committee of the Red Cross, the League of the Red Cross Societies and the American Friends Service Committee. Then in December 1949, the United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA) was created and became operational in 1950. The country's second wave of Palestinian refugees came in the aftermath of the six-day war in 1967. (Bocco, 2009)

The next big population influx to come was caused the invasion if Iraq in 2003. In the following four years, 750,000 to a million Iraqis arrived to Jordan. In this particular case however, the Iraqis did not need as much assistance as the Palestinians, as most of them were from well-off families. Most of the Iraqis were able to live in the capital and rent and even own their homes. Iraqis also made investments in Jordan, as a study in 2007 showed that 23% of Iraqi households

had some form of investment. Given these circumstances, it is clear to see why only 35% of them chose to register with the UNHCR (around 15% of the highest wealth group and more than 50% of the lowest wealth group). (UNHCR, 2007)

Most recently, following suit of other countries in the Middle East and North Africa, Jordan was hit with the Arab Spring. Although the kingdom was able to survive a wave of protests without going through extremely violent clashes or a civil war, it later had to deal with the influx of millions of refugees from several Arab countries affected by the Arab Spring. The vast majority of these refugees are Syrian, and as of March 2018, number around 655,000 refugees registered with the UNHCR and 1.3 million total. About 80% of the Syrian refugees live in cities and towns in Jordan, the remaining 20% reside in refugee camps, the two biggest being Zaatari and Azraq, both run by UNHCR. Syrian refugees are considered very vulnerable with over 90% of the urban refugees living below poverty line. This increase in population has put a great strain on the Jordanian economy and service sector including education, health, and waste management amongst others. Host communities have been unhappy with the impact of the refugees as they already suffered from high unemployment, and the surge in rent prices hasn't helped. They also believe they are just as entitled to the humanitarian assistance the Syrian refugees received since a large number of the host community isn't financially well-off. (Francis, 2015)The other nationalities of refugees include Christian Iraqis from Mosul who fled as ISIS took control of their city, around 80,000 Libyans who came to Jordan for treatment and left after, and 8500 Yemenis.

There is a substantial number of non-Arab Spring refugees and asylum seekers from African countries; 3800 Sudanese and 773 Somalis, as well as a smaller number of Kenyans and Eritreans. In fact, a UNHCR report in 2014 found that Jordan was host to 44 nationalities of refugees, and out of its 9 million population, 6.5 million are Jordanian. The problem in this case however is that African refugees are considered "second-tier" refugees when it comes to humanitarian assistance. Although they are registered in the UNHCR and are carriers of the refugee/asylum seeker card, the thousands of African refugees face a lot of challenges; they have a harder time integrating into societies due to racial differences and a language barrier (the latter inapplicable to the Sudanese), it is also more difficult to get a job permit which leads to a

lack of resources and an almost complete reliance on UNHCR and charities. There is also little light shed on their issues as the general global direction of humanitarian assistance has shifted towards Syrians and Iraqis. For these reasons, the African refugees consider Jordan a transit country as they wait to be resettled in Europe, USA, or Canada, which is far from guaranteed.(Gibreel, 2016)

2.4.   INGOs and Jordan's response to the refugee crisis

Towards the end of 2011, the clashes between the Syrian regime and protesters grew violent and new even more extreme terrorist groups rose in Iraq and Syria. This signaled to the world the beginning of a huge humanitarian crisis for Syrians in Syria and the ones who fled to neighboring countries. The response of the international community and governments wide world was immediate, and operated on several levels. On the field level in Jordan as a host country, the UN injected resources to meet the immediate needs of the Syrian refugees who were, at the height of the crisis, entering Jordan by the thousands each day. UN agencies, donor governments, and INGOs all worked with the government in Jordan to ensure proper response.

In 2014, when it became clear it would take the refugees a long time until they are able to return to their country, the Jordanian government and UNDP prepared a three-year-long Jordan Response Plan that addresses all the needs of Jordan regarding the refugees, in every sector. They created the Jordan Response Platform to the Syria Crisis (JRPSC) to deliver both short-term humanitarian assistance and long-term interventions to build resilience. Under JRPSC, Jordan now has JORISS (The Jordan Response Information System for the Syria Crisis) to coordinate the funding, projects, and implementing partners, be it governments, companies, or NGOs.

Also in 2014, a network of 58 INGOs working towards the relief of vulnerable Jordanians, and Palestinian, Syrian, and Iraqi refugees formed the "Jordan INGO Forum". JIF works closely with MOPIC, ministries, UN, and local NGOs to coordinate the relief efforts, and it is represented in many JRP taskforces. JIF is hosted by the Norwegian Refugee Council and funded by ECHO, DFID, and the Swedish International Development Cooperation Agency. It

has four main activities: Information Sharing/Communication, coordination, policy/advocacy of JIF members' interests, and representation of the members to the UN, Jordanian government, and other external stakeholders. The forum has five working groups to facilitate coordination: Advocacy, Government Liaison, Human Resource, Livelihood, and Security Working Group.

3. Literature review

When I first started researching the topic, I realized the literature is quite lacking. And even though there has been a huge rise in international NGOs, and a rise in humanitarian funding, the literature that has been added does not examine the NGOs themselves, rather the context which they're in, or the NGOs' relations to other stakeholders. I found the book "Inside NGOs" which was published 20 years ago in 1998, it examines the relationship between the headquarters and field offices. Although the book discusses international development NGOs and not humanitarian ones, it was still the most similar piece of literature to my topic that I found. During the data collection, I realized some of the literature on international organizations (IO) can be applied to my research as well. Towards the end of the data collection, I came across one case study that explores how HQ and FO differ in they view regarding the project they are implementing. In this section, I will go over the ideas expressed in "Inside NGOs" and Eschenbacher's case study, and explore some relevant concepts of IO theory.

3.1.   HQ-FO relationship

Inside NGOs (Suzuki, 1998) delves into the conflict that arises between field offices and HQs in NGOs. Suzuki noticed the lack of literature on the matter, and the researchers' problem of viewing an NGO as one single entity rather than a complex, multi-faceted organization. Suzuki understood the complexities of NGOs, and the intricacies of having an international work force with operations across the globe. In his book, he attempts to address the areas that create tension between field workers and HQ. As for Eschenbacher, she researched the difference of perceptions between the staff in HQ and FO by conducting a case study of an educational program in South Sudan. In her specific case, there were three levels of the organization; the headquarters in the USA, the program office in South Sudan, and the field office which is implementing the program on the ground.

Suzuki categorizes the outcomes of this tension into three problem areas: 1) the conflict between program-centered vs organization-centered activities: activities relating to the projects in the field and ones concerned with the financial sustainability and funding of the organization, 2)

diversity vs similarity amongst the staff: differences in nationalities, backgrounds, languages, and the common shared values between staff. 3) Flexibility vs consistency in organizational procedures and policies. Below, I will provide a summary of each problem area

Program-centered vs organization-centered activities

An NGO has two main external parties to cater to: the donors that fund the NGO's operations and the beneficiaries of the projects on the field. The NGO has to strike a balance between those two parties or it ends up being at risk of going too far in either direction. Being too program-centered results in self-destruction, as the organization focuses entirely on serving the projects and neglects maintaining itself by securing funds. Being too organization-centered on the other hand leads to self-perpetuation; the organization's primary objective becomes maintaining itself and loses sight of its real objectives for the field.

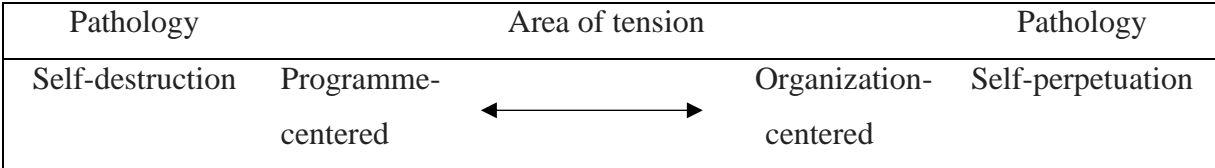| Pathology	Area of tension		Pathology
Self-destruction	Programme-centered	⟷	Organization-centered Self-perpetuation

Figure 1: Program centered vs. organization centered activities

Eschenbacher's findings confirm the different priorities of HQ and FO, which stem from the difference in their contexts, and the parties they cater to. This had an immediate effect on how they understood the reason and future of their project. For example, HQ and FO staff agreed that their program was concerned with educational quality in South Sudan. However, FO staff viewed it as relating to educational access, since their specific work was about distributing materials. HQ on the other hand saw it in normative terms; the concepts employed by the influential agencies in such cases are ones that worked in other similarly-situated countries. They also disagreed on the future of the program; while they both think it's viable, FO believe the adaptability process is the key to its viability, but HQ consider that it is tied to the program design and substantiation. Overall, FO efforts were more concerned with adapting the program to fit with the local environment, including the social conditions and the local government. HQ's primary interests were those of the donors' grants agreements.

Suzuki approaches this tension from two perspectives: **recruitment and staff training.** He argues that recruitment can be at risk of being organization-centered; for example when it is done with the intention of protecting the recruiters' positions, the objectives of the NGO are compromised. Or it could be program-centered, which is also problematic as recruits would suffer from job insecurity because their jobs end once the program end. He lists several reasons for the problems that emerge in the recruitment process, based on the accounts of NGO staff. The <u>first reason</u> is *inappropriate recruitment criteria*, which can happen for example when an applicant has a good resume but is undesirable. This is mainly about the applicant's character; they might have the right qualifications but their personal interests contradict that of the NGO. The issue is a very subjective one, as the recruiter has to judge the character based on their own opinion.

Inappropriate criteria can also be caused by the discrepancy between an NGO's values and the values of its employees. This is especially the case in religious and humanitarian organizations. An employee can have excellent expertise in his field of work, but does not subscribe to the religion of the NGO, or if the NGO works with refugees and the employee holds anti-refugee sentiments. Finally, the recruitment criteria are affected because sometimes the recruitment is manipulated for internal political games rather than the good of the projects. This is quite common as a person employed into a senior position, say a country director, will naturally have a big influence on the field office. So if the person hired used to work in HQ, HQ will automatically have a bigger influence on the FO. Unfortunately, that means that the opinions of the local staff and the actual needs of field projects are not considered when recruiting the country director.

The <u>second reason</u> is *discrepant employment terms* which differ greatly depending on whether the employee is local or an expatriate, and if an expatriate, a paid or unpaid one. Paid expatriates have higher salary scales, more secure job contracts that are not tied to projects' funding, and there's somewhat of an employer-employee relationship with local staff; expatriates are usually the decision makers and can delegate that to the locals, and they can hire and fire locals but not vice versa. As for unpaid expatriates, the tension between them and the paid ones is substantially

higher in the field than in HQ. When unpaid volunteers are doing the same amount of work but not getting paid, and especially if they are not getting outside support, tensions will rise even if they have agreed to these terms before.

The third reason is the problems in *matching a person to a position*. When NGOs are looking to hire, they can look internally to rehire from their own staff, and if that option isn't available, they hire externally. One of the challenges they face is the scarcity of effective local staff; a person might look like they have the education required, but in reality the quality is bad. Since the NGO work is a "learning by experience" process, local staff can only have that opportunity if they have long-term contracts, which is most often not the case. When the NGO does recruit internally, they might reshuffle their staff and completely neglect the staff's views while focusing on the organization's needs. There is also the issue of employees having the responsibility of a problem without the authority to solve it, even if they possess the needed skills and ability. Even if it is acknowledged that the staff aren't granted the authority, they could still be blamed for not handling a situation that is above their position. Finally, there is the issue of change and continuity; FOs use short-term contracts for most of their staff, including the country directors. Suzuki brings up one case where an FO had 3 country directors in 5 years; the question of how to balance the change each new director brings while continuing the positive aspects of the previous one remains difficult to answer.

The fourth reason is *ambiguous recruitment processes*, specifically regarding expats hired by HQ to work in FOs. Problems here arise because of the obvious gap in the available information from both sides, the gap in the expectations of the field as well as the recruiter, the difficulty of the FO to reject a candidate recommended by HQ, and the difficulty of FO to get consensus to reject a candidate.

Staff training has the possibility of being program or organization centered through three categories: the expected return from trainings, locals vs. expatriates, and direction vs. manipulation. Because of the high turnover rate of NGO staff, the long-term return on the resources invested in training is doubted. For example, when there is an emergency situation, the funding increases, and NGOs recruit more beginner employees. While those new recruits

need training, the NGO knows that donors will start losing interest soon and funding will decrease, or perhaps the needs on the field will change. This means that the training will not meet the organizational needs in the long term. On the other hand, if staff are provided with training, they might use that for their own interests and seek better employment elsewhere. This was again confirmed in Eschenbacher's case study; HQ was reluctant to provide national staff on the field with training, as there's no certainty they will stay with the organization, especially that highly-trained and qualified national staff are in high demand. Interestingly, the FO staff cited the lack of professional development and authority to adapt the program as their reasons for leaving the organization.

How the organization chooses to train its local staff can reinforce the assumption of expat superiority; the NGO can either provide regular training to the local staff, or bring expats from HQ to work in FO and train the locals, the latter contributes indirectly to a top-down structure. Staff trainings in NGOs include language trainings for locals, usually the English language. While it could be a well-intentioned attempt to ensure local staff aren't left out of the conversation with expats and HQ, it still has negative consequences such as advanced English becoming a criterion in recruitment, English culture dominating over local culture, and encouraging top-down approach. That being said, the top-down approach is only bad if the FO wants a bottom-up one, so imposing the latter is actually contradictory to a democratic NGO.

Suzuki brings up the concern if staff training directs employees in the direction of the NGO's value or is used to manipulate, brainwash, and indoctrinate the staff. He explores both sides of the argument. On the organizational side, these trainings help bring staff into the membership and build commonality amongst them. On the other hand, the trainings can subtly convince the staff to comply with HQ without supervision. Another conflict here is the adaptability of local staff to core values of the NGO; trainers have to understand the trained staff on an individual level, and see what organizational values work in the FO, and which ones need to be adapted to fit the local culture.

Diversity vs similarity

The second area of tension results because of the NGO's handling of both the diversity and similarity of its staff. The NGO's international nature can make for a tricky work environment where an organization might focus too much on the differences and lose its coherence as a unit, leading to a fragmented performance. Over-valuing similarity can also be problematic, as the organization introduces control mechanisms to homogenize itself, causing restricted performance.

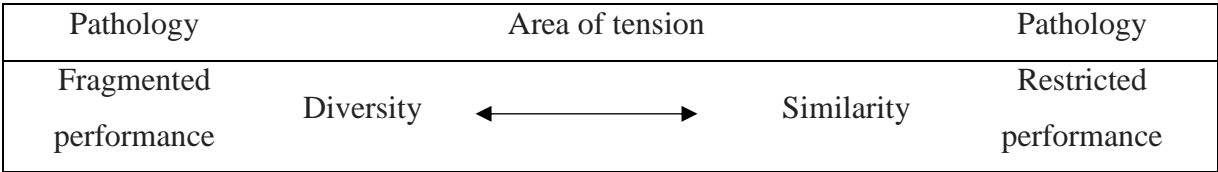| Pathology	Area of tension			Pathology
Fragmented performance	Diversity	←——————→	Similarity	Restricted performance

Figure 2: Diversity vs. similarity

Decentralization can be used to expand diversity; as FOs gain more autonomy, they relieve the HQ from some burden. And while communication is reduced and FOs can make quick decisions on the field, decentralization can still cause serious problems. Extremists can take it too far and reject organization hierarchy altogether, including all standardized policies and procedures. NGOs lack the coordination capacity to handle decentralization of the entire organization. The discussion within the NGO regarding this issue is already fragmented, as HQ is reluctant to give up control, FOs push for it, and support offices aren't concerned with the issue at all. And when HQ senses a loss of order, they might feel the need to regulate the organization to the point of complete negation of diversity. Therefore, it is essential to differentiate between fragmentation and diversity.

Another contributor to fragmentation are **cultural differences.** Misunderstandings that result from such differences lead to distrust between employees and the assumption of difference in values. This is further exasperated when employees don't have a chance to clarify misinterpretations and lack the capacity to understand the mindsets of people from different cultures or ability to change own mindset. The differences also create a dichotomy in the organization; the problems stem not only from the different backgrounds and languages, but from the different way a culture tries to understand another.

Finally, the **differences in scope**; how employees perceive the situation they're in largely depends on the context. Employees working in the field are concerned with the day-to-day work, but when they return to HQ, their context changes and so do their priorities. In HQ, their focus shifts to broader policies and priorities. So when there is conflict between HQ and FO, their experience ends up not contributing to a solution as they are overwhelmed with the new context they're in. This is again reinforced by the imposed hierarchy of the NGO. In addition, there is the case of the superficial experts from HQ who, based on a few visits to the field, believe they know enough about the situation. Unfortunately, what they impose on the field because of this belief is concerned with HQ's own interests instead.

This difference is manifested in the discrepancies between anti-diversity ideas in diverse environments. For example, should the ideas of authoritarianism and homogenization be accepted? The discrepancy happens on two levels: first is on the country level where there could be a contradiction between the office's mission is and what they practice; a Christian NGO serves only Christians, but instead of promoting harmony, creates a divide in the community. The second is at the organizational level; should the HQ accept the country office's activities when they are not aligned with the organizational practices and its general direction?

Lastly, there is the intentional ambiguity that surrounds the communication between HQ and FOs, which could happen in either direction. The FO might not know why HQ is enforcing a certain policy, or HQ just assumes FO is overwhelmed with work and can't send reports on time. Although this is sometimes beneficial when a country director for example wants to avoid a risky confrontation with the HQ.

As mentioned above, **similarity** can also cause problems, through a tendency to use **recruiting to homogenize the organization**. There are three factors that contribute to this: *Organizational consistency*, *administrative efficiency*, and *productive donor relations*. When an NGO is doing well, they do not want to risk changing anything, so they aim for organizational consistency by abandoning diversity and recruiting people of the same values and interests for leadership positions. NGOs will use in-house recruitment to ensure consistency; although the position

changes frequently, the values are long-term. While this is supported by some staff, others argued that it causes the organization to miss out on new ideas.

NGOs seek many ways to increase administrative efficiency, the main one is using one working language. Because of the current nature of NGOs, English is the dominant language. While this does have its benefits and is seen a necessity, there are two major consequences for such a choice: Firstly, the FO will take on the burden of translation, which might decrease the information flow from the locals to HQ while increasing it vice versa. Secondly, English fluency becomes an essential criterion for management positions, homogenizing the leadership in FOs and HQs, and in turn, the organizational culture. This applies as well when the NGO attempts to preserve donor relations which is a high priority, thus excluding competent people from recruitment because they are culturally distant from donors.

The process of **constructing identity** for the NGO, which would usually include imposing it on the local staff, leads to sidelining diversity. When diversity is perceived as an obstacle in building organizational identity, the NGO resorts to *devaluing differences* until they fit the organizational framework. This further contributes to the HQ's dismissal of FOs, turning FOs into merely the implementers of HQ's agenda, rather than being agenda-setters. This also applies to the communication system, which is usually in English and HQ-centered. Through efforts to construct identity, the HQ *encourages top-down control.* Rather than identifying as the NGO's staff, staff in HQ identify themselves as such, and so do staff in FO. This not only divides the organization, but defines how each party sees themselves. Suzuki discusses how the relationship is similar to a parent-child one. With the HQ giving itself that responsibility, and the FO reducing their role into that of a child, the top-down approach comes easily. Lastly, NGO staff end up with a *given identity* rather than constructing one. This happens for two reasons: 1. Administrative capacity: considering NGOs are large and disperse, it is not easy for the entire staff to get together to design their identity. Having representatives from each FO helps when the representation is accurate and unified, but that is not always the case. The best the FOs could do is take already decided identity of the organization, and interpret it according to their own context. 2. Structural constraints: communication between HQ and FO is limited to a select

number of people on the FO's side. Therefore, local staff cannot deliver their vision to HQ, and must adapt and accept whatever identity is given to them by HQ.

Flexibility vs. Consistency

The final area of tension according to Suzuki results from the organization's attempt to balance between flexibility and consistency in their systems. If it leans too much into flexibility, it risks opportunism, while being overly consistent may lead to unresponsiveness. Suzuki provides the rationale behind systems in an organization and their negative consequences.
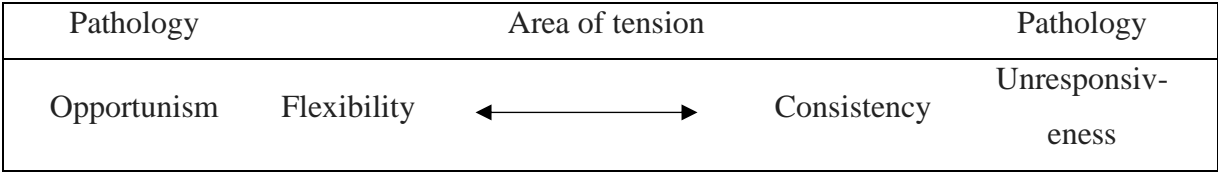
Pathology		Area of tension		Pathology
Opportunism	Flexibility	←————————→	Consistency	Unresponsiv-eness

Figure 3: Flexibility vs. consistency

Systems are *efficient learning mechanisms;* new staff need existing systems to figure out their jobs, especially staff that works in highly systemized departments such as accounting and human resources (HR). Systems also help *reduce opportunism*; in humanitarian situations, there are many urgent situations coming up at the same time. This can prove difficult for staff who have to choose which ones to respond to and how; systems can help them decide their priorities. Formal systems help organizations *be more accountable*; even if employees sometimes prefer informal work styles, formal systems are needed to regulate staff performances to ensure no malpractices take place.

Moreover, systems manage quality by establishing *coherence between policies and projects*; FOs don't have the capacity to coordinate policies on an organizational level, so systems that enforce policies –of course with an understanding from the project's level- are a welcome relief for FOs. Furthermore, systems are used to *control NGOs' outputs*; Suzuki uses the example of reporting to donors, where employees do not have to take on the entire responsibility of reporting properly, since there are systems that govern the reporting process. Finally, systems *manage information flow*; communication between HQ, FOs, support offices, and donors is a very

tangled web that needs to be systemized to ensure the efficiency and accuracy of the information communicated.

That being said, systems do have their downsides. In terms of *employment*, not all employees receive the same support –mainly financial support-, and while the system is consistent, it isn't fair for all staff. There is also the matter of *money*; as NGOs have to comply with the funding system, they might begin to change their original mission to accommodate the needs of the donors. Even when the donors match the NGO's vision, the huge funding that comes in times of crisis deters the organization from reasonable actions into quick expansions not thought through well, which leads in turn to downsizing once the funding goes back to pre-crisis levels. *Language* can also be considered a system that has negative consequences listed above. Finally, systems affect the *modus operandi* of FOs in three ways: Firstly, HQ's demands are expected to be met as the HQ stipulates, so FOs have to adapt to that without a question. Once that happens, the FO's modus operandi is automatically changed to that of the HQ's. Finally, the FO being the lowest level of the organization is taken for granted, therefore its own modus operandi is seen as less effective and goal-oriented than the HQ's.

Afterwards, Suzuki explores how **systems perpetuate control mechanisms**. These self-regulating mechanisms are observed in the *systematic gap between administration and operations*; the gap exists in the three ways: 1. The FO staff (operations) believe that HQ staff (administration) are too narrow-minded to understand the reality on the field, and in return HQ staff choose to apply more systems to close the gap. 2. They have different frameworks; administration have clear direct frameworks whereas operations need flexible one that can adapt to the unstable environments in which they operate. 3. Systems inhibit interaction between administration and operation and their efforts to reduce the gap. Self-regulation is again observed in how *rules lead to more rules*. Systems try to be as comprehensive and encompassing as possible, but sometimes situations can be unpredictable and out of control. This can either result in systems being too rigid and controlling of staff, or they continue to develop more and more rules and regulation for every individual situation that comes up, thus perpetuating themselves beyond staff control. , there is the issue of *participation* in decision making; there is a conflict between the authoritarian top-down approach and the horizontal process that involves

too many parties and can be inefficient. The components that result in the conflict can be summarized in 1. Number of participants: it's used to indicate the scale of participation, but in doing so, other important aspects such as quality or efficiency of participation are neglected. 2. The term's ambiguity, as participation could mean different things to different people. 3. Using participation for personal interests and to assert own rights and benefits. 4. Institutionalized participation; once participation is legitimized, it becomes a rule that must be followed regardless of its inefficiency.

Suzuki added that aside from control mechanisms, **systems reproduce hierarchy.** Here, he discusses how systems and hierarchies reinforce each other through six components. 1. Different perspectives: because of the different frameworks within which the HQ and FO work, they both tend not to share the same views on many organizational matters. For example, HQ understands the importance of thorough reporting to donors to secure funding, but for FO the reports' requirements can prove too much of a burden on an already busy office, yet they have to comply. Here, the system of reporting and the hierarchical order reinforce each other. 2. Prioritizing organizational issues over operational ones: top-down structure overtakes in scenarios where organizational and operational issues contradict. It is much more likely for the first to affect the latter than vice versa. 3. Apathy and fear: local staff might be afraid to voice their opinions or criticize because they are either afraid of retaliation from the management, or they believe that management are apathetic to their opinions. 4. Hierarchically ordered credibility: the employee's perceived credibility depends on their level in the hierarchy. This could lead to a systematic dismissal of lower staff input. 5. Less field input results in less field concern: as a result of the dismissal, HQ continues to apply its own rules and frameworks on FOs. 6. Titles: While they are essential to the organization, titles remind employees of the vertical hierarchy. This can cloud the judgement of the staff and make them more concerned with furthering their career and getting promotions, rather than have the organization's mission as their priority.

Eschenbacher uses the frameworks of Kingdon (1995) and Suzuki (1998) to explain the differences in perspective of HQ and FO and how they affect the organization as a whole, and adds to them to include the program level. On the political stream level, problems and solutions are identified, and policies are created in response, which in turn are implemented by

organizations as programs. On the organizational level, they have the choice between organization- and program-centered activities, and the degree of flexibility or consistency they can afford to give their employees. At the field level, the staff are at a crossroad between choosing to address global concerns and assistance norms or remain close to local concerns of the communities in which they operate. They also have to decide how to implement the program; either by substantiating a planned design or through an adaptive process by integrating their efforts into local context. "In each of the organization tensions and program-level processes, the upper level preference was associated with the headquarters using top-down strategies to design systems and the lower level with the field using bottom-up processes with emergent strategies (or self-organizing systems)".
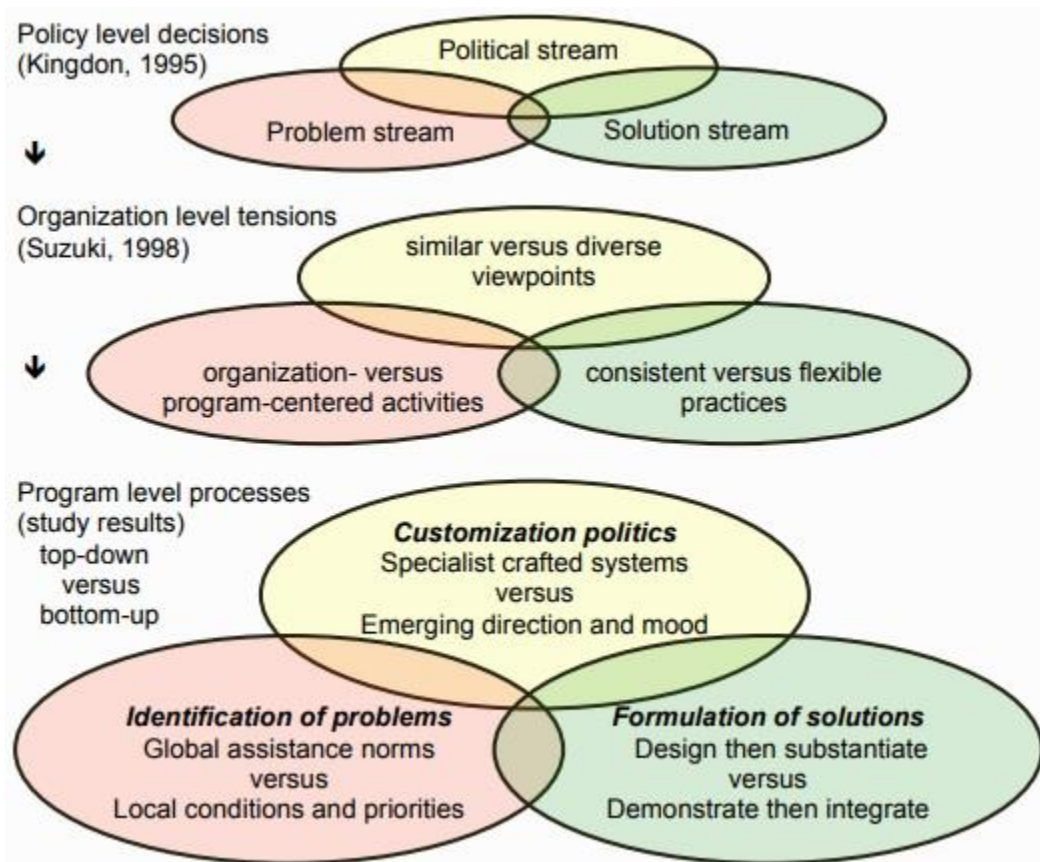
Figure 4: Eschenbacher's framework

Eschenbacher then examined what HQ and FO would do differently if they knew what was happening on the other end. Aside from technical issues concerning compliance with donors, HQ showed no interest in being involved in the small details of the implementation on the field. The FO on the other hand viewed the donors' policies as guidance more than strict rules, believed it should be adaptable to the local context, and considered it the HQ's responsibility to realize the grant.

3.2. International Organization theory

In his book "The management of non-governmental organizations", David Lewis (2000) provides a summary of the analyses of NGO management. In one chapter he discusses the linking between culture and organization management through organization theory. He points to several authors who contributed to our understanding of organizational management in NGOs. Handy (1988) categorizes cultural styles into four; power culture: power is central and held by a few individuals. Here, regulations and processes are undermined by the focus on individuals and their achievements. It is good in that there is quick decision making and little bureaucracy, but can turn negative if the decisions are bad. Role culture is the opposite; it is very concerned with the position/role of the individual. It is bureaucratic, possibly to a fault, but it is more secure. Then there is task culture, where results-based management is prominent and team structure is flexible, its success is highly dependent on the skills of the team members. The fourth style is person culture, and as its name suggests, revolves around the people themselves and not the organization. In other words, the organization's goal is the jobs it provides the employees; these NGOs serve the staff not the other way around. None of these styles is particularly good or bad; it depends on many factors such as the NGO's size, stage of development, personnel, etc.

A study by Brown & Covey (1983) looked at the NGO as "microcosm" that reflects the wider ecosystem in which it exists. The organization suffers from the same ideological conflicts that plague a society; ones that are based on the ideological and ethnic diversity in the culture. They argue that the solution lies in building an ideology that crosses cultural barriers through a process of "ideological negotiations". From this, Lewis moves on to explore literature on cross-cultural

management and globalization, citing the research of Jaeger & Kanungo (1990). They criticized the practice of transferring or imposing Northern ideas and techniques on the South and the lack of understanding of the latter. Believing this results in NGO ineffectiveness, they highlighted the need for "indigenous' management that considers the external environment surrounding the NGO.

Hofstede (1984) researched IBM, a multinational US based company, and found many "national cultural" differences amongst the work values held by its employees. He developed a model of four cultural dimensions: power distance, uncertainty avoidance, individualism-collectivism, and masculinity-femininity. Two more dimensions were added later: long-short term orientation and indulgence-restraint. The power distance index indicates the degree to which the subordinates are okay with a few individuals in the organization holding all the power. When the power distance index is high, the hierarchy is strong, and when it is low, it means the staff seeks equalization of power. Uncertainty avoidance index is used to estimate the organization's willingness to embrace or tendency to avert the ambiguous and unexpected. When an organization rates high on this index, the laws and regulations are many and well-enforced to avoid any unknown situations, if it rates low, it is free-flowing and more accepting of different ideas. Individualism vs collectivism describes the social framework of a society/organization; the degree to which an individual feels integrated into the societal collective. The consequences of where a society ranks on this dimension could mean very tight-knit frameworks where individuals are expected to look after and support all other members of society, or a loose one where individuals are expected to take care of themselves and their nuclear family. Masculinity vs femininity: Masculinity refers to a climate of valuing achievement and material rewards vs femininity which is more concerned with cooperation and quality of life. A masculine environment is a competitive one, while a feminine environment is more consensus-oriented. Long vs short term orientation describes a society's attachment to its traditions. A short-term oriented society is focused on the immediate gratification the individual gets from following traditions and hierarchy, while long-term ones care more about being pragmatic, circumstantial, and adaptable. And lastly, indulgence vs restrain; the degree to which a society regulates or controls gratification and fun. In some societies, people are freer to have fun and enjoy basic

human desires, while in more restrained societies, strict social norms are used to control people's lives and emotions.

4. Methodology

4.1. Grounded Theory

When I first began researching the topic of the relationship between CO and HQ in INGOs, I quickly realized the scarcity that exists in the literature. This meant that I wouldn't be able to find an existing theory to verify for the research ahead of the data collection, and thus, had to find a research method that allowed me to not use a hypothesis in advance and instead work out a theory from the data collected. For this purpose, I decided to use the Grounded Theory approach.

Grounded theory was first developed by American Sociologists, Barney G. Glaser and Anselm L. Strauss; they had originally created this approach while working on their study "The awareness of Dying" (1965), and published "The Discovery of Grounded Theory" two years after. Strauss and Glaser explained that grounded theory is called that because the theory is developed through the analysis of systematically-collected data. They argued that theory could be generated through an on-going analysis of data during the collection, rather than having a pre-existing theory to be verified by analysis after data collection is completed. Their goal was to "Bridge the embarrassing gap between theory and empirical research" (Glaser & Strauss, 1967, p. 2). They both emphasized the inductive approach that a researcher should take, without any preconceived knowledge as to where the analysis would lead, with the ultimate goal of conceptualization. Glaser and Strauss employed several procedures to conduct data collection analysis including: 1. *Coding:* There are many methods of coding that differ from one form of GT to the next, so I will not go into the details now, but will discuss my specific coding process in the following section. 2. *Theoretical sampling*; analyzing initial data to identify gaps and the need for further evidence in specific areas. This process continues until the data reaches a point of *saturation*, where no new data is emerging and so the researcher must stop the collection. 3. *Constant comparison;* data is coded and labeled and each code is compared with other codes and emerging categories, emerging categories are compared with each other, and finally, the emerging theory is compared with the literature. 4. *Memo writing;* the researcher writes down their reflections, and the memos serve as a map when writing the final thesis or paper. Their

contribution to social sciences was much needed, as it cemented the credibility of theories generated from qualitative analysis.

In 1990, Strauss partnered with Juliet Corbin to further develop Grounded Theory in their attempt to elaborate on the process of data analysis; they departed from the original GT and allowed for theory to be deduced from data through a new process of coding they presented. They also permitted using literature review and personal experience to guide the data analysis. This new form of GT was thus dubbed Straussian GT. However, Glaser did not agree with this development; he believed that literature can have a strong effect on the emerging theory and can derail its path, the researcher might be at risk of using imagination rather than interpretation to generate theory from data. Glaser published many books and articles defending the original form of GT, which became known as Classic or Glaserian GT. Glaser wasn't the only critic of Straussian GT, as other researchers pointed out the rigidity of the framework presented, which prompted Strauss and Corbin to publish another book in 1998, where they claimed that rigidity was never their intention, and instead promoted more flexible methods.

The third variation of GT, constructivist GT was introduced in 2006 by Kathy Charmaz. She was a student of both Glaser and Strauss but disagreed with Glaser's emphasis on induction purely from data, and instead believed that a theory can be constructed from "our past and present involvements and interactions with people, perspectives and research practices". She also rejected Strauss' rigid coding process, arguing that it limits the researcher's creativity. Instead, Charmaz argued that a flexible and adaptable coding process helps the researcher "become receptive to creating emergent categories and strategies". After Strauss' death, Corbin published several books on GT, which had a more relaxed approach towards coding, and was more in line with constructivist GT.

For this research, I found the constructivist GT to be the most appropriate. There are three reasons why I believe this form was the most suitable: the use of literature, interviews, and the coding process. Of all three forms, Charmaz's had the most liberal use of literature; she did not believe that a research could be completely isolated, instead the research happens in a context

that definitely influences it. She argued that "it facilitates the researcher to enter into the dialogue of the pertaining academic field; it reinforces the researcher's credibility, authority, and ensuing argument; and it can justify and explicate the researcher's rationale in the ensuing chapters of the thesis". Charmaz argues that literature review should be done during every stage of the research, however to avoid loss of creativity, she suggested the researcher delays a part of the literature until after the analysis is completed. She also emphasized the need for a specific chapter dedicated to literature review.

At the very beginning of my research, I was influenced by the colleagues in the INGO I was working for, specifically the employees who had the biggest share of contact with HQ. Through several conversations with them, I was able to understand some of the difficulties they were having with HQ, and inspired by that, I started researching the literature on the issues they described. Soon enough I learned that while there is a lot of literature on INGOs as a whole and their role in development, a very small percentage of the research examines the INGO itself from an organizational perspective. "Inside INGOs" was so detailed and thorough, it was enough literature review before the research. Midway through my interviews, I realized I could also integrate Organizational Theory (OT) to an extent. I went through a quick review in chapter three as it is definitely helpful and can be integrated into the analysis later on, but had I delved into it further, it would have derailed the path of the research into a purely organizational one, losing focus on the aspects specific only to humanitarian INGOs. Later, I was able to find one paper that addresses the same topic, however the researcher had opted to do a case study on a single program in an organization. In conclusion, these were the only relevant studies I found; although I did go through much more, I believe their addition would have hindered my creativity and the emergence of an independent theory from the collected data, so I settled for the above mentioned.

As for interviews, Charmaz advocated for having intensive interviews through few but broad and open-ended questions, "By creating open-ended, non-judgmental questions, you encourage unanticipated statements and stories to emerge" (Charmaz, 2006). The interviews can be semi-structured questions or more loose, where the interviewer explores certain topics without formal questions. She emphasized the role of the researcher by having them be actively engaged with the subject of the interview; the researcher has the space to comment, ask for further

clarifications, follow a hunch on the spot, and return to previous points in the interview when needed.

Charmaz's approach to coding was different from Straussian GT in that it departed from a strict perspective on coding as she believed it hindered the researcher's creativity. Instead, she introduced a fluid framework which consisted of at least two phases, initial coding and focused coding. Initial coding, Charmaz explains, should code "with words that reflect action"; this helps the researcher avoid imposing any preconceived ideas and theories before they have done the needed analytical work. Charmaz detailed the different guidelines and methods of initial coding including word-by-word, line-by-line, and incident to incident. She also stressed on including the researcher's own ideas and observations of the data when performing constant comparisons, as well as preserving the participants' intentions through in-vivo coding, which refers to the special terms used by participants. The following phase, focused coding, takes the most prominent and important initial codes that best interpret the phenomenon in question and categorizes them into a smaller number of codes. These focused codes could be examined and tested against the original data until they form theoretical categories in an emergent process.

4.2.   Presentation of data

When I first decided on my topic, I had wanted initially to speak to employees on both sides, the HQ and the CO. I didn't mind which employees to speak to, as long as they had frequent contact with the other side. For example, in the CO, I was aiming to interview employees in upper management, monitoring and evaluation, communication, and so on. My first interviewee was the Jordan country director of the INGO that I had interned for, and from the content of the interview, I realized that country directors have access to information that employees of lower positions don't know about, hence, have a more thorough perspective on the topic. It was clear to me also that it was not feasible to get high quality interviews from the right people at HQ level. Consequently, I made the decision to interview only country directors, managers, representatives, and heads of missions in Jordan.

Although my first interview was with a close source, they were unable to refer me to other country directors. Eventually I was able to get leads and contact information from the Jordan INGO Forum and an online database of the UNHCR, listing all the NGOs and INGOs working on the response plan for the Syrian crisis. A total of 21 INGOs were contacted, 10 of which were interviewed. The tenth interview was with an INGO that does development work. However, the answers were radically different from previous interviews, and I realized that development INGOs have a very different experience from humanitarian ones and it would be better to focus on INGOs that are doing either pure humanitarian work or both humanitarian and development. Therefore, I decided to disregard the last interview.

I ended up with 9 interviews, ranging from 40 minutes to an hour. Only one of these interviews was done via Skype, the rest were face-to-face at the offices of the INGOs in the capital Amman. The nationalities of the country directors were composed of two Jordanians and seven Europeans, although the Europeans weren't all from developed western countries or countries that provided foreign aid to Jordan. The INGOs and names of interviewees will remain anonymous to ensure maximum honesty. The Jordanian country directors were interviewed in Arabic and the rest in English. I did the transcribing myself, without using any software or freelancers.

Before starting the data collection phase, I had of course done research on the thesis topic. There weren't many resources; a few articles and "Inside NGOs". So I relied on those and on my own internship experience to decide on the general themes I would discuss with the interviewees. I went into the first interview with a specific set of questions, but I soon realized that due to the nature of the topic, it is better to ask general open-ended questions/themes and allow them the time they need to answer them and add their own input or touch on other aspects of their experience. So after the first interview, I was introduced into other themes which I had not considered before. I applied this method for the second and third interviews, so by then I knew the themes I will discuss with the rest, while of course allowing them the space to add any new perspectives. Therefore, all the interviews were semi-structured, and my part included only directing the interview to ensure the themes I want to discuss are covered.

At the beginning of this phase, I had set my goal at 15 interviews at least. It soon became apparent however that this many would not be needed, as I was already reaching data saturation by the seventh interview. I decided to go for two more just to ensure that I have covered as many different styles of management as possible. This was achieved, as different INGOs had different structures, but the interviewees' areas of concern remained the same, which allowed for some consistency in the data.

4.3. Presentation of method

My analysis of the interviews started with the very first interview. Although I went into the interview with semi-structured questions, the interviewee themselves took over and explained the challenges they face with HQ, my role became about probing, asking follow-up questions, asking for further clarifications, etc. After the interview was over, I applied initial coding. In the second interview, I already knew to allow the interviewee to speak comfortably with little interruption; however I did ask about some of the codes of the first interview, only as a way to guide him into this area of the relationship between HQ and FO rather than to impose a pre-assumed concept. I applied this process to the rest of the interviews. By the fourth interview, I applied the first focused coding, and the second one by the seventh interview. It was clear to me then, through two processes of focused coding, that clear concepts had emerged in all seven interviews. To increase the credibility, I conducted two more interviews to ensure the research reaches data saturation. After all nine interviews were conducted, I reapplied initial and focused coding, and from that, four theoretical categories emerged, which made up the four areas of concern that govern the FO's relationship with HQ.

I did face some challenges during the process of data analysis. For example, while all the INGOs' mandates were either purely or partly humanitarian, their organizational structures varied greatly. Some were very big federations, others were smaller in size and had a basic form of management from HQ to field level. This, in addition to different terminologies from one INGO to another, made the data analysis at the beginning challenging. However when I started the analysis with the initial coding method, the codes arising from the transcriptions became clearer. This is because once I stopped looking into the small details of each INGO's structure,

the problem areas were mostly the same across all the interviews. Initial coding also helped because as Charmaz explained, the coding should focus on verb and action, which facilitated comparison of codes from one transcription to the next.

In the next section, I will go into each of the four areas of concern in detail, discussing the various arguments presented by the interviewees, and the corresponding literature for each concept.

5. Outcome of analysis

The data analysis resulted in finding four areas of concern: 1) Autonomy and decentralization: Decision making regarding many operations such as annual strategies, human resources, finance, procurement, and general policies and procedures. 2) Funding: This was another main issue, including relationship with donors on the HQ and CO levels, as well as the decision making on unrestricted funds. 3) Local vs expat staff: Hiring policies and the decisions on hiring local and expat staff; why INGOs choose to hire the way they do, and how the Syrian crisis had a big impact on INGOs' hiring practices in Jordan. 4) Accountability; the systems that INGOs put in place to ensure they are held accountable by themselves, their donors, and their beneficiaries. These findings were based solely on analysis of the data collected for this research. For each sub-chapter (area of concern), I present my own findings, and then I integrate the literature reviewed in chapter three to see in what ways the results agree and/or disagree with other researchers' findings.
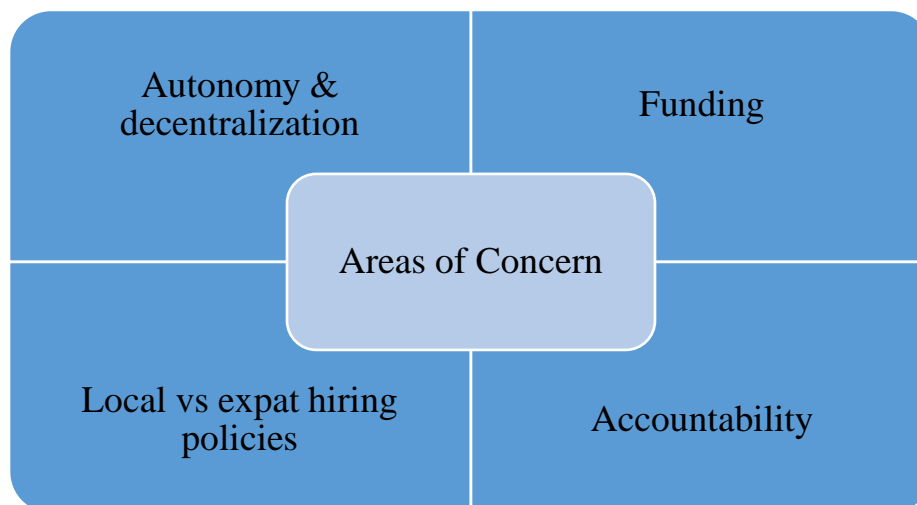
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┌─────────────────────────┬─────────────────────────┐
│   Autonomy &            │        Funding          │
│   decentralization      │                         │
│           ┌─────────────────────────┐             │
│           │    Areas of Concern     │             │
│           └─────────────────────────┘             │
│   Local vs expat hiring │     Accountability      │
│   policies              │                         │
└─────────────────────────┴─────────────────────────┘
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Figure 5: Areas of concern in relationship between HQ and CO

5.1. Autonomy and decentralization

Autonomy in the context of this thesis is concerned with several issues regarding the relationship between HQ and CO. These include the standardized policies and procedures set by HQ and

applied in all the COs, the strategies and annual plans (e.g. focus areas, priorities, etc.) which are developed either globally or regionally and adapted by each CO, and funding (relationship with donors, grants opportunities). These issues are related to almost all the work that COs do. For example, the policies and procedures could include human resources, procurement processes, finance-related matters, and so on. This obviously means that autonomy is at the center of the conversation about the relationship between HQ and CO, as it dictates many aspects of operations within the COs. I will now explain further some of the decision-making mechanisms and procedures used in the INGOs I interviewed, and after discuss their advantages and disadvantages as described by the interviewees.

> *The relationship between country level and HQ is a problematic one. From HQ standpoint, there's the assumption to keep under control whatever is possible, and from the country level, the main concern is that very often HQ doesn't have a clear idea of what's going on in the field in terms of dynamics, feasibility, and relationship with other stakeholders: local partners, donors, and other NGOs. I don't want to say it's a conflictual relationship, however it is not an easy one.*

Before delving further into autonomy, I must first clarify the organizational structure of the interviewees' INGOs. For the majority of the subjects, the INGOs consist of the HQ; they have one main head office usually in a European or North American country, and the regional office; either located on the field or is part of the HQ, and finally the CO in Jordan. It becomes more nuanced as we go into each INGO; for example, in one organization, the HQ outsources some tasks related to IT or HR to other more cost-effective countries outside of Europe and North America. The RO in some INGOs had big tasks including planning and strategizing, and supporting in HR and procurement, while in others it was simply a desk in the HQ, the main responsibility being coordinating communication between HQ and CO. As for the CO, it also differs, as in some cases, the CO is responsible for operations in Jordan and Syria, while in others, the CO only works in Jordan. However, despite these differences, the concept of autonomy and decentralization still applies to all INGOs, and the model suggested in the thesis still applies, but it is a matter of how it is adapted into each different structure.

The policies and procedures are usually set by HQ to be implemented across all offices. For example, during procurement, the CO has to go through a tendering process, and receive three offers from three different sellers before deciding to sign a contract with one. Another example is HR, so contracts, working hours, holidays, overtime, and other policies are also decided either on a regional or HQ level. As for bigger matters, such as the overall strategy and focus areas of the INGOs, they are decided by the HQ, then usually it is up to the RO and CO to decide which areas apply to their specific context, but they cannot choose a completely different area even if there is a funding opportunity available. So let's say one INGO focuses on education and livelihood, the CO might have the authority to decide how to adapt education into their context, and decides to focus on early childhood education. The CO can also say that within their context, they can't work on livelihood. Annual plans on the country level usually have to get final approval from either the regional or HQ level, and sometimes both.

The interviewees who were not content with their level of autonomy cited several downsides of having too much control from HQ. One interviewee believes lack of autonomy leads to a lack of trust and ownership amongst employees, who see themselves as having a more passive role by only being implementers of ideas conceived on the HQ level. This applies to all employees in the CO including higher management.

> *"In my opinion, I don't like this model. I think it does not build trust within the organization and does not build ownership, and that is the most important thing, you can't build ownership with your local national colleagues."*

> *"I think that COs are always struggling to understand how they fit into the organization and they struggle to understand how much the organization is empowering them and letting them talk and work on behalf of the organization and in interest of it."*

Overall efficiency of the CO is also negatively impacted by lack of autonomy. It is impacted in different aspects. For example, the time it takes to get approvals on small financial decisions; in one INGO, COs in different countries with completely different economies all have the same financial restrictions, which means all COs have to get approval for expenditures over a specific amount, regardless of the purchasing power of that amount. Efficiency could also be

compromised through time wasted in communicating back and forth from the CO to RO to HQ and back.

> *"In expensive countries, operations are more expensive, so you spend per month a lot more money, which means you go back to HQ for more money over things you have no autonomy for, versus cheap countries, where you have a lot of responsibilities, but cheap operations, so more autonomy. The cheaper the currency is, the more autonomy you have."*

> *"In a certain level of autonomy you can utilize and fix a lot of things in a much timely matter, while maintaining organization checks and balances. Autonomy in decision making is very important for making decisions and those decisions be implemented faster, and be more efficient"*

Efficiency also becomes a problem when centralization is combined with a lack of clear job roles. A country director's role might overlap with roles of employees at regional or HQ level, which not only leads to time wasted in misunderstandings, but might also create tension between CO and RO or HQ.

Finally, centralization in decision-making can have a big impact on the role of the entire INGO in the country. This rings especially true in Jordan, where the Syrian crisis has entered its seventh year. All of the INGOs interviewed fully or at least partly do humanitarian work, but how does the nature of this work change when the refugees are still very vulnerable but need long-term humanitarian intervention? One interviewee discussed that the COs in Jordan recognize the shift happening, but are not sure how their HQs will react, as the decision whether to stop the operations of the CO in Jordan or adjust their projects to the changing needs to refugees will eventually come from HQ. Another interviewee was worried about the HQ side-lining the INGO's advocacy role to appease the government. Once that is decided, the CO has to comply with HQ's decision, even if they feel it undermines the overall mission of the CO in that country.

> *"Here in Jordan, the government has been saying for a while that for every Syrian you assist you need to assist a Jordanian, so the 50/50 plan. What we're seeing is that the government in Jordan, are already suggesting a 70/30 split. This means for us as an office that the reality here is devolving from the reality in Syria. War is entering its 7th year, so now I would like to see some devolution or separation or a greater degree of autonomy."*

Of course some interviewees were satisfied with their level of autonomy. The most prominent thing that many interviewees agreed on is the importance of open dialogue between HQ and CO. Regardless of the official policies in place, and even if the final decision has to come from HQ, if it is based on feedback from COs, or they are involved one way or another, then the COs feel enough confidence and ownership in the decisions because they contributed to them. This not only matters because it builds ownership, but because the decisions end up being more sensitive to the contexts in which the COs operate, thus leading to better overall efficiency of the office.

> *"It's not a matter of their decision or mine but a decision together that serves the HQ strategy... So eventually we have discussions, but tension is not there. They usually approve what we suggest because they say we understand the context on the field.*

> *"And this is why I enjoy working in this organization, it's been an open dialogue. We never receive any dictates on doing specific activities or approaching specific donors."*

Another reason the interviewees appreciated their relationship with the HQ is because it was a supportive one. When an HQ adapts a policy of strengthening the capacities of COs to perform tasks that otherwise would be handled by HQ, the COs are better able to define their position within the entire organization. The support is also needed when the COs are in a compromised position for example when they are operating in an unstable country.

> *"We feel support from HQ that they give us training on certain things; for example writing proposals when applying to grants, or they refer us to other COs to share their experience in a specific matter."*

> *"If you look at the support you receive from HQ it is very weak and you are abandoned. So there is no safety or security, everything is on your shoulders."*

When it comes to decentralization, there exists a balance where the HQs' role can be a supportive one that treats the COs as an equal in decision making rather than an implementing partner.

To summarize, the relationship between HQ and CO is a constant effort on each side to keep or gain more control. While support from HQ is appreciated, and the globally-applied procedures and policies are important for security reasons which will be elaborated further in a later section, the micromanagement of CO can lead to four main problems: 1) Lack of ownership from CO staff, leading them to question their role in the organization. 2) Inefficiency and increased cost resulting from the waste of time in going back and forth with HQ over miniscule issues. 3) Neglecting the context, which means CO has to struggle with the discrepancy between the HQ demands and the reality on the ground. 4) Lack of adaptability to changing local needs as crisis turns into a long-term humanitarian problem that is too early to turn into development aid.
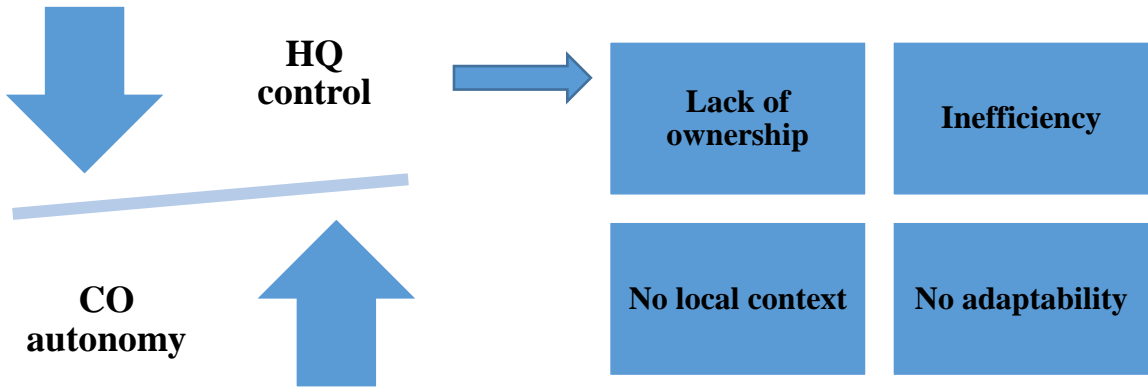

Figure 6: Impact of centralization on CO

From an organizational perspective, it seems humanitarian INGOs in Jordan have a dominance of role culture as Handy (1988) explained, where the positions are emphasized and as a result bureaucracy is high. It has its benefits in ensuring any fraud or illegal activities within the organization are difficult to attempt, but it does lead to the aforementioned problems. They also seem to rate somewhat low on Hofstede's power distance index, and desire less control from people in HQ who are thousands of kilometers away from the crisis. Due to the many years the refugee crisis has been happening, it seems COs are now transitioning from short-term to long-term thinking, which has not yet reached HQ in terms of strategy. Although at the time of writing this research, few Syrian refugees have begun to return home, the crisis is far from over, and

very much still in need of and completely reliant on long-term humanitarian aid and donations. This was also supported by Eschenbacher's findings in her case study; the FO employees were concerned with the adaptability of the program to fit with the local government, whereas HQ was more focused on the program as stipulated by the donors.

These issues were explored in more details in Suzuki's second problem area: Diversity vs. Similarity. He warned that by seeking too much autonomy, COs risk fragmentation. Because the organization cannot coordinate extreme decentralization of the entire organization, it is important that some fundamental policies and procedures are determined by the HQ and implemented by COs across the world. As data analysis showed, extreme decentralization is not something desired by the country directors, as they also understand that the INGO on a global level has a mission to stick to, and that the management they provide is vital for employees in the COs to feel secure enough in a humanitarian unstable situation to perform their duties.

The research findings agree with the literature that the policies, procedures, and strategies enforced on the COs should be informed ones that take into consideration the different realities on the ground. Suzuki warned against HQ's "superficial experts" that have quick visits to COs and believe they've concluded enough to draw their strategies, which end up serving HQ's interests instead of the COs. He also stresses the importance of open communication between HQ and CO; for example when COs are late on reports, HQ just assumes they are overwhelmed which isn't necessarily the case. One of the interviewees explained how they need government approval for all projects they implement, which can take up to four or five months. The CO then cannot be blamed when HQ signs a two-year grant agreement with a donor and the project ends up starting 6 months late. All in all, there needs to be a balance between a top-down and bottom-up approach, that allows HQ to preserve the identity of the INGO and provide support for COs, while giving COs the space to each adapt their programs to their own local contexts. This, in addition to a clear dialogue between the two to clarify the intentions behind any controversial decisions that might seem to have a negative impact on one or the other.

5.2. Funding

Fundraising is naturally one of the core operations of INGOs. The financial sustainability and scope of operations of humanitarian INGOs is determined by their capacity to fundraise. Before I discuss the experiences of the interviewees, I will first explain the different types of donors and consequently the different natures of fundraising. INGOs deal with many donors, the biggest ones are usually the institutional donors such as UN agencies, EU agencies, governments, and governmental organizations. Sometimes the donors can be other INGOs, where big and well-funded INGOs provide grants to other smaller INGOs. And finally, there are private donors that could be foundations, philanthropists, and individuals.

Fundraising takes different forms as well. The private donations can be collected online through donation options on the websites, fundraising events for wealthy individuals, campaigns, etc. The money collected through these methods is called unrestricted funds; that means that the INGOs are not obligated to spend it in a specific way. So an INGO could put the money into overhead expenditure, advocacy, implementing activities in the field, or whichever way they choose. Many INGOs have fundraising offices, usually in developed countries in North America, Europe, Australia, and East Asia. These offices' sole responsibility is to find funding opportunities, write proposals, apply to grants, etc. The mechanisms through which they interact with the COs differs from one INGO to another. In some cases, they look at the needs of the COs and search for suitable funding opportunities, or they secure funds and ask the COs to accommodate the donors' priorities in their projects. The fundraising can also take place at the CO itself; some COs have fundraising teams or grant management departments, which either apply to grants themselves or notify fundraising offices of the opportunities. Finally, big INGOs secure partnerships with institutional donors which could last years. For example, if one INGO works on child education, their go-to partner would be UNICEF. Each method of collecting funds comes with its own challenges. The interviewees cited general issues they had with donors regardless of the method, and others that relate to specific methods. I will detail their arguments below.

One of the main problems facing humanitarian INGOs in Jordan is the decrease in funds for the Syrian crisis which has entered its seventh year. Syrian refugees in Jordan and other neighboring countries still rely greatly if not completely on foreign aid. So although there is a change in the way humanitarian aid is delivered, that doesn't mean it is not needed anymore. Refugees and host communities alike are still struggling to cope with the crisis, which could also indicate an initial lack of foresight on the regional and international community part in understanding the nature of the Syrian crisis and its long-term consequences. And due to this issue, donors should not be redirecting the aid away on the account that it's a long-term problem, they should rather try to rectify the mistakes committed at the beginning, and engage in a dialogue with the INGOs to see how they can change the way humanitarian aid is delivered in long-term humanitarian crises.

> *"Situation in Jordan doesn't allow for development. Donors don't understand that, they say we've been hosting 7 years and to them humanitarian aid is for life or death situations. They want us to do more development but situation for vulnerable Jordanians and Syrians still requires humanitarian."*

Another issue the interviewees were concerned with was the sidelining of INGOs by the donors. Although one interviewee blamed HQ for neglecting their role of advocacy, other interviewees also saw the donors taking part in doing so. They believe donors are complicit –with the government- in limiting the role of INGOs to implementing humanitarian intervention activities only, and refusing to include them in the conversations regarding governmental policies, and the overall national and regional response to the Syrian crisis. This is dangerous not only because the INGOs have crucial knowledge of the situation on the field, but because they represent only the voices of the vulnerable, be it the refugees or the host community. Whereas the national government might have different priorities, to which the high-level institutional donors find easier to go with.

> *"I have seen lately a kind of tendency from some of the actors we mentioned to be a bit too much aligned with the position of national governments instead of standing firmly with the humanitarian mandate."*

> *"So in general we have lost a bit our role of bringing to surface humanitarian needs. Tendency from higher level UN agencies and other big donors of seeing us as someone excluded from the table discussion."*

Interviewees whose INGOs had fundraising offices in the global North also had concerns regarding the model through which fundraising happens and its effect on the CO's relationship with the donors. Having these fundraising offices creates another layer between the donor and the CO, which means the CO gets pushed further down and away from the conversation and the decision-making on the activities implemented in the field. This is problematic because it also limits the INGO's relationship with the donor to the INGO's fundraising office, which at times operates as a sales department, trying to hit a target of partnerships or grants without considering the real needs on the field. So for example a CO is focused on three areas, which don't include protection, but the fundraising office's responsibility is to get as much money as possible, so if there is a donor offering a grant for protection, they have to apply for it. Without proper direction from HQ to have the CO as an active participant in the relationship between the INGO and the donor, the priorities of the CO and the fundraising offices might not align, which could become problematic for the INGO and its trustworthiness in the eyes of the donor.

> *"The fact that they are there and they started the connection with the donor means they have to remain there as the connection. Which further pushes down the field office away from that layer (the money). So they become only implementers."*

> *"So the whole model becomes similar to a company or a business. They have sale offices who have nothing to do with the activism or idea, but they have a target that they need to close by the end of the year or their salaries will get affected"*

The final concern, which happens with both INGOs that have fundraising offices in the global North or ones which fundraise on the CO level is the percentage that goes into covering the overhead expenditure of the HQ. Usually every INGO has a specific percentage, for example the HQ takes 7% or 10% of the amount of funding raised. Sometimes the donors make it clear that a grant has a specific percentage which could be below the HQ's one. It is globally understood that some of the money should naturally go to cover these expenses.

To summarize, INGOs as a whole have several concerns when it comes to the issue of funding: 1. the changing needs of the humanitarian crisis seven years into it, which seem to escape the

donors' understanding, leading to a conflict between the donor's push for development aid and the INGO's commitment to fulfill the refugees' and host communities' humanitarian needs. 2. The exclusion of INGOs and implementing partners from the conversation on overall strategies and policies to handling the crisis by governments and institutional donors, thus reducing the input of the only party that has the obligation to represent the interests of the most vulnerable and nothing else. 3. The push from donors to increase the resources going to activities and decrease overhead expenditure to an extent that affects the efficiency of the CO and HQ by limiting their recruitment. 4. The final point concerns only the COs, specifically ones whose organizations do not have fundraising at the CO level, as the fundraising offices create even more distance between the donors and the people implementing the activities on the ground.
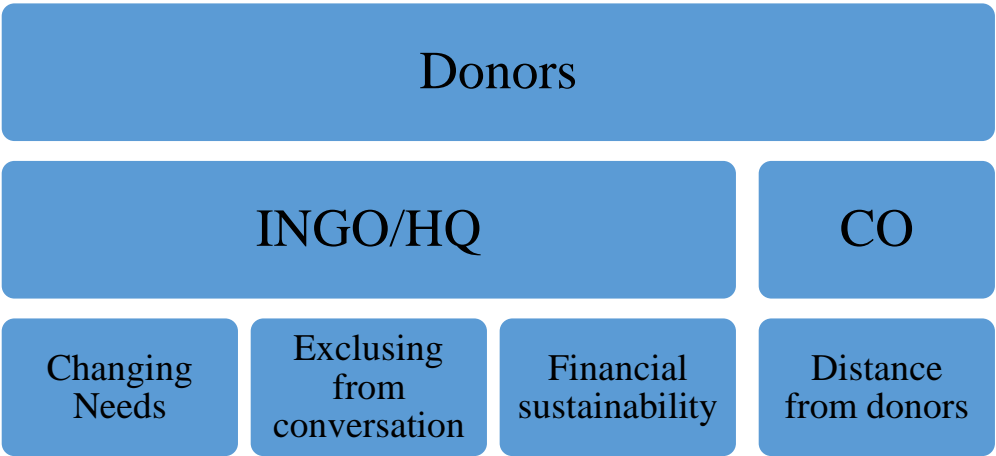

Figure 7: Donors' relationship with HQ and CO

Examining the relationship between the INGOs and the donors, it seems the power distance index can again be applied here; although COs rely on the funding provided by the donors, they can still be skeptical of the conditions that come with the grants. This is also where HQ can choose to be either program-centered or organization-centered. However, in times when the funding for the Syrian crisis is decreasing, INGOs are finding themselves, more than ever, bound by the donors' demands as they begin to have less and less options to choose from. This automatically leads to both HQs and COs becoming more organization-centered.

Eschenbacher (2011) explored this heavily in her research. In her case study, she explains the different approaches the FO takes compared to that of the HQ and the donors. Firstly, the higher level thinks of normative terms and concepts, borrowing from their experience in previous crises. While this is of course useful, it can cause a neglect of local knowledge, be it the knowledge of the people of the country themselves, or the expats who have been on the field long enough to fully grasp the reality of the situation.

Again, the issue of FO's prioritization of project's adaptability in contrast to HQ's tendency to go with the donors' requests. I would add to Eschenbacher's conclusion with my own findings, that this contradiction is exasperated particularly in the cases of INGOs with specialized fundraising offices in the global North. The further the COs are from the source of funding, the less is communicated from the bottom up and from the top down, the less understanding and compliance the COs display towards the donors' terms and conditions. This is important to note because the donors' practices might become unintentionally vilified if they are viewed only from the perspective of the field, and without clear communication of the justification behind the decisions concerning the partner INGOs.

Finally, Eschenbacher's model is applicable to this section of the research. Policies are created on the political level, which in this case comprises of governments, intergovernmental agencies, and institutional donors. The INGOs, being the implementing partners, are excluded from the discussion table, and are only left to decide whether they want to be organization- or program-centered. This decision is usually made at the HQ level, and on the field level, COs are left to decide if they want to address assistance norms or the local concerns of the field. The choice of using emergent strategies through a bottom-up approach is favored by FOs. Considering the changing needs mentioned earlier, it would be wise to include the INGOs on the political level, and benefit from the perspectives of field workers who have the most experience working directly with local stakeholders, and have witnessed the change through the seven years.

5.3. Local vs. expat hiring policies

Due to the nature of INGOs, COs of course have a blend of expat and local staff, with the expats being predominantly western. When I first started conducting the interviews, I had not given much thought to that issue, as I didn't think it related to the relationship with HQ. It was first brought up by one of the Jordanian interviewees and then discussed with the rest to understand their views. It is first important to state that the vast majority of the employees are Jordanian; so for example in one CO, there were 150 staff, only 6 of which are expats. The expat staff however are always in high management positions. And although at first I had assumed that the expats make up a higher percentage of the total staff, it was soon clarified to me why this isn't the case.

The humanitarian response to the Syrian crisis has been mainly located in neighboring developing countries such as Jordan, Lebanon, and Turkey. So it was a case of a humanitarian response in non-war-affected countries with high capacities. Jordan is a developing country with a high literacy rate, and a big number of holders of degrees of higher education from good universities in Jordan and abroad. There is also a large pool of technically skilled people. These, combined with a somewhat high unemployment rate, provided the COs with high-skilled candidates available immediately for hire. With time, and over the seven years of the crisis, the local staff started gaining more experience in the INGOs, and their contribution was recognized through promotions into higher positions.

> *"Post Syrian crisis this has changed. It was very strange to have a Jordanian project manager in an INGO. Now it's natural to be Jordanian. Before it was not normal to have a Jordanian country director, now it's more possible."*

> *"If you work in Jordan, well chances are your Jordanian procurement manager has graduated abroad with a master's in UK and worked 5 years in Libya, and is as knowledgeable and experienced as any other expat."*

The question remains on why higher management is still mostly expats. The answer from non-Jordanians was the same: it is to protect both the organization and the local staff from risk. A local manager could be subject to pressure from a group (e.g. their tribe) to either hire people from that group or sign procurement contracts with them or other possible favors. In more

volatile countries, this could mean a serious risk for the manager to be threatened or harmed, in Jordan however, this means a higher risk of corruption. One interviewee cited a case in Lebanon where the procurement manager, without a proper tendering process and under pressure from his family, signed only family members as suppliers for a project he was supervising. This kind of corruption not only hurts the INGO by ignoring the most suitable options in favor of nepotism, but it also undermines the organization's credibility in the eyes of society, and creates resentment from the beneficiaries and host communities.

> *"The hiring happens this way because of the non-embeddedness of the employed. If I fire someone they can't come for me. But if they're Jordanian, you don't know if other family members could be at risk"*

> *"The matter of conflict of interest, so in some positions we avoid hiring locals. Many of the expats in higher positions, were national staff before. It's about protecting nationals from exposition and risk."*

However, one Jordanian interviewee is not convinced with this reason. As a Jordanian director of a country office, she does not think her position exposes her to any risk, nor the organization to possible corruption. In Jordan, the probability of getting physically hurt by family members because of situations mentioned above is low to non-existent, at least not significant enough to warrant such hiring policies. And the HQ has clear HR and procurement processes to ensure fair treatment of all candidates. For example, the tendering process requires the CO get three offers from suppliers or contractors and choose the most suitable, a choice they would have to justify during the internal auditing later. This leaves no room for the local decision maker to use nepotism as they would be endangering their own job security. Also, some INGOs require local staff to declare if they have any possible conflict of interest with suppliers or candidates for a staff position, after which they would be removed from the selection committee to protect the INGO and the employee themselves. With strict and thorough policies from both HQ and CO, the possibility of corruption is controlled, even with the existence of local staff.

> *"We have procurement guidelines which we strictly follow. We have a conflict of interest list: all staff have to write down all their acquaintances that have businesses who could compromise ethical processes. You must disclose if you have a relative in the business. If you don't and you are found out, you have a penalty that could reach ending your contract."*

Another reason interviewees provided is the lack of specific capacities the CO looks for. For example, M&E has spread greatly in INGOs, however it is still fairly recent, and not enough Jordanians have solid M&E experience or training to be an M&E manager of a multi-million-dollar project. In this case, the CO will advertise the position and look for local candidates, however if there aren't any suitable ones, they have to consider foreign applications as well. Nobody would blame the CO for choosing an expat for such a position, however the debate is on how to move forward in M&E and other areas in which Jordanians lack expertise. COs are heading towards adopting a strategy of building national capacity in the different areas they need. That could happen naturally; since the crisis is ongoing and the presence of humanitarian INGOs is still needed, Jordanian employees who started out in entry level positions of those areas can now qualify to be in the upper management of them. This not only means that COs will witness more local staff in management, but in a few cases, those now-skilled locals can themselves become expats abroad.

> *"Twenty five years ago this was a job for western people, European, American, and Canadian. Over this period of time, the composition of expat staff changed a lot."*

> *"We need to discuss this issue. Supporting capacity building of national staff: I want to leave at end of term 95% of office is high-standard Jordanian professionals."*

Another benefit to nationalizing higher management positions is that locals might stay longer at them. When expats are hired they might stay from one to three or four years at best, however with locals this could double. This is especially important because one of the barriers the interviewees mentioned to improving the relationship between HQ and CO is that the country directors don't stay long enough to take on such a monumental task; this could change when you have a local country director staying for eight years, where they could take their time in following through with any proposed changes.

> *"I'm in favour of nationalizing management position. When you nationalize management, the nationals can stay in the same position for many years maybe 10, and that completely changes how things work."*

Finally, there was a debate amongst the interviewees on the added value of expats. While some believed it is good to have a diverse workplace where the CO can have the different perspectives of a vast variety of international experiences, others saw that what really matters is the expertise and proximity to the field, regardless of the nationality.

> *"The question of expat or Jordanian is not the most important questions; more importantly is where they are physically located and how much time they spend on the problem."*

The starting point of any discussion on the issue of hiring locals in COs is the recognition that Jordan is a high capacity country that has a large number of readily-available highly-qualified candidates, and the effect of the long-term crisis has helped build the capacity of the national staff to become qualified for management positions and expat positions abroad. Problems standing in the way include the risk of corruption and endangerment of managers in a country where nepotism is rampant. The way to combat this is through tough procedures in procurement and recruitment enforced by HQ and CO. The other problem is the lack of capacity in skills specific to humanitarian INGOs; this is partly resolved by the long-term nature of the crisis that allows local staff to gain the needed expertise and rise through the levels of the CO. Acknowledging the prior, COs are beginning to employ the concept of building national capacity and aiming for a higher percentage of locals among top management.

Literature has spoken extensively on this issue in particular. Suzuki addresses the struggle recruiters face in matching a person to a position, usually because of the lack of effective local staff. He also discussed how it is difficult to build the locals' capacity as most contracts are short-term. The short-term contracts bring another problem: how could management of long-term organizational change be possible when even the CO's top managers are there for no more than three years? The findings of this research suggest that most of these problems could be solved through national capacity building coupled with long-term employment of locals.

Building national capacity can happen through the natural gaining of work experience and through training. Suzuki finds that the reluctance to invest in trainings for staff is due to the

uncertainty of the long-term benefits of such investment. The uncertainty derives from two factors: the concern that once the staff are trained, they will seek better employment opportunities in other INGOs, and the fear of donors losing interest if the crisis is turning into a long-term one, thus rendering the training useless. It is then much easier to instead, bring HQ-approved expats that are already qualified, which reinforces the top-down hierarchy. This was also confirmed by Eschenbacher's findings; in the organization she studies, management were afraid their national staff would leave once they are trained, despite the nationals complaining that one of their reason for leaving is actually the lack of professional development.

Suzuki mentioned the dominance of the English language and its effect on the organization. Although in my findings this was only brought up once, I still think it is important to make note of it as it was the Jordanian CD that discussed it, and it's something that seems to evade the expats. CO taking on burden of translation, the decrease of local input to HQ with an increase the other way around, and elimination of qualified candidates because they don't speak the donors' language are some of the consequences Suzuki lists. Interestingly, aside from the issue of the English language, what was not brought up in any of the interviews are the cultural differences within the organization, and the tension this creates between local and expat staff. Although a big part of the literature of both Suzuki's and IO theory is dedicated to this matter, it did not seem to be a problem for any of the COs interviewed. At first I thought perhaps it's because the majority are expats themselves, but the Jordanian ones didn't address it either. Eschenbacher's research was in this particular area similar to mine. Both researches' subjects seemed more focused on the divide between HQ and FO staff rather than the cultural divide within FO staff. Because of this disinterest in the cultural diversity, integrating the literature of IO is not possible. Perhaps the only part that could apply is Jaeger & Kanungo's criticism of imposing Northern unto COs through recruitment, and the importance of "indigenous" management to preserve effectiveness.

5.4. Accountability

Accountability in INGOs has many dimensions. When I was conducting the first interview, I had only considered the accountability of the CO towards the HQ and vice versa. However, the interviewees were quick to point out the many sides by which the COs are held accountable, the different systems of accountability they have, and the purposes they serve. I will first quickly go through them and then discuss the issues and problems surrounding those systems.

Each INGO has to maintain an internal accountability system to supervise the COs' activities; the HQ requires specific reports and updates from each CO, and has certain mechanisms in place such as external and internal audits, and accountability units or M&E departments on both the CO and HQ level. This ensures the well-being of the organization and minimizes the risk of corruption or mismanagement of resources. The INGO is of course held accountable by the donors; the bigger the donation or grant, the more comprehensive the system. Donors usually already have guidelines on reporting in grant agreements and Memorandums of Understanding, and when the INGO signs these documents, they are obligated to present progress reports on a frequent basis as required by the donors. This again mitigates the risk of corruption, and can also help build the trust between the donor and the INGO, and possibly pave the way for further partnerships. The government holds the INGO accountable through its laws, which the latter agrees on automatically when they are registered in the country. A point brought up by the interviewees is the accountability towards beneficiaries. Until recently, and although they are the entire purpose for the existence of humanitarian INGOs, they had been left out of the accountability systems. Because they have no leverage or power to hold INGOs accountable, the INGOs have to take the initiative themselves to build systems that cater to the beneficiaries' concerns. And finally, the staff also requires a safe system through which they could give feedback, and report any problems such as sexual harassment, financial fraud, etc.

Because of the nature of INGOs, the funding they receive, and the work they do in local communities, the interviewees are very understanding of the measures of accountability towards the HQ, the donors, and the government. Although some of these measures can be constraining

or time-consuming, they are necessary. This is especially true for INGOs, for example, a scandal of fraud in one organization can have a negative impact across the entire sector, threatening the credibility of all INGOs. This also means that when it comes to specific procedures, all COs must adhere to the same regulations stipulated by HQ. These not only include bureaucratic processes for each INGO, but also globally agreed-upon standards such as the Core Humanitarian Standard on Quality and Accountability and Protection from Sexual Exploitation and Abuse.

> *"When it comes to accountability and compliance, I agree that there is a need*
> *for standard procedures rolled out at global level rather than a country level.*
> *For example, PSEA policy (protection from sexual exploitation and abuse) is*
> *a global policy that was fed by different experts at country level, to make sure*
> *that the system put in place is flexible enough to adapt to different contexts*
> *and capacities. So a flexible but consistent system."*

While the systems of accountability towards the HQ, donors, and government are all clear and followed by the CO, the interviewees brought up the lack of accountability towards two parties: the staff and the beneficiaries. When it comes to the staff, having the human resources department handle any complaints is not enough. It is not very black and white, as there are power dynamics at play in the work environment. So sometimes, an employee might not feel safe reporting financial fraud on their manager, because they are intimidated or feel that there is not much HR can do. In other instances, a female employee might feel uncomfortable reporting on sexual harassment to a male. This has come to the public eye recently due to the "me too" movement, which has spread out of Hollywood and is affecting other sectors, including the development and humanitarian ones. Some INGOs have made efforts to ensure staff's safety and secure their ability to report any misconduct by their colleagues. Some of the measures include ensuring anonymity and having an investigative unit in HQ to deal with complaints in a timely manner.

> *"So now we have a number of channels for people on all level and in HQ and*
> *field to come forward and make allegations through emails, hotlines, HR, and*
> *so on depending on the nature of the allegation."*

With beneficiaries, it becomes more complicated. Although they are at the receiving end of the aid, and are the most knowledgeable about their own needs, they do not have a proper platform

to voice their concerns. COs being so close to the field have started recognizing the lack of accountability from the bottom and are making efforts to change this, and trying to include HQ in the process. There is a new direction of recognizing that the vulnerability of the beneficiaries should not hinder their ability to question how INGOs are spending the aid meant to help them, and their right to file complaints regarding any misconduct of staff towards them.

> *"Accountability towards the beneficiaries is not just bla bla, but something real through core humanitarian standards that are implemented at field level. In CO we have a compliance department. I feel that with every year there is more emphasis put on it."*

Big revelations about sexual abuse of beneficiaries by staff in big reputable INGOs caused a shock that was felt across the sector and was a strong reminder for HQs to develop a strict system of accountability to protect the beneficiaries. Because it is a relatively recent development, HQ along with COs are still trying to navigate the waters and understand the best system to put in place. The main solution some of the interviewees have pointed at is having a feedback and complaints system in place, with an investigative unit to tackle any issues reported. However, as with the case of the staff, this is a matter of continuous improvement. Beneficiaries are still reluctant to use the system, and COs have to study the reasons behind this reluctance. Some interviewees suggest it could be that beneficiaries do not believe the system is effective, or they are worried about it backfiring on them.

> *"Our compliance mechanism, feedback mechanism, it's a work in progress which started a while ago. Again if Oxfam couldn't immediately tackle these cases, then they are probably not the only ones. You can only mitigate the risk not completely remove it. There's been a lot of discussion between HQ and CO and a lot of back and forth to address the gaps in the system."*

> *"For example one of the issues we found out is that because of confidentiality issues, things tended to be too secretive. And then the impression the whistle-blower gets is that nothing is happening for months because everything is kept confidential. So we realize we need to disclose more to show that things are moving forward and being investigated."*

Accountability seems to be the only aspect of the HQ-CO relationship that all interviewees do not mind, and are in fact fully understanding and supportive of it. Because of the nature of work of humanitarian INGOs, and the many financial and legal details involved in its processes, COs are fully compliant and on board with the accountability systems put in place by the HQ, donors, and governments. Because they have been established a long time ago, the COs don't face many difficulties following the instructions of reporting to these parties. The one positive outcome of the recent scandals (will be discussed in more detail in the following section) is that INGOs have recognized their shortcomings in the area of accountability towards their staff and beneficiaries. COs have responded with different reporting and investigating mechanisms, although they are not fully used as there is still skepticism of their efficiency from beneficiaries and staff. The COs have to work together with HQs to test out the best systems and continue to improve on them as needed. Empowering beneficiaries' capacity to question the INGOs is a big and much-needed leap forward in the way INGOs operate in local communities. For COs, it can be quite challenging in the beginning, but in the long term, it also helps empower them by forcing the HQ to listen to what is happening on the field.
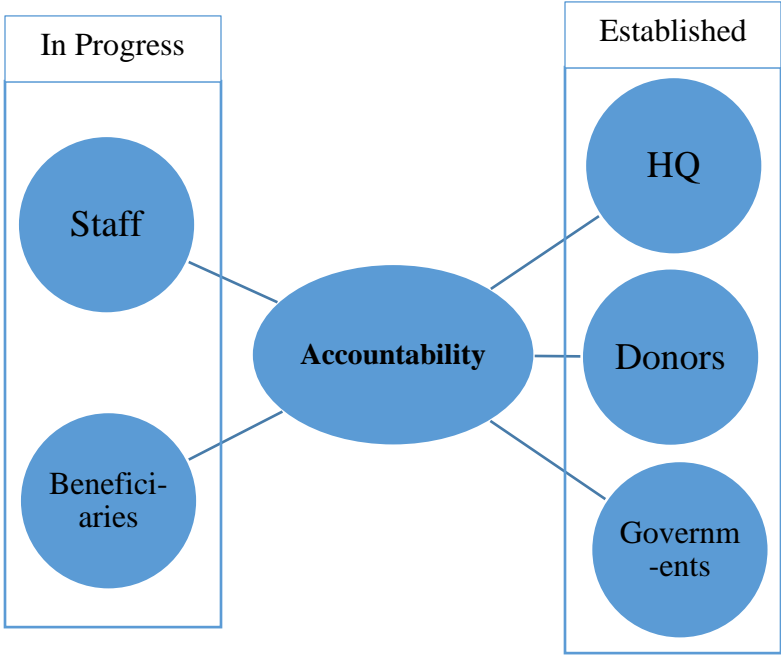

Figure 8: Systems of accountability towards different parties

6. Conclusion

6.1.   Relevance to current INGO scene

As mentioned before, there is a serious lack in the literature on INGOs; that is, literature that treats the INGO as a complex entity rather than a whole unit, and looks at ways to reform the INGO itself. This research is important not only because of the obvious need to fill the gap in the literature, but also because it comes at an interesting time in the INGO scene; in this section, I will discuss two issues that have and will continue to have a big impact on the current structure adopted by INGOs: the growing trend of HQs moving South, and the sexual abuse scandals that have shaken INGOs in recent years.

The discussion on moving HQs to the Global South has been growing in the sector, although in reality, only three INGOs have moved forward with this step: ActionAid, Oxfam, and the Association for Cooperative Operations Research and Development (ACORD). Williams (2018) lists three main reasons for this trend: 1) shifting global dynamics: this includes the decreasing number of low-income countries, demographic shifts, rise of BRICS and CIVETS, and technological advances. There is also the shifting on the idea of aid from financial assistance to private investments and commercial opportunities, and the South-South cooperation. In addition to the increasing number of "one-world" matters such as climate change. 2) Evolving role of Northern-based INGO: After the criticism INGOs suffered in the eighties and nineties, the sector adopted a more decentralized approach that guaranteed the right of the South to be more involved in decision making. Their role also widened to include advocacy and switching from service delivery to a rights-based approach. 3) Growing importance of Southern INGOs and new players: INGOs in the South grew in numbers after the cold war. Some focused their services on their own regions, while others extended them globally. This, in addition to the rise of social entrepreneurship and citizen-led movements, have given more power and agency to the South.

A big part of the research, specifically "Autonomy" and "Local vs Expat hiring" would be affected greatly if this trend keeps growing. However, it is clear that even without physically moving HQs to the South, the inner dynamics of INGOs are changing, in an effort to decentralize and give more decision-making power to the locals. While the idea of moving South in principal seems noble, it is important to note that this direction was not supported by most of the interviewees. Their main concern was their source of funding; whether HQ is in the North or South, the financial aid itself is still primarily from the North, and so many of the financial and managerial operations need to remain close to the donors. Additionally, this move could hurt the smaller Southern civil society organizations, as INGOs tend to have a more credible reputation to the donors. This not only means less money for the smaller organizations, but the higher salary scale that INGOs provide employees means it will attract local talent away from the local CSOs. Williams highlighted some of the challenges that would face INGOs if they choose to move South, which includes funding and recruitment. Other challenges include the high financial cost, strong leadership and skills, balancing decision-making between Southern and Northern staff, and committing to values of participation through holding themselves accountable to the communities they serve.

In February 2018, The Times published an investigation into claims of a cover-up of sexual misconduct of international staff in Oxfam's mission in Haiti in 2011, following the 2010 earthquake. The newspaper revealed that some members of the staff paid for young prostitutes to attend parties in a guesthouse, and in some instances, were coerced to exchange humanitarian relief for sex. Management in Oxfam were informed of these incidents, and dismissed four employees. It was also revealed that the charity commission might have ignored pleas from the head of safeguarding to increase resources due to the rising number of allegations of abuse. Making matters worse, the investigation pointed out that Roland van Hauwermeiren, the Haiti country director who was forced to resign in 2011 after accusations of hosting sex parties, went on to work for two full years in Action Against Hunger, and another employee left to work for Mercy Corps, both organization said they were not told of the reasons for the men' departure from Oxfam. The report showcased a culture of bullying and intimidating employees into silence. The repercussions of this unraveling were felt immediately; soon after the story broke,

the deputy chief executive and the organization's ambassador resigned and 7000 people cancelled their regular donations.

Unfortunately, Oxfam isn't an isolated case. In 2002, UN and Save the Children released their findings after an assessment on sexual exploitation of refugee children in West Africa. The reports say in some cases, male national staff traded humanitarian aid for sex with underage girls. Over 40 agencies and organizations were mentioned in their report. Syrian women were not spared either, as men delivering aid and men in authority would ask for sex in exchange for goods and services. It was so prevalent, that some women would avoid going to the distribution centers altogether to avoid abuse and their reputation being smeared. The women also faced exploitation by shelter supervisors and private owners when they tried to secure housing.

In 2003, as a response to the allegations of sexual abuse in West Africa, policies on Protection from Sexual Exploitation and Abuse (PSEA) were formally adopted by the UN, to protect persons of concern that the UN, INGOs, and NGOs should be helping. PSEA has four pillars: Engagement with local populations to raise awareness and help build a working complaints mechanism, Prevention through training personnel on PSEA and implementing better hiring processes to ensure no employee had committed SEA, Response by having internal complaints, investigation, and sanctions systems as well as a victims assistance mechanism, and finally Management and coordination which includes creating an internal accountability system for each organization and activating an inter-agency network to tackle. This pertains specifically to the fourth area of concern "Accountability"; interestingly, it was the interviewees who first brought up the idea of accountability towards beneficiaries. Discussing it from a general perspective in addition to PSEA, interviewees addressed the constant effort the INGO have to put into ensuring the complaints systems are trusted by the affected community and are used.

Another discussion that's been raised recently in the humanitarian aid community is about sexual misconduct and harassment at the workplace. Following the #MeToo movement in late 2017, UN workers felt secure enough to raise their voices regarding the hostile work environments they suffer through. In the following months, management in several INGOs and

UN agencies recognized the possible consequences of neglecting these allegations and immediately reacted; Interaction, an alliance of over 180 US-based INGOs and partners, released a joint statement from the CEOs of all its members, promising to implement policies and procedures to prevent SEA and harassment by and of the staff. Several INGOs disclosed the numbers of employees fired due to sexual misconduct, they also updated policies and added hotlines so staff can feel more secured to report such incidents. As some of the interviewees explained, some staff might not feel safe reporting violations to HR, either afraid the management won't take appropriate action or they themselves would suffer from coming forward.

6.2. Limitations and future research

The main limitations I believed I would face at the beginning of the research did not actually happen; I thought it wouldn't be easy to have a face-to-face meeting with the country directors of the INGOs, it was partly true as I contacted many organizations with which I couldn't get a meeting, in the end though I did reach data saturation with the nine interviews I conducted. The two limitations I did face were the possible lack of honesty from the interviewees, and the inability to collect data from HQ.

I assured all interviewees that they and their organizations will remain completely anonymous. Some of them were very open and critical of their own NGOs and NGOs in general. These interviews in particular gave me fresh perspectives that I couldn't get otherwise. Not that the others were unusable, just that I could feel a sense of diplomacy in their answers. I tried to control this by asking their opinion on ideas introduced by the more open interviewees and try to get a reaction on that; this did help as they felt more secure in answering because other country directors before them did. I believe this issue could face any researcher no matter how much they promise anonymity, as the interviewees would still feel responsible to represent their organizations. But by hinting at the degree of honesty their colleagues provided, the interviewees might feel that it is acceptable to be critical, and it is a good opportunity to voice any frustrations they have.

The other limitation is that I didn't have the opportunity to interview people from HQ. I had to consider two aspects when deciding whether to pursue interviews with HQ staff: 1. which positions would be the most suitable and give a balance to the interviews of the country directors? 2. Would I have access to those people and would they be available for an interview? Realizing both those questions are difficult to answer, and would need far more time and resources, I decided to stick with interviewing FO only. This does not affect the credibility of this research, as the interviewees' opinions and complaints are still valid and should be considered. However, although I did reach data saturation with the country directors, had I had more time I would have tried to conduct more interviews with HQ and other employees in the FO.

As mentioned earlier in the research, there is very little literature concerning the internal operations of INGOs, so there is a lot of room for further research into this topic. Due to lack of access and time, I was only able to interview country directors in the FO. For future research into this matter, I think it would be beneficial to interview people from HQ as well to better understand the relationship. This will provide a more comprehensive insight into the relationship between FO and HQ. In addition to HQ, the sample of interviewees could also include employees of different levels who might have something to say about their work and how it is affected by HQ and the regional office if there is one.

In this research, I decided to only interview INGOs that are purely or partly humanitarian, as their operations and strategies differ greatly from development INGOs. That being said, I do think it is just as important to examine development INGOs; considering they have a similar organizational structure, they will have their own set of challenges regarding the relationship between HQ and FO. Finally, this research gave me perspective on the relationship with FO and other actors in the field, such as the donors, local government, local NGOs, beneficiaries, etc. It would be interesting to dissect these relationships individually, in research that tackles the FO as a whole or be more department specific within the FO.

In conclusion, the study of this topic is an interdisciplinary one that should include management and organizational theories as well as development studies. There is definitely a gap that researchers of the mentioned disciplines should tackle more often.

6.3. Conclusion

The thesis set out to explore the relationship between HQ and FO in humanitarian INGOs from the perspective of country directors in Jordan. The need for such research is apparent because of the lack of literature that studies the INGO itself instead of its position within the politics of humanitarian aid. Even more lacking is research that examines HQ-CO relationship specifically, despite being a very complex one that determines much of the role and effectiveness of INGOs.

In the first chapter, I introduced the thesis in general, presenting to the reader a brief summary of its chapters. In the second one, I provided the context of the thesis; beginning with the definition of NGOs; this issue in particular negatively impacted my research at it is such a widely used term that one has to go through so much literature to find the ones most close to their topic. I also gave a quick history of the internationalization of NGOs. Afterwards, I present an overview of the refugee crises Jordan went through since its independence, and discuss the response to the current Syrian refugee crisis. I decided not to go into too much detail here, as the entire context treats INGOs as one whole unit, and any more of such information would negate the thesis' purpose to dissect the INGO.

In the third chapter I provide the literature review, relying on three sources. Two of the sources related directly to my topic, while the third –IO theory- was close enough to be able to integrate it with the findings. I had to make the difficult choice of stopping at three, even though it was tempting to go for more. But, again, this would have been a disservice to the thesis. Suzuki's book was incredibly thorough and provided a lot of insight into the relationship between HQ and CO, Eschenbacher's case study –which used Suzuki's model- added even more insight and validated Suzuki's to an extent. The findings from this research complemented theirs.

The fourth chapter discussed the methodology used, and the process of data collection and analysis. As I was not personally used to GT, I struggled at times with the uncertainty that comes from using such a method. It was suitable to apply constructivist GT in particular, as it already matched my line of thinking while I was interning at the INGO even before I had decided to use it. Particularly in the case of this topic, where there is little research as it is, and a credible reason to produce a theory from the input of interviewees.

The fifth chapter presented the findings, which are four areas of concern that govern the relationship. Autonomy was at the very beginning as it determines so much of the remaining three areas. Being a constant struggle between top-down approach from HQ and bottom-up from CO. Such problem does not have one definite solution, instead, it is a continuous process of finding what works and what doesn't, trying to balance the two approaches and make the most out of the positives of each one. Contracts being most short-term, and country directors not lasting more than three or four years in their position, make it difficult to manage any long-term change, automatically allowing HQ to be the final decider on the level of autonomy. Funding was the first area to bring a third party into the HQ-CO relationship. It explored the donor problems HQ and CO face separately and together. This area is interesting because it is one that that neither HQ nor CO have full control of, but instead have to manage their relationship with whatever the donors impose. The third area looks at the hiring policies, how they differ from local to expat, and the impact this has on the HQ-CO relationship and the organization in general. Humanitarian INGOs operating in a developing country with high capacities was stressed, as this changes the long-term strategy the HQ and CO have towards local staff. It was interesting to see what issues expat CDs claimed stood in the way of hiring locals in management positions, and the Jordanian CDs' argument against them. The fourth area is accountability; it was very eye-opening for me personally, as I realized the INGOs' shortcomings in holding themselves accountable to their own staff and beneficiaries. The interviewees' input here were unanimous; they were all understanding to the accountability systems towards donors and HQs, and believed in the importance of establishing such systems towards staff and beneficiaries, although they were at different phases of building them.

The sixth chapter put the findings into the context of the current INGO scene. The thesis comes at a time of uncertain changes; one regarding the discussion taking place in the humanitarian and development sector on the benefits of moving HQs to the South, taking into consideration both managerial and ideological factors. The other being the sexual harassment and abuse of INGO staff to both beneficiaries and other staff. The scandal of INGOs hurting and exploiting the vulnerable people they are supposed to help caused a strong reaction from the public and the humanitarian community in general, putting immense pressure on INGOs to devise systems to ensure such atrocities never take place again. The #metoo movement is very recent, and even though INGOs have responded, they are still trying to navigate the many legal, sociological, and managerial aspects of implementing these systems.

Although the data was collected from purely and partly humanitarian INGOs in Jordan, most of the concerns of the country directors can apply to INGOs in general, as the literature integration showed, there is quite some agreement with the findings. This can be used to further support the need to continue examining the HQ-CO relationship to improve organizational performance and impact. The research touches on some issues that are specific to two situations: 1. INGOs working in stable developing countries with high capacity, as they can have a different approach to recruitment that encourages capacity building for local staff. 2. Humanitarian INGOs working with the extremely vulnerable, now beginning to recognize the importance of better accountability towards their beneficiaries through giving them effective platforms to raise their concerns.

The thesis has tried to fill a bit of the gap in the existing literature. It is perhaps a very specific topic, but as the findings suggest, it controls so much of the impact these organizations have. As I stated in the previous chapter, there are many ways for future research to build on this, whether in this direction in particular or several others. And perhaps if they are able to overcome the limitations I faced, they will cover more sides to this relationship, as well as others in the INGO.

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