Merging Organizational Development and Social Work Practice to Mentor Organizations to Stability and Sustainability: The Resource Mentoring Project

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Merging Organizational Development and Social Work Practice to Mentor Organizations to Stability and Sustainability: The Resource Mentoring Project

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The importance of building organizational capacity in community and faith based organizations is critical. Typically, these organizations serve the most vulnerable people in the poorest neighborhoods (Lewis, 2003). In the past decade, there has been a concentrated effort by foundations and government-funded initiatives to provide financial support to faith-based and secular grassroots organizations, so that they can continue to respond to the needs of their communities (Blumethal, 2003; Lewis, 2003; Wing, 2004). Throughout the Mid-Atlantic region alone, hundreds of new organizations spring up each year to deliver essential programs and services. Yet despite need and support, at least that many go out of existence, often causing confusion and disruption of human services in the communities they serve.

Much of this organizational "churn" can be traced to how organizations understand themselves; specifically, that most organizations think of themselves as programs rather than organizations. Consequently, most (if not all) of their energies and resources go to delivering programs and not establishing stable infrastructures (Letts et al 2003). Many of these organizations are riddled with infrastructure challenges that imperil survival, including a lack of strategic planning, information management, program performance management, resource acquisition, staff development and retention, and efficient board governance processes (Blumethal,

2003; Hopkins & Hyde, 2002; Kluger & Baker, 1994; Lewis, 2003; Patti, 2000).

Concerned by the number of organizations struggling to survive, the Social Work Community Outreach Service (SWCOS) at the University of Maryland, School of Social Work conducted an exploratory research project in which a cross-section of grassroots agency directors in Maryland were interviewed (Busch, 2002). All interviewees agreed that:

- At some point in its life cycle, a grassroots community organization will encounter issues and needs that cannot be handled with internal resources;
- While there is a wealth of resources available to help grassroots community organizations, there is no single provider that can meet all the needs;
- It is potentially confusing for grassroots community organizations to find the right resources they need because of their program-driven foci and subsequent lack of understanding regarding organizational capacity building issues;
- Assessments would be beneficial for grassroots community organizations to help them define the extent of their need;
- A city (such as Baltimore) would greatly benefit from a single point of contact for grassroots community organizations to help guide them to the resources best suited to solve their particular problems; and

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- Having a "mentor" to help grassroots community organizations build capacity would make it easier for them to access the most productive forms of assistance.

To address these needs and concerns, The Resource Mentoring Project (RMP) was developed in Fall 2002. Under the auspices of the University of Maryland, School of Social Work – Social Work Community Outreach Service, and initially supported by Associated Black Charities and Coppin State College Department of Social Work, the purpose of the RMP is to facilitate an empowered model of capacity building in community and faith based organizations (CBO/FBO's). An organization that gains and maintains its health has a better chance of long-term survival, which in turn results in healthier communities.

The prevailing perception about capacity building in nonprofits is that the efforts and resources expended do not necessarily lead to lasting organizational changes or improvements (Blumenthal, 2003; Lewis, 2003; Wing, 2004). Further, there are growing concerns that much of the research on capacity-building strategies and organizational change focuses primarily on larger nonprofits rather than smaller, community and faith-based agencies, and that the instruments used to measure capacity-building efforts are too abstract and inconsistent (Bordia et al., 2004; Cunningham et al., 2002; Sussman, 2003). In addition, time frames for evaluating organizational improvements often are too short. Agencies engaged in capacity building efforts require a minimum of one year to demonstrate effective change (Wing, 2004).

To address some of these concerns, this article describes the Resource Mentoring Project's capacity building model and then provides evaluative data of the RMP's first initiative. The Resource Mentoring Project signifies a new model of social work with organizations, as well as an innovative form of a university-community partnership. Looking at the CBO/FBO as a "client," the Resource Mentoring Project works with the organization to help it assess its organizational capacity as well as the depth and breadth of its need. The RMP then connects the CBO/FBO to the appropri-

ate technical assistance provider that will help meet that need. In a very real way, the RMP provides case management for organizations. Through these processes, the RMP also acts as a conduit for university and environmental resources that are made available to vulnerable grassroots organizations.

The Resource Mentoring Project

In October 2002, Associated Black Charities (ABC) was awarded a Compassion Capital Demonstration Fund (CCDF) grant, renewable each year for a total of three years. Under this grant, ABC then "re-granted" money to Maryland community and faith based organizations specifically to help them build their organizational capacities. During the first two years of the CCDF, ABC awarded these grants through a competitive process. The Resource Mentoring Project partnered with ABC to deliver one-on-one mentoring to 28 grantees in an effort to help them understand differences between good programs and healthy organizations, and then develop stable infrastructures and long-term sustainability plans.

Each grantee was asked to participate in the RMP capacity assessment process to identify areas in which capacity could be built and to establish a base line against which to measure progress and change. Working from an organizational empowerment model (Gutierrez, GlenMaye & DeLois, 1995), the two-step "facilitated self assessment" process was created, field-tested and fine-tuned. The RMP philosophy is that in order to build capacity the CBO/FBO should know specifically where they have opportunities to make the greatest impact on their organization's ability to sustain itself. The facilitated self-assessment process illuminates those areas of opportunity and provides a way to focus discussions and efforts.

First, the executive director, board president and staff member in each grantee organization were asked to complete an Organizational Capacity Assessment tool (Lusthaus, Anderson & Murphy, 1996) without conferring with each other. RMP staff aggregated the information from this assessment and produced an initial organizational profile for reflection and discussion. The RMP then facilitated a

meeting during which the assessors reported to each other his/her perceptions about the current capacity of the organization in a number of key areas, such as vision and mission, planning, program development and performance, financial management, leadership, board governance, human resources, and technology. RMP staff found that this often was the first time that organizational members heard each other's perceptions or beliefs about organizational capacity (in fact, it typically was the first time they had engaged in any discussion on organizational issues). This process helped organizations focus on their strengths and weaknesses more broadly as an organization instead of taking a more narrow programmatic view. Next, based on the profile and discussions, the RMP helped each client organization develop an action plan with specific capacity building steps grounded in the assessment information.

Following the facilitated self-assessment process and action plan development, the RMP implemented the "mentoring" stage of its organizational casework model. The RMP staff researched the extensive resources available throughout Maryland in an effort to create as wide a network of "technical assistance providers" as possible (for this database, go to www.umaryland.edu/rmp/). This network includes non-profit organizations, for-profit companies, individual consultants, institutions of higher learning, and volunteer organizations—essentially anyone who could assist community organizations in building their capacities. The RMP then brokered relationships between the organization and technical assistance providers who "mentored" the CBO/FBO in meeting their organizational capacity building goals.

For Year 3 of the project, ABC and RMP decided, as partners, to review all 28 grantees and select those organizations that had demonstrated a willingness to expend the effort to truly build their organizational capacities. From this review, 14 organizations were invited to participate into the third year with the following stipulations: ·

- They would partner with the RMP to custom design capacity building projects to further the work they had already accomplished, and

- They would be comfortable developing open and "transparent" lines of communication through the RMP to ABC as they were mentored further during their capacity building projects.

Upon acceptance of this invitation, RMP worked closely with the 14 organizations, reviewing their efforts at capacity building to date and custom designing capacity building proposals intended to make a deeper impact on the organization. These proposals were then budgeted with the help of RMP staff and submitted to ABC for approval. It should be noted that at every step along the way RMP and ABC staff's were in constant communication so there would be "no surprises" when the final proposals were submitted.

Once ABC approved the proposals, the grantees had the choice of continuing to work with their current technical assistance providers/consultants or the RMP could broker relationships with new providers/consultants. In several cases, where the organization was working on more than one project, they chose to work with their current provider/consultant for part of the process and bring in a new provider/consultant for the rest.

While the organizations were working on their projects, RMP staff was in contact at least once a week offering counsel or a "friendly ear" to encourage and support organizational members. RMP staff was also in contact with the technical assistance providers, working with them to help the client organizations understand their obligations as to the timeliness of the work *they* must do. This could be frustrating to the client organizations because, for example, it was difficult to control the schedule of the board. In response, RMP staff was available to meet with the board, and explain the process or reinforce the work being done with the technical assistance providers. In all cases, RMP staff emphasized that the organizational casework model did not mean that they were "consultants," but rather the facilitators of and counselors for both the client organization and technical assistance providers. This partnership proved helpful on many occasions. When either the organization or the technical assistance provider experienced difficulty

moving the project forward, RMP staff intervened to keep the project on track and help the organization focus on the outcomes in the action pan.

At the end of the third year, 12 grantees were asked to complete a post self-assessment using the same Organizational Capacity Assessment tool they used in the beginning (the remaining two agencies were not able to complete their projects or non-compliant). Two case studies (see Appendix) briefly illustrate the RMP organizational casework model and its impact on the organizations.

Evaluation of the RMP

Two university faculty members and three doctoral students evaluated this initial effort by the Resource Mentoring Project. The primary purpose of the evaluation was to determine whether this organizational casework approach improved the capacity and viability of the client agencies over time. The organizational capacity self-assessments that were completed by agency members at the beginning of the project, referred to as Time 1, were used to establish organizational capacity baselines (n=16 agencies). These same agency members completed the capacity assessment tool again about 12 months later, referred to as Time 2. Finally, agency members for 12 of the organizations completed the capacity assessment tool again 18–24 months later, referred to as Time 3. The capacity assessment data were entered into a database for descriptive and bivariate analysis. Thus, organizational progress and change could be tracked over time. Additionally, the research team examined the action plans and matched them with the capacity assessment data from the agencies, as well as written observations and documentation from the RMP staff, to determine if each organization was able to build capacity in the areas identified in their action plan.

The organizations involved in the RMP included 19 community faith-based organizations and nine community secular organizations. All of the organizations have a small number of staff. Within these agencies, organizational members completed 166 Organizational Capacity Assessment tools. Thirty-eight percent (63) of the assessments were completed by Board members, 32 percent (53) by

Executive Directors, and 30 percent (50) by staff members. The gender of the respondents included 43 percent men and 57 percent women. The majority (69 percent) of the respondents were African American. Thirty-six percent of respondents held a college degree, 37 percent held a graduate degree, and 18 percent had a doctorate degree. Almost half of the respondents (44 percent) had worked in the social service field for more than 10 years.

Measures

The organizational capacity assessment tool was adapted from the "Institutional Assessment—A Framework for Strengthening Organizational Capacity" (Lusthaus, Anderson, & Murphy, 1996) and the Maryland Association of Nonprofit Organizations, "Standards of Excellence." Items in the assessment tool were related to mission and goals, structure, program strategies, planning and development, human resources, funding and technological literacy. The individual assessment tool items were combined into 11 scales that captured each of the various conceptual categories in the instrument. The statistical reliability of each of these scales were tested using Cronbach's index of internal consistency. All assessment tool items were measured using a four-point Likert-like scale that reflects the degree of capacity currently in place from 1 (No Capacity) to 4 (High Degree of Capacity) with higher scores indicating higher levels of each construct:

- *Hopes and Dreams* was measured by four items that asked respondents about the clarity of the organization's vision, mission, and goals, $a = .87$.
- *Programs* was measured by four items related to the development, growth and relevance of agency programs, $a = .85$.
- *Performance Management* was measured by two items about program performance and the measurement of outcomes, $a = .86$.
- *Planning* was measured by six items related to strategic, financial, operational, program, and human resources planning, $a = .89$.
- *Funding* was measured by four items related to funding diversification and financial operations and management, $a = .70$.

- *External Relations* was measured by four items related to relationships with the local community, public relations and marketing, partnerships with other organizations, and the ability to influence the system, $a = .82$.
- *Board Governance* was measured by four items related to board involvement, competence, and operations, $a = .83$.
- *Leadership* was measured by seven items related to the leader's passion, skills, experience, analytical and financial ability, management style and personality, $a = .93$.
- *Staffing* was measured by four items related to the adequacy and levels of management, staff and volunteers, $a = .74$.
- *Technological Literacy* was measured by 12 items related to access to technology, technological planning and policies, management information system, and email, internet and telecommunications system, $a = .89$.
- *Organizational Structure* was measured by seven items related to organizational design, divisions, processes, and shared references, $a = .82$.

Results

Capacity Assessments: First, an overall comparison of capacity assessment data for 28 agencies, as reported by organizational members, at Time 1 and Time 2 (approximately 12 months later) revealed that most of the organizations appeared to have marginally improved capacities, based on somewhat higher mean scores for many of the scaled variables (See Table 1). Using t-test analysis, the data indicated that the organizations, overall, significantly improved capacity at Time 2 in certain areas, including *performance management* (t (161) = -1.98, $p < .05$), *external relations* (t (161) = -2.27, $p < .05$), and *technological literacy* (t (158) = -5.23, $p < .01$). There were no significant differences in organizational members' assessments of organizational capacity at Time 1 and Time 2 by gender or position (board, leader/ director, staff).

Table 1: Overall Mean Scores for Organizational Capacity Assessment at Time 1 and Time 2 (N = 28 Agencies, 84 Respondents)

Organizational Capacity	Time 1 M	SD	Time 2 M	SD
Hopes and Dreams	2.97	.67	2.98	.71
Programs	2.84	.69	2.87	.64
Performance Management	2.44	.77	2.70*	.83
Planning	2.62	.63	2.64	.64
Funding	2.34	.58	2.42	.59
External Relations	2.40	.64	2.62*	.66
Board Governance	2.40	.70	2.50	.66
Leadership	3.18	.53	3.30	.58
Staffing	2.62	.65	2.66	.72
Technology	2.16	.63	2.74**	.78
Organizational Structure	2.78	.59	2.83	.60

* $p < .05$; ** $p < .01$

Next, an overall comparison of capacity assessment data for 12 agencies (that continued to work with RMP beyond 12 months) at Time 1 and Time 3 (approximately 18-24 months) revealed both higher mean scores for many of the scaled variables and statistically significant improvements in capacity in several organizational areas (See Table 2). Using t-test analysis, the data indicated that the organizations, overall, significantly improved capacity at Time 3 in *hopes and dreams*—clarity of vision, mission and goals (t (61) = -2.91, $p < .01$), *planning* (t (61) = -2.23, $p < .05$), *performance management* (t (60) = -1.96, $p < .05$), and *technological literacy* (t (60) = -3.84, $p < .01$). Again, there were no significant differences in organizational members' assessments of organizational capacity at Time 1 and Time 3 by gender or position (board, leader/director, staff).

Table 2: Overall Mean Scores for Organizational Capacity Assessment at Time 1 and Time 3 (N = 12 Agencies, 36 Respondents)

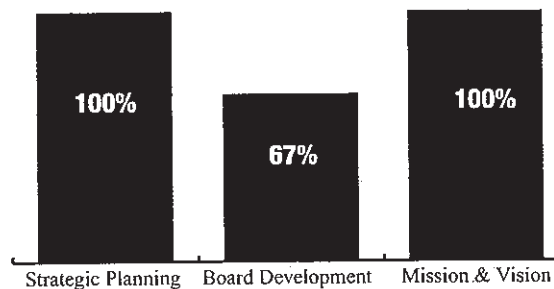| Organizational Capacity	Time 1		Time 3	
	M	SD	M	SD
Hopes and Dreams	2.93	.66	3.37**	.53
Programs	2.63	.73	2.85	.69
Performance Management	2.28	.73	2.67*	.83
Planning	2.48	.68	2.80	.65
Funding	2.23	.66	2.37	.63
External Relations	2.32	.67	2.55	.66
Board Governance	2.33	.63	2.58	.70
Leadership	3.14	.58	3.07	.81
Staffing	2.51	.68	2.46	.81
Technology	1.97	.64	2.60**	.65
Organizational Structure	2.65	.63	2.86	.64

* $p < .05$; ** $p < .01$

Action Plans—Areas of Focus: An examination of the action plans, capacity assessments and RMP documentation for the 16 organizations involved with the RMP for 12 months revealed that of the 7 agencies that focused on building capacity around strategic planning from Time 1 to Time 2, 4 (57 percent) increased their capacity through a strategic planning process. Of the five agencies that focused on marketing efforts, four (80 percent) increased their marketing capacity. Four of the agencies worked to build capacity around their boards and three (75 percent) of those agencies were successful in developing and improving their boards (see Figure 1).

Figure 1: Increases in capacity in area of focus (n = 16 agencies

Strategic Planning   Marketing Effort   Board Development
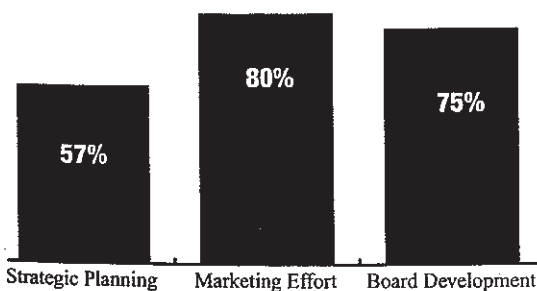
All of the 12 organizations involved with the RMP for 18–24 months focused on building capacity around strategic planning and all 12 increased their capacity in this area of focus. Additionally, nine of the agencies also worked to build capacity around their boards. Of those six, (67 percent) substantially increased the capacity of their boards. Four (100 percent) of the agencies that planned to develop a shared vision and mission did so (see Figure 2).

Figure 2: Increases in capacity in area of focus (n = 12 agencies

Strategic Planning   Board Development   Mission & Vision

There are limitations to this evaluation of the RMP organizational casework approach because of the small sample and agency members' somewhat subjective assessments and interpretations of organizational capacity. Their responses are based on their perceptions and experiences in the agency and might not have been characterized accurately. However, attempts were made to counter this as much as possible by gathering additional information from the organizational action plans and RMP staff who facilitated and brokered the capacity building efforts with the mentors.

Discussion

The third year (2005) of the Compassion Capital Demonstration Fund was a breakthrough year for the grantees. Not only did the organizations report some significant growth in organizational capacity in certain areas, but also the RMP staff observed a noted shift in the grantees' understanding of the importance of *organizational* development work.

Executive directors were heard to discuss capacity building in terms that indicated that they truly understood the import of what they were saying. In several cases, they spoke passionately about the importance of not only completing a strategic plan, but also of engaging their boards in executing that plan. Taken together, the data and observations indicate that the grantees comprehend the difference between good programs and healthy organizations, and that they are working diligently to create stable infrastructures for themselves. As a result, the chances are very good that these organizations will be able to sustain themselves, delivering their needed programs to the community over the long haul.

While these efforts yielded positive outcomes for the grantees, the work of the RMP during the past three years also suggests several important lessons for organizational development. First, there is a "*semantic misconnect*" between what government agencies and some private funders mean by capacity building and what community-based organizations understand it to mean. The funders' definition focuses on developing the core infrastructure components of the organization, while the organization focuses on increasing its program capacity (e.g. getting more children in their after school program, helping more families with food assistance or getting more people off the streets and into shelters). While these are desirable outcomes, they can only be achieved if an organization is healthy and efficient in its infrastructure. Because this connection is not fully understood by many CBO/FBO's, the initial effort at organizational capacity building can be frustrating. Instinctively, the CBO/FBO tries to bend the effort to support programs. It is important that an educational component be included at the start of a capacity building effort, to help organizations see the difference between work needed to sustain a program and work needed to sustain an organization.

Second, regarding organizational capacity building, many grassroots organizations "don't know what they don't know." Therefore, early in the relationship between organizations and consultants (mentors), the tone of the interaction is timid and tentative. During this "feeling out" process, the small gains that are made by the organization increase its confidence in performing activities; as the organization garners more successes from its actions, its confidence and self-efficacy increases. A critical part of this process is helping organizations become self-reflective and constructively critical which is vital to the development of their organizational identities. The self-assessment processes promote positive growth in organizations that is essential in developing strategies to address and achieve their mission and vision. This organizational learning curve needs to be understood and anticipated by those parties that are assisting the effort.

Third, organizations, like human beings, are unique unto themselves. To get the best results each must be approached from where *they* are. Therefore, there is no one solution to the organizational capacity building issue that fits all organizations. For example, the effort at strategic planning could result in totally different processes for two different organizations. Also, just supplying technical assistance through workshops and seminars is not enough to help an organization. Since CBO/FBO's may be in different stages in their development, some may not know what to do with the information. To be the most productive, technical assistance must be applied to the specific needs of the organization on a one-on-one basis at the time they need it. As organizations become more self-reflective, they are able to communicate their needs for assistance in a more focused manner. In essence, they know what they don't know and are able to be more precise in their requests for assistance.

Finally, it is difficult to assure a positive organizational capacity outcome within a twelve-month time frame. Organizations learn at different speeds, with some needing much more time to understand the various organizational development processes. However, patience can be rewarded, with even the slowest organization making breakthroughs that lead to stability.

Working from an empowerment perspective and applying social work principles to organizational capacity interventions can move organizations to

much deeper understandings of the importance of *organizational* capacity building efforts, which can then continue over time. The result is that they build capacity to deliver meaningful programs to their communities over a long period of time.

There have been a variety of approaches to enhance the health of the grassroots nonprofit sector, yet the RMP's "organizational casework" approach is innovative. While assessment and resource matching for nonprofit programs exist, the RMP is unique because it focuses on the total organization (not just a program or service), provides a comprehensive intervention plan, and features a mentoring component in the capacity building process. By incorporating the lessons learned from the Resource Mentoring Project, and conducting evaluative research in other communities, universities in partnership with non-profit agencies can effectively facilitate capacity assessments, design change models, and promote mentor matching that will help sustain multi-layered and comprehensive organizational development.

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Appendix

Case Examples of Growth in Capacity

The following accounts suggest how two grassroots organizations benefited from the RMP organizational casework approach.

Kunta Kinte-Alex Haley Foundation

The Kunta Kinte-Alex Haley Foundation KKAH was founded in the early 1990s with the mission of spreading Alex Haley's vision of a world that celebrates ethnic diversity while honoring mankind's common, universal experiences and building mutual respect. The organization's founding project was the creation of a memorial to be placed at the City Dock in Annapolis. This project carried with it many political pitfalls and took much of the organizational energy from its founding through to the seven years it took to bring the memorial to life. The memorial was dedicated in the spring of 2002, and at that point all of the energy seemed to go out of the organization.

When the organization became a client of the Resource Mentoring Project in the Fall 2002 it seemed to be floundering, with a loss for direction and a nearly burned out board. An in-depth organizational capacity assessment identified that the organization no longer had a clear vision for itself. At the first meeting, RMP and organizational staff discussed whether the organization had in fact accomplished its mission and should close its doors. The response was a firm "no, we still have work to do."

The RMP brokered a relationship with a consultant for the organization and they embarked on a strategic planning effort that included a visioning process. The going was slow in the beginning, and board participation was spotty. One of the issues that was identified was the board's habit of "rubber stamping" decisions of the executive director and supporting his efforts, rather than initiating efforts of their own or following through on some commitments. This became frustrating for some board members and staff, and contributed to the organization's drift.

On-going discussion with the staff and board members, made it evident that they had not internalized the real value of the organizational capacity building efforts. Instead, it seemed to them as though it was an extra effort with no apparent benefit. RMP staff worked with the organization's staff and board to gently but persistently reinforce the value of their efforts. Gradually, the executive director came to realize that he was heading an "organization of personality" not a "mission driven" organization. The staff began to consider the organizational impact of their program decisions. At a lunch meeting, the administrative assistant commented on the importance of strategically looking at the results of a project they were working on rather just concentrating on the project as an end in itself. She went on to discuss the impact that their decisions had on the organization. Then at a board meeting, RMP staff observed the executive director seriously engaging various board members in the decision making process. He also encouraged them to participate in a strategic planning committee as a way to help the organization move toward a "mission driven focus."

After a year of hard work, the organization developed a new vision and focus for their work. The new vision is to be the world's premier organization for African Americans and all others to come to for a fuller awareness and appreciation of their history, the universality of the human experience, and a deeper understanding of slavery and its impact on race relations in America today. This vision has led the organization to sponsor a "Reconciliation Walk," two summers of "Roots" camps, and the development of a searchable "Slavery" database. As a result of the efforts at refocusing the organization, the Kunta Kinte-Alex Haley Foundation has a new energy. The board is fully active in helping bring a new strategic plan to life, and is working with the executive director and staff to develop marketing and fund development plans.

Agape House

Agape House is an organization driven by the passion of its executive director with a mission of creating a healthy caring community where people feel respected, are fed, clothed, housed, grow in faith and gain the self esteem needed for a successful, self sufficient life. For two years, the organization has struggled with organizational capacity building issues, yet not really engaging in comprehensive organizational development processes. For example, in 2003 the organization underwent a strategic planning process, but the board did not play a very active role. Several times, the executive director commented to RMP staff that they had been in existence for almost 20 years and that "God had always provided."

Then in Fall 2004, the organization had a breakthrough. The executive director admitted to RMP staff that he did not have a real budget and had no idea how to track his income and expenses. He asked for help understanding his "business" and also agreed to try again to engage the board in developing a new vision for the organization and to truly participate in a strategic planning process.

RMP staff brokered a relationship with several consultants for Agape House. One began working with the organization on developing accounting processes and a working budget. Another began working with the board and staff to develop a shared vision and workable strategic plan. The board was engaged in the process through several retreats and one-on-one interviews. As they saw that their concerns and ideas were being taken seriously they became more committed to the process and more actively involved in the organization.

In Spring 2005, the executive director conveyed to RMP staff that he feels a new energy in the organization. He said, "For the first time I really see the board working with me, not just doing what I ask them too." He also expressed, with some pride, that they now have two working committees and a real sense that they have control of their future.