

Final Report: Discovery Assessment

This report captures significant information about the affiliate's and organizational development consultant's work together. This information is critical for HFHI to best support the affiliate in the future, and for other HFHI staff to have a snapshot of the affiliate. This report is also for the participating affiliate, ODC and the US Office to develop an understanding of the impact the OD program has had on this affiliate. It is a part of the Evaluation Process on the HFH Revised Model of Superior Customer Service. When completed, both the ODC and the affiliate receive a copy for their files.

Affiliate Name: Hartford Area Habitat for Humanity
State: CT

Date: November 7th, 2013

Compiled by ODC(s): Melinda Mylet / Ginny Claborn

Section One – Interviews

Assessments are designed to solicit input from a range of affiliate stakeholders, both internal and external, which can be used to inform future planning and operational decisions, as well as generate community support, build morale among staff and unite board members for common goals. Discovery assessments will incorporate on-site and /or virtual meetings and last a short time frame. A variety of tools and processes exist to assist an affiliate in identifying key organizational priorities. A combination of the following was used to assess the overall health of the affiliate:

- Stakeholder interviews using appreciative inquiry questions
- Meeting observations / reviewed minutes from board meetings
- Reviewed Bylaws
- Reviewed financial reports / chart of accounts
- Reviewed policies and procedures regarding family selection, pricing

The Discovery Assessment was completed November 5-7th via interviews with 38 community members. The list of interviewees is listed below:

Tuesday 11/5/13	Wednesday 11/6/13	Thursday 11/7/13
Lou Golden	Paul Kiefer	Mike Brandt
Mike Bangor	Eliot Bryant	Karraine Moody
Rose Vigdal	Ron Masters	Caitlin Thayer
Lydia Avrett	Bob Spenser	Veronica DeLandro
Dean Andrews	Sara Salomons	Burt Mitchell
Tracy Thomas	Turquoise Blue	Endia DeCordova
Scott Orsey	Nancy Rion	Pam Carpenter
Lucinda Valanteijus	Doris Sugarman	
Dick Allen	Phil Titolo	
Kevin Morrison	Mike Marshall	
Bob Cassello	Tom Trumble	
Chris Montross	Paul Eckstrom	
Scott Orsey	Lisa Chirichella	
Don Shaw	Jennifer Cassidy	
Ben Daigle	Vanessa Rossitto	
	Ed Kindelan	

The same questions were asked to each individual. Questions to individuals of other nonprofit entities were changed slightly due to the applicability of the questions.

- 1) Why do you volunteer/work for Habitat? What is your story, how did you get here?
- 2) What is it about the affiliate that keeps you here?
- 3) What are one or two things that the affiliate does really well?
- 4) What do you value most about the organization?
- 5) What would you like the affiliate to have accomplished 3 years from now?
- 6) What changes do you think need to occur in order for that to happen?
- 7) If you had a magic wand and could change one thing, or make one thing happen, what would it be?

Section Two – Results (top answers in no particular order)**1) Why do you volunteer/work for Habitat? What is your story, how did you get here?**

1. Volunteered in college
2. Knew someone and was asked to volunteer
3. Retired, looking for something to do
4. Corporate build day
5. Women's Build
6. Participated through church
7. Hired as staff
8. Knew board member

2) What is it about the affiliate that keeps you here?

1. Believe in home ownership
2. Seeing the families get a house
3. See homeowners get the keys to the house
4. working in a group environment - get to know each other well
5. Venue to meet people of diversity be part of Hartford community
6. House is just the beginning- what's the end result- social service
7. I like the people- hearts are in the right place
8. Look forward to it - building for people in need
9. The mission, the people, the need, chance to give back
10. Believe in the mission- not a giveaway - pays a mortgage

3) What are one or two things that the affiliate does really well?

1. Build good quality houses
2. Strong relationship with Corporations
3. Homeowner selection process
4. Brand name
5. Good people, dedicated and passionate
6. Presence in the community
7. Branding of HFH
8. Getting families involved, keep families focused on the program, family services does great job at preparing families
9. Family education program - mentoring with volunteers
10. Quality construction

4) What do you value most about the organization?

1. Ground breaking ceremony- watching the community come together
2. Doing something good for the neighborhood
3. Appreciate the fact that we build to provide homeownership
4. Look forward to being part of a group
5. Help people in my back yard
6. Brings people together from all walks of life & provide families an opportunity
7. House dedications
8. Great stories to tell- a lot of reason to believe in HFH
9. Brings all these constituents together (city, state, gov, big corp, banks).
10. Habitat is more than just a house

5) What would you like the affiliate to have accomplished 3 years from now?

1. Increase house production
2. Expand service area - build outside of Hartford
3. Most diverse board - serve as reflection of the community
4. H/o kids come together and want to do more. Making neighborhoods safe, create community, pull together, own their neighborhood
5. To have a complete staff, who know the mission, live the mission, work as a team without agendas
6. Have angel with a lot of money - expand region.
7. Reputation turned around
8. Milestone house or completion of a community - building out a block rather than scattered sites
9. Families, staff volunteers knowing each other and all work together - would be a happy place
10. Stronger board- engaged that has influence and knows the mission, understand its role

6) What changes do you think need to occur in order for that to happen?

1. No clear lines between management, board, staff
2. Hire good people, train, and then let them do it. Right people on board, staff, leadership
3. Strong board leadership- sets direction
4. Executive director face of community
5. People have to be held accountable
6. Create a strategic plan with an operating plan
7. Transparency at board level - Executive committee doing board work
8. Solidarity in office
9. Get vision for the affiliate

10. Get an Executive Director who knows all the positions - and create one unit.
Everyone needs to come together and get the job done

8) If you had a magic wand and could change one thing, or make one thing happen, what would it be?

1. Executive director who is a leader, set goals with board and manage staff
2. Happiest place in Hartford to work respect each other
3. Better working atmosphere -environment of staff
4. Create an environment where folks want to come to work
5. Functioning staff - working to their full potential - fill key positions
6. Leader that has the heart and spirit to help this organization grow and develop
7. Stability within Leadership
8. Get Board to operate better
9. Strong leader that people believe in- move it from now to potential
10. Build Board capacity – utilize local resources for support

Interesting comments

- Critical - that they (the board) hire well this time - corporate community is watching
- Wish we could rewind clock - to before hiring the previous ED and start over
- At full board meeting, people ask themselves, why am I here? I have no impact

Section Three – Red Flags

Based on the review of affiliate documents, interviews, financials and board minutes, the following areas are considered Red Flags and are recommended that they be reviewed immediately by affiliate leadership.

- Organization reporting structure is not consistent with the overall needs of the organization.
- Staff morale is low.
- Mixed messages between board and staff, roles and responsibilities.
 - Staff going to board to air grievances
 - Board going to staff to do specific tasks
- No clear message on what the plan is, and what should be accomplished (short term and long term).

- Too much emphasis on new ED to solve problems; tendency to avoid looking at other sources of tension in the organization.
 - Effectiveness of board
 - Lack of vision – no strategic plan, no operating plan
 - Board too involved in staff issues

Section Four – Recommendations

1. Create 30-60-90 day action plan for board and staff
2. Define specific measureable goals and accountability
3. Monthly updates and progress reports

Next 30 Days – Interim ED

- Assess current commitments
 - Construction in progress
 - Other
 - Review cash flow, expenditures, next 90 days
- Review current staff job descriptions and structure
 - Written staff work plans – 3 months
- Create operational plan for current commitments / construction/ funding
- Counseling for staff – local resources

Next 60 Days

- Define organizational structure and job descriptions
- Team building – office layout
- Staff reviews & recognition
- Review prior Board self-assessment and board committees / structure
- Timeline for Interim ED and new hire
- Assess and evaluate current staff positions and open positions

Next 90 days

- Search committee reviews and revises ED search criteria
- Conference call panel of successful Habitat ED's and search committee
- Analysis Board self-assessment
- Identify training opportunities (local & HFHI)

Status: as if 11/19/2013

1. Weekly meetings being held with Interim ED and ODC
2. Organization structure being reviewed; looking at other similar affiliates across country
3. Melinda to provide ED Search committee with successful ED's – possible panel discussion
4. Office layout – design being reviewed. Complete before year end.
5. Next scheduled on-site visit, January 2014.

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Interim Executive Director

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Date

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