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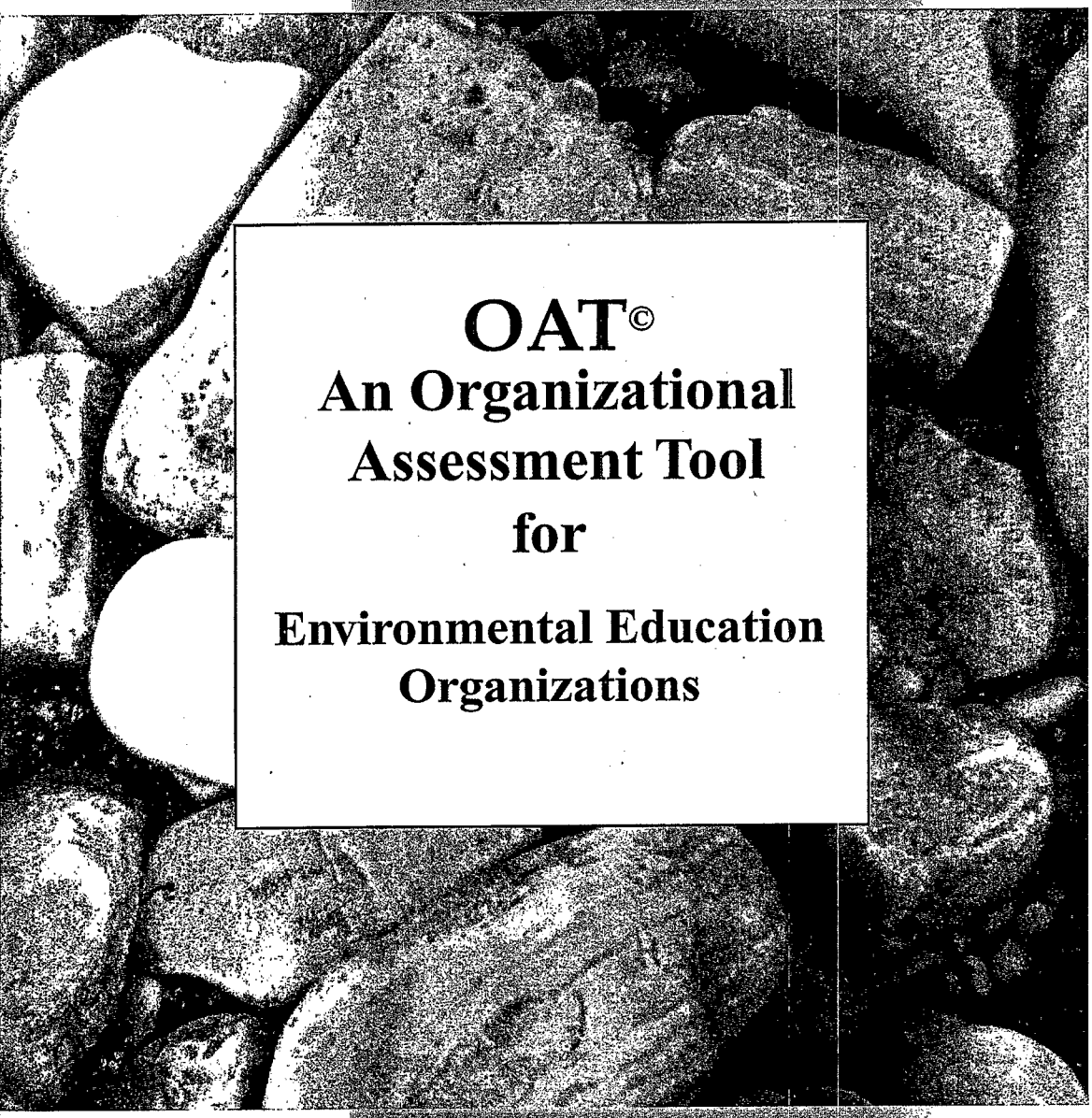

# OAT©
# An Organizational Assessment Tool for Environmental Education Organizations

The National Environmental Education Advancement Project

# OAT©*
# An Organizational Assessment Tool

## for Environmental Education Organizations

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NATIONAL
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PROJECT

***It is recommended that the OAT be used in combination with the organizational development services of the National EE Advancement Project (NEEAP) or other EE capacity building organizations.***

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*This publication is supported through funding from the U.S. Environmental Protection Agency (USEPA), The Environmental Education and Training Partnership (EETAP), and the National Wildlife Federation (NWF). Its contents do not necessarily reflect the views and policies of the USEPA, EETAP, or NWF.*

*The OAT is an EE organizational development resource of the:*

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PROJECT

*NEEAP is a nonprofit organization dedicated to providing organizational and capacity building support to EE organizations at the national, state, and local level. It is recommended that the OAT be used in combination with the organizational development services of the National EE Advancement Project (NEEAP) or other EE capacity building organizations.*

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Copyright ©1999 National Environmental Education Advancement Project
Published by: National Environmental Education Advancement Project,
University of Wisconsin-Stevens Point

Printer: The Print Shop, Wisconsin Rapids, WI

Cover Design and Layout: Tracie Beasley

Printed on 100% recycled paper

# Acknowledgments

*OAT©, An Organizational Assessment Tool* was made possible because of the commitment and contributions of many EE leaders, individuals, andorganizations. We deeply appreciate and acknowledge the following for their participation in developing this tool:

We gratefully acknowledge Dr. Richard Judy and other graduate committee members for their guidance and support, and for serving as advisors to the process and reviewers of the OAT.

All reviewers of *An Organizational Assessment Tool (OAT©)* for their commitment to the project, time dedicated, and helpful insights:
*Marina Gorton,* Researcher-The Evaluation Center, Western MI Univ., Kalamazoo, MI
*Elaine Hampton,* President-EE Assoc. of NM, NM State Univ., Las Cruces, NM
*Richard Judy,* Prof. of Business Administration, UWSP, Stevens Point, WI
*Judy Mann,* Director-Iron Oaks Env. Cntr, President- IL EE Assoc, Olympia Fields, IL
*Joyce Meridith,* PA Center for EE, Slippery Rock Univ., Slippery Rock, PA
*Libby McCann,* Doctoral Student, WI Assoc. for EE, Madison, WI
*Nalani McCutcheon,* SNAP, Board Member-MN Assoc. for EE, Northfield, MN
*Corky McReynolds,* Assoc. Prof.-CNR/Director-Treehaven-UWSP, Stevens Point, WI
*Margaret Menzies,* Underwater World, Past-President-MN Assoc. for EE, Bloomington, MN
*Cheryl Riley,* Consultant, President-MI EE Assoc., Jefferson City, MO
*Craig Russon,* Researcher-The Evaluation Center, Western MI Univ., Kalamazoo, MI

EE Assoc. of IL, MN Assoc. for EE, and MO EE Assoc. board members and leaders for using the draft OAT in their organizational development process, and participating in telephone research interviews and focus group processes to provide feedback on the OAT's design/usefulness.

Over 100 EE leaders who reviewed and provided feedback on the original draft as a part of the NEEAP /NAAEE Spring 1998 Leadership Clinic. These individuals represent EE organizations in: *AR, CA, Canada, CO, HI, ID, IL, IA, KS, KY, MD, MN, MS, MO, NH, NM, NC, PA, Puerto Rico, TX, UT, VT, WI.*

Special thanks to the EE leaders who provided case studies:
*Tim Brown (and USEE staff),* Executive Director-UT Society for EE, Salt Lake City, UT
*Laura Downey,* Assistant Executive Director-KS Assoc. for Conserv. and EE, Manhattan, KS
*Robert McAfee,* President-AR EE Assoc., Hackett, AR
*John Guyton,* EE Specialist, President-MS EE Alliance, Biloxi, MS
*Elaine Hampton,* President-EE Assoc. of NM, NM State Univ., Las Cruces, NM
*Jeff Hohensee,* Ed. Director-Tree People, CA Regional EE Coord., Beverly Hills, CA
*Rosalyn McKewon-Ice,* Director-Center for Geog. & EE, President-TN EE Assoc., Knoxville, TN
*Margaret Menzies,* Underwater World, Past-President-MN Assoc. for EE, Bloomington, MN
*Celeste Prussia,* Program Mn., MO Botanical Garden, Pst President-MO EE Assoc., St. Louis, MO
*Cheryl Riley,* Consultant, President-MO EE Assoc., Jefferson City, MO
*Julie Smither,* Past President-KY Assoc. for EE, Frankfort, KY
*Mike Way,* Executive Director, CO Alliance for EE, Golden, CO

For providing the funding to initiate this project: the National Wildlife Federation.
We gratefully acknowledge USEPA who's support helped in the completion of publication.

For providing org. develop. contacts: *International Assoc.for Public Participation.* Alexandria, VA.

For providing organizational assessment resources for review:
*Citizen Forestry Support System. Washington, DC.*
*Miskiman, Donald.* Human Resource Services, Vancouver, BC.
*Support Center for Nonprofit Management,* San Francisco, CA
*The Evaluation Center,* Western Michigan University, Kalamazoo, MI.
*Training Resources for the Env. Community (TREC),* Seattle, WA.

For assistance with photo preparation: Ian A. McPherson Studio, http://www.ianmc.com.au/.
Microsoft Publishers for use of clip art.

*Amy Kowalski, NEEAP Program Assistant, for her friendly support and guidance in understanding Aldus Pagemaker. Jen Fulsom for final edits. NEEAP and UWSP for use of computers and facilities.*

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# OAT©, An Organizational Assessment Tool for Environmental Education Organizations

## What is the purpose of the OAT?

The OAT was written to promote learning and growth within environmental education (EE) organizations. The OAT is a self-assessment tool which can be used by the leadership of EE organizations to increase organizational effectiveness. It is a one-stop organizational assessment resource, intended to provide EE leaders with a tool to comprehensively review the major aspects of internal organizational development. The OAT also serves as an educational tool for individual organizational leaders and members.

## Who can use the OAT?

The OAT was designed specifically to assist EE practitioners and supporters in their efforts to build local, state, and national capacity for EE. It was designed to address the needs of EE professionals **and** EE organizations. However, much of the information may also be applicable in non-EE leadership settings.

## How can the OAT help individuals and organizations?

Assessment is a **necessary** and **ongoing** part of organizational development. It provides an organization the opportunity to identify aspects which help or hinder the accomplishment of its mission and goals. Using the OAT will help identify areas of professional development and organizational leadership that, if incorporated, should increase an organization's sustainability and ability to build capacity for EE. Information in the OAT should also enhance individual leadership in the EE field and beyond.

## What is in the OAT?

A wealth of information exists on organizational development and assessment. The OAT distills this information and applies it directly to the unique and diverse needs of the EE field. The OAT attempts to present the most widely used and most current information available on organizational development in an easy to understand, easy to use workbook format. It was designed to be used in part or whole, whenever an individual or organization feels self-examination is needed. The OAT addresses leadership throughout all major areas and concludes by identifying significant leadership attributes.

The OAT is divided into **six** major areas of organizational development:

1. **Organizational Culture**
2. **Team Building**
3. **The Organization- (The Governing Structure, Governance, and Strategic Planning)**
4. **Managing and Leadership**
5. **Stakeholders-External**
6. **Program Evaluation**

Each major area listed above contains **six** components:

- **Definition/Description of Area**
- **Assessment Questions**
- **A Case Study Drawn from the Field of EE**
- **Importance to the Sustainability of Your Organization**
- **Latest Trends**
- **Personal Prioritization of Needed Action**

A final section, **"Leadership for EE Capacity Building-What is Your Personal Plan?"** ( p. 54) provides a checklist of leading attributes of effective leaders and guidelines for a personal plan for leadership.

Components which are a necessary part of the assessment and which require writing are identified by the icon: **.
Components which are provided as additional clarifying and enrichment material are identified by the icon: .

**Recommended:**

**Time to Write**

**Read Carefully**

## How should an Organization use the OAT?

Use of the OAT is completely up to the organization. There is a logic behind addressing the sections in the order presented, but it is not absolutely necessary to do so. Making a committed effort to reflect upon the organization's efforts and the role of individuals in the organization is what is key to using this tool. *(We recommend that individuals complete the OAT in small sections, rather than all at once. We have identified recommended stopping points within the OAT.)*

Organizational development is complex and ongoing. In order to implement changes based on the OAT results, we recommend that a planning process be used to prioritize and tackle these changes in a realistic and efficient time frame. Monitor changes. This will allow everyone involved to see, enjoy, and learn from these changes and improvements as they occur. Success builds confidence and inspires further improvement.

Photo:Doug Moore

We recommend that the OAT be used by all members who are actively involved in your organization's strategic plan development and implementation. This should include board members, the executive committee, executive directors, staff, volunteers, and anyone else who is a leader in your organization. The OAT is also an ideal board of directors development tool.

## OAT Tips

The OAT is designed to be used by **groups of individuals.** Organizations are groups of individuals with a similar purpose. Therefore understanding the perspectives and experiences of individuals is vital to the whole. Please also note:

- Individuals should allow approximately **two hours** for completion of the OAT and reflection.
- Organizations should be willing to commit **a minimum of four hours** to the initial group discussion and prioritization of the OAT results.
- This process requires participants to be **open-minded** and **committed** to working together for the good of the organization as well as toward their own professional development.
- This tool is designed to **assess the organization as it exists today,** not as it might exist in the future.

## Steps in Using the OAT-An Overview

**1. Individuals Complete the OAT:**

❖ **Identify your personal strengths and needs and the strengths and potential areas of change for your organization.** Reflect on your responses to the OAT questions. Record your responses to the assessment questions in the blanks provided and on the removable "Assessment Question Response Sheet" (located on the following page). This will allow you to retain a copy of your answers for personal review and group discussions. Record a summary of ideas and/or potential steps to be taken for personal and group action and to use in group discussion on the "Personal Prioritization of Action Steps" section included at the end of each chapter .

**2. Compile Individual OAT Results:**

❖ Once individuals have completed the OAT, gather results for a collective assessment. One or a few individuals should **collect the "Assessment Question Response Sheets" and compile the results.** An organization may also choose to collect copies of the "Personal Prioritization of Needed Actions" sections and compile them as well. *(Information on compilation is provided in Appendix B)* Organizational members may or may not choose to maintain anonymity during this process step.

**3. Hold Group Sharing/Prioritizing Meeting** *(minimum of 4 hours)*:

❖ Review the compiled results as a group. Share individual responses and ideas, and ask questions of one another in a **facilitated group process.** It is important to recognize the value and necessity of sharing information openly in this and following steps. Get group agreement on the process to be used to complete this step. Suggested process outcomes include: 1)producing a list of organizational needs and potential areas of change, 2)prioritizing areas of potential change, and 3)arriving at consensus on an organizational development plan.

**4. Develop/Implement the Organizational Development Plan:**

❖ If the group agrees to move forward toward organizational enhancement, an **action plan for organizational development will be needed.** We recommend that the action plan list priority objectives, implementation steps, and that it be based on a short-term (eg. one year) time frame. We suggest that this process of identification and implementation of organizational priorities become a standard part of your organization's activities. Identifying individuals or a committee to monitor and report on the progress of this process is recommended.

# 1. Organizational Culture

## Definitions/Description

Organizational culture *is the collection of shared values, beliefs, expectations, attitudes, and assumptions that exist within an organization.* Assumptions *are all the beliefs that have been taken for granted to be true but that may turn out to be false under close analysis.* Organizational culture produces "norms" *or unwritten rules of behavior that become " automatic"* and may unknowingly drive the actions of individuals and groups in an organization. An organization whose members regularly discuss their efforts and offer each other suggestions for improvements value and experience open communication norms.

## Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

## My Work in Our Organization

1____I recognize that our organization has a set of unwritten rules that influences the behaviors and actions of its leaders.
2____I make our leaders aware of the influence that our organization's unwritten rules are having on our behaviors and actions.
3____I try to set positive examples for others in our organization.
4____I view all of my actions as learning opportunities.
5____I am motivated to use all of my talents and energies in my work.
6____I follow through on my organizational related commitments.
7____I let others in our organization know when they are doing a good job.
8____I have honest, open, comfortable relations with others in our organization.
9____I am comfortable telling others in this organization "what is on my mind".
10____I act to reach organizational goals, not to keep the status quo.
11____I strive to strengthen our organization's capacity to operate efficiently and effectively.
12____I am confident in our organization's ability to reach its goals.

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

## Our Organization

1____Our organization discusses its organizational "habits" and unwritten rules of behavior.
2____Our organization's values, beliefs, and visions guide its actions.
3____Our organization's leaders makes an effort to involve the general membership in organizational decision making.
4____Our organization makes new members feel useful and important.
5____Our organization's leaders set realistic work plans for those working on strategic and organizational plan implementation.
6____Our organization's leaders take steps to prevent "burnout".
7____Our organization's leaders are timely in their decision making.
8____Our organization's leaders are innovative in their decision making.
9 ____Our organization stresses good relationships between people as much as it does project completion.
10____Our organization is committed to open communication.
11____Our organization's leaders encourage constructive criticism.
12____Our organization's leaders let individuals know when they are doing a good job.
13____Our organization attempts to strengthen the skills of its leaders by providing professional development opportunities.
14____Our organization's leaders actions are based on the anticipated organizational demands of the future.
15____Our organization has the collective power to achieve its goals.

## EE Cross Cultural Initiative

### Arkansas Environmental Education Association (AEEA) "Congeniality and Sense of Purpose"

Realizing that the individuals who would become members of AEEA were already very busy, from it's inception, AEEA's organizers have operated under the simple philosophy that AEEA will provide an atmosphere of congeniality. This sense of appreciation, adaptability, and unity in purpose set the stage for a solid positive culture and organizational success.

Quick to emerge from this enthusiasm and strong sense of purpose was the development of a sense of respect for the wide range of individuals and professionals represented. Because AEEA was primarily established to collaborate efforts to promote EE in Arkansas, it was important that all feel comfortable with AEEA'smeetings.

The spirit of enthusiasm and cooperation quickly becomes apparent to first-time attendees to AEEA meetings. There is an underlying sense of the importance of our mission and that everyone fills a vital role in the process. Meetings are structured loosely in order to maximize time together, and there is always time provided for members to express concerns. AEEA's leadership recognizes that to sustain the enthusiasm and energy of the organization that they acknowledge mistakes, discuss improvement, and also celebrate victories.

*Robert McAfee, AEEA President*

## Culture Improvement to Sustainability of Your Organization

An effective organizational culture is one in which actions reinforcing the organization's mission and goals and capturing the drive and imagination of everyone involved become the "norm". Culture provides meaning, direction, and an energy that spurs action within an organization. An organization's culture helps to guide the shared commitment of members to each other and the organization. In order to make their organizations sustainable, EE leaders should work to create a culture which supports the personal and professional needs of leaders and members, and is adaptable to the dynamic and sometimes chaotic nature of the field of EE.[1]

## Latest Trends

**Learning Organizations-** Creating the **capacity** within an organization **for learning to occur on a continuous basis is necessary to keep pace with the changes that are occurring both inside and outside of the organization** .[2] Most adults have a need for learning and growth that is often left untapped by the organizations they belong to. In learning organizations, members can say yes to the following questions:

- Does your organization discuss successes and "failures" in ways that allow you to learn from them?
- Does your organization regularly provide training opportunities to members which emphasize problem solving and creativity?
- Do your teams produce creative results?
- Does your organization experiment with different problem solving strategies?
- Do you seek to continually improve your performance?
- Are you aware of the special skills and experiences that others in your organization possess?

## Latest Trends

**Innovative Cultures-** The hierarchical, power-oriented cultures of yesteryear are being replaced by team-oriented cultures which encourage flexibility and look to incorporate the strengths and needs of individual organization members. Organizations that encourage **adaptability, strategic risk taking, creativity,** and **challenge** their leaders are more likely to keep pace with the changing nature of our society and the field of EE.[3] It is important that all members of an organization recognize and celebrate exercises in strategic risk taking, no matter the outcome.

## Personal Prioritization of Needed Actions-

## Organizational Culture

**Please list in order of priority, specific actions that you should take in order to make progress in this area of organizational development.**

**What I need to work on:**
**(for our organization)**

## Personal Prioritization of Needed Actions-

## Organizational Culture

**Please list in order of priority, specific actions that your organization should take in order to make progress in this area of organizational development.**

**What our organization needs to work on:**

**Great job! Consider taking a break before continuing.**

# 2. Team Building

## Definitions/Description

**Team building** *is the process of learning to function and communicate more effectively as a group.* Team building occurs among individuals within groups, between groups in an organization, and between organizations. Committees, task forces, and staff, also function as teams and need to regularly practice team building.

## Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

### My Work in Our Organization

1____I actively support the efforts of others within our organization.
2____I look forward to working with others in our organization.
3____I regularly use my expertise/experience in my work with our organization.
4____I openly discuss my work with other organizational leaders.
5____I ask for help from other individuals, teams, or committees when I need it.
6____I believe that authority in our organization is decentralized.
7____I am satisfied with the decision making processes in the teams that I work in.
8____I have the skills to deal effectively with conflict.
9____I attempt to notice and resolve conflicts.
10____I have used a personality type indicator such as Myers-Briggs, Keirsey-Bates, or True Colors to better understand leadership styles within our organization.

*Photo: Hui-I Chaing*

## Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

### Our Organization

1____Our organization's leaders make major decisions as a team.
2____Our organization's leaders implement priority actions through teamwork.
3____Our organization's leaders work to merge individual and organizational goals.
4____Our organization's teams share information about their work.
5____Our organization's teams understand each other's problems.
6____Our organization's teams share responsibility for their actions.
7____Our organization's teams cooperate well with each other.
8____Our organization's leaders capitalize on each other's strengths when working on organizational tasks.
9____Our organization provides opportunities for its members to develop team building skills.
10____Our organization's leaders discuss the influence that personality types have on our work as an organization.
11____Our organization's leaders celebrate individual efforts.
12____Our organization' leaders celebrate team efforts.
13____Our organization's leaders provides counseling to individuals who are not fulfilling their organizational responsibilities.

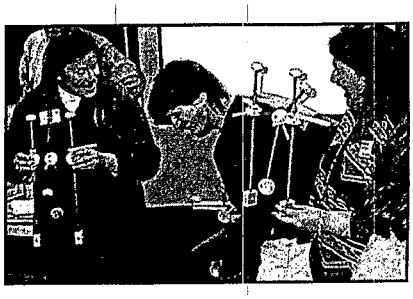


*Photo: Abby Ruskey*

## EE Case Study: Team Building

### Tennessee Environmental Education Association (TEEA)
### "Teaming with EE Stakeholders"

TEEA strives to be inclusive of statewide EE programs and providers by making them an active part of TEEA quarterly board meetings and decision-making processes. TEEA believes that there is so much to be done in EE, that there is enough for everyone to have "a piece of the action" and that the workload needs to be shared to accomplish it all. As a result of these efforts, turf wars or programmatic jealousies are rare in the Tennessee EE community.

Project directors or contacts for major EE programs (i.e., Project Wet, Project Learning Tree, Project Wild, Project Aquatic Wild, and Tennessee Wildlife Resources Agency) are ex-officio members of the TEEA board. When project directors change, the new directors (and new ex-officio members) are invited to attend board meetings and are placed prominently on the agenda early in the day when participants are fresh and engaged. Informal discussion opportunities are provided following presentations by the stakeholders to allow board members time to talk to the directors and learn more about each other's strengths and needs. Project directors are invited to write articles for the TEEA newsletter about their projects, including training opportunities or future workshops. The project directors are also invited to work with professors in pre-service and in-service teacher education programs to provide training, materials, and resources for upcoming professionals.

The invitation to these program directors to be part of the TEEA board has forged strong linkages between statewide EE programs and the TEEA. TEEA has been able to distribute free EE curriculum materials statewide, schedule presentations by these leaders for the TEEA annual conference, increase volunteer participation on advisory committees, and schedule training sessions for new EE program facilitators. Both TEEA members and the program leaders leave board meetings with a strong sense of good will, mutual interest, and the knowledge that they have a partner to call on for future EE activities. By actively involving stakeholders in board meetings and developing partnerships with them, TEEA has expanded the concept of teamwork to a new level and has developed linkages that are truly benefiting the statewide programs, TEEA, and the EE community.

*Rosalyn McKeown-Ice, TEEA President*

## Team Building-Importance to the Sustainability of Your Organization

The impact and influence of individual leaders in the field of EE can be significant, but the impact or influence of a group of leaders which works well together can be much greater than that of many individuals working alone. Much work in today's EE organizations requires group effort (committees and boards). If an EE organization's leadership works well as a team, then it is likely that a synergy will be created which will produce high morale and high performance. An organization with leaders who are enjoy working together and who are highly productive is much more sustainable than one which lacks teamwork and camaraderie.

## Latest Trends

**Organizational Communities**[4] -Many nonprofit organizations provide a positive community experience for those involved. Leaders are concerned with each other's well being and strive to help each other. This community approach becomes a pattern that is fulfilling on many levels for participants. Work is often considered fun, and productivity is high, in part due to the enjoyment organization members get out of working together as an effective team toward common goals and ideals. Environmental educators often comment on the motivation, exchange and learning they derive from working on EE capacity building with peers in their EE associations and across the country. These organizational EE communities have contributed greatly to the development of the field of EE as a whole.

## Personal Prioritization of Needed Actions-

## Team Building

**Please list in order of priority, specific actions that you should take in order to make progress in this area of organizational development.**

### What I need to work on:
### (for our organization)

## Personal Prioritization of Needed Actions-

## Team Building

**Please list in order of priority, specific actions that your organization should take in order to make progress in this area of organizational development.**

**What our organization needs to work on:**

**Great job! Consider taking a break before continuing.**

# 3. The Organization: The Governing Structure, Governance, and Strategic Planning

## Definitions/Description

**Structure** *refers to the physical design of the organization. Structure provides a mechanism for allocating responsibilities.* Where structure provides and organization's framework, **governance**, determines *how an organization operates, including allocation of responsibilities.* The **strategic planning process** *is a directed effort to reach important decisions and actions that shape and guide an organization's future.*[5] *It attends to the organization's mission and vision statements, goal development, objectives, action plans, assessments, and evaluations.* **Strategic planning** *results in a document which guides the work of the organization.*

## A. The Governing Structure

### More Definitions/Descriptions...

*The majority of EE organizations are nonprofit organizations, which follow the federal government's 501 (c)(3) regulations. These organizations must have a public service mission and follow written bylaws that attend to structural details which help the organization run effectively. The governing board and various committees typically make up the structure.*

A **governing board** is *accountable (legally and organizationally) for all that happens within the organization.* The governing board's role is to *develop goals for the organization and see that these goals are accomplished.* In some cases, board members become responsible for the implementation of these strategic plan goals. In other cases, the organizational staff shares the responsibility for accomplishing these goals.

An **organization's leaders** *are any organizational members that are active in the organization's strategic planning processes and/or implementation.* Examples include board members, committee members, task force members, advisory board members, staff, and volunteers.

An **advisory board** *is a voluntary group of individuals who provide input to the governing board.* Its members usually do not participate in decision-making actions.

## Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

**Even if your organization does not have a board of directors, all organizations require a system of governance, and therefore should review this section.*

## Our Organization

1____Our organization's structure is such that it can deal effectively with multiple initiatives and problems simultaneously.

2____Our organization's structure allows easy flow of work from one task to another.

3____Our organization's structure (committees, projects, teams, etc.) changes as our organization's needs change.

4____Our organization has written descriptions of all committees, their responsibilities, and authority.

5____Our organization's leaders are heterogeneous in background and experience.

6____Our organization has written job descriptions for board members and committee chairs.

7____Our organization's job descriptions do not limit what a person may do.

8____Our organization's leaders are familiar with our by-laws.

9____Our organization's leaders review and update (if necessary) our by-laws on a periodic basis.

10____Our organization's new leaders are introduced to our by-laws.

11____Our organization's new leaders are acquainted with our committee structure.

12____Our organization's board has a representative serve on each committee.

13____Our organization's committees effectively fulfill their responsibilities.

14____Our organization has considered creating an advisory board.

15____Our organization's advisory board effectively fulfills the purpose for which it was created.

## EE Case Study- The Governing Structure

### Missouri Environmental Education Association (MEEA)
### "Commitment to 'Bottom-up' Operations"

MEEA is firmly committed to building the organization through professional development and recruitment of its members. To include a number of members in planning and decision-making actions, the MEEA board actively seeks general members to chair and serve on committees. Board members also participate in committees as liaisons. This allows the interests and "thoughts" of the board to be represented, yet provides an opportunity for the general membership to take on leadership roles and to serve as the voice of the general membership. Committee chairs and active members are invited to participate in professional development sessions with board members.

MEEA has also conducted surveys to determine the EE interests, needs, and program priorities of its membership. The results of these surveys are being used to guide MEEA's strategic planning and to develop a listing of members with special skills.

*Celeste Prussia, MEEA Board Member*

## Governing Structure-Importance to the Sustainability of Your Organization

Organizations need to adopt a structure which effectively aligns resources in order to move their efforts forward. Sometimes organizations create committees based on another organization's model and/or rely on old committee structures when changing times and needs require an updated structure. Sustainable organizations develop structures that addresses current and anticipated needs. Effective structure designs readily adapt to the complex problems EE organizations are facing and the dynamic nature of today's world. Todays' board structure must be flexible enough to meet change head-on, rather than simply accommodating change.

## Personal Prioritization of Needed Actions-

## The Governing Structure

**Please list in order of priority, specific actions that you should take in order to make progress in this area of organizational development.**

**What I need to work on:**
**(for our organization)**

## Personal Prioritization of Needed Actions-

## The Governing Structure

**Please list in order of priority, specific actions that your organization should take in order to make progress in this area of organizational development.**

### What our organization needs to work on:

**Great job! Consider taking a break before continuing.**

## B. Governance

More Definitions/Descriptions...

Governance *defines the responsibilities of the board, sees that these responsibilities are addressed, sets standard meeting protocol, and attends to volunteer and membership issues.*

Consensus *is a cooperative strategy for arriving at a decision that can be accepted by all members of a group.* By using consensus, groups commit to addressing and resolving conflicts. *Voting is a "majority rules" way to make decisions.* Voting may be preferable in large group situations or when prioritizing multiple options.

### Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

### 1. Board Responsibilities- Financial

**Our Organization**

1____Our board has a financial committee.
2____Our board develops annual fund/resource development plans.
3____Our board monitors/evaluates fund development efforts.
4____Our board ensures that our organization is on budget.
5____Our board ensures that regular audits takes place.
6____Our organization has adequate resources for fund development.
7____Our organization ensures that individuals who coordinate fund development efforts have received supportive training.
8____Our board maintains records on prospective contributors.
9____Our organization is able to secure adequate financial resources.
10____Our organization raises money through its membership.
11____Our board members financially support our organization.
12____Our organization pursues multiple funding opportunities.

## EE Case Study-Finances

### Colorado Alliance for Environmental Education (CAEE)
### "Aligning Organizational and Funding Opportunities"

A often-heard frustration for capacity-building organizations is about the temptation to go after a funding opportunity which might not be within the organizational mission - usually expressed as a question about whether or not "the tail is wagging the dog." While the answers to this issue are almost never simple or clear-cut, CAEE has adopted an approach which seems to help. CAEE staff has developed a clearly-defined "menu" of organizational projects which are "approved" by the board of directors. The "menu" is a series of one or two page "white papers" which summarize each distinct project into goals, objectives, target audience, activities or project deliverables, timetable, etc. The menu is a smorgasbord of projects which define the priorities and strategic direction of the organization, but the projects only become active as a funding source becomes available. Thus the organization is always working on approved priorities, and always operating within their financial means. As local, state, or national grant announcements or "Request For Proposals" become known, it becomes a fairly easy task to pull out a promising white paper from the file and adjust or customize it to meet the parameters of the grant. Sometimes, several projects can be mixed and matched together to fulfill a grant opportunity which can accommodate an especially long term or complex project.

The main advantages are twofold: (1) responsiveness and (2) appropriateness. The response to the grant opportunity can be more timely because a considerable amount of the project design has already been done—it is relatively easy to simply "write it up" in the style or format requested. Secondly, no time is wasted being sure that the proposal is an appropriate "fit" for the organization. The consideration or board approval of the project has already been done, thus minimizing the danger of the "funding tail which begins to wag the organizational dog."

*Mike Way, CAEE Executive Director*

## 2. Board Responsibilities- Membership/Volunteers

### Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

### Our Organization

1____Our organization's membership is heterogeneous in background and experience.

2____Our organization has been able to attract the active members that it wants.

3____Our organization's leaders have identified target membership groups.

4____Our organization's leaders have developed a plan for attracting target membership groups to the organization.

5____Our board works to attract the membership that it wants.

6____Our board regularly infuses new members.

7____Our board make members feel welcome at organizational meetings, conferences, workshops, and other activities.

8____Our organization's leaders assign board member selection responsibilities to a committee (permanent or temporary) .

9____Our board nomination processes are publicly announced.

10____Our board uses a set of written qualities to guide recruitment of new board members.

11____Our board's needs are considered when recruiting new board members.

12____Our board's actual turnover follows the planned turnover.

13____Our board assigns experienced board members to new board members as mentors.

14____Our new board members receive personal orientation to organizational goals, programs, and structure.

15____Our organization has a large volunteer base.

16____Our organization widely advertises volunteer opportunities.

17____Our organization's leaders informally and formally recognize its volunteers.

18____Our organization's leaders provide a variety of large and small tasks for volunteers to complete.

EE Case Study-Membership

## Mississippi Environmental Education Alliance (MEEA)
## "Building Leaders Through MEEA & Project CARE"

The 2 year old MEEA was searching for ways to expand its membership, meet Mississippi's EE needs, and sustain the state-level EE initiatives it had begun through participation in the NEEAP EE 2000 Program. Several MEEA members suggested developing and supporting an auxiliary youth environmental organization as a solution. The concept was far different from the organization's past initiatives, and received a mixed review from MEEA's board members.

Despite the concern that this might be "thinking too far out of the box", MEEA had the vision to move forward with the project. After 18 months, MEEA feels that it has implemented an exciting model for perpetual leadership development within the state which will sustain their NEEAP's EE 2000 Program initiatives. The model is a youth organization called Project CARE (Caring Adolescents Reshaping the Environment), and it is already proving its value.

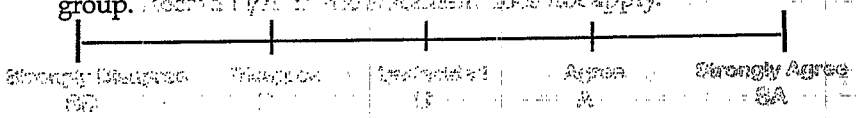
During the fall 1997 Project CARE organizational meeting, students from 14 schools participated in writing a constitution and electing officers. A spring conference was also held to extend the experience to more students. MEEA soon realized the youth lacked the skills and knowledge needed to sustain their involvement. In order to provide Project CARE members with leadership skills development opportunities and to empower them to become leaders in Project CARE, their personal lives, and potentially MEEA, MEEA officers decided to conduct a leadership development clinic for Project CARE. In January 1999 MEEA officers and leaders from The Mississippi Forestry Commission, The Clarion Ledger (newspaper), USDA Wildlife Services, the MSU Extension Service, the Mississippi Power Company, as well as numerous teachers, volunteered to lead clinic activities.

Keep Mississippi Beautiful is funding 4-H Environmental Clubs and Environmental 4-H Clubs are beginning to participate in Project CARE functions. The National Audubon Society's Mississippi office is considering using the MEEA conference as an annual gathering opportunity for members. This recent involvement of such a diverse array of organizations and individuals in both MEEA and Project CARE, as well as the voluntary involvement of over 300 students, has proven that "thinking out of the box" and looking to diverse ideas is proving to be highly effective for MEEA!

*John Guyton, MEEA President*

## 3. Meetings

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.



### My Work in Our Organization

1____I attend all meetings that I am responsible for attending.
2____I help keep meeting agendas on track and on time.
3____I respect other's rights and opinions during meetings.
4____I find organizational meetings personally beneficial.
5____I leave meetings feeling that our goals have been accomplished.

### Our Organization

1____Our organization's leaders structure board meetings around strategic priorities.
2____Our organization's leaders schedule board meetings as needed.
3____Our organization's leaders invite and encourage the general membership and the public to attend meetings.
4____Our organization's board meetings include an agenda.
5____Our organization's leaders provide board meeting agendas to all expected participants before meetings.
6____Our organization's leaders begin board meetings on time.
7____Our organization's leaders record minutes at all board meetings.
8____Our organization's meetings are open to new ideas and new approaches to issues.
9____Our organization's board meeting chair is neutral and fair.
10____Our organization's board meeting participants leave with assignments to complete.
11____Our organization's board sets the date, time, place, and agenda for the following meeting before the conclusion of a meeting.
12____Our organization's meeting discussions have closure.
13____Our organization's meetings always end on time.
14____Our organization's meetings are regularly evaluated for their effectiveness.
15____Our organization's leaders are trained in meeting facilitation.

## Governance-Importance to the Sustainability of Your Organization

The overlying purpose of governance is to ensure the long-term welfare of an organization, and to ensure that an organization is actively working towards attaining its mission.[6] More concretely, governance insures that specific organizational responsibilities are attended to. Ensuring that an organization has adequate resources to achieve its mission is one of the responsibilities that a board must attend to. Finances and organizational members who actively support the organization's efforts are two of those resources. A board is responsible for seeing that adequate funds exist and that they are being used effectively. To help ensure organizational sustainability board members are also responsible for selecting effective new leadership and for planning how to involve the general membership in organizational decisions and plan implementation. Efficient meetings are one of the most helpful tools for addressing governing and management issues, particularly in non-profits that meet on a very infrequent basis.

## Latest Trends

**Action Oriented Meetings-** According to Tim Merriman, National Association of Interpreters Executive Director and Association of Nature Center Administrators member, a very powerful and effective way of managing meetings is to focus on action instead of administration. **Meetings organized by need for action, discussion, and information,** consecutively, **tend to be highly productive and highly efficient.** The first items addressed in meetings should be those that require decisions or motions to be made. Discussion items should be presented in priority order, with the most important first. Informational items should be presented in writing. Setting time limits for each item before your meeting and providing a place to write down items which are brought up by members, but not on the agenda should increase efficiency and hold the attention of those in attendance. Approving actions by consensus instead of voting should increase members' sense of ownership and ability to compromise.[7]

## Personal Prioritization of Needed Actions-

## Governance

**Please list in order of priority, specific actions that you should take in order to make progress in this area of organizational development.**

**What I need to work on:**
**(for our organization)**

## Personal Prioritization of Needed Actions-Governance

Please list in order of priority, specific actions that your organization should take in order to make progress in this area of organizational development.

### What our organization needs to work on:

Great job! Consider taking a break before continuing.

## C. Strategic Planning

Key Definitions/Descriptions

A mission statement *describes the overall purpose of an organization.* A vision statement *indicates what an organization would like to achieve and become in the future.* A strategic plan *is future oriented, lists organizational goals, and strategies for achieving those goals.* An operational plan or strategic action plan *includes specific steps, budgets, timeliness, and assignments of responsibility for achieving the strategies and goals of the strategic plan.*

Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

### 1. Mission and Vision

#### My Work in Our Organization

1____I believe in the vision of our organization.
2____I relate my work back to our organization's mission.

#### Our Organization

1____Our organization's mission was created via a group process.
2____Our organization's mission statement includes what we are providing, to whom, and why.
3____Our organization's mission is flexible enough to accommodate changing priorities and activities.
4____Our organization's mission is realistic given our current resources.
5____Our organization's vision was created via a group process.
6____Our organization's vision discusses values, and the long term impact of our organizational efforts.
7____Our organization's vision is far reaching, yet sets clear direction.

## 2. Strategic and Operational Plans

### My Work in Our Organization

1____I have a copy of all current organizational planning documents.
2____I actively participate in our organization's planning processes.
3____Our board members incorporate general membership ideas and concerns into the organization's strategic plan.

### Our Organization

1____Our organization's leaders have a strong understanding of the strategic planning process.
2____Our organization has a strategic plan.
3____Our organization's leaders incorporate ideas and concerns from the general membership into the organization's strategic plan.
4____Our organization's strategic plan has a realistic time frame.
5____Our organization's strategic plan is realistic, given our resources.
6____Our organizational structure and governance are based on our strategic plan objectives.
7____Our organization has an operational plan.
8____Our organization's operational plan contains clear objectives.
9____Our organization's operational plan lists those who might be best suited to complete each task.
10____Our organization's leaders select the objectives that they will work on based on their interests and/or skills.
11____Our organization examines the short and long-term benefits and disadvantages of all planning options before acting upon them.
12____Our organization's leaders receive ongoing training/information to help them with strategic plan development and management.
13____Our organization's leaders participate in regular strategic planning retreats.
14____Our organization's strategic/operational plans are updated regularly.
15____Our board (and/or staff) produces an annual report on our organization's achievements.

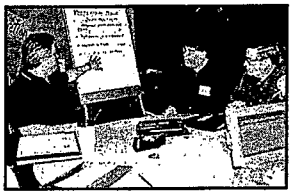


*Photo: Abby Ruskey*

## EE Case Study- Strategic Planning

### California's EE Vision for the Nineties

In 1992, the California Department of Education's Science and EE Unit convened education leaders and EE stakeholders to develop "A Vision for the Nineties: Strategies for Improving and Implementing EE Curricula."

The conference utilized a powerful process that distilled the knowledge and perspectives of participants, created consensus, and built a strategic plan for the 1990's which is still going strong. Major steps in the process included: 1) hiring of a private consultant who was a master of process, 2) preplanning meetings to hammer out clear objectives, 3) rotating small groups, large group brainstorming, organizing questions, with an ability to take written notes and ideas from earlier group meetings into new ones, 4) a thoughtful review of benefits & liabilities, and 5) identification of tangible action items before the conclusion of the planning session.

*The following achievements of CA's EE community can be traced to the action steps in this strategic plan:*

Publishing of the six EE compendiums which evaluated K-12 curricula from throughout the US and published summaries for easy teacher identification of valuable EE resources. This project also established criteria that in the long run increased the quality of EE curriculum development.

The formation of the CAEE Interagency Network (CEEIN) and the National EE California Advancement Project (NEECAP). CEEIN brought together sixteen departments of the state EPA and the Resource Agency by finding common ground on K-12 issues. NEECAP is comprised of federal, state and local agencies, formal, and non-formal environmental stakeholders.

An increase in corporate partnerships. In 1998, The Environmentality Challenge Project, a corporate partnership with Walt Disney Company and CEEIN, engaged over 60,000 5th grade students in class projects where the students personally selected and addressed environmental issues.

The development of the California Guide for Environmental Literacy, which will focus on systems-based, interdisciplinary instruction. Its vision of education places the environment at the core of school curricula and makes creating sustainable communities a fundamental goal for all of education.

The establishment of the California Regional EE Coordinator (CREEC) Network. In the last two years ten regional CREEC's have been established. These CREEC hubs have made significant inroads in EE capacity building by linking regional, state and national EE efforts with local teachers.

*Jeff Hohensee, CA Regional EE Coordinators Network (CREEC)*

## Strategic Planning-Importance to the Sustainability of Your Organization

According to the Association of Nature Center Administrators (Byrd, 1998, p. 35), strategic planning is "a disciplined, consensus building process of creating a desired future for an organization and developing strategies to attain that future". It ensures that organizational members are working toward the same goals, allows the organization to assess and adjust the organization's direction to meet the needs of a changing environment, and it focuses the organization's energy.[8] In other words, strategic planning guides all that takes place within and by an organization. Benefits of strategic planning include: "Promotion of strategic thinking and action, improved decision making, enhanced organizational responsiveness and improved performance."[9] Organizations with effective and efficient planning strategies are more likely to reach their goals and to ensure organizational sustainability.

## Keys to Strategic Planning Success

**Commitment to Quality-** plan within an understood process using effective tools for participation and decision-making; use outside consultants who are capable of educating the group and facilitating the process

**Commitment to Continuity-** build strategic process into the organization's culture; use strategic processes as a tool for learning; separate strategic planning meetings from regular business meetings; dedicate at least one meeting per year to reflect and renew the strategic plan

**Commitment to Priority-** strategic plans create direction and should create focus for action; keep aligning resources toward the strategic priorities as stated within the plan

**Commitment to Time-** all organizational leaders must realize and accept the extra effort strategies and action will require, while being able to eventually merge regular work plans with strategic initiatives.

*Corky McReynolds (1998) in The Nature Center Handbook, (Byrd, p.60). Used with permission.*

## Personal Prioritization of Needed Actions-

## Strategic Planning

**Please list in order of priority, specific actions that you should take in order to make progress in this area of organizational development.**

**What I need to work on:**
**(for our organization)**

## "What do you think?"- Feedback Form

**NEEAP welcomes comments and feedback on the OAT's design and usefulness. The OAT is a work in progress and will continue to evolve to meet the needs of the EE organizations that use it.**

**Please send comments to: neeap@uwsp.edu**
**or mail this form to:**

**NEEAP-CNR**
**University of Wisconsin-Stevens Point**
**Stevens Point, WI 54481**

1) Are there areas in the OAT that were particularly helpful to you as an individual? Please explain.

2) Are there areas in the OAT that were particularly helpful to your organization? Please explain.

3) How might the OAT be improved?

4) Other...

Organization_____ Date_____

# OAT Assessment Question Response Sheet

The OAT is divided into six major areas of organizational development: **1) Organizational Culture; 2) Team Building; 3) The Organization-The Governing Structure, Governance, and Strategic Planning; 4) Managing Skills; 5) Stakeholders-External; 6) and Evaluation.**

Please record your responses to the assessment statements in the blanks provided in the OAT. Transfer your responses to the corresponding blanks on this sheet. This will allow you to keep a copy of your responses to track the effects of any changes you or your organization may choose to make. Blanks for Appendix A- EE Organizations with Staff have also been included on this response sheet.

Allow approximately two hours for completion of the OAT and reflection. The "Personal Prioritization of Action Steps" section is included at the end of each chapter as a place to record ideas for personal and group action and to use in group discussion. After completing the OAT, return this response sheet to the appropriate person(s) in your organization for tabulation with other individuals responses and group discussion/planning.

| Organizational Culture | Organizational Culture | Team Building | Team Building | The Organization: A. The Governing Structure | The Organization: B. Governance- 1 Board Res., Financial | The Organization: B. Governance- 2Board Res., Membership/Volunteers |
|---|---|---|---|---|---|---|
| *My Work* | *Our Org.* | *My Work* | *Our Org.* | *Our Org.* | *Our Org.* | *Our Org.* |
| 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| 6 | 6 | 6 | 6 | 6 | 6 | 6 |
| 7 | 7 | 7 | 7 | 7 | 7 | 7 |
| 8 | 8 | 8 | 8 | 8 | 8 | 8 |
| 9 | 9 | 9 | 9 | 9 | 9 | 9 |
| 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| 11 | 11 | | 11 | 11 | 11 | 11 |
| 12 | 12 | | 12 | 12 | 12 | 12 |
| | 13 | | 13 | 13 | | 13 |
| | 14 | | | 14 | | 14 |
| | 15 | | | 15 | | 15 |
| | | | | | | 16 |
| | | | | | | 17 |

## OAT Assessment Question Response Sheet Cont.

| The Organization: B. Governance- 3 Meetings | The Organization: C. Strategic Planning- 1 Mission and Vision | The Organization: C. Strategic Planning- 2 Strategic/ Operational Plans | Managing Skills | Stakeholders-External | Evaluation | Appendix A- EE Organizations with Staff |
|---|---|---|---|---|---|---|
| *My Work* | *My Work* | *My Work* | *My Work* | *My Work* | *My Work* | *Our Org.* |
| 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| 3 | *Our Org.* | 3 | 3 | 3 | 3 | 3 |
| 4 | 1 | *Our Org.* | 4 | 4 | 4 | 4 |
| 5 | 2 | 1 | 5 | 5 | 5 | 5 |
| *Our Org.* | 3 | 2 | 6 | 6 | *Our Org.* | *6* |
| 1 | 4 | 3 | 7 | 7 | 1 | 7 |
| 2 | 5 | 4 | 8 | 8 | 2 | 8 |
| 3 | 6 | 5 | 9 | 9 | 3 | 9 |
| 4 | 7 | 6 | 10 | 10 | 4 | 10 |
| 5 | | 7 | 11 | *Our Org.* | 5 | 11 |
| 6 | | 8 | 12 | 1 | 6 | |
| 7 | | 9 | 13 | 2 | 7 | |
| 8 | | 10 | *Our Org.* | 3 | 8 | |
| 9 | | 11 | 1 | 4 | 9 | |
| 10 | | 12 | 2 | 5 | 10 | |
| 11 | | 13 | 3 | 6 | 11 | |
| 12 | | 14 | 4 | 7 | | |
| 13 | | 15 | 5 | 8 | | |
| 14 | | | 6 | 9 | | |
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| | | | 13 | | | |

## Personal Prioritization of Needed Actions-

## Strategic Planning

**Please list in order of priority, specific actions that your organization should take in order to make progress in this area of organizational development.**

### What our organization needs to work on:

**Great job! Consider taking a break before continuing.**

# 4. Managing Skills

*This section addresses the role of managing skills in an organization and assesses managing skills not incorporated in other OAT areas.*

## Definitions/Description

**Managing skills** *provide individuals with tools needed to implement strategic and operational plans and to effectively work with others.* Managing skills are inherent to all areas of organizational development.

**Human relations** involve areas of *human behavior such as: attitudes, motives, understanding other's feelings, interpersonal communication, tact, cooperativeness, and diplomacy.*[10]

**Conceptual skills** *include analytical ability, logical thinking, idea generation, creativity, problem solving, perception, ability to anticipate change, and recognition of opportunities and problems.*[11]

**Technical skills** involve *understanding the processes, methods, and information required to achieve goals and plans.*[12] Technical skills needed vary with each organization.

## Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

### My Work in Our Organization

Photo: Abby Ruskey

1____I treat others as equals.
2____I appreciate other points of view.
3____I work to empower others.
4____I encourage creativity in others.
5____I trust our organization's leaders.
6____I recognize other's strengths and contributions.
7____I have strong active listening skills.
8____I make my assumptions about problems explicit.
9____I examine all possible solutions to a problem.
10____I don't assume everyone sees problems as I do.
11____I am careful to solve problems, not symptoms of problems.
12____I examine short and long-term benefits and disadvantages when solving complex problems.
13____I anticipate obstacles and resistance when choosing solutions.

## Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

### Our Organization

1____Our organization's leaders examine their assumptions before making decisions.

2____Our organization's leaders use consensus in decision making whenever possible.

3____Our organization's leaders look to those with different solutions to problems.

4____Our organization's leaders use teams to solve complex problems.

5____Our organization has leaders who provide vision for the organization.

6____Our organization is adaptable and resourceful.

7____Our organization has leaders who focus on the realities of the present.

8____Our organization's leaders are trained in group facilitation techniques.

9____Our organization's leaders have a strong collective knowledge of EE.

10____Our organization's leaders have a strong collective knowledge of education.

11____Our organization has a specific individual who oversees and coordinates the work of each committee and project.

12____Our organization has someone who oversees the completion of objectives between committees/teams.

13____Our organization has an individual or a team that is in charge of organizational development.

Human Relations

Conceptual

Technical

## EE Case Study- Managing Skills

Utah Society for Environmental Education (USEE)

### "Leadership in Management"

One of the first things USEE's Executive Director tells new staff members is that there are no bosses at USEE. With five and a half full-time staff members and a vast number and scope of projects, USEE's executive director has had to assess how to effectively manage USEE's work. The decision was made to place daily and weekly decision making and goal setting in the hands of individual staff members, and this decision has had a positive impact on USEE. Instead of managing implementation of USEE's vision, the director serves to enlist USEE staff in creating a shared vision and strategically working towards it.

There are some managerial procedures set in place at USEE, which help keep everyone in check. Individuals take responsibility for creating work plans and prioritizing daily tasks. These plans and priorities must be in line with the overall goals of the organization. Work schedules individual staff agendas each week. Staff is also asked to write weekly accomplishments, so they are not only responsible for reporting what they plan to do, but also what they have done. Communication is the key. By using these techniques and by holding bi-weekly staff meetings, the entire staff is kept aware of what each person is working on and how projects are progressing. This gives everyone a chance to talk about what they are working on and to collectively make decisions on important issues in the office. Initiatives that foster teamwork, involvement in challenging opportunities, and shared ownership help to create a shared vision at USEE and spur the energy and the "rhythm" that is necessary to reach that vision.

By allowing individual to manage their own projects, USEE's Executive Director realizes the need to accept how each person does things differently. USEE parallels EE... it is the essence of student-based learning (we are all students of life right?). Management of projects by those involved allows individuals the flexibility of working on their own time schedule, and the flexibility of working at home. This increases morale and allows USEE the use of personal resources such as computers and phone lines.

Because of decisions made by USEE management to empower its staff, USEE is running smoothly and growing as each person is empowered to bring personal strengths and leadership qualities to USEE's efforts.

*USEE Staff*

## Managing Skills-important to the Sustainability of Your Organization

Your EE organization may not have paid staff and/or a manager. This may be by choice or due to current financial limitations. However, all organizations rely on management skills to insure the implementation of their strategic plans.[13] All leaders within an organization need strong people relation and problem solving skills, and administrative activities should be assigned to individuals within your organization who have or can be trained in the necessary technical skills. Positive relations among leaders often increase team efforts and the desire for personal and organizational success. Problem solving skills can help leaders: 1) build relations with the external environment and each other, and 2) develop and implement effective strategic planning plans.

## Latest Trends

**Management Lessons from the Natural World-** Organizations can learn a great deal from observing the natural world and from examining "new sciences", such as quantum physics, according to organizational development leader, Margaret Wheatley (1994). Organizations, like life, are open systems, which interact with their environment, grow, and evolve. We need to nurture the growth and evolution of organizations. In the natural world, structure is based on relationships. We need to build better relationships in our organizations. As in the natural world, organizational structure and management actions should support relationships and change with changing needs. Fields, similar to magnetic fields, exist within organizations. The greatest task of an organization's leaders is to communicate the "field" of guiding visions, strong values, and organizational beliefs; to keep this field present and ever clear, and to ensure that this field reachs all corners of the organization, involves everyone all of the time, and finally, to allow individual members the opportunity and freedom to "make things happen".[14]

## Personal Prioritization of Needed Actions-

## Managing Skills

**Please list in order of priority, specific actions that you should take in order to make progress in this area of organizational development.**

### What I need to work on:
### (for our organization)

## Personal Prioritization of Needed Actions-

## Managing Skills

**Please list in order of priority, specific actions that your organization should take in order to make progress in this area of organizational development.**

**What our organization needs to work on:**

**Great job! Consider taking a break before continuing.**

# 5. Stakeholders-External

## Definitions/Description

The external environment is the dynamic *environment outside the organization* and includes factors which the organization cannot control. Political, economic, social, educational, and technical trends are all part of the external environment. Stakeholders are *any individuals, groups, organizations, or communities that have some stake in and influence over what your organization does.* Stakeholders and external factors can greatly influence the overall status of the EE program in your state. **This section addresses stakeholders in the external environment.** Examples include students, funders, elected officials, educators, business and industry representatives, agency representatives, parents, and the media.

## Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

### My Work in Our Organization

1____I am aware of current trends in the external environment (political, educational, economic, social, technological, other…).

2____I can identify stakeholders that contribute to EE and the work of our organization.

3____I am aware of individuals, organizations, or events that may hinder my organization's efforts.

4____I identify my assumptions about our stakeholders.

5____I attempt to establish partnerships with stakeholders.

6____I know how to write and speak effectively about our organization, its mission, and its programs.

7____I make an effort to educate our stakeholders about our organization, its mission, and its programs.

8____I am aware of the special skills and experiences that our organization's stakeholders posses.

9____I know how to effectively describe the field of EE and why quality EE contributes to society.

10 I have a working relationship with local reporters and editors.

## Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

### Our Organization

1____Our organization's leaders discuss obstacles and opportunities related to external forces.

2____Our organization's leaders consider the needs of stakeholders when developing goals and strategies.

3____Our organization's leaders identify their assumptions about our stakeholders.

4____Our organization's leaders regularly meet with stakeholders to discuss their concerns, goals, and interests.

5____Our organization attempts to establish partnerships with stakeholders possessing interests similar to ours.

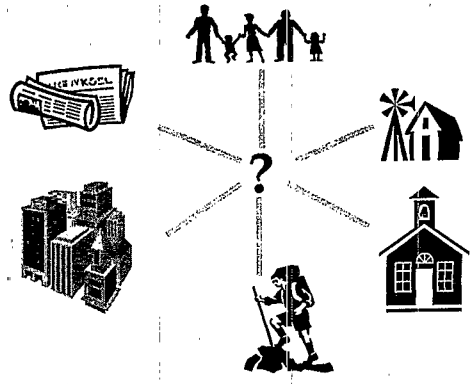
6____Our organization and stakeholders implement shared projects.

7____Our organization's leaders encourage me to understand and reach out to stakeholders.

8____Our organization and our efforts recieve positive media coverage.

9____Our organization's leaders have established a good working relationship with print, television, and radio reporters and editors.

10____Our organization has leaders trained to work with the media.



EE Case Study- Stakeholders

## Environmental Education Assoc. of New Mexico (EEANM)
## "With Stakeholders 'EEANM Makes the Grade'"

Not unlike many other organizations, one of EEANM's top goals for 1998 was to increase its organization membership. By October 1998's end, EEANM had doubled it's membership! How was EEANM so successful when so many organization's struggle to do the same?

EEANM identified one of its most vital stakeholders, the classroom teacher, and embarked upon a massive communication and collaboration effort with the teacher-related programs in the state. EEANM also identified a target project, its annual conference, to provide a concrete basis for initiating its collaboration and recruitment efforts.

EEANM designed its conference to be particularly attractive to teachers by: 1) having teachers serve on the conference planning committee, 2) inviting teachers known for their effective EE programs to present at the conference, and 3) letting teachers know that a number of free materials from informal EE agencies would be available. The New Mexico math and science teacher's organizations, the National Science Foundation funded Collaborative for Excellence in Teacher Education, an EPA Teacher training grant, and professional development centers from two of the largest school districts helped announce the conference and paid some of the teacher registration fees. The NM State Department of Education recently adopted standards and benchmarks. Several conference presentations were designed to assist teachers in aligning their lessons with these standards and to provide examples of EE-related lessons that meet the new standards. The USEPA provided a grant to help pay teacher's expenses, and science instructors at the local university dismissed classes so that their students could participate in this professional development opportunity. Conference registration also included one year's membership.

EEANM has sparked the interest of classroom teachers and educational entities throughout the state. It has also taken a significant step in maintaining their interest and participation by increasing its board size to allow for greater involvement by these individuals at the leadership level!

*Elaine Hampton, EEANM President*

## Stakeholders-Importance to the Sustainability of Your Organization

The external environment represents the needs and audiences which your organization works to address. It also provides funds to meet these needs and additional resources through collaboration opportunities. On the flip side, the external environment can present barriers and limitations as you work to achieve EE programs. A comprehensive understanding of the external environment is necessary to develop plans that are appropriate to the needs of your audience and stakeholders and to develop and maintain positive, ongoing relationships with them.

## Latest Trends

**Stakeholder Dynamics-** For many EE organizations stakeholders are very diverse and their plans, decisions, and needs can and often do change regularly. EE organizations should get to know key stakeholders in terms of what they can provide as well as what it is they need. This process of investigation demonstrates interest and mutual respect. From this initial step, collaborative projects and mutual support can blossom. EE organizations should also **regularly check** the status of their **stakeholders** and **work to build solid relationships** with them. Regularly examine any **assumptions** you or your organization makes relative to stakeholders and the trends of the external environment, and incorporate your findings into your efforts. This should enable your organization to anticipate and understand changes quickly enough to successfully act upon them.

## Personal Prioritization of Needed Actions-

## Stakeholders

**Please list in order of priority, specific actions that you should take in order to make progress in this area of organizational development.**

**What I need to work on:**
**(for our organization)**

## Personal Prioritization of Needed Actions-Stakeholders

**Please list in order of priority, specific actions that your organization should take in order to make progress in this area of organizational development.**

### What our organization needs to work on:

**Great job! Consider taking a break before continuing.**

# 6. Evaluation

## Definitions/Description

Program evaluations *are used as tools to guide change and foster improvement by examining the performance of an organization, and its leaders.* Performance *is the accomplishment of goals, objectives, and strategies.*

## Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

## My Work in Our Organization

1____I find my work in the organization be professionally satisfying.
2____I regularly evaluate my efforts in our organization.
3____I participate in regularly scheduled organizational evaluations.
4____I am evaluated in a specific, descriptive manner.
5____I use evaluations of my performance as learning tools.

## Our Organization

1____Our organization uses clear leadership performance standards.
2____Our organization achieved most of last year's goals/objectives.
3____Our organization's leaders reflect on why or organization does or does not achieve its goals/objectives.
4____Our organization completes projects and produces results that our stakeholders are satisfied with.
5____Our organization evaluates its structural effectiveness each year.
6____Our organization uses evaluations to plan our programs.
7____Our organization uses evaluations for fund development.
8____Our organization uses evaluations to report program benefits to the public.
9____Our organization evaluates programs/events.
10____Our organization uses evaluations to improve the performance of individuals.
11____Our organization's leaders take corrective action when board members do not fulfill their responsibilities.

## EE Case Study Evaluation

### Kansas Association for Conservation and Environmental Education (KACEE) "Planning and Assessment Committees"

In late 1997, members of KACEE, a public/private partnership committed to promoting effective EE in Kansas, completed and distributed a Five-Year Strategic Plan. This strategic plan outlines seven priority goals and key actions necessary to achieve these goals.

Towards this end, KACEE hosted a retreat for Executive Committee members in May 1998. The retreat served to both familiarize members with the goals and ideas of the strategic plan and initiate actions that will ultimately lead to the attainment of these goals. Perhaps one of the most exciting outcomes of this meeting was the permanent establishment of six working committees charged with carrying out the actions identified in the strategic plan.

Among the new committees established was the Planning and Assessment Committee (PAC). This committee, comprised of Executive Committee members and KACEE staff, is charged with evaluating the preceding year and organizing planning for the upcoming year. In January 1999, the committee presented data collected from the other working committees as well as the home office of KACEE and has utilized this data to provide a report of progress towards the Five-Year Strategic Plan. This information will be used by committee members and staff to assess strategies and begin planning for the upcoming year. The PAC has set a target deadline for completion of the Annual Implementation Plan and will be gathering pieces from committees and staff in the upcoming months. Ongoing monitoring of plans and progress is also a responsibility of this committee. By formalizing mechanisms for actions as well as monitoring and evaluation, KACEE hopes to increase their organizational effectiveness and in the process, more actively involve its members in carrying out the mission of the organization.

*KACEE Staff*

## Evaluation-Importance to the Sustainability of Your Organization

Setting appropriate goals and objectives and accomplishment of them are driving factors in the future of any organization. Completion of goals and objectives in a timely and effective fashion is often a positive indicator of the success of an organization. Organizations which consistently meet their goals and objectives may be well on their way to sustainability. Evaluation is necessary to gauge the impact and success of organizational efforts. Organizations that engage in formative evaluation, or evaluation which takes place while a program or plan is in action, are better able to incorporate immediate changes, and enhance the likelihood of success. Summative evaluations, or evaluations that take place after a program or plan has been completed, can also provide significant insight. However, caution should be taken when evaluating past experiences only. Those strategies that have been effective in the past may not be effective today or tomorrow, especially in an area as dynamic as EE.

## Latest Trends

**Organizational Stories-** What is your organization's story? According to Harrision Owen *(The Millennium Organization, 1994)*, much can be discovered through the stories that are told by individuals about their organization. What is the spirit like in your organization? Is it positive? What were the "good ol' days" like? Have you experienced troubles in your organization? Is your organization making a "fresh start"? Examine the stories that organizational members tell each other and their friends. Consider making a collection of the stories. Are the stories positive? Work as a team to create an environment that fosters positive stories. Collect items to use as visual components of your stories. Use stories to celebrate organizational efforts and successes. Stories provide strong evidence as to the potential sustainability of your organization.[15]

## Personal Prioritization of Needed Actions-

## Evaluation

**Please list in order of priority, specific actions that you should take in order to make progress in this area of organizational development.**

**What I need to work on:**
**(for our organization)**

## Personal Prioritization of Needed Actions-

## Evaluation

**Please list in order of priority, specific actions that your organization should take in order to make progress in this area of organizational development.**

### What our organization needs to work on:

## Conclusion-Leadership for EE Capacity Building: What is Your Personal Plan?

As you completed the OAT, did you find yourself thinking about your leadership ability and potential? Leadership and organizational development are processes that go "hand in hand". One of the primary purposes of the OAT was to provide you, the EE leader, with a resource for reflection on personal strengths and goals. Mixed throughout the OAT are questions, EE case studies, and "latest trends" that also address leadership. The "Personal Prioritization of Needed Actions" sections were provided as a place to record actions to strengthen your leadership abilities. The quotes, table and the plan guidelines on the following pages take your "Personal Prioritizations of Needed Actions" one step further by providing additional insights into personal leadership and by providing guidelines for the development of a personal leadership development plan. Examine the leadership attributes provided and think about where you excel as a leader and where you would like to grow. Then, enjoy the process of developing a personal plan for learning and growth! *(These pages are expressly for your own personal use.)*

### Leadership Quotes

*"Somewhere there is somebody who looks to each of us for leadership in some field. At the same time, however, leaders are also followers. Followers, in fact, are the backbone of the nation."* -E. M. Clark

*"Leadership does not depend on innate talent only, but very much also on intensity of conviction and willingness to serve."* -Walter Gropius

*"The prime function of a leader is to keep hope alive."* -John Gardner

*"I could live a week on one good compliment."* -Mark Twain

*"I would rather fail in a cause that will ultimately succeed than succeed in a cause that will ultimately fail."* -Woodrow Wilson

*"Difficulties exist to be surmounted."* -Ralph W. Emerson

## Leadership Attributes

Below are some of the major Leadership Attributes covered by the OAT. Are there others that you value and are working towards? Feel free to add them to the list. Which leadership attributes do you posses?

| Leadership Attributes | Yes, I am! | I aspire to this... | Comments |
|---|---|---|---|
| **Motivator** (a roll model, builder of self confidence, enthusiastic, & trusting...) | | | |
| **Visionary** (can imagine possible futures, innovative, & inspires with ideas...) | | | |
| **Life-long Learner** (reflective, seeks input, looks for new challenges, embraces change...) | | | |
| **Team Builder** (encourages, achieves, & rewards cooperative efforts, helps others find their "niche...) | | | |
| **Good Communicator** (communicates regularly & effectively, understands & uses many comm. tools...) | | | |
| **People Oriented** (puts people & relations first, enjoys interacting with others, works to understand other's needs...) | | | |
| **Effective Managers** (provides mgmt systems & structures, is supportive yet defines expectations & boundaries...) | | | |
| **Agents for Change** (opens doors to opportunity, acts as a catalyst, takes risks...) | | | |
| **Passion for Leading** (believes in purpose & people, proactive & goal oriented, takes responsibility for self & efforts...) | | | |
| Other: | | | |
| Other: | | | |

*Attributes taken from the OAT, Apps (1991), Locke (1991), and McReynolds (1992) (1998)*

## Developing Your Own Personal Leadership Plan

Following is a list of potential guidelines for developing a "personal leadership development plan". These guidelines are based on the book *Leadership for the Emerging Age* by Jerold Apps. These are provided to give you a basic outline of what a personal plan might involve. You may have other guidelines or features to include in your plan.

**1.** Describe the context in which you function as a leader. Provide information about the organization, it's mission and goals and where you fit in.

**2.** Describe yourself in your leadership capacity (see table on previous page). What do you do well and what do you want to improve on? How do you feel about being a leader?

**3.** Indicate your long-range leadership goals. These can be 3, 5 or 10 year goals, etc.. The point is to discover and define where you are heading as a developing leader.

**4.** Write down a topic(s) you want to learn more about. This can be a focused or broad topic, the key is pick something that truly excites you about leadership and learn more about it.

**5.** Write one or more objectives for each topic. Get specific about what you want to learn and be able to do. Realize that these objectives will change over time as your learning proceeds.

**6.** List the resources that will help you attain your learning objectives. Is there a particular individual, institution, book, video tape or course that will help you in your learning? Who do you go to in order to find out?

**7.** Provide your progress indicators. How will you know that you have made progress? Indicate that you have completed steps you set out for yourself and how you planned to try what you are learning in your organization. Did the effort change your behavior and/or skills?[1]

*Remember, becoming a leader is a developmental process that is truly never ending. Your efforts to build EE capacity and/or to provide quality EE to your students is making a difference in strengthening the field of EE and achieving environmental literacy. We hope that your efforts also prove to be personally and professionally rewarding and that the skills and perspectives gained will serve you in all avenues of your life.*

[1] Apps, Jerold (1994). Leadership for the Emerging Age. San Francisco: Jossey Bass.

# Appendix A. EE Organizations with Staff:
## Assessing Board/Staff Relations

The following assessment statements are provided to assist EE organizations with paid staff in assessing the effectiveness of board/staff relations. The purpose of this section is to initiate discussion of the status and role of the board/staff relationship in the organization. All leaders in an organization with staff should complete this section, including the board, committee chairs, the executive director, and other lead staff.

### Assessment Questions

Record the letters representing your response to each statement below in the **blanks** provided. After completing the section, transfer your responses to the **"Assessment Question Response Sheet"** for use by the group. Record N/A if the statement does not apply.

| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
|---|---|---|---|---|
| SD | D | U | A | SA |

### Our Organization

1____Our organization's board members are team players, not obstacles to achieving plans.
2____Our organization's board actively supports the needs of the staff.
3____Our organization's board members who also serve as staff, understand the different lines of authority for the two roles.
4____Our organization's executive director and chair/president are different individuals.
5____Our organization has established clear expectations for board participation (as compared to staff responsibilities).
6____Our organization's board has established clear performance standards and monitoring techniques for lead staff.
7____Our organization's staff and volunteers participate in decision making processes.
8____Our organization's staff take responsibilitity for implementing operational plans.
9____Our organization's staff make day to day management and organizational decisions.
10____Our organization's board evaluates/assesses the performance of lead staff.
11____Our organization's board takes corrective action when lead staff do not fulfill responsibilities.

# Appendix B. Using the OAT Results

## A. Assessment Question Responses

All assessment statements in this OAT are written in a **positive format.** This means that statements that receive SA (strongly agree) and A (agree) are areas that an individual or an organization is doing well in. SD (strongly disagree) and D (disagree) statements would indicate areas in need of attention and potential action.

EE organizations scoring well on many OAT questions are likely to be models of sustainable organizations. However, to be truly sustainable, these characteristics must be maintained over time as staff and members change. Regular use of organizational assessments will support and guide the efforts of EE organizations as they strive toward their goals and achieve sustainability.

### Steps in Compiling Assessment Question Responses:

1. **Select an individual (or several) who will be responsible for collecting and compiling the results.** This can be someone from within or outside of the organization. Persons completing the OAT may choose to submit their responses anonymously.

2. **Tally responses to all statements.** We recommend a computer spreadsheet program as an efficient way to do this, although it can also be done by hand or in a word processing program. **A tally sheet can be downloaded from NEEAP's website (http://neeap.uwsp.edu).** For each assessment statement, record the total # of times each choice was selected (SD through SA). *(Ex. Nine individuals answered statement #2. Three individuals recorded SA. Five individuals recorded A, and one individuals recorded U. Indicate this in your spreadsheet. Refer to the sample table on page 58.)* Averages can also be recorded, but the previously suggested method provides richer information. Disagreements in responses to questions can be lost in an average.

3. **Categorize the results.** Create three results groups: 1) statements which receive a majority of SD's and D's, 2) statements which receive a majority of A's and SA's, and 3) statements which receive a majority of N/A's. Include category headings and the actual statements. It is up to your organization to set the number of responses that constitute a "majority" *(See page 59)* .

Sample Results Tally Sheet-Step #2

| | Response Choice | | | | | | |
|---|---|---|---|---|---|---|---|
| **Item** | **SD** | **D** | **U** | **A** | **SA** | **N/A** | **Other** |
| **Organizational Culture** | | | | | | | |
| *My Work* | | | | | | | |
| 1 | | | | 1 | 8 | | |
| 2 | | | 1 | 5 | 3 | | |
| 3 | | | 1 | 5 | 3 | | |
| 4 | | | 2 | 3 | 4 | | |
| 5 | | | 3 | 4 | 2 | | |
| 6 | | | 1 | 5 | 3 | | |
| 7 | | | | 3 | 6 | | |
| 8 | | | 2 | 5 | 2 | | |
| *Our Organization* | | | | | | | |
| 1 | | 1 | 2 | 5 | 1 | | |
| 2 | | 1 | 3 | 4 | 1 | | |
| 3 | | | | 5 | 4 | | |
| 4 | | | 3 | 4 | 2 | | |
| 5 | | 3 | 4 | 2 | | | |
| 6 | | | 1 | 6 | 2 | | |
| 7 | | 2 | 5 | 3 | 1 | | |
| 8 | | 5 | 2 | 4 | | | |
| 9 | | 4 | 1 | 2 | 1 | | |
| 10 | | 2 | 5 | | | | |
| 11 | | 1 | 2 | 4 | 1 | | |
| 12 | | | 2 | 5 | | | |
| 13 | | | | 5 | 2 | | |
| 14 | | | 1 | 3 | 5 | | |

4. Provide the results from step #3 above to all individuals who were asked to complete the OAT. It is necessary to provide this information prior to the group sharing/prioritizing meeting.

## Sample Category Results Sheet-Step #3 :

**OAT Responses: *Majority (5 or more out of 9)= Strongly Agree (SA) or Agree (A)**

| **Organizational Culture** | # |
|---|---|
| *My Work* | |
| 1 Strengthening our organization's capacity to operate efficiently and effectively is one of my goals. | 9 |
| 2 My leadership sets positive examples for others. | 8 |
| 3 I view all of my actions within the organization as learning opportunities. | 8 |
| 4 I am motivated to use all of my talents and energies in my work. | 7 |
| 5 I agree with the expectations our organization has of me. | 6 |
| 6 I care about how my work affects others in this organization. | 8 |
| 7 My relations with others in our organization are honest, open, and comfortable; not formal. | 9 |
| 8 I let others in our organization know when they are doing a good job. | 7 |
| *Our Organization* | |
| 1 I let others in our organization know when they are doing a good job. | 6 |
| 2 Our organization sets realistic work goals for all organizational leaders. | 5 |
| 3 Our organization has agreed upon values and beliefs that guide the organization's actions. | 9 |
| 4 Our organization stresses good relationships between people as much as it does project completion. | 6 |
| 6 Our organization believes that involving the general membership in organizational decision-making is very important. | 8 |
| 11 Our organization encourages constructive criticism. | 5 |
| 12 Our organization attempts to strengthen my capacities and encourages my professional development. | 5 |
| 13 Our organization lets me know when I am doing a good job. | 7 |
| 14 Our organization has the collective power to achieve its goals | 8 |

**OAT Responses: *Majority (5 or more out of 9)=Strongly Disagree (SD) or Disagree (D)**

| **Organizational Culture** | # |
|---|---|
| *Our Organization* | |
| 8 Our organization is innovative in its decision making. | 5 |

**OAT Responses: *Majority (5 or more out of 9)=Not Applicable (N/A)**

| **Organizational Culture** | # |
|---|---|
| None | 0 |

*Each organization should determine how to define "majority" for itself before compiling results.

## B. "Personal Prioritization of Needed Action" Responses

The "Personal Prioritization of Needed Action" sections may be used in group discussion. Individuals can record their thoughts on priorities and potential action steps for both themselves and the organization. Decide if your organization wants to examine i ndividual responses to the "What I need to work on " or "What our organization needs to work on" pages in addition to the assessment question results. If so, have the person(s) tallying the assessment question results collect copies of these sections from each person who used the OAT. Create a summary report of individual comments, grouped according to the major sections of the OAT and distribute to all participants prior to the group sharing/prioritization meeting.

## C. Group Sharing/Prioritization Meeting

By identifying potential need for change and by using the OAT, a large part of the organizational assessment process has been completed. The next part of this process is to achieve consensus on strengths, weaknesses, and change priorities of your organization. This can be achieved at a facilitated sharing/prioritizing meeting. Ample time (at least 4 hours) should be set aside for this process.

Choose a facilitator, preferably, someone who has not completed the OAT for your organization, and work with this individual to identify or design the facilitation processes which suit your organizational needs best. The person should be capable of being impartial, and should be responsible for recording information exactly as stated by participants in the process. *Processes such as the Adapted Nominal Group Technique may prove helpful for prioritizing. Refer to the "Recommended Resources" (p. 62) for information on facilitation techniques. NEEAP has developed an EE Barter Network to help identify individuals with facilitation and organizational development skills to help with this process.*

Provide an opportunity for an open, facilitated, discussion of the results. Identify and celebrate successes. Identify and discuss areas of concern. For questions that recieve a majoity of N/A's, do a "group check" to be sure that these items do not apply to your organization.

## D. Develop/Implement an Organizational Development Plan

*If your group agrees to move forward toward organizational change and enhancement, an action plan for organizational development will be needed.*

**Action planning includes:**

1) listing and prioritizing needs
2) identifying and listing objectives
3) developing a written plan of action

**We recommend that an action plan:**

1) list priority objectives
2) list implementation steps
3) list persons responsible for each action step
4) include a timeline
5) have a budget

The first step, identifying priority areas for action, takes place during "C. Group Sharing/Prioritizing Meeting" (p.60). Once priority objectives have been determined: 1) identify and evaluate alternative strategies to achieve objectives, and 2) incorporate the selected strategies into the organizational action plan. These two steps will require a time commitment beyond the original four hours suggested for prioritization and would most likely occur in a series of follow-up meetings unless the OAT is being used as a part of an organizational development retreat.

## E. Monitoring Organizational Development

Once the implementation process begins, it is important to regularly evaluate the organization's progress towards its goals. Identifying individuals or a committee to monitor and report on the progress of this process can be an effective strategy and is highly recommended.

### *Sample OAT Process Timeline

| | |
|---|---|
| Discuss use of OAT | February 1 |
| Distribute OAT | March 1 |
| Collect OAT Responses | April 1 |
| Distribute OAT Results for Review | April 15 |
| Conduct a Group Sharing Prioritizing Meeting | May 1 |
| Develop an Organizational Development Plan | May 1 or June 1 |
| Board Approval and Plan Implementation | Next Board Meeting |

# Appendix C. Recommended Resources

The following resources are all excellent supplements to this tool, and many were used as reference materials. Visit the organizational development (OD) section of NEEAP's website (http://neeap.uwsp.edu) for an extensive listing of top OD books and websites.

Bader, Barry S. (1991) *Planning Sucessful Boad Retreats.* NCNB Governance Series Booklet #10. $12. NCNB, 1-800-342-5709. Discusses successful **retreat elements:** committment, objectives, logistics, agenda. Planning checklists and questions.

Bay Consulting Group. *Lessons Learned Toolsite.* Free. Available: http://www.arts.endow.gov/pub/Lessons/BODY1.html. Comprehensive guide to **organizational planning.** Topics such as: designing **missions and visions, assessment planning, group facilitation techniques, managing conflict,** others...

Bryson, John. (1995). *Strategic Planning for Public and Nonprofit Organizations.* Jossey-Bass. Many examples of sucessful and unsuccessful strategic planning practices. Presents a "Strategy Change Cycle" model for strategic planning.

Byrd, Norma J. (1998) *The Nature Center Handbook-A Manual of Best Practices from the Field.* Association of Nature Center Administrators. 1-800-490-2622. Highly applicable to EE organizations. Based on current research/practices and the experiences of professional nature center administrators. Case studies, recommended practices, references, and resources on **leadership, strategic planning, and board development, staff, and fund development.**

Carver, John. (1997) *Boards that Make a Difference.* Jossey-Bass. Reviews effective policies, meeting **structures,** committee assignments, and **board-management relationships.** Presents a "policy governance" model.

Citizen Forestry Support System. *Tip Sheet Packet.* 1-800-323-1560. Topics include: **organizational assessment,** developing **media** savvy, **strategic and operational planning,** avoiding burnout, **board roles** and responsibilities, **fundraising,** starting a nonprofit, **volunteers,** effective **meetings.**

Doyle, Michael and Straus, David. (1976) *How to Make Meetings Work.* The Berkley Publishing Group: New York. 212-951-8891. This "classic" is full of background information, **facilitation models,** tips, and insights that will help you improve your **meetings.**

Drucker, Peter F. (1993) *The Five Most Important Questions You Will ever Ask About Your Nonprofit Organization-Participant's Workbook.* Jossey-Bass. Guides organizations through a series of open-ended questions which all organizations should address when participating in a **strategic planning** process.

Fitzpatrick, Joyce L. (1993) *The Board's Role in Public Relations and Communications.* NCNB Governance Series Booklet #15. $12. NCNB, 1-800-342-5709. Provides reasons for **communicating,** knowing your audience and what they think, improving and addressing communication in strategic plans.

Kilmann, Ralph H. (1989) *Managing Beyond the Quick Fix-A Completely Integrated Program for Creating and Maintaining Organizational Success.* Jossey-Bass. Provides an in-depth, sequential framework for facilitating **organizational assessment, implementing change programs,** and managing success. Addresses **culture, management skills, team building, strategy-structure, and rewards.**

Kotter, John P. (1990) *What Leaders Really Do.* Harvard Business Review. May/June, 103-111. Discusses the difference between **management and leadership**, the significance of both to nonprofit organizations, and methods for developing a **culture** of leadership.

Merriman, Tim. (1994) *The Action Agenda.* Directions, 4(1), 1-3. Association of Nature Camp Administrators. 1-800-490-2622. Suggests structuring **meetings** around action, discussion, and information items to increase their effectiveness.

Nason, John W. *Board Assessment of the Chief Executive.* (1990) NCNB Govenance Series Booklet #4. $12 NCNB, 1-800-342-5709. Simple, yet comprehensive guide for **assessing nonprofit executive directors.**

Owen, Harrison. (1994) *The Millennium Organization.* Abbott. 301-469-9269. Discusses ways of incorporating "Millennium Organization" **(successful organization) characteristics:** celebration of life, open systems, high learning, high play, appropriate structure and management, genuine community, spirit.

Ruskey, Abby and Wilke, Rick. (1994). *Promoting Environmental Education-An Action Handbook for Strengthening EE in Your State and Community.* New Hope Graphics: Amherst, WI. Provides organizational development information in the context of building comprehensive state and local level EE programs This is the first, and still the most comprehensive book on EE capacity building.

Sashkin, Marshall. (1995) *The Visionary Leader-Leader BehaviorQuestionnaire-Self.* HDR Press. 1-800-822-2801. Fifty item questionnaire/booklet for individuals and organizations. Provides information on visionary **leadership** behavior, characteristics, and vision in building **organizational culture.**

Senge, Peter M., Kleiner, Art, Roberts, Charlotte, Ross, Richard B., and Smith Bryan J. (1994) *The Fifth Discipline Fieldbook, Strategies and Tools for Building a Learning Organization.* Doubleday. Collection of tools, methods, case studies, reflections, guiding ideas, and exercises for **building effective organizations.**

Stoesz, Edgar, and C. Raber. (1997) *Doing Good Better: How to Be an Effective Board Member of a Nonprofit Organization.* Good Book. Addresses many board concerns. Highlights include: **leadership, meetings, developing board proposals, money, conflict, leaving the board, liability,** checklist for **orientation of board members,** and **board self assessment** of key responsibilities.

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Wheatley, Margaret J. (1994) *Leadership and the New Science-Learning About Organization from an Orderly Universe.* Berrett-Koehler. 801- 377-2996. Presents the "new sciences" (physics, chaos theory, biology) perspective on organizational develop ment. Addresses change, **control, structure,** flexibility, **planning,** and innovation.

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## Areas Addressed by the OAT©

- Board Roles & Responsibilities
- Coaching/Mentoring
- Communication
- Conflict Management
- Cultural Competency/Diversity
- Evaluation
- Financial Responsibilites/Practices
- Governance/Principles of Operation
- Governing Structure
- Group Process & Decision Making
- Leadership/Followership
- Managing Activities
- Meeting Management
- Organizational Culture
- Problem Solving
- Rewards
- Stakeholder Relations
- Strategic Planning/Visioning
- Team Building
- Volunteers & Membership

*It is strongly recommended that the OAT be used in combination with the organizational development services of the National EE Advancement Project (NEEAP) or other EE capacity building organizations.*

### *Here's what EE association leaders have to say about the OAT:*

*Comments from Board Members of the MN Association for Environmental Education:*
"It' suprising to me how nobody had thought of these things before..." "I really see [the OAT] as an incredible tool to help us narrow down and prioritize where we need to be going in setting goals..." "I think probably the most useful part of the OAT is simply the learning that goes on, of knowing that these kinds of things are out there..." "It really is a valuable assessment tool for boards...."

*Comments from Board Members of the Environmental Education Association of IL:*
"It was organized in such a way that it is simple and it addresses both personal aspects of asssessment and organizational..." It's probably the one tool that I'm aware of that's out there, that's first of all, geared toward environmental education [organizations]..." "It gives us a really strong tool to be able to work on and build capacity in our organization..."

*Comments from Board Members of the MO Environmental Education Association:*
[The OAT] helped solidify where we are and what we need to do..." [The OAT] gave me a number of insights to guide my work as president..." "It is an excellent retreat tool..."

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