

WOMEN & EMPLOYMENT: A TIME OF TRANSITION

Final Project Report  
Community Economic Development  
New Hampshire College

January, 1989  
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A) The Problem: Women and Employment, (W&E) is a community based membership organization. Its mission is to address issues of economic equity for women through education, advocacy and social change. W&E was established in 1979 as an outgrowth of a program called Jobs for Women. Over the past ten years, W&E has developed these program areas: Jobs Development and Training, Self Employment, Development of Community Institutions and Access to Capital.

\*Jobs Development and Training seeks to assist women by working with employers and agencies to create an environment for women to find meaningful, well paying employment in the male-dominated non-traditional occupations.

\*Self Employment seeks to increase and encourage self employment initiatives among low to moderate income women.

\*Development of Community Institutions offers expertise and support to local groups throughout the state pursuing community and educational activities.

\*Access to Capital seeks to promote the access to capital by women and low income communities throughout the state.

In December of 1987, eight years after its inception W&E found itself at a crossroads. A variety of factors were changing the shape of the organization and the program work of W&E needed to be evaluated. After several years of exploring the idea of membership, the Board was moving to adopt a membership structure. Two longtime program staff recently left the organization, each for different reasons. The founder/director of W&E was being pulled in new directions and was beginning to set the stage for her

departure. The impact of these events on the organization was not yet clear. Throughout its history, W&E's Board and staff has looked at its program work critically and attempted to make adjustments accordingly. Still, a constant demand for work and limited staff resources allowed for a certain amount of inertia to pervade the organization, making change difficult.

The changes or impending changes in structure and staff provided W&E an opportunity to step back and to critically analyze itself. W&E recognized it was a maturing non-profit, community organization that needed to examine its accomplishments and project what it hoped to achieve in the future. The Board and staff of W&E was interested in developing a plan of financial diversification which would not leave it vulnerable to one major funding source. Agreeing to this as a priority, one of W&E's key funders provided funding to bring in consultants to help address this objective. In the fall of 1986 a process of long range financial and strategic planning was begun. W&E was struggling to implement the plan while at the same time respond to the changes in staffing and program needs.

The move to membership implies an aggressive plan of outreach if W&E hopes to have any members. In the past W&E relied on groups or individuals, who were contacting the organization for assistance, to support the organization. There has never been any formal relationship between the people W&E works with and the organization. The move to membership is an attempt to provide a relationship between interested people and the organization.

Development of Community Institutions is an emerging area of work for the organization. W&E has found been asked by other groups for assistance with organizational development or technical analysis. There is no set process to evaluate the involvement of the organization with another group. As with membership, Women & Employment needs to know its organizational expectations if it is to begin a more aggressive plan of outreach and relationship with others. Clearly, this is a time of change for the organization. It needs to understand its goals if it is to weather the transitions in leadership.

B) Project Goals: The primary focus of this project is to examine the process of transition to new leadership; to work with the board, and staff, both old and new, to document this process and examine its implications on the organization. It is my hope that this analysis will be of assistance to other community groups as they too, reach a transitional stage in organizational development. Women and Employment has always sought ways in which it could serve as a model, so that other organizations could learn from its mistakes or duplicate its successes.

A second focus area for the project will be on the self employment and community development work of W & E. As the staff member working in this area I am interested in developing a coherent program strategy. If possible I will begin to implement that strategy.

C) Methods: The documentation of the process has occurred in my quarterly project reports. Most of the changes have been discussed, adopted, endorsed at meetings. These will consist of weekly staff and quarterly review and planning meetings. As well as meetings with individuals. The Board involvement has occurred during board meetings, held every six weeks, and board/staff committees. Everyone, both Board and staff have been involved in annual board/staff retreat. As the retreat involves the most critical analysis of the organization an outside facilitator has been brought in to assist with this process.

The meetings of board and staff continued throughout the process of transition. The importance of these meetings was stressed to those involved. Full participation was essential for a long range plan to be implemented.

D) Results: Certainly a lot has happened at W&E in this past year. The fact that the organization remained intact while so much occurred is a testament to the planning process which was begun over two years ago. The strategic planning process was initiated as a means of evaluation and future projection. In the past this process was done on a rather informal basis; W&E listened to the women it was working with in order to gain direction for its program work. That strategy led W&E to expand to its current work with issues of self employment and access to capital. This model while effective for choosing program areas does not address changes in the internal structure of the organization. In the strategic planning process W&E undertook a self assessment of the organization by Board and staff was taken.

Other individuals and organizations working with W&E were contacted. These groups/individuals were asked about their perception of the work and effectiveness of W&E. This was all done by an outside facilitator W&E brought in to assist with the process. She met with Board and staff individually, contacted other organizations by phone, and wrote up the responses in report form. This was distributed to Board and staff prior to its retreat.

The information collected was examined at the 1987 Board/staff retreat. With this inventory of perception both internal and external, the Board and staff were equipped with information necessary to evaluate where the organization had been in the past and where it was likely to go in the future. At this meeting primary focus was given to program work. A strategy was mapped out as to how W&E would obtain these future goals. This was done very specifically in the form of measurable goals and objectives for a two year period of time. The plan for the next board/staff retreat was to examine those goals as a means of evaluation. Also in the agenda for the 1988 meeting was an assessment of the changes which had taken place within the organization.

With an initial strategy in hand, work began on its implementation. In fact many changes have occurred during this past year. Perhaps the easiest way to approach this is to list those events.

Organizational - The first piece of the organizational puzzle was to bring on the appropriate staff. In January 1988, a Job Advocate was hired to head the Jobs Development and Training project. She was brought into a project without much substance. This weakness was apparent at the Nov, 1987 retreat. A review of the project showed little measurable results from the project the previous year. Her predecessor had been let go because of unsatisfactory work. It was a difficult transition for this new staff member. She was coming into an organization which was short staffed, and looking at further transition. The new Jobs Advocate spent time with various staff members as is the style for orientation. What became clear was that no one had an idea of where the project was headed. This issue was raised at a staff meeting and while the staff was supportive, little was done to provide clarification. The result was a confusing orientation with many mixed messages, and a program being handed over with very little direction.

In May 1988, a new director was hired. This process went a bit more smoothly. Both Board and staff were involved. The entire staff and a personnel committee worked to narrow down applications. Staff met and made five suggestions which were then passed to the Board. Final candidates were selected by the Board. These individuals were interviewed by the staff, who presented the Board with a recommendation. The candidates were also interviewed by the Board and a final decision was made.

The old director had planned for a three month transition period. This allowed for some continuity and a chance for the new

director to take on responsibility slowly. This process had both positive and negative aspects. It was good for the organization to have some continuity. Thus, the long changeover period allowed the new director to ease into her duties without the feeling of being thrown to the lions. On the other hand, lines of communication were sometimes mixed as the question of who was making certain decisions became muddled. The new director is in place and continues to put effort into building relationships with Board and staff.

An ongoing project of Women & Employment is the implementation of a financial plan. One of the goals of the plan is to explore income generating ideas. In March 1987, during a planning meeting, several ideas emerged. Among them was a real estate proposal. It was suggested that W&E look for a new building which would be able to house the organization as well as rent out excess space to other groups. At present, W&E owns its own building and rents out several rooms. The building is an old house and in need of repair. The thought was W&E would acquire new space, on a somewhat larger scale. In this way, the mortgage could be subsidized by the tenants and W&E would free up income for the program which had been going to mortgage, repair and upkeep.

A significant amount of time was spent locating a building, and examining the possibilities which existed. A partner was located and further number crunching was done to see if the deal would work. A board/staff real estate committee had been set up to investigate the real estate possibilities. Staff assisted with



preparing pro formas and educating the Board. The partner met with the Board so that everyone knew who the various players were. An offer was made on a building and was rejected by the owner. So the search for a new building continues.

There was a certain amount of relief among the board members that the offer was rejected. The offer of \$490,000 seemed to stretch the Board's comfort level. Even with a partner it was a significant leap from W&E's present situation. Secondly, there was also a large amount of vacant space in the new building and no assurances of tenants to fill the space. Several lessons were learned which will assist W&E as it continues to investigate the real estate market. First, it is important that most of the board members feel comfortable with the deal and are willing to own the decision. The offer on the first building had been made with only a simple majority of the board giving the go ahead. Secondly, education of the Board about real estate was necessary for them to make an informed decision. As a result, movement was slower than the partner would have liked. However, it is the organization's future and not the partner's desires which need to be given primary emphasis. Exploration of future building sites will move more quickly because of the background the Board has developed.

The road to membership was a long one. At the 1986 Board/Staff retreat the issue of membership was brought up. An organizing committee comprised of both board and staff was established to look at what membership would mean for W&E. The committee looked at other membership based groups for a possible model. A hybrid of sorts was developed and presented to the Board

who adopted the plan and made appropriate changes in the bylaws. The planning for this took about a year, and it was another six months before the Board amended the bylaws to reflect the changes. This time has paid off. At the most recent board/staff retreat, November 1988, the board gave an overwhelming commitment to membership. The organizing committee was laid to rest as it had accomplished its goal of moving W&E to a membership organization. In its stead a membership committee was established to draw up a plan for a membership campaign. The Board is taking this on as a major responsibility. Half of the board, seven of fourteen members, are on this committee. Membership goals were also set by the Board.

Programmatic - During this year of transition I have looked specifically at the Self Employment Project and the Developing Community Institutions Project to get a clearer idea of where they were headed.

One clear commitment is continued work on the AFDC pilot project. The project involves individuals receiving public assistance. Participants would receive training to assist them in opening a small business. However, the transfer payments they receive would not be affected by this entrepreneurial venture for a period of up to two years. This would allow the individual to reinvest income back into a business without the consequence of losing the stability of the income from transfer payments. The project, a priority set by the Board several years ago has involved W&E in promoting legislation, and testifying in Washington to secure waivers. In December 1988, a request for

proposal was issued by the Department of Human Resources. Women & Employment submitted a response for the training project. If awarded the proposal it would be significant on several levels. One, it would provided a major portion of funding for the self employment project and perhaps more importantly it would allow West Virginia, through W&E, to be among several other states which are piloting self-employment projects for public assistance recipients.

The Self employment Project of W&E has provided technical assistance to women interested in starting or expanding their own businesses. This has been done both through workshops and consultation on a one to one basis. There is some question as to the efficiency of the latter. I think that more effective assistance can be provided through small group sessions. Participants will be able to seek out answers to individual questions while at the same time work with other women who are also pursuing a business interest. As the AFDC project unfolds W&E will have an opportunity to test training on a group basis.

The shift toward providing training on a communal basis arises from several observations. One, Women Business Owners, (WBO's), have requested the development of a network of other WBO's when asked what type of support they could use. Secondly, it provides a sense of a broader community. Self-employment initiatives are important, indeed they have provided the bulk of business start-ups over the last few years. However, in most instances the business owner is simply interested in developing his/her business and does little to reflect on the broader

economic picture of the community. By providing an opportunity for training to take place in a communal environment the stage is set to integrate more global economic issues into the training.

This approach to training is also consistent with W&E's priority to assist the development of community institutions. As people come together for education a natural forum is created. In a group concerns are surfaced which may be shared by others and a decision may be made to respond to those concerns collectively.

This process remains to be tested. W&E is attempting to initiate a setting for this to happen. During the past year W&E has worked with a coalition of church and community groups which has provided two consultation days on community economic development in various parts of the state. Over 60 people came to each event and were excited to share ideas and experiences. After each consultation there was a request for further gatherings. There are plans to continue these gatherings and to provide increasingly challenging information to those attending. Perhaps an end product might be a collectively developed plan for local development.

W&E has successfully worked with several marketing co-ops. The assistance provided has ranged from simple advice to more involved long-term training. The pay off has been four crafts marketing cooperatives. Throughout the training the co-op principle of returning something to the community is stressed. Thus a broader perspective of community development is provided. An example of this, the newest co-op recently held its annual meeting in the community room of its town hall and invited the

public to attend. Over thirty people turned out. At the meeting the members included in the speeches a piece on what a co-op is all about. It is through this sort of gathering the idea of co-ops becomes more wide spread. After hearing this experience and following the progress of this group for over a year the Board of W&E has expressed an interest in continuing to work with developing co-operatives.

E. Analysis - Most community based organizations go through some sort of mid-life transition. The work of the organization has become clear and a certain amount of expertise has been developed. It can begin to look in new directions. This transition is brought on through the simple evolution of work. Also, when funding is dependent upon grants an organization is forced to look at new projects to continue to secure future funding. The group is presented an opportunity to grow, expand and become stronger from this challenge, or conversely it may weaken and fold. Looking at one's own organization is time consuming and a difficult task. It is almost impossible to stop the day to day work in order to step back and look at the organization objectively while also introducing new ways of doing things. Planning means setting priorities and making choices. In social change work everything is important and ranking things, saying yes to some issues and no to others is a task no one likes.

What made it happen for W&E was a major change in personnel; most significantly, the resignation of the founder/director of the organization. In this case she had given birth to an organization, nurtured it and was helping it to leave

home. There was a critical mass of new people, both staff and board who were asking what W&E was all about, where it was heading and why it was happening. A planing process begun two years earlier was reexamined and tailored to fit those who were active in the organization. Due to those alterations ownership of the organization was transferred to those newly involved with the organization.

These changes were not made cavalierly. There was a process by which they were examined. An outside facilitator allowed people to ask questions which were not taken personally by others. They were done over a period of time, in light of the mission statement, and as a group. These elements are necessary for the changes to be owned by those making them.

In the case of W&E, the founder of the organization had the foresight to begin this process. It is interesting to note that as the process continued and the organization progressed accordingly, the founder came to the conclusion that it was time to move on and to let a new generation evolve.

The process of transition has provided a learning experience for the board. As a new director was hired it forced them to examine their role and their expectations of a new director. The Board was actively involved in setting a long term course for the organization and mapping out their participation in executing those goals. Over a two year period there has been tremendous movement by the board in assuming their responsibilities.

The need to develop the Self-Employment program continues to present itself. If awarded the AFDC training contract W&E's training sessions will be forced to take on a broader perspective, simply to reach those participating in the program. Funding will be present and sufficient staffing will be hired to carry out the plan. If not awarded the contract, the movement toward collective training will be a much slower track. W&E will be faced with the difficulty of too little staff and limited resources to hire additional persons.

The pay off of developing community institutions appears to be more exciting and far reaching than assisting individuals on a one-to-one basis. Resources will be aimed in this direction, however, the pay off is expected to be slow. While W&E has assisted in the development of several co-ops, in each instance there was an individual who was willing to take responsibility for seeing the project pushed along. While W&E would like to see more co-ops developed it is clear that its role is not the organizer, but rather the information provider, hand holder, etc. This is a critical distinction to make as the level of activity is dependent upon an outside, interested party.

Both the Self-Employment project and the developing community institutions projects will carry on. Each has more clearly defined where it is heading. The degree of activity will be somewhat dependent upon an introduction of more staff. By exploring the projects a clearer picture of staffing needs has arisen.

This project has allowed me to help W&E step back and move through its transition. This period of time for any organization is apt to be crazy and often people are torn in different directions and the loss of staff can have a devastating effect on an organization. Throughout this time of transition, W&E has attempted to keep communication open among the staff, the Board and between the two. Where possible people were pulled into the decision making process so they could own the decisions being made. When additional input was not appropriate people were kept informed about what was happening. This was effective in keeping people involved in the process of change.

All these changes were not easily accomplished. W&E had begun a planning process to help carry these changes out. In retrospect, it did not set its priorities easily. Goals and objectives were laid out, and yet we were not clear as to who would do what tasks. As a result the organization was spread in many different directions and no staff to help carry on the work. The benefit to having a multi-year planning process is some built in continuity to a plan. W&E would have benefited from building in an evaluation period six months after the first planning session. Our experience has shown that unless a meeting is specifically built into a process it is apt to get lost in the shuffle of work.

This time of transition for W&E has meant a lot of time focused on the internal workings of the organization. It has been time well spent as it is a much stronger organization that is starting out in 1989. Personally, the experience has



generally been a positive one and I am excited about working at Women & Employment as a new chapter unfolds.