



# ORGANIZATIONAL DYNAMICS

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September 6, 1988

Jerry Arnold  
President, Washington County Community Action Organization  
245 SE Second  
Hillsboro, OR 97123

Dear Jerry,

Ray Wilson and I thoroughly enjoyed working with you, Jerralynn and the Board of Directors of WCCAO. What follows is a compilation of your answers to each question on the survey, a percentage break-down by section, and a narrative containing our analysis and suggestions based on your answers. Our report provides specific feedback on your Board's composite survey responses.

Please remember that these are observations from two people (Ray and myself) who stand outside of your agency. The Board needs to fully discuss our observations and determine their relevancy. Keep in mind that although our suggestions are based on "hard data", you are the experts regarding your Board and organization and so you must determine what's best for your Board.

Our understanding is that you'll be sending this report out with your Board package on September 9, so that the Board has time to review it before discussing it at your September 20th Board meeting. The combination of your needs assessment last March and this Organizational Training Needs Assessment survey should provide you with the ability to put together a comprehensive training program.

I won't be in town on September 20th, so can't be at the Board meeting. I believe Nancy Snodgrass has talked with Jerralynn about options for discussing the report. Please feel free to call her with any questions. Thank you for giving us the opportunity to work with you and we're looking forward to contact with you in the future.

Sincerely,

Arty Trost  
Consultant and BoardWalk trainer

Ray Wilson  
Consultant and BoardWalk trainer

ORGANIZATIONAL TRAINING NEEDS ASSESSMENT  
WASHINGTON COUNTY COMMUNITY ACTION ORGANIZATION  
August 17, 1988

Section I: General Impressions

The WCCAO Board is well represented and individuals showed strong commitment to the organization. Although some members are more experienced in Board activities than others, no member appeared to dominate. A few of the quieter members, while appearing comfortable with the process, perhaps need to be encouraged to participate more. The Board president was comfortable in the role of facilitator and encouraged shared leadership. There was a really nice atmosphere during the meeting: people joking with each other, talking comfortably and generally showing that they value each other.

People feel positive about the organization, its administration and staff, and its role in the community. People also felt that they were making strides in refining the structure of the organization and its direction.

One concern is that work done by committees may not be thoroughly understood by all the Board members. This statement comes from observation of only one meeting, so you need to decide if the incident was typical. We observed that there was virtually no discussion, comments or questions when the 1988-'89 Annual Plan was adopted. Given the significance of the Plan, this seems curious. It may be that the Board had discussed the Plan at prior meetings and the Aug. 17 meeting was only a vote for the record. If not, it's an area to look at.

Section II: Organizational Training Needs Assessment Results

Fifteen members took the OTNA. Their responses form the basis for the following comments.

A. Essentials for Successful Boards

• Strengths

Seventy-three percent of the Board felt that you have the essential elements to be a successful Board. There was unanimous agreement that you have the current size of the Board is appropriate and that the Board's committees are active and functioning. People also were unanimous in their opinion that Board meetings were effective, with sufficient materials distributed prior to facilitate decision-making. Although not unanimous, a substantial

majority (thirteen) felt that there was a clear process for conducting discussions and making decisions at Board meetings.

Thirteen people felt that Board members are recognized and appreciated for their work.

The statements dealing with appropriateness of By-laws were also answered positively by a clear majority...or 75%.

- Areas needing work

Eleven of the members (out of fifteen) said that help was needed in understanding personal liabilities and legal responsibilities.

Eight were unclear about how the nominating committee developed its nomination list, with four of the eight indicating that work was needed and the other four being unclear about how the nominating committee functioned.

Only three people (out of fifteen) felt comfortable with the amount of leadership training provided to Board members. We are sure this is why your Board has been so willing to work in this area.

There may be a need to be clearer about job descriptions for committee members. Four people said they were provided, four said they were but work was needed, six were unsure about whether they were available, and one person said they were unavailable.

## B. Operational Strategies for Boards

- Strengths

People were unanimous that the meeting agendas were clear and helpful. Throughout, all statements dealing with how Board meetings are run were answered positively by all, or by virtually all Board members.

They also were unanimous in feeling that the Executive Director was part of the decision making process. These statistics were borne out by our observations of how Board members interacted with Jerralynn. People obviously feel very good about her leadership and administrative abilities and look upon her as a colleague.

- Areas Needing Work

People felt that there needs to be work done in the area of identifying the skills and interests of all members when making Board assignments. This ties in with the response to personal commitment (see below: 25% of the Board doesn't feel that their personal skills and perspectives are being utilized) and with our observation of the lack of discussion about the Annual Plan.

When there is such a variety of background and experience on a Board, it is a challenge to ensure that less experienced members are utilized fully and are helped to develop to their full Board potential. Continuing in this line, the Board was almost evenly split as to their opinion about whether all members are encouraged to present their views and opinions.

Given the various places where this concern came up, it would seem that some training in utilizing and involving everyone would be appropriate.

### C. Planning

- Strengths

Members felt that they have a systematic planning process. Having seen the 1988-'89 Annual Plan and having discussed the process with Jerralynn, these consultants would like to state that few other not-for-profit organizations have as well-developed a planning process. Your annual plan and the process that developed it could easily be a model for other organizations.

- Areas Needing Work

There was some question about the degree to which the planning process incorporated a regular look at trends on a national and local basis.

### D. Evaluation

- Strengths

Evaluation was the area that most strongly indicated need for work. Half the members felt that WCCAO regularly evaluates its programs. No one said this doesn't happen, but five people out of the fifteen felt that additional work was needed and two were uncertain about the status of evaluation.

- Areas Needing Work

Only 37% of the Board was satisfied with the evaluation process. Thirty-nine percent had questions about it or felt it wasn't applicable.

The number of people who responded ? (meaning they were uncertain how to answer) indicates a need for information giving and shouldn't automatically be interpreted as being a cause for concern. It does imply that there is a need for training so that people's uncertainties are resolved..

### E. Managing Change

- Strengths

Roughly seventy percent of the members felt that WCCAO was managing change effectively.

- Areas Needing Work

Half of the members felt that there needs to be more emphasis on the Board's role in keeping the organization dynamic. This is a common response when there is a competent Executive Director; the Board sometimes leans on that person too much and doesn't realize the extent of its own role.

### F. Cooperative Action in the Community

- Strengths

Two-thirds of the members recognized that WCCAO belongs to community networks of agencies. Half felt that WCCAO takes a positive approach to joint activities with other agencies.

- Areas Needing Work

According to the data, this was the third most critical area for improvement. There was a high percentage of "uncertains". This response can also be interpreted as "Not Applicable" but since cooperative action in the community is definitely applicable to WCCAO, we have interpreted these responses as "uncertain". Between the "uncertains" and the "needs work" responses, over half the members felt the need to do more collaborative work in the community.

It's important to remember that this survey doesn't reflect on how important people feel one area is or how much time and energy should be devoted to a particular area; it only shows whether or not people feel that an area is being attended to. When discussing Cooperative Action in the Community with the Board, perhaps there should be a discussion about the relative importance of this area and whether or not time and energy should be spent here.

#### G. Personnel

- Strengths

In looking at the overall data compilations, this area can be interpreted in two ways. One is that only 60% of the Board responded "yes" to the ten questions...not a high percentage. However, 31% had questions...were uncertain. These may reflect lack of information rather than concern about how things are being done.

This area confirms the impression that people generally feel good about the Board's relationship with the Executive Director. They are also pleased with the activities of the personnel committee and with WCCAO's current personnel policies.

- Areas Needing Work

As mentioned above, and also in the area on evaluation, it seems that people are unsure of their information in this area. This implies a need for training. People also indicated that there is a blending of the distinction between Board and staff responsibilities and authority and so some clarification in this area would be helpful.

People were also uncertain as to whether the Executive Director was evaluated annually. Another area of uncertainty was in the area of role distinctions when a Board member serves as a direct-service volunteer. Almost 80% were confused about this.

Overall, it seems that training in this area would be very beneficial to delineate the distinction in role, responsibility and authority between Board and staff.

## H. Financial Decision Making

- Strengths

A significant number of the Board responded that there was an active finance committee which presented an appropriate annual budget to the Board for approval. They also felt that the organization has internal financial controls.

- Areas Needing Work

Only one person said yes to question 63 "Do Board members understand the financial reports and balance sheets so that they are comfortable asking questions?" This substantiates our observation that people are not asking the hard questions which are appropriate when they are asked to approve committee work, especially that of the finance committee.

This is a typical response in not-for-profit boards. During the discussion on Aug. 17, people said that they felt comfortable with the finance committee member capabilities, so felt absolved from the need to become expert in this area. We discussed how ALL Board members are responsible for making financial decisions, not only the finance committee members.

While it might not be necessary to have three hours of training in this area, it certainly is important for a brief session on the responsibility of ALL Board members to understand and discuss financial reports. In addition, the finance committee should assess whether its reports are intelligible to the Board and should take care to provide its reports in easily understandable form...not in "accounting-ese."

## I. Fundraising

- Strengths

The Board was unanimous in its opinion that it has several sources of revenue and so isn't unduly dependent on any one source.

- Areas Needing Work

The area of most concern was whether the purposes of the fund-raising activities were clearly communicated to the community. Half the Board felt that this didn't happen. There was also a split as to whether fund-raising activities have been successful, with 66% saying yes and 33% saying no.

## J. Legal Issues

- Strengths

Twelve people felt that the Board operates legally within its by-laws and charter, and three people didn't know. Thirteen people felt that the Board periodically reviews insurance needs, and two people didn't know.

- Areas Needing Work

Overall, 58% of the Board feels that legal issues are being appropriately addressed. This number should be higher, but there were a high percentage of "uncertains". Again, this indicates a need for information sharing (if certain

mechanisms are in place) or for training, if the mechanisms need to be developed.

#### K. Marketing

- Strengths

The responses reflect that WCCAO is very aware of the potential clients for its services and programs, and that planning includes community assessment.

- Areas Needing Work

There is a question about whether the organization has a marketing plan and how well that marketing plan is working.

#### L. Public and Community Relations

- Strengths

The data doesn't reflect the strengths of WCCAO's Public and Community Relations efforts: based on the data we might consider that there are serious problems and training needs in this area...only 42% felt that you were strong in this area. However, the discussion on Aug. 17 clearly showed that people felt very good about the efforts that are occurring. WCCAO has made this a top priority and, while things are not yet where the Board would like them to be, most feel it is due to the relative recency of the focus in this area.

- Areas Needing Work

While people know that this is an area for much work, they didn't see a training need...only a need to fully implement plans in this area.

#### M. Personal Commitment

- Strengths

There was almost total unanimity that there is strong personal commitment to the work of the organization. Twelve people said that they were actually willing to commit even more time and energy when needed. Everyone felt that they were able to put aside personal positions when compromise is necessary.

- Areas Needing Work

Twenty-five percent of the Board felt that they needed to do more in the area of contributing their skills and perspectives to the work of the Board and WCCAO. It would be important to follow up on this and see if people felt unable to contribute due to lack of skills or whether they don't feel that their contributions are particularly sought.

### Section III: Overall Recommendations

At this time it might make sense to determine where information-giving is appropriate. By this we mean that if mechanisms are in place and people aren't aware of them, the Board may choose to bring people up-to-date by different means. This could include "briefings" at Board meetings, letters or memos to Board members, and inclusion of written materials in Board packets.

Some areas seem to indicate a need for training...helping people obtain the skills necessary to help the Board function optimally. We recommend training that will emphasize the roles of Board members in order to bring the entire Board to a common level of understanding of their roles and responsibilities. Even members who already are knowledgeable in this area should attend, to make sure that all hear a consistent message.

Another area for training is the delineation of authority, responsibility and decision making between Board and staff. This, combined with information on legal responsibilities, would serve the Board well.

In looking at the needs assessment done by WCCAO in February, the area of personal legal obligations, legal accountability and liability, effective Board involvement, and role and responsibilities of Board members and staff were the most highly rated. The Essentials of Boards module could be customized to cover the above areas. It should also include methods for involving less experienced Board members and for developing mechanisms for real discussion of issues.

Another area for training is in how to understand a financial report and its implications. Tied in with this is the area of how to question a financial report so that it becomes understandable and can be used for decision-making purposes. Before training is given in this area, the finance committee and treasurer might want to look at how they can make such reports as easy to understand as possible, without sacrificing comprehensiveness. The report format necessary for reporting to funding and regulatory agencies may not be the most helpful to Board members.





Volunteer Leadership  
Development Program/BoardWALK Series  
**Survey Answer Sheet**  
Organizational Needs Assessment

Date: \_\_\_\_\_

Name \_\_\_\_\_ (OPTIONAL)

Position                
VOLUNTEER STAFF

Organization Name WCCAO

United Way Affiliated?                
YES NO

Primary Purpose of Organization \_\_\_\_\_

**Answer Key:** Y = Yes      NW = Yes, but needs work  
N = No                      ? = Uncertain or not applicable

A. Essentials of Successful Boards					B. Operational Strategies for Boards					D. Evaluation				
	Y	NW	?	N		Y	NW	?	N		Y	NW	?	N
19.	13	1	1		20.	15				32.	12	2	1	
TOTAL: 19x15=285					TOTAL: 9x15=135					TOTAL: 5x15=75				
2.	4	7	3	1	21.	10	5			33.	10	1	3	1
3.	11	3	1		22.	9	4	1	1	TOTAL: 58 9 7 1				
4.	12	2	1		23.	7	5	3		E. Managing Change				
5.	15				24.	8	4	3		34.	9	5	2	
6.	11	3	1		25.	13	1	1		35.	2	3	10	
7.	12	1	2		26.	4	6	5		36.	6	4	5	
8.	7	3	4	1	27.	14	1			37.	5	3	6	1
9.	12	1	2		28.	15				38.	7	2	6	
10.	8	4	3		TOTAL: 95 26 13 1					TOTAL: 28 17 29 1				
11.	3	3	7	2	C. Planning					E. Managing Change				
12.	13	2			5x15=75					5x15=75				
13.	15					Y	NW	?	N	39.	11		2	2
14.	15				29.	14	1			40.	11	2	2	
15.	15				30.	9	4	2		41.	12	2	1	
16.	15				31.	13	1	1		42.	8	5	2	
17.	4	4	6	1	TOTAL: 53 11 9 2					43.	11	2	2	
18.	9	5	1		TOTAL: 53 11 9 2					TOTAL: 53 11 9 2				

# SURVEY ANSWER SHEET: Organizational Needs Assessment

F. Cooperative Action in the Community $5 \times 15 = 75$					61.	13		1	1	K. Marketing $5 \times 15 = 75$				
					62.	15				Y	NW	?	N	
	Y	NW	?	N	63.	1	9	5		80.	1	6	2	
44.	5	5	5		64.	11	1	2		81.	13	1	1	
45.	10	1	4		65.	14		1		82.	10	2	3	
46.	6	5	4		66.	10	2	3		83.	13	2		
47.	8	2	5		67.	13		2		84.	9	5	2	
48.	6	2	6		TOTAL: 97 18 19 1				TOTAL: 46 14 15 0					
TOTAL: 35 16 24 0					I. Fundraising $6 \times 15 = 90$					L. Public and Community Relations $6 \times 15 = 90$				
G. Personnel $10 \times 15 = 150$						Y	NW	?	N		Y	NW	?	N
	Y	NW	?	N	68.	11	2	2		85.	8	6	1	
49.	11		4		69.	15				86.	4	4	7	
50.	12		3		70.	12	1	2		87.	8	4	2	1
51.	7	2	6		71.	8	3	4		88.	7	4	4	
52.	5	1	8	1	72.	7	6	2		89.	7	5	2	1
53.	11	2	2		73.	9	6			90.	4	4	6	1
54.	7	6	2		TOTAL: 62 18 10 0				TOTAL: 23 27 22 3					
55.	7	1	6	1	J. Legal Issues $6 \times 15 = 90$					M. Personal Commitment				
56.	13		2			Y	NW	?	N		Y	NW	?	N
57.	13		2		74.	12		3		91.	14	1		
58.	1	3	11		75.	5	4	5	1	92.	15			
TOTAL: 87 15 46 2					76.	4	2	7	2	93.	12	3		
H. Financial Decision Making $9 \times 15 = 135$					77.	9	1	5		94.	15			
	Y	NW	?	N	78.	13		2		95.	12	1		2
59.	6	6	3		79.	9	2	4		TOTAL: 68 5 0 2				
60.	14		1		TOTAL: 52 9 26 3									

Comments:

SUMMARY TABLE OF RESPONSES  
to  
ORGANIZATIONAL NEEDS ASSESSMENT SURVEY

	Y	NW	?	N
A. Essentials of Successful Boards	73%	14%	11%	2%
B. Operational Strategies for Boards	70%	19%	10%	1%
C. Planning	77%	12%	9%	1%
D. Evaluation	37%	23%	21%	19%
E. Managing Change	71%	15%	12%	3%
F. Cooperative Action in the Community	47%	21%	32%	0%
G. Personnel	58%	1%	31%	1%
H. Financial Decision Making	72%	13%	14%	1%
I. Fundraising	69%	20%	11%	0%
J. Legal Issues	58%	10%	29%	3%
K. Marketing	61%	19%	2%	0%
L. Public and Community Relations	42%	30%	24%	3%
M. Personal Commitment	91%	7%	0%	3%

KEY: Y = Yes  
NW = Yes, but needs work  
? = Uncertain  
N = No