

Onion River Exchange

case study 2012d



Authored by: Cecile M. Green

Founding partner, Round Sky Solutions

January, 2013



Leadership Coaching and Organizational Optimization

Copyright © 2012-2013 Round Sky Solutions. All rights reserved.
All photographs in this case study courtesy of Onion River Exchange

Any comments relating to the material contained in this document may be submitted to
info@roundskysolutions.com

Table of Contents

Summary	4
Introduction	4
Methods	5
Intake Snapshot	6
Solutions Implemented	8
Implementation Challenges	9
Results	10
Conclusion	11



*Onion River Exchange
Mission:*

“to help Central Vermonters to exchange goods and services without using money.”



Summary

- who: Onion River Exchange Time Bank
- where: Montpelier, Vermont
- when: August-December 2012
- what: Two local time banks merging and reconfiguring financial models for ongoing sustainability

Introduction

Onion River Exchange (ORE) was founded in 2008 with the mission of facilitating Central Vermonters in the exchange goods and services without using money. Shortly after it's founding the organization split into two separately managed and financed time banks due to a philosophical disagreement over financing models. These two time banks, ORE and REACH, operated separately for four years, each gathering strength, momentum and membership until the original funding monies began to run out, inspiring a revisiting of the vision of joint operations. As the two time banks were gearing up for the merger, the team tasked with supporting the move contracted with Round Sky Solutions to facilitate this transition. The transition team was comprised of the newly hired, part time Executive Director, a staff of three, a board representative, and several enthusiastic members.

ORE's presenting challenges were varied and layered. One of the single biggest frustrations evident from the intake survey was the lack of clarity around who was responsible for what decisions which resulted in significant inefficiencies due to important decisions remaining unaddressed or being continually re-addressed. In the words of one of the staff "Decisions were not happening because everything was SO confused."

In addition, financial pressures were mounting towards critical and the accountability for innovating the financial model of the organization rested with the board which had a history of slow action, generating increasing anxiety and frustration at the staff level. To complicate matters further, in response to the previ-

Key Intake Challenges:

- *inefficient meetings*
 - *lack of clarity around who handles what issues*
 - *pressure to increase revenue*
 - *decisions remaining unaddressed*
 - *merging organizations*
 - *new executive director and board members*
 - *multiple oversight teams*
-

ous management needs of the two organizations, several oversight teams had been formed whose roles in the newly merging organization were unclear and sometimes in conflict with each other, further driving wasted time and energy.

The merging time banks contracted with Round Sky Solutions for our Collaboration Course to train them in the distinctions around the seven different aspects of organizational communication including governance, operations, long and short range strategy, scope, individual, interpersonal, and purpose. After several weeks, the transition team dissolved itself and the training continued with the staff scope for the remaining four months. During the training sessions, the team learned the process tools for the various tensions they raised, and via using these tools successfully, merged the two organizations including questions of rebranding and downsizing, clarified all staff roles, began the clarification of the board roles and other oversight bodies, and created a viable financial plan for the short range.

Methods

Before beginning the Collaboration Course, both the REACH and ORE teams completed a survey assessing their organization. The survey used both positive and negative measures and asked respondents to answer using a 5-point agree/ disagree scale, where 1=strongly disagree and 5=agree. By this system, higher scores (indicating stronger agreement) are desirable for positive statements and undesirable for negative statements. For example:

I love my job and find it fulfilling.

I am frequently frustrated and unhappy with my job.

The 72 statements in the survey were collapsed into 10 categories, which covered both the organizational and individual levels. (Overall Job, Overall Organization, Management, Compensation, Physical, Tasks/ Workload, Recognition, Communication/Interpersonal, Systems, and Outputs/ Performance).

Scores at intake and exit were analyzed to assess change in



the organization as a result of Round Sky Solutions’ work.

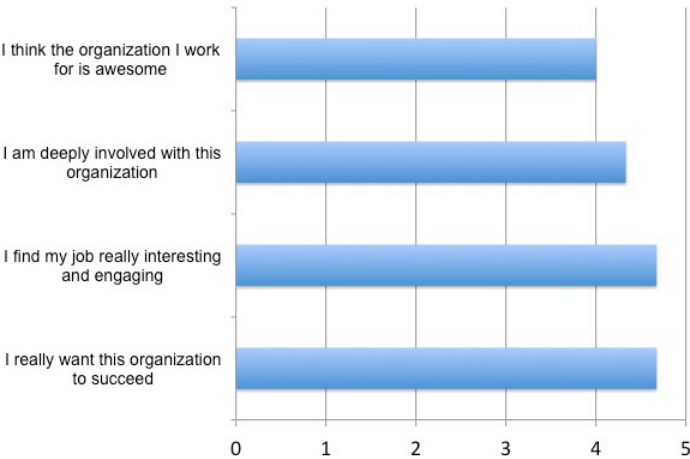


Intake Snapshot

At the time of the intake survey, the organization had many things working in its favor: namely enthusiasm and dedication on the part of employees.

“Cecile came to us at a time of absolute chaos. She leaves us with the ability to better see the full scale of work that has been done, needs to be done, and how to do that in a way that includes all staff members in the decision making process for everything relating to our scope.” Chloe Budnick

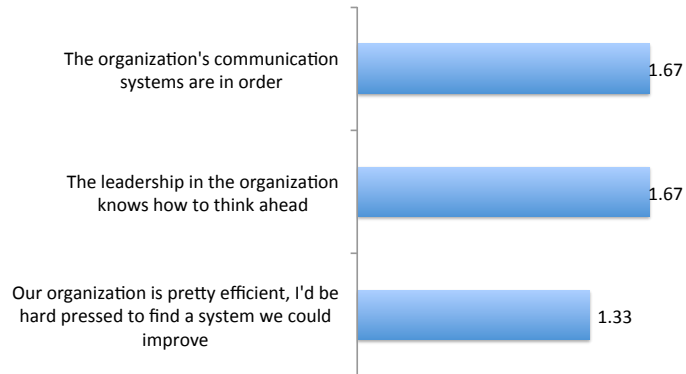
ORE staff demonstrated enthusiasm and commitment (scores out of a maximum of 5)



At the same time, the main presenting issues were lack of visibility into and communication around roles and accountabilities across the organization, operationally separate scopes assuming the same accountabilities, lack of capacity to rapidly respond to a critical financial forecast, slow and fuzzy decision-making that was slowing down operations, and rapidly changing expectations and operating landscape.

Room for improvement in some areas

(scores out of a maximum of 5)



"You trained staff to be able to facilitate our staff meetings, know whose role was what, see if folks had followed through and if not, be able to immediately surface that tension. Issues have a clear path to some kind of solution." Chloe Budnick

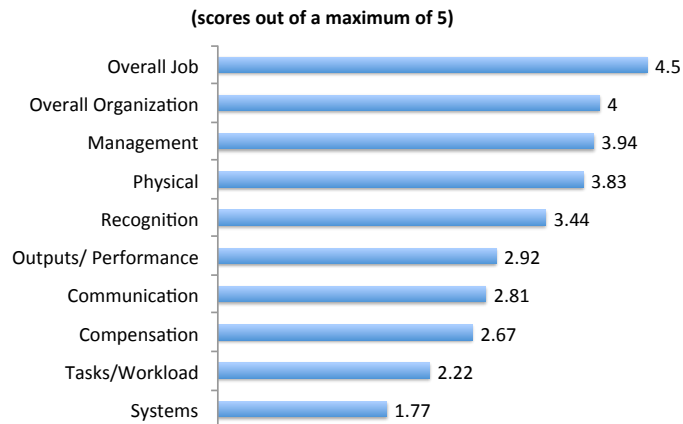
In open ended responses to the question of what ORE most needed, the following words and phrases stood out:



At intake, overall scores ranged from a high of 4.5 (out of 5) on "overall job" to a low of 1.77 (out of 5) on "systems"—a finding which is understandable given the organization's present situation.

“There was always movement towards a solution. All meetings were immensely productive.” Heather Kralik

Intake scores were high for overall job, organization, and management, while scores on systems and tasks were lower



Solutions Implemented

ORE began their Collaboration Course with an introduction to the basic meeting processes including tension based agenda generation, tension sorting, and the process tools to metabolize operational and governance issues. After beginning to use the online tracking tools that enabled the team to make use of the outputs of their meetings and reuse them again as part of the transparent accountability system, it became clear through the kinds of tensions that were surfacing, that the team needed a short range strategy to keep them in sync through all the chaos and pressure. Once the short range goals were set, the staff could more clearly see the increasing pressure to have a financial model (long range strategy) that would carry the organization through and simultaneously confirmed that the board would be addressing this issue in time for the end of the year deadline.



Meanwhile the first merged board was struggling to find a compatible time to meet and recruiting new board members at the same time and elected to invite Round Sky to facilitate their first merged session. During this introduction, the board surfaced some very challenging issues and used Round Sky's tools to process them into clarity in remarkably short, if uncomfortable time, including getting all the board members rapidly in sync with the urgency of the or-



"You helped us to listen to each other with greater intent and clarity and to develop courses of action that are productive. I am more likely to hold other's paradigms by using this process." Heather Kralik

ganization's situation. From that launch, the new board was able to quadruple the amount of time commitments from board members and went intensive work mode to address the leadership issues on the table including generating a short term financial plan and beginning to look at the long range needs.

Due to financial constraints, the board chose not to continue direct training with Round Sky but to absorb what they could through the training occurring at the staff level through the Executive Director and the Staff Representative to the board. The last several staff training sessions focused on facilitation training and core role elections so that the staff could continue to use these practices as the newly merged organization took on the new year.

Implementation Challenges

ORE was in significant flux on multiple levels when Round Sky was contracted for the Collaboration Course. This meant that there was a lot of content the team had to process and enact in order to deal with all the variables flowing at them. And they had to do this under resource constraints. Despite all this, and through the greater effectiveness and efficiency that the Round Sky tools offered their team, in 5 month's time ORE had successfully merged, downsized and prepared for the next three months, buying them sufficient time to raise funds and rework their financial model.

The team reported feeling challenged by the stretch of learning this new set of terms and tools while going through this intensive a time in the organization. The felt sense of integrating a new skill set while under pressure to use it was especially trying. Despite discomfort of the cognitive stretch which lessened with time, the team reported relief after every meeting at just how much ground they were covering.

A further challenge was that especially at the beginning there were different levels of commitment to the tracking systems which generated additional frustration in those who were doing most of the work for the



The equality in this process is truly wonderful.” Chloe Budnick



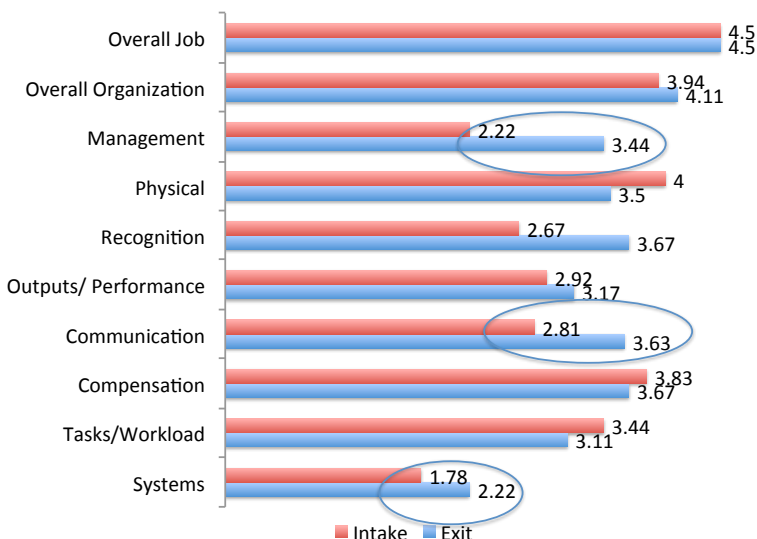
organization. Suggestions were made regarding offering videos of the tools in action to support the learning process.

A third challenge with the implementation was the tepid uptake of the tools by the board. With their additional training, the staff scope soared ahead of the board in terms of clarity and effectiveness. Unfortunately, with the board scope holding key authority with less bandwidth, board related tensions continued to clog up the agenda of the staff, though over the course of the implementation the board steadily gained traction.

Results

After working with Round Sky Solutions, the staff once again assessed their organization. Increased scores were seen in most areas, most notably around “management,” “communication,” and “systems.”

Large improvements were seen in key areas
(scores out of a maximum of 5)



In answers to open ended questions, the key reported results were greater clarity on what was happening at ORE, a drastic improvement in accountability, organized, clear and efficient staff meetings, appropriate linkage to the board with a concomitant capacity to get issues addressed more rapidly. On an individual level, staff re-

ported an increase in confidence in their abilities and a jump in their capacity to alleviate their tensions productively.

In open ended responses from the exit survey, these key words highlighted ORE's experience and the benefits they received from the Collaboration Course:

"Round Sky has an innovative and re-freshing approach to organization accountability and efficiency that empowers all members at all levels of to contribute to the organization and take ownership of their jobs." Irvin Eisenberg



Conclusion

By the end of the five month training, the two time banks had completed their merge into one with an efficient, agile and streamlined staff, a committed and attentive board, a funded action plan for the short term, and a membership over 800 and growing daily. Relationships with partnership organizations were emerging into functional clarity, having made significant strides from just a few months prior when operational confusion was rampant. The staff had increased their operational effectiveness and efficiency through the internal clarity of shared agreements and accountabilities. And the organization had the tools and the training to continue the practices which enable them readily unpack their organizational tensions into immediately useful and strategically productive solutions as they take the newly integrated time bank forward.