



BUILDING COMMUNITY ORGANIZATIONS

Client Name: Be the Change Earth Alliance (BTCEA)

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The Initiative: Increasing Sustainability (Organization Review & Strategy Design)

The Client Organization:

BTCEA is a non-profit organization dedicated to facilitating and supporting citizen engagement vehicles to raise consciousness, and affect change in individuals and communities towards environmental sustainability, social justice, and spiritual fulfillment. BTCEA's primary products include: Action Circles, a copyrighted Action Planning Guide, Symposia, annual Gatherings, presentations, videos, and a targeted curriculum. With increasing interest and demand for BTCEA's programs and offerings, the organization was challenged by the tension between meeting their external demands while at the same time building the infrastructure necessary to support and sustain their growth.

BTCEA was formed in 2007 from the consciousness that one must be the change one wishes to see in the world in response to meet the growing global eco-social crisis. The organization is staffed by paid staff (2 full time and 2 part time), dedicated advisory and operational volunteers, and an active volunteer Board of Directors.

Entry and Contracting:

In July we met with the client (Exec. Dir. BTCEA), Board members, staff and key advisory volunteers to introduce the BCO consulting opportunity and to explore and surface the client's needs. Based upon the needs identified by BTCEA, BCO contracted a two-phased approach with the client to help them identify the infrastructure and plan of action needed to service the organization's concepts and growth objectives. In August our follow up meeting with the client focussed on collaboratively co-designing the consultation process, data gathering process, information sharing, establishing roles and responsibilities, project outcomes, success indicators and anticipated timeline(s).

Phase 1 included 3 elements: Initiation, Exploring current state, gaps, opportunities and action planning. Phase 1 outcomes were refined to clarified priorities and strategies in:

- Improving product: Creating highly functional circles
- Increasing organization sustainability
- Decision making principles, shared culture
- Governance
- Organization structure
- Workload

Phase 2 included strategic planning, project close and handover. Phase 2 outcomes were refined to:

- Clarified vision, mission, values
- Clarified operation framework and activities

The consulting project incorporated elements of three framing parameters aligned with the BTCEA core:

1. 'Chaordic' Process: How to create self organizing circles
2. Creating highly functional program(s): Circle development
3. The Integral model

Project success indicators were defined as providing BTCEA increased clarity in its current activities, future goals, and having the basis to build an overarching business plan in the future.

Data Collection & Interpretation:

Individual structured interviews were held with 8 people including the Board of Directors, Executive Director, Operations Manager and key Volunteers. Participants were asked to share their views of BTCEA's history, their involvement, current organizational strengths and needs across its structure, operations, people, culture, and leadership.

Mind-mapping and 5-Why data analysis methods were used to identify commonly expressed themes around BTCEA's core strengths as well as root causes to key organizational issues. In order to place data collection findings in an organizational context, we used the 5 Life Stages of an Organization to present trends and themes identified to the client, Board and key participants.

The 5 Life Stages of an Organization



Reported findings: as an organization moving from its start-up phase, BTCEA exhibited elements of growth across Stage 1, 2, and 3 concurrently. There are areas where BTCEA reaches “produce” in Stage 3 while bypassing stage 1 and 2. The resulting need is to go back to fill in gaps of the previous stages so as to enable the organization to have strong foundations for “persisting”. Overall areas needing attention included: **Board** roles & responsibilities, strengthening **Commitment to plans & priorities** addition of Volunteer coordinator role to **align volunteer skills with activities and to recruit more** volunteers, **Burnout** risk, **More tracking** for results, **More Follow-up** (as needed), **Internal Communication** gaps, and **Leadership imbalance**.

Action Planning & Implementation :

Together, BCO and BTCEA reached agreement on the current state, and co-designed action plans for moving forward and for affecting changes in agreed areas of attention. Two BTCEA group planning sessions were held to identify action plans, set priorities, assign responsibilities and timelines. Areas prioritized as having the capacity to take BTCEA the furthest were; Internal Communication Gaps, HR/People Engagement Activities, Board roles & responsibilities Clarification, and Mission/Vision/Values Revision.

Planning tools included: Brainstorming, Subject Prioritization & Group decision-making, Force-field Analysis

Flowing from the planning sessions, we recommended a 1-day workshop dedicated to Vision, Mission, Values and overarching strategic goal identification. BTCEA embraced our recommendation and a workshop was planned and held for 10 BTCEA participants including paid staff, Board of Directors and key volunteers.

Workshop Content:

1. **Visioning – Why?**, ‘Show & Tell’ symbol/metaphor to share individual’s essence of BTCEA’s vision, Evaluate existing statements (2008 & 2009), Refine/strengthen, create a writing team to finalize specific wording
2. **Missioning – Who? What?** Inventory of stakeholders and assets (skills needs and available)? Evaluate existing statements (2008, 2009), Refine/strengthen, create a writing team to finalize specific wording.
3. **Guiding Principles (Values)**; Identify collective values and refine down to agreed top 3 – 5 values.
4. **Strategizing – How?**; Develop 3-4 core strategies that will move us furthest towards client mission
5. **Project Closing**; Recap progress over past months, Appreciation, Client Feedback & Next steps.

Project Outcome:

By late 2009 BTCEA had gained clarity around its current state and needs overall, particularly in board development. While the Board President resigned in Dec 2009, BTCEA efficiently began its board recruitment process immediately. Due to the

need for orienting potential new board members, BTCEA decided to first clarify its current operational framework, activities, and to finalize its vision, mission and values before moving on to complete the 2-3 year strategic plan started in Jan, 2010.

BTCEA's accomplishments during this project were tremendous in terms of gaining clarity on its direction and making immediate operational changes. The outcomes of this project are framed within a renewed vision, mission, values, and four action plans to improve:

- Human Resources,
- Internal Communications,
- Governance,
- Finance Model

Several of BTCEA's initial action planning objectives were reached at the time of the project closing, with remaining and incomplete tasks handed off to BTCEA staff and board to continue fine-tuning and working with.

As an organization moving from a start-up phase to one of establishing and consolidating, BTCEA has, in the last seven months begun shifting its organizational focus from the immediate to the long-term, from fire-fighting to infrastructure building, from reacting to careful planning (strategic and tactical), and finally, from an individual to a team-based leadership model.

Evaluation and Debrief:

The BCO team believes BTCEA will reach its mission in time and be ready for the important and exciting growth now at its door, provided that:

- newly created action plans are implemented
- new habits towards clear and committed work plans replace ad-hoc activities
- leadership is shared with an increasingly well-functioning Board
- results are monitored continuously to strengthen the organizations' infrastructure, processes, and commit the organization's resources towards not only its' immediate but also its' long term goals

The development of a strong Board, including clear board recruitment, orientation, training and engagement processes will enable the Executive Director to have support in leading the organization forward. As BTCEA shifts from an individual to a group leadership model, and refines its operation processes and systems, the organization will grow in its capacity to manage resources effectively at a larger scale. This in turn, will position BTCEA for growth. AS BTCEA continues in this direction, the Executive Director's attention will shift away from day-to-day operational duties towards strategizing, developing and managing, as is common in all growing organizations from 'perform & persist' to "review & renew" stage.

The BCO team constructed and distributed to BTCEA team a satisfaction and feedback survey using Survey Monkey. Based upon survey results, following is the feedback BCO received.

BTCEA rated BCO's contribution to generating high impact at lowest cost and depth of intervention as:

- *MOST IMPORTANT* → co-creating actions plans that were concrete, measurable & achievable, linking change process to daily organizational environment, motivating and empowering them towards sustainable change
- *VERY IMPORTANT* → helped them to own the change process toward future states

Where we did well:

- We understood the client's needs and operating environment. We effectively co-designed the consultation process, clearly explaining how the consultation would unfold and effectively facilitated exploration of alternatives to issues and were able to change direction and approach to better facilitate BTCEA's needs.
- Throughout the project we communicated clearly and effectively and worked with the BTCEA team to meet their needs. We met agreed timelines, made effective use of team, group and workshop sessions, providing excellent value for time spent and met overall project objectives.
- Interviews were felt to be well-organized and respectful of participant's time and availability. Data collection tools and models to report findings were felt to be appropriate, with data analyzed well, logically presented and meaningfully to BTCEA team.

Where we could have done better:

- While most BTCEA participants felt we worked with the team to meet their needs and made effective use of team meetings, there were some members who did not fully agree
- A couple of team participants felt the structured questions asked during the data collection phase weren't relevant to the process, that we did not logically present and explain the data collected or explore various alternatives to the issues arising from the data
- Consider the impact of organizing our 4 member BCO team into 2 facilitating teams versus one team of 4

As BCO Consultants, our key learnings are:

- The use of a grounded consulting process to guide a project from diagnosis, data feedback, action planning, intervention to follow-up
- Value of meeting with the main client in planning and debriefing meetings, sessions and/or interventions
- Accurate, on-going monitoring and response to new organization dynamics or issues, with constant trust to our intuition
- Collaboratively designing and adjusting the consulting deliverables with the client
- The art of involving client participants to plan and own implementation activities
- Performing effectively in an atmosphere of ambiguity and chaos
- Importance of "reading the room" to assess participant's ability to complete planned agenda items, being prepared to end planned session early, identify remaining items and next action steps with participants and/or main client
- Deeply respectful, authentic team communication (as modelled by client group)
- Remaining flexible to the needs of the client and honouring the concepts, language, and processes that aligned with their organizational culture and values

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