

## **Project Client: A Refugee Services Organization**

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### **Background**

In late September 2005, the organizations' Co-ordinator requested the help of volunteer OD consultants from the Building Community Organizations Initiative. The organization is an agency that comes to the aid of claimants and refugees, mainly Chinese- and Spanish-speaking, by providing settlement and referral information.

By late November the two OD consultants met with the Co-ordinator and soon after interviewed others in order to understand this most complex interweaving of organizations, sponsors, board members, advisors, and funders. This is a cast of many attempting to join together into an alliance.

### **The context**

From the organizations' point of view the issues appeared to be the co-location of two agencies, and the potential of a partnering of four agencies into an alliance. We use the words 'potential' and 'attempting' even though there was a Memorandum of Understanding (MOU). The biggest player in the alliance, saw the MOU as 'merely a background document that had four parties agreeing to a common philosophical approach and a recognition of each parties expertise in moving forward with a coordinated integrated service delivery system.

### **The process**

The request for the BCO consultants was to assist in developing a clear, efficient, partnership for stronger advocacy and integrated systems; a collective; an alliance. The reality we discovered after interviewing several key individuals in the four organizations was that it is a group of individual organizations with individual boards with individual histories – many of which did not completely embrace the idea of a collective. The loss of funding left each of the organizations, with the exception of one, with less money to do the same work. These people and organizations know each other well and they wanted to become more integrated.

Scoping out the work seems to be doing the work, before the contract is revealed. The consultants needed to push back on the request to develop a policies and procedure guideline for the two organizations that co-located in January 2006 and push forward on helping the groups to actually operate under an alliance project charter. We wrote a report by the end of December outlining what we had learned in our interviews and recommending that a day be assigned for stakeholders to work together to develop the alliance project charter.

On a Saturday, January 28, 2006 we facilitated a successful day-long process that our mentor John Baker had coached us through. People associated with each of the four

organizations made commitments to develop action plans with timelines. To date, many of these commitments stemming from this process have been successfully completed.

### **Lessons Learned**

#### *a) Identifying the client*

The consultant team had interesting dialogues about what the work was and who in fact our client was. It was helpful to have each other to listen to and offer other perspectives. The relationships between the organizations were complex and it was important for us to be clear to all in our discussions. Therefore, our initial report highlighted what we discovered through our interviews (*quotes were used as much as possible*) and what we were proposing was important for all to have.

#### *b) Following the timing of our clients*

Part of the success of the intervention was the fact that the day-long Project Charter discussion occurred after the actual co-location which revealed 'below the waterline' resistance that made true integration challenging.

#### *c) Making connections- modelled by our illustrious mentor*

Our mentor, John Baker stressed the importance of making a connection with our clients. As simple as this may sound; the reminder was potent. John both modelled this and asked us to reflect on this in our debrief sessions. Without relationships with these individuals our conversations would have been limited and our work less effective.

#### *d) Looking at our own reactions- modelled by our mentor*

Again, John made sure that we articulate our gut reactions to information and meetings. This helped us to acknowledge our individual perspectives, to utilize our inner wisdom.

#### *e) Hosting conversations on possible outcomes*

As facilitators, we took care to plan the date and place with plenty of advance time. All invitees accepted and were present and the participants took responsibility to organize the food. In order to move towards an alliance we needed all the participants to move to a common vision for the alliance. The conversation began with the participants selecting images that represented the alliance. The power of visual image was reinforced and the idea sharing was rich.

It was through the common vision that individuals representing different organizations were able to make commitments to produce work that the group had been identified as furthering the alliance.

We had a full day planned, however we were aware that there might be some unexpected discussions that might arise and we were certainly ready to put the plan on hold to encourage the group to have conversations that mattered to them and that were vital to the alliance successfully coming together.

There are tangible outcomes and intangible outcomes from this day. The tangible include the action plans and the intangible were building relationships, sharing knowledge, and

providing opportunities for contributions. Conversation is action. Things became 'real' when they were expressed. Then it germinated. Other people heard it, other people began to feel it, there was sharing of ideas together and it was important enough for relevant action to be planned. The participants started to talk and got to work.

f) *Assumptions of helping change*

Conversation is critical to make change happen. In fact the conversation was the change itself that needed to be discussed and that is being discussed throughout the organizations.

**What could have been improved in this project?**

The time span of 4-6 months seemed a little too compressed, perhaps the expectation might have been between 6-8 months. There could have been a lot more discussion by us, up front about the expectations of the original request for help.