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MONTEREY, CALIFORNIA

MBA PROFESSIONAL REPORT

Organizational Assessment
of
Shelter Outreach Plus

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December 2003

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This report is an organizational analysis of Shelter Outreach Plus (SOP), a non-profit agency in Monterey County providing homeless support and shelter, domestic violence victim support, and women and men transitional support services. Semi-structured interviews were conducted with four Board members and 11 staff members to generate an organizational diagnosis using systems theory as a foundation for improvements. A strategic planning session was arranged and facilitated and Board members and key personnel generated five strategic goals. There is widespread passion and commitment to the mission, including long-term delivery of multiple and unique services which positively impact the county. There is little interaction among the five program offices and trust and leadership issues exist between staff and executive leadership. SOP faces fiscal challenges brought on by statewide cutbacks and lack of countywide visibility. Information technology improvements are ongoing and needed and a more decentralized decision-making structure is recommended for operational efficiencies and employee motivation.

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ORGANIZATIONAL ASSESSMENT OF SHELTER OUTREACH PLUS

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from the

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ORGANIZATIONAL ASSESSMENT
OF
SHELTER OUTREACH PLUS

ABSTRACT

This report is an organizational analysis of Shelter Outreach Plus (SOP), a non-profit agency in Monterey County providing homeless support and shelter, domestic violence victim support, and women and men transitional support services. Semi-structured interviews were conducted with four Board members and 11 staff members to generate an organizational diagnosis using systems theory as a foundation for improvements. A strategic planning session was arranged and facilitated and Board members and key personnel generated five strategic goals. There is widespread passion and commitment to the mission, including long-term delivery of multiple and unique services which positively impact the county. There is little interaction among the five program offices and trust and leadership issues exist between staff and executive leadership. SOP faces fiscal challenges brought on by statewide cutbacks and lack of countywide visibility. Information technology improvements are ongoing and needed and a more decentralized decision-making structure is recommended for operational efficiencies and employee motivation.

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EXECUTIVE SUMMARY

This report is an organizational analysis of Shelter Outreach Plus (SOP). The report is a group project required for completion of a Masters of Business Administration from the Naval Postgraduate School, School of Business and Public Policy, Monterey California, December 2003. The authors are grateful to the Board and staff members for taking the time to answer our many questions and for your willingness to consider organizational improvements.

We found employees and Board members who were both passionate and committed to fulfilling the SOP mission – *to be leaders in ending the cycle of homelessness or violence by providing safe housing, compassionate support, and opportunities for self sufficiency* – throughout the Monterey Peninsula. We also found an organization struggling with an array of challenges and problems characteristic of many other organizations – profit and non-profit alike. This report chronicles our findings with the hope and expectation of improving the working environment for SOP employees, improving organizational performance, and enhancing SOP's stewardship role in the community. No names are used in this document – anonymity was promised. Some findings are sensitive, and non-attribution is expected and should be honored.

A. BRIEF FINDINGS

The strategic planning process is unclear and not necessarily connected to daily operations. A strategic planning session was held and facilitated – including development of a prioritized strategic issues agenda – yet follow-through, implementation, and performance metrics to evaluate progress are markedly insufficient.

SOP has existed for five years and has a positive reputation among county and state officials, but is facing potentially severe financial difficulties. This is due partly to the ongoing state fiscal crisis, but is also related to an apparent lack of visibility and absence of a marketing plan. Although the overall economy is persistently troublesome, SOP's traditional funding source – grant funding – is itself facing changes, limitations, and declines. There is an opportunity for increased private funding, yet there is no explicit strategy for acquiring more widespread private donations.

SOP's staff are dedicated to accomplishing the mission, yet many express a range of frustrations and perceived problems such as lack of empowerment, lack of clear job descriptions, shifting of people with little explanation, top-down decisions with little to no employee involvement, interruptions in the workflow by Board members' special requests, lack of trust in the executive leadership, and evidence of workplace fear.

SOP recently launched a much-needed website which should improve organizational visibility, yet information technology problems persist such as: a lack of training; insufficient phone lines; typewriters still being used to complete forms; and confusion over the role of technology related to strategy, performance, and communication. There appears to be a lack of communication and interaction among the five geographically dispersed offices.

This report describes important organizational components using a systems model shown in Appendix A. A system is defined here as a set of interrelated components or elements working towards a common purpose. These components consist of: external environmental factors; setting direction through mission, purpose, policies and strategies; organizational design elements (structure, people, tasks, processes, and technology); and organizational results (culture, outputs and outcomes). Each section of the report contains descriptive information and analysis.

All the aforementioned issues, problems, and challenges are addressed in detail, including recommendations for improvement. Report analysis is based on a review of applicable SOP documents, workplace and strategic planning observations, and semi-structured interviews conducted with four Board members and 11 staff personnel.

An entering assumption is that there are not enough resources to make wide-scale changes. It is up to decision makers to prioritize what can actually be implemented and when. Additional MBA project groups from the School of Business and Public Policy can be solicited for follow-on assistance where applicable. Thank you again for a worthwhile learning experience. Although there are some substantial challenges and problems indicated in this report, we believe SOP can and should improve in order to better serve and accomplish its crucial community mission.

I. INTRODUCTION AND SYSTEMS MODEL

A. INTRODUCTION

1. Purpose and Overview

Shelter Outreach Plus (SOP) is currently operating in an environment with considerable demand for its services but with scarce resources. Fortunately, SOP has employees and Board members who are both dedicated and passionate in assisting Monterey County in reducing the number of homeless people. This report chronicles our findings with the hope and expectation of improving the working environment of SOP employees, improving organizational performance, and enhancing SOP's stewardship role in the community. No names are used in this document – anonymity was promised. Some findings are sensitive, and non-attribution is expected and should be honored.

2. Methodology

This report uses a four-step approach in analyzing SOP. First, relevant material such as pamphlets, the website, and job descriptions were reviewed. Next, a series of semi-structured interviews involving four Board members and 11 employees were conducted. Then, a strategic planning session was conducted with Board members and employees. In sum, SOP was assessed based on document reviews, semi-structured interviews, a strategic planning session, and comparison to an organizational systems model (Roberts, 2000) that views the organizational components from a holistic perspective (Appendix A).

3. Organization of the Report

Chapter I provides an introduction and discusses the components of the systems model used as the basis for this analysis. Chapter II describes and analyzes the external environment and system direction of SOP. Chapter III describes and analyzes the internal organizational design factors of SOP. Chapter IV identifies our conclusions and provides recommendations for SOP leadership.

B. SYSTEMS MODEL

This report describes SOP by mapping all important factors onto what is called an open systems model (Nadler and Tushman, 1988; Roberts, 2000). A system is defined here as a set of interrelated components or elements working towards a common purpose. This model is used to assist leaders and managers in viewing the organization from a macro perspective by examining the external environment and the internal components, and understanding how outcomes are generated based on the interrelationships of a number of variables (Bruner, 1998). In fact, it is the fit or congruence among all variables that determines performance. The following briefly explains each of the components of the systems model:

1. External Environment

The model begins by looking at an organization's external environment, i.e., political, economic, social, and technological factors that may influence the internal workings of the organization. SOP is an open system influenced by forces and trends in the external environment, for example, California's fiscal crisis.

2. Key Success Factors

These are the main factors that an organization needs in order to be successful. Success factors are different for every organization. For a non-profit organization, a key success factor would be the ability to obtain finances through grants and voluntary sources. Additionally, leaders and managers would need to adopt organizational efficiencies, even though the organization does not make a profit or charge customers fees for services. Leaders would ideally identify these key factors and focus resources (staff) towards accomplishing three to five primary goals per annum.

3. System Direction

An organization's direction often includes its mission, goals, and strategies. Systems theory says that an organization should set a direction based on external environmental assessments and an internal assessment of organizational capabilities.

4. Design Factors

Design factors are internal organizational components, which include tasks, technology, structure, people, and processes. Congruence among these components

determines the extent of organizational success. For example, how well does decision-making structure fit with how members accomplish tasks?

- *Tasks:* The specification and differentiation of the tasks often determine the design of work to be performed. The point is to be able to describe all relevant tasks, and understand their relationship to other design variables like organization structure.
- *Structure:* Structure describes the groupings of activities and people in an organization. It identifies who is responsible at various levels, what the basic groupings of people are, and how decisions, responsibilities, and accountability are dispersed or positioned.
- *Technology:* Technology is the process through which work gets completed. It also includes the interdependencies among the units in the work flow and the condition of the physical facilities and equipment.
- *People:* This refers to the knowledge, skills, and abilities of the people. It also includes their expectations, backgrounds, and experience.
- *Process:* This design factor is further divided into the following subsystems:
    1. Financial Management: This describes how an organization manages fiscal areas including how people are held accountable for managing budgets.
    2. Human Resource Management: This encompasses the recruitment, selection, retention, rotation, promotion, and termination of employees. It also includes the training, development, and reward system set up for employees.
    3. Communication and Decision Making: This deals with how information is gathered, processed, distributed, and evaluated. Decision making is a process that involves the coordination of vertical and horizontal communication. Vertical communication

enables the policies and standards of upper management to be conveyed to subordinate personnel. Horizontal communication can facilitate coordination across various offices.

5. Culture

The culture of an organization is the informal, acceptable patterns of interaction among employees. It affects the people and how they perform their tasks. According to Daft (2001), culture is defined as "the set of norms, values, beliefs, understandings, and ways of thinking that is shared by members of an organization and is taught to new members as correct" (p. 198). In the systems approach, culture is important because it directly affects organizational results. It is slow to change yet has a direct bearing on performance.

6. Outputs and Outcomes

Outputs are what the organization produces in terms of goods and services. Performance indicators are often used to measure outputs. Outcomes are the consequences of the outputs. For example, SOP obtains a number of grants per year (outputs), which are used to provide shelter and protection for underprivileged human beings in Monterey County (outcomes).

In the report, the external environment, system direction, and design factors, are described and analyzed in separate sections. Key success factors, tasks, people, culture, outputs and outcomes are interjected in various parts of the report where applicable.

II. EXTERNAL ENVIRONMENT AND SYSTEM DIRECTION

External Environment and system direction are inputs to an organization. The external environment includes political, economic, social, and technological concerns. The system direction includes the mission, values, goals, and strategic issues.

A. EXTERNAL ENVIRONMENT

A systems perspective can begin by examining an organization's external environment. External environmental factors are inputs to the design factors of the organization. These factors consist of those things outside the organization which affect its operation, including social, economic, political, and technological forces and trends. Identification of external environmental factors is necessary as all organizations – public and private – struggle to adapt to pervasive, turbulent changes.

1. Description

At 36.5 million people, California is the most populous state in the United States. In the past ten years, California grew by 17 percent; in the last 50 years, the population more than tripled. Today, over 550,000 new residents crowd into the Golden State annually. Of the California population, over 361,000 residents experience homelessness on any given day, while a great many more require food and other services. This equates to about one percent of the California population being homeless everyday ("NPG State Facts," 2003). In 1999, Monterey County had approximately 400,000 residents (U.S. Census Bureau, 2000). According to a 1999 Monterey County Homelessness Report, approximately 2,917 people are homeless on any given night and 6,835 individuals are homeless at some time during the year on the Monterey Peninsula, indicating a homeless percentage of over 1.7 percent (Applied Survey Research, 1999). SOP is the largest supplier of services for the homeless in Monterey County. According to SOP's website (2003), in 2002, it referred 7,393 people and provided services to 1,566 clients.

Federal and State governments are experiencing significant economic challenges because of the current economic volatility. Specifically, California is experiencing considerable turmoil with an estimated $14 billion in long-term debt (Welch, 2003). The State government is in a serious economic predicament. Simultaneously, the political

environment of California transitioned in an unprecedented governor recall, changing the political leadership from Democratic to Republican.

Technology is constantly improving and evolving. Like most non-profit organizations, due to the expenses associated with upgrading technology, SOP has not been keeping up with all technological changes. However, it has made several information technology improvements within the past year.

2. Analysis

The percentage of homeless people in Monterey County is not consistent with the percentage for the State. In fact, the Peninsula's homeless percentage is almost double that of the State of California. The excessive number of homeless in the area is due in part to the large influx of immigrants, including legal, illegal, and undocumented workers, who come to Monterey County to find employment in the flourishing agricultural and tourism industries. Many of these people need and use the services provided by SOP, and their numbers are steadily rising. Furthermore, many of these itinerant workers may not be represented in the posted statistics, which makes it more difficult to predict the actual number of homeless people.

SOP may experience a decrease in money received from the State because of the current economic condition. Already, the extreme deficit of California has brought about a fundamental change in the grant process. Changes in the grant application process have increased the time it takes to apply for a grant and receive money. Additionally, the recent change in the State political leadership could also impact SOP's State funding – an important concern considering SOP obtained nearly a quarter of its funding from State grants last year. As Governor Schwarzenegger implements his political platform, more changes may occur in the upcoming year for SOP and other agencies statewide.

B. SYSTEM DIRECTION

System direction refers to the different ways that an organization can project or plan its future path, including clarifying to employees and other stakeholders what is important for the future. This is typically accomplished through mission, vision, goals, policies, values, issues, and strategic plans.

1. Description

SOP has a defined mission and recently developed a strategic issues agenda identifying five primary goals. A mission encompasses the vision, shared values, and beliefs of an organization. It states the overarching goal of the organization as well as the desired outcomes. The mission of SOP is ("Bylaws of Shelter Outreach Plus," undated):

> To be leaders in ending the cycle of homelessness or violence by providing safe housing, compassionate support, and opportunities for self sufficiency which include, but are not limited to:
> a) outreach services and programs;
> b) emergency shelter programs;
> c) transitional living programs; and
> d) support services

The progress of an organization towards accomplishing its mission is typically tracked by identifying and accomplishing measurable goals. These goals and/or objectives communicate to employees where to focus their efforts, simultaneously holding management accountable. SOP has identified five overarching goals, but does not have an identifiable process in place for articulating or accomplishing explicit, measurable objectives.

SOP identified strategic issues facing the organization in a session arranged for this project. A strategic issues agenda was produced at the meeting identifying a series of important challenges and problems facing SOP over the next one to three years. The meeting consisted of a majority of the Board of Directors, Executive Director, Deputy Director, two staff members, and one volunteer from SOP. The meeting formulated the issues into the following goals which were prioritized by the participants (Strategic Planning Session 10/08/03):

1. Ensure the fiscal viability of SOP for the services we provide.
2. Ensure Board and staff morale is recognized, processed, and resolved.
3. Develop and utilize all of our resources, including Board members, to increase SOP's effectiveness.
4. Enhance SOP's visibility in Monterey County.
5. Improve SOP's technical capabilities.

Identifying strategic issues facing SOP is the first step in developing a strategic plan.

2. Analysis

SOP has a traditional non-profit mission of helping the homeless and those experiencing domestic violence in the area, yet struggles with adapting its mission and strategy to fit a changing economic and political environment. The mission of SOP is to be leaders in ending the cycle of homelessness and violence, yet there are few, if any, identifiable and measurable objectives whereby the organization can document and improve its performance. There are no metrics concerning resource management, employee development, or productivity. The Board has performed some strategic direction setting in the past few years but little systematic implementation occurs.

III. ORGANIZATIONAL DESIGN FACTORS

Design factors are the internal components of an organization, including tasks, technology, structure, people, and processes. Whereas setting organizational direction is the domain of leadership, design refers to areas more in the domain of management. Again, the point is to seek congruence or fit between direction and design and among design variables.

A. STRUCTURE

Structure is an element in organizational design that describes the groupings of activities and people in an organization. It identifies who is responsible at various levels of an organization, what the basic groupings of people are, and how decisions and accountability are dispersed or positioned, e.g., centralized or decentralized decision making.

1. Description

SOP follows a typical top-down, divisional structure (Appendix B). This structure is suited for an unstable environment and benefits from decentralized decision making. SOP is separated into five program offices that are located in Marina, Salinas, and Seaside, based on services provided. These five offices report to the executive leadership of the organization. The Deputy Director reports to the Executive Director and the Executive Director reports to the Board of Directors.

2. Analysis

According to Daft (2001), when organizational structure is out of alignment with organizational needs, one or more of the following symptoms will appear (p. 49):

- *Decision making is delayed or lacking in quality.* Decision makers may be overloaded because the hierarchy funnels too many problems and decisions to them. Delegation to lower levels may be insufficient. Another cause of poor quality decisions is that information may not reach the correct people. Information linkages in either the vertical or horizontal direction may be inadequate to ensure decision quality.
- *The organization does not respond innovatively to a changing environment.* One reason for lack of innovation is that departments are not coordinated horizontally. The identification of customer needs by the marketing department and the identification of technological developments in the research department must be coordinated.

Organization structure also has to specify departmental responsibilities that include environmental scanning and innovation.

- *Too much conflict is evident.* Organization structure should allow conflicting departmental goals to combine into a single set of goals for the entire organization. When departments act at cross purposes or are under pressure to achieve departmental goals at the expense of organizational goals, the structure is often at fault. Horizontal linkage mechanisms are not adequate.

SOP is experiencing all three symptoms. Part of the problem can be traced back to the merger of Shelter Plus and Peninsula Outreach in 1998. Two organizations with similar missions merged and the resulting structure remained unchanged. SOP currently operates as several independent entities governed by the leadership of SOP. In other words, the organizations merged on paper but did not make changes to adapt to emerging structural and cultural consequences. For example, there is an over reliance on top-down decision making. Program offices do not feel empowered to make decisions regarding programs without the consent of executive leadership. The executive leadership is involved with many facets of daily operations, making it difficult for it to respond to program offices in a timely manner. This over reliance on executive leadership causes a backlog of work at the top of the organizational structure, which in turn leads to inefficiencies within program offices and organizational ineffectiveness.

In a declining Federal and State economy, SOP must react quickly to the changing environment. The executive leadership is responsible for responding to changes in Federal and State grant processes. The recent economic changes have placed the burden of the grant process on the non-profit organizations. The over reliance on the executive leadership is preventing SOP from innovatively seeking solutions to environmental problems.

The five program offices within SOP view themselves as separate entities. There is no realization of or ownership for the entire organization. In one interview, when asked to identify an aspect the interviewee liked about SOP, the response was, "I can't tell you about SOP but I can tell you about my program." There is no sharing of resources or information across program offices. This condition has led to competition for resources and animosity among program offices. The structure has separated SOP and essentially created five independent organizations.

It appears the current organizational structure and decision-making process are not appropriately aligned. SOP is forcing a centralized decision-making process on a decentralized structure. This arrangement is causing SOP to be slow in responding to environmental changes, work to pile at the top, poor horizontal communication among offices, and a restricted view of organizational goals.

B. TECHNOLOGY

Technology is an element in organizational design describing workflow, activities involved, and physical facilities and equipment of the organization. It answers the question, "How does the work get done around here?"

1. Description

In the last couple of years, the Board of Directors has sought to acquire directors from diverse backgrounds and recently brought onboard an information technology (IT) consultant. SOP has updated and purchased computers, provided every employee with an email address, and intends to formulate a plan to increase employee proficiency in IT areas. Information gathered during interviews to support findings in this section is located in Appendix C.

SOP has offices in Marina, Salinas, and Seaside. The administrative office is located in Marina. Shelters and offices in Marina are converted residential homes and therefore not designed to have more than two phone lines. Some offices are using typewriters to fill out forms and others complete forms by hand. When asked about their comfort level with computer programs, several interviewed employees stated that they use Microsoft Word, Excel, Outlook, and PowerPoint on a daily basis.

2. Analysis

By cultivating a group of directors with diverse backgrounds and skill sets, the Board is able to detect deficiencies in various areas and guide SOP in performing efficiently and effectively. The participants at the strategic planning session identified improving technical capabilities as one of the five goals. Despite the IT improvements SOP has made and is in the process of making, it still faces substantial obstacles. For example, aged facilities are not modernized for computer requirements. The lack of phone lines at the administrative office hinders employees from responding quickly to important calls from the Board of Directors, clients and potential clients, and potential

donors. The Board of Directors has expressed its frustration in not being able to communicate with the offices in a timely manner because they cannot get through to the office. The inability to answer critical calls at the administrative office delays work, creates inefficiencies, and may affect donations. SOP's brochure provides one number for the administrative office. When faced with busy signals, one can keep calling or give up. Obviously, people in need of serious help would face hurdles just getting through to the office.

Another example of the technical challenges SOP is facing concerns the routine process of filling out forms. Employees from one of the offices must drive to the administrative office to duplicate forms because they do not have a photocopier available. These forms are then completed by hand. Employees at the administrative office use typewriters to fill out some forms. These methods are tedious and time-consuming, especially when mistakes need to be corrected. In summary, there are hardware, equipment, and facility problems, combined with a lack of training in using more technologically advanced tools on the job.

Although all the interviewees stated the frequent use of Microsoft programs, further research revealed that the majority of the employees are not computer proficient by reasonable standards. Many interviewees were not able to give examples of the usages of the programs. One example to illustrate the low comfort level in basic programs is a submitted budget statement that was handwritten. The use of typewriters and copiers to complete forms also indicates SOP's lack of awareness or use of more efficient computer software alternatives. It is promising to hear that every interviewee was eager to obtain additional training in computer programs.

C. PROCESS

Process is an element in organizational design that encompasses financial management, human resource management, communication and decision making.

1. Financial Management

Financial Management is a subset of process under organizational design. This describes how people are held accountable for the organization's resources such as its budget.

a. Description

Non-profit and for-profit organizations have differing goals but both must practice prudent financial management to survive. Non-profit organizations face a greater challenge in obtaining funds. For-profit organizations make money when fulfilling their missions while non-profit organizations consume money while fulfilling theirs. This dichotomy between the mission and working capital limits most non-profit organizations from satisfying their missions.

Both the Federal and State governments are experiencing budgetary problems. These economic deficits have already affected the State government in the form of cuts in the number of personnel who process grants. A fundamental modification to the grant process has been implemented to compensate for the cuts to the personnel processing State grants. Monterey County no longer accepts grant proposals from every organization wishing to apply. The new system breaks the county into geographic regions with money being allotted based on critical needs. County officials determine each region's critical needs. For example, Salinas may obtain money from the county only for recreation, domestic violence counseling, and shelter related services. The organizations in each region are now charged with the responsibility of working together, appointing a lead agency to assume responsibility for drafting a collaborative request for funding, and disbursing funds when the grant is approved. SOP is dependent on grant funding; nearly 90 percent of its annual income is in the form of grants while private donations make up approximately 10 percent. Information gathered during interviews to support findings in this section is located in Appendix D.

b. Analysis

The majority of non-profit organizations are routinely forced to operate with constrained resources. Budget cuts are commonplace, and these cuts often result in the detriment to one or more of SOP's programs. Although the government makes money available, it can only be obtained through a lengthy, detailed grant process. Limited resources, budget cuts, and difficulty obtaining funds are a few challenges non-profit organizations must face while struggling to gain financial support. SOP is continually challenged with these situations when securing funding to support the numerous programs it offers.

SOP has experience in applying for grants, but has no procedure for retaining the corporate knowledge of grant writing. Although it applies for numerous grants annually, it does not maintain a record of previous grant proposals. Each time it applies for a grant, SOP must endure the fastidious application process, even if it is applying for the same grant it received the previous year. The grant process is further hampered by the lack of a dedicated grant-writing position. The Executive Director and Deputy Director currently share the responsibilities associated with writing grant proposals.

The condition of the Federal and State budgets is of concern to SOP. The economic predicament of the Federal and State governments increases the need for the services offered by SOP. SOP's over reliance on these entities could lead to shortfalls in funding of its programs. While it is impossible to accurately predict how SOP's budget will be affected, it is expected that funding will decrease while the needs of the community will increase.

The cut in county personnel has shifted the burden of the grant process onto the organizations within the regions. This change in the grant process has also increased the time it takes to receive grant money from six to 12 weeks. Because grant money was easier to obtain prior to the current economic crisis of the Federal and State governments, SOP sought much of its financial support from Federal and State grants. Although grants have proven to be a positive stream of resources for SOP, they do have limitations. Non-profit organizations do not always have control over how the funds can be distributed. Typically, guidelines state that grant money is awarded for a specific purpose (i.e. women's shelters). Grant money cannot be obligated for discretionary purposes. Dependence on grant funding is risky – especially with the current shortfalls in the Federal and State budgets and the added complexities of the new grant process – and limits the flexibility in determining how to allocate money across the organization.

Private donations make up the remainder of SOP's financial support. Private donations can compensate for the shortfalls of Federal or State funding and do not require the meticulous proposals necessary for grant applications. The affluence of the local population may be especially beneficial in the pursuit of private donations. SOP

has begun soliciting donations from the community but most of its efforts have been limited in scope. For example, when the idea of hosting a fundraiser was proposed, it was suggested that SOP hold a bake sale. The revenue generated from a bake sale is clearly insufficient to supplement its annual budget, which is in excess of one million dollars. This lack of funding strategy is due in part to SOP's previous dependence on grant funding.

SOP's difficulty in obtaining private donations is also the result of the employees' lack of understanding about funding requirements. Most staff members simply do not understand the fiscal requirements necessary to keep SOP functioning. Interviewees expressed differing opinions concerning private donations. Some staff members felt that SOP was successful in obtaining private donations because they could recall when their office received a contribution from a private donor. However, the donation was received a long time ago and was for a small amount of money, attesting to the infrequency and inadequacy of charitable contributions SOP receives from private donors. Other staff members recognized the importance of private donations, particularly with the economic condition of the Federal and State government.

2. Human Resource Management

Human resource management is a subset of process under organizational design. It involves the utilization of personnel from hiring to termination, training, retaining and rotating employees, team building, and the reward system.

a. Description

The Board of Directors at SOP is responsible for hiring and firing executive-level employees. The Executive Director and key staff members interview, evaluate, and hire all other staff members. Information gathered during interviews to support findings in this section is located in Appendix E.

Job descriptions are used to define the duties of a person who occupies a particular position within an organization. SOP has a job description for each position within the organization and all job descriptions are kept on file at the administrative office. The job descriptions outline what is expected of employees in performance of

daily operations. The Board of Directors has a single job description (Appendix F) that encompasses all Board members. Although Board members attend annual retreats, training is not typically included.

SOP is attempting to implement a plan to train employees in the area of IT, but does not have a training program to identify individual roles and responsibilities. Some employee job rotations occur but they are often unanticipated. The senior executive shifts employees from one program to another when necessary. There is currently no explicit reward system at SOP.

b. Analysis

The senior executive occasionally hires lower-level employees without publicizing solicitations, and does not always consult with or inform the program directors when terminating employees. The programs losing employees often incur additional tasks. Employees are apparently shifted among programs for unclear reasons, which generates some confusion. Job rotations can provide career development when employees are provided resources, training, and motivation.

There is no indication that job-specific training programs exist to acclimate employees to new positions. Some employees feel their job titles do not reflect daily work and most mentioned not having routine days. Not all employees are experienced with managing a budget and program directors do not always know the implications of their expenditures.

There is a lack of clarity in the Board of Directors' roles and responsibilities. SOP bylaws state the duties of some, but not all Board positions. The blanket Board member's job description includes the general member duties, but does not contain specifics on individual positions. One of the important responsibilities of the Board is to enhance the public image of SOP. Participants at the strategic planning session identified increasing visibility as one of the five goals. As expected, Board members experience some frustration concerning specific roles, responsibilities, and accountability. Some Board members are more closely involved with SOP and contact the staff directly, often bypassing the Board President. Again, employees expressed frustration about how this arrangement adversely impacts their daily tasks. On the other hand, some Board members are less involved and only attend monthly meetings.

Employees may be facing operational, work overload. They often indicated that there is little time to develop additional skills, and they do not have the opportunity to interact with other employees outside their own program. There may be a scarcity of positive feedback coming from top management. Some employees feel discouraged when not recognized for their efforts.

3. Communication and Decision Making

Communication and decision making are a subset of process under organizational design. Communication encompasses how an organization gathers, processes, distributes, and evaluates information. Decision making is a process that involves the coordination of vertical and horizontal communication. Vertical communication enables the policies and standards of upper management to be conveyed to subordinate personnel. Horizontal communication can facilitate coordination across various offices.

a. Description

Communication between the Board of Directors and staff is accomplished primarily through monthly meetings. The meetings are intended to brief operations, resolve problems, and answer questions about projects. The executive leadership interacts with all program offices. Prior to the implementation of information systems (email), communication was conducted by telephone or in face-to-face meetings.

There appears to be little communication across program offices, and program offices are prohibited from interacting with the Board of Directors. SOP Personnel Policies state ("Shelter Outreach Plus Personnel Policies," undated):

> Employees of Shelter Outreach Plus are accountable only to the Executive Director, through whom all communication to the Board of Directors is channeled. An employee who does not follow the stated policy of channeling information through the Executive Director is subject to disciplinary action.

There is no channel for employees to voice concerns to the Board of Directors. Information gathered during interviews to support findings in this section is located in Appendix G.

b. Analysis

There may be vertical communication problems between the Board of Directors and executive leadership, and between the executive leadership and subordinate

personnel. There is also little to no horizontal communication across program offices. Decision making is viewed by staff to primarily reside with the executive leadership. An apparent consequence is low employee morale and feelings of disempowerment.

Unscheduled interaction between Board and staff members is often unanticipated and disruptive. The attention required to resolve excessive issues generated by the Board distracts from daily operations and creates work backlogs. An over reliance on resolving issues outside regularly scheduled meetings is definitely problematic. The recent addition of information systems should prove useful in disseminating information throughout SOP. This is a move in a positive direction but not a substitute for the use of other communication channels. The interaction between leadership and staff is perceived to be top-down only. Additionally, communication is perceived to be predominately negative. Some staff members feel uncomfortable discussing their concerns with senior leadership.

Decision making is viewed as primarily top-down with little input from subordinates, which also adversely affects morale. There is a definite gap between how communication is perceived between senior leadership and staff personnel. Senior leadership perceives no problems with communication while employees feel they have no avenue to voice problems or concerns with upper management because they are restricted by personnel policy. The current policy does not provide a system of checks and balances within SOP regarding this apparent disconnect.

The addition of information systems should enable offices to interact and share information. In one interview, it was noted that supplies were purchased by one office without knowing another office had an abundance of the same product. In another interview an employee stated that they benefited from horizontal communication when it was used. The one-time horizontal communication resulted in a monthly cost savings of $800. This is a definitive example of the benefits offered by opening horizontal communication channels.

V. CONCLUSIONS AND RECOMMENDATIONS

A. CONCLUSION AND RECOMMENDATION

SOP has good intentions in accomplishing its mission, but lacks clear strategic direction in terms of focusing its scarce resources towards prioritized objectives. The lack of direction is causing the organization to operate at a status quo. There are no measurable goals in place to track performance. Employees perform daily operations with no strategic direction. A strategic planning session was conducted in October 2003 but lacked sufficient staff involvement. A "meeting of the minds," or consensus, should occur among Board members, executive leadership, and key staff members when devising strategy and implementation plans. If there is a lack of understanding among all levels of an organization, the planning and implementation efforts will face obstacles. SOP must provide a strategic direction that encourages employee participation and should establish measurable goals in evaluating progress towards accomplishing its strategic direction.

B. CONCLUSION AND RECOMMENDATION

An extremely top-down, centralized, decision-making process generates inefficiencies and adversely affects employee morale. SOP is forcing a centralized decision-making process on a decentralized structure. This misfit discourages communication and hinders employees from making operational decisions. Inefficiencies arise because employees are not allowed to make operational (daily) decisions. This, in turn, slows organizational processes and creates bottlenecks. This frustrates employees who get further behind waiting for decisions. This is called a vicious cycle, and unless SOP is able to face this difficulty and intervene, the cycle will perpetuate. Supervisors should be trained on essential managerial skills to assist SOP in accomplishing daily operations in an efficient manner. Empowering employees to make program decisions will not only open communication channels but also allow the executive leadership to concentrate on executive-level decisions.

C. CONCLUSION AND RECOMMENDATION

Board members are experienced professionals in various fields improvising with scarce time and resources, but they lack clarity on individual roles, responsibilities, and accountability. Board members want the organization to succeed which is why they devote time to SOP. However, their process of communicating with and tasking staff members may cause as much harm as good. Unless the Board is better able to focus its efforts on a few key issues, clarify individual roles and responsibilities, and restructure the way it communicates with staff, it will likely have the same recurring problems. The Board of Directors currently has a blanket job description. This job description may be causing the communication problems due to the lack of clear roles, responsibilities, and accountability. Developing position-specific job descriptions will enable the Board to clarify the scope of responsibility that accompanies a particular position. This will help to eliminate confusion and counterproductive interactions.

D. CONCLUSION AND RECOMMENDATION

SOP employees lack professional development opportunities, including planned job rotations and training towards career development. There is no indication that career development opportunities exist for SOP employees. Erratic job rotations are causing confusion among employees and a lack of continuity in program offices. Giving employees prior notification before rotating them among programs will allow program directors to plan ahead and provide the employees with a more stable, comfortable working environment. Additionally, providing employees with technical, on-the-job, and career-broadening training will create more knowledgeable and skilled employees who can better serve the community.

E. CONCLUSION AND RECOMMENDAITON

SOP is over reliant on Federal and State grants to support operations. An over reliance on grant funding is risky, especially considering the current fiscal troubles of the Federal and State governments. The lack of private funding limits the flexibility of SOP. These funds can be used for discretionary spending whereas grants require money to be directed to specific activities. Private funding is not as sensitive to the fiscal conditions of the government, is not restricted in how it can be spent, and may be easier to obtain, considering the prosperity of Monterey County. Additionally, the new process

for obtaining State grant money is complex and time-consuming. SOP should devote additional effort towards obtaining a larger ratio of its income from private contributions. A Board member should be appointed to lead SOP in planning fundraisers.

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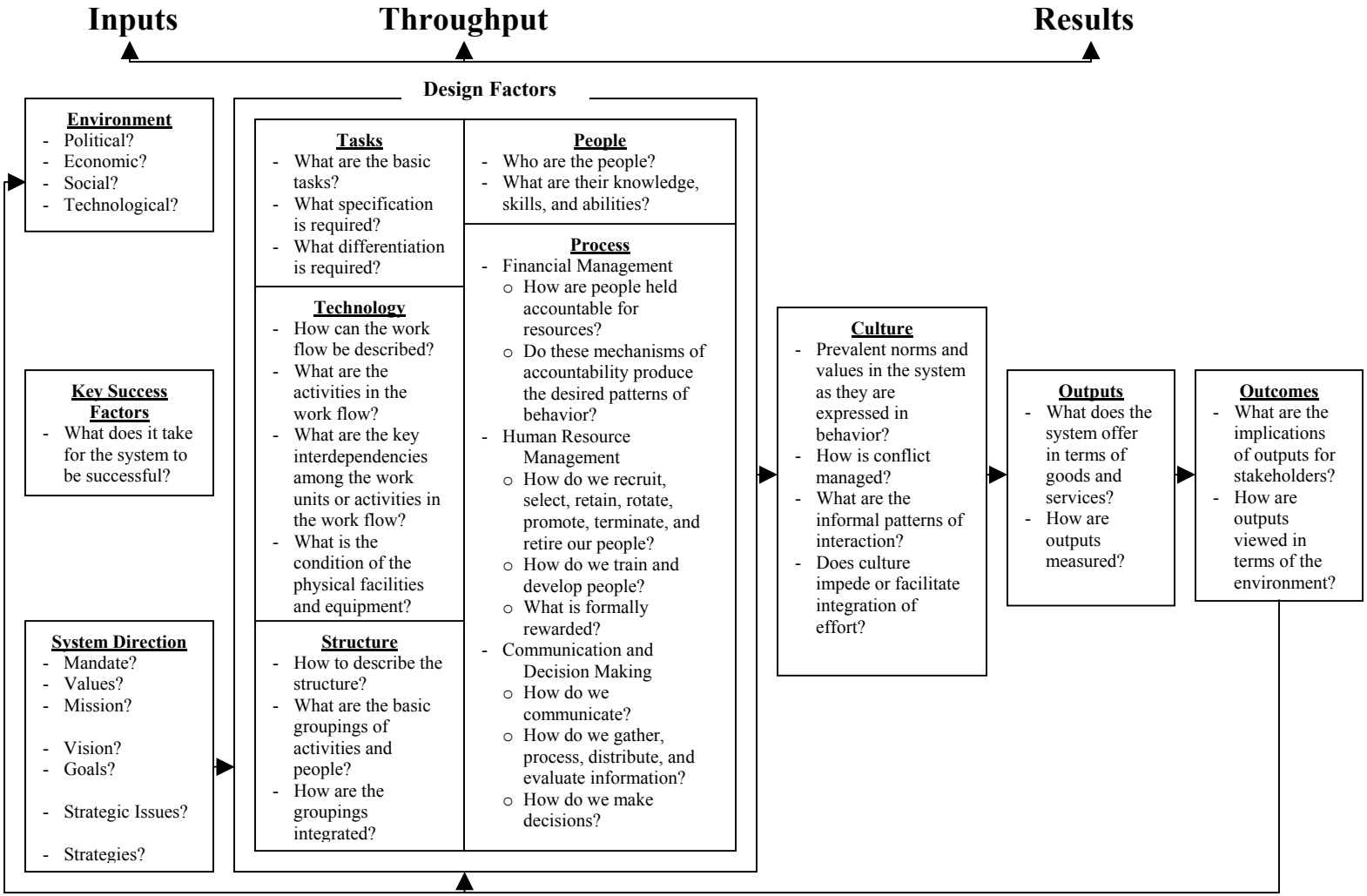
APPENDIX A (ORGANIZATIONAL SYSTEMS FRAMEWORK)



(Source: Nancy Roberts, Naval Postgraduate School, 2000)

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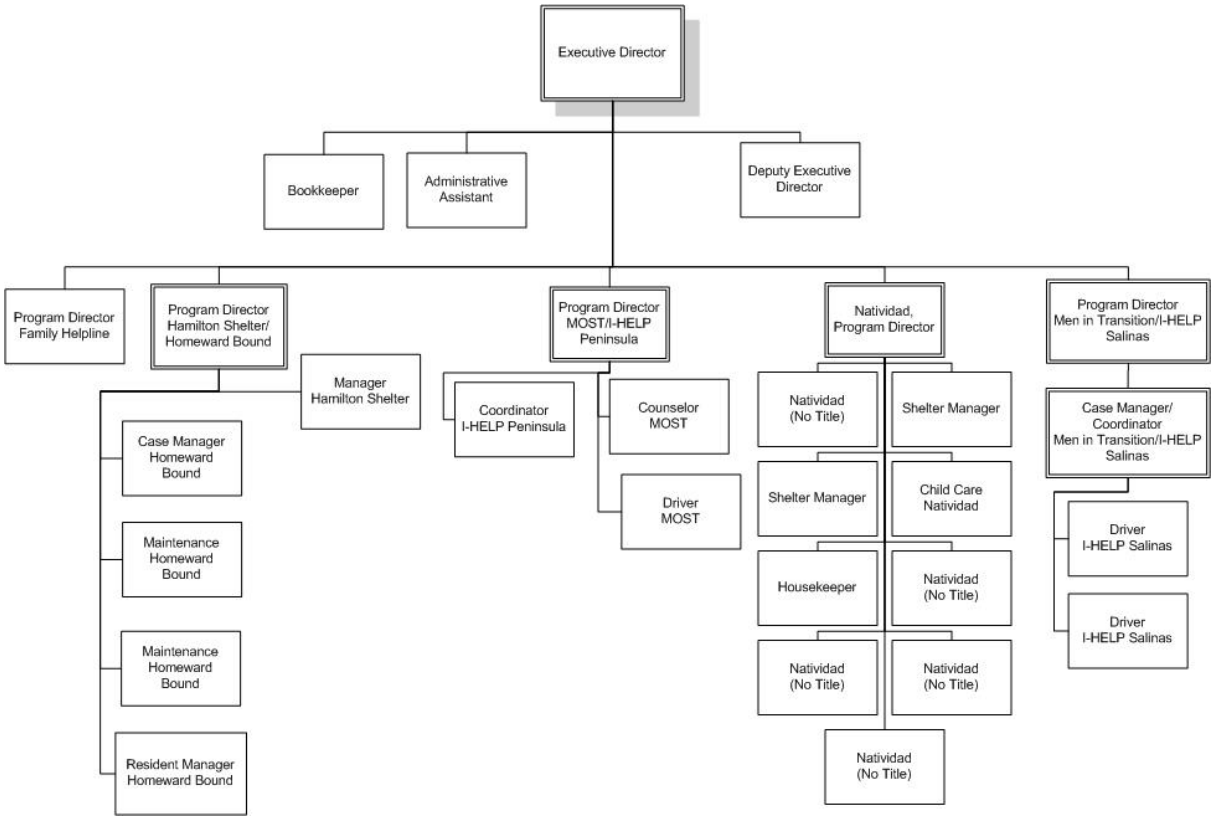
APPENDIX B (DIVISIONAL ORGANIZATIONAL CHART)



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APPENDIX C (TECHNOLOGY INTERVIEW DATA)

Four Board directors and 11 employees were interviewed for approximately one hour each on various questions relating to SOP. Interview comments are paraphrased and grouped into themes relating to technology.

THEME ONE: TECHNOLOGY IMPROVEMENTS

- We have recently provided all of our employees with email addresses.
- We purchased new computers and are in the process of obtaining more.
- We are planning to train employees to use computer programs.
- An IT consultant has just been brought onboard to help SOP with IT concerns.

THEME TWO: FACILITIES

- Our facilities are terrible; they're not business-friendly.
- The one thing we would like for our office is a photocopier.
- We complete forms by hand after we duplicate them at the administrative office.
- We fill out some forms with typewriters.
- The administrative office only has two phone lines.
- It is frustrating not being able to get through to the administrative office.

THEME THREE: COMPUTER PROFICIENCY

- I use all the computer programs everyday.
- I think I'm pretty good at using computers.
- I would definitely like additional training if it will help me in my job.
- We have new computers but we don't know how to use them to our advantage.
- Everyone needs a computer and IT training.
- One of the staff members submitted a handwritten budget statement.

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APPENDIX D (FINANCIAL MANAGEMENT INTERVIEW DATA)

Four Board directors and 11 employees were interviewed for approximately one hour each on various questions relating to SOP. Interview comments are paraphrased and grouped into themes relating to financial management.

THEME ONE: ECONOMIC CONDITIONS

- Economic problems will create a greater need for the services offered by SOP.
- SOP has the ability to provide great services but doesn't have enough financial support to fulfill the community's needs.
- Shortfalls in Federal and State governments have significantly altered the grant process.
- Budget cuts will affect the grants we receive; the shelter will be in trouble.
- Bush's plan is to end homelessness in 10 years so there's got to be money out there to do that; we can get some of this funding.
- Economic conditions are not an issue; there isn't anyone else who can do what we do so we won't have to fight for funding.
- We want to start a children's program but there is not enough funding.

THEME TWO: GRANTS

- SOP doesn't apply for as many grants as it should.
- Much of management's time is spent trying to obtain resources.
- Leadership is always writing grants.
- With the new grant process, it takes a lot longer to receive grant money.
- The new grant process is more complex and time-consuming.
- In the next five years, the shelter will be receiving more grants.
- SOP should look for more grant sources.

THEME THREE: FUNDRAISING AND DONATIONS

- We solicit donations from the public but only at Mom and Pop events; nothing high dollar.
- The Board needs to plan more fundraising events. After all, it is one of their duties as a Board.
- Donations are decreasing in frequency and amount.
- One of the recent fundraisers was a huge success.
- SOP needs a constant source of finances.
- The Board makes a lot of financial decisions.
- Donations in kind are more critical than cash.
- We receive a large portion of our funding from private donors.

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APPENDIX E (HUMAN RESOURCE MANAGEMENT INTERVIEW DATA)

Four Board directors and 11 employees were interviewed for approximately one hour each on various questions relating to SOP. Interview comments are paraphrased and grouped into themes relating to human resource management.

THEME ONE: BOARD MEMBER'S JOB DESCRIPTION

- It is hard for us to accomplish our daily tasks when each Board member calls us individually to solve his/her concerns.
- I would like to be in charge of enhancing SOP's public image in the community but that is not the position I was given.
- I am frustrated and confused because I do not have clear guidelines on what is expected of me.
- Some Board members don't do anything outside of our monthly meetings.
- The Board is not accepting their responsibilities in acquiring funds.

THEME TWO: HIRING, ROTATING, AND TERMINATING EMPLOYEES

- I sit in on interviews but the executive leadership has the final say.
- Sometimes I'll come into work and find out that I just lost an employee or gained one from another program.
- The executive leadership doesn't always publicize solicitations when hiring employees.
- Employees feel confused about being shifted from one position to another.
- I don't think my title fits the job I'm performing.

THEME THREE: TRAINING

- We are planning on training employees in IT skills.
- The Board goes on annual retreats but we don't do much training on the retreats.
- Some employees spend money without considering the implications it has on our budget.

THEME FOUR: REWARD SYSTEM

- We don't have enough money in our budget to give employees raises.
- There are no "pat-on-the-backs" when we provide good ideas.
- We only hear from the executive leadership when we do something wrong.
- Executive leadership thinks it has to act like a tyrant to get the employees to do the work.

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APPENDIX F (BOARD MEMBER JOB DESCRIPTION)

The following is the job description of a Board member for SOP.

Title: Board Member

Board Members of Shelter Outreach Plus have certain duties and responsibilities as they provide stewardship and governance for the organization. In general, it is the responsibility of the Members of the Board to determine the organization's mission and purpose; select the chief executive; support the chief executive and assess his or her performance; enhance effective organizational planning; ensure adequate resources; manage resources effectively, determine, monitor, and strengthen the organization's programs and services; enhance the organization's public image; ensure legal and ethical behavior and maintain accountability; recruit and orient new board members and assess board performance. Specific duties and responsibilities include:

1. Participate in the development of, and approve, overall goals and objectives for the agency. Formulate and help implement long-range plans for agency development.
2. Monitor the agency's financial, legal, administrative, and program status to ensure that, obligations, goals and objectives are met.
3. Review and approve the agency budget.
4. Help provide adequate funds for support of the operations of the agency by making a gift, working on fundraising campaigns identified in the fundraising plan, and using their influence to generate resources for the agency. Resources include people, funds, goods and services that could build programs.
5. Oversee the performance of the Executive Director to include recruitment, selection, salary determination, performance evaluation, and, if warranted, termination.
6. Review and approve agency personnel policies and compensation package, including salary ranges and benefit levels.
7. Help to increase the agency's community support base.
8. Serve as liaison between the agency and community, telling groups and acquaintances about the agency and by providing feedback on community opinions concerning the agency.
9. Perform other duties as required.

It is expected that each board member will have time to participate in monthly board meetings, to include a yearly retreat, and will work on at least one committee which meets as needed. In addition, it is expected that each member will notify the chair of the board or committee when he/she must be absent.

New board members will be asked to attend an orientation meeting on the agency. The term of office is three years.

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APPENDIX G (COMMUNICATION INTERVIEW DATA)

Four Board directors and 11 employees were interviewed for approximately one hour each on various questions relating to SOP. Interview comments are paraphrased and grouped into themes relating to communication.

THEME ONE: INTERACTION BETWEEN OFFICES

- There is very little communication with other branches.
- I only interact with one other person at another office and only when necessary.
- I hardly ever interact with other offices.
- Offices seldom communicate with each other.
- We don't interact with the other offices.
- There doesn't seem to be any interactive communication between sites.
- There is no communication here with other offices.

THEME TWO: COMMUNICATION WITH EXECUTIVE LEADERSHIP

- Punitive communication is given from executive leadership.
- The tone of the senior executive has no respect and dignity, it's invalidating.
- Executive leadership appears to be out of touch with what is going on at lower levels.
- I fear talking to the executive leadership.
- Executive leadership may be taking on too much of a workload.

THEME THREE: LACK OF EMPOWERMENT

- I cannot make decisions on my own about my program.
- I feel unappreciated, isolated and unimportant.
- I have to get approval from executive leadership before making decisions.
- Feedback is given but there is nothing done with it.
- There are empowerment issues.

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