

Organization for Transformative Works

Strategic Planning Committee

Report on the Survey Workgroup

The Strategic Planning Committee surveyed and reviewed the Survey Workgroup as part of our larger goal to put together a reasonable and practical strategic plan for the Organization for Transformative Works (OTW).

The Survey Workgroup is on hiatus, but nevertheless this report should be read as a helpful document, meant to illuminate, reveal, and guide. It will be followed by similar reports for other committees and workgroups, and an overall report for the whole organization. These reports will then be synthesized into the strategic plan for the organization, which will be presented to the Board and shared publicly. The Board will decide how to act on the data offered by stakeholders, alongside the reports from the wider OTW Community Survey that has been analyzed by the Survey Workgroup.

Methodology

The information in this report was compiled by reviewing the workgroup's internal documentation on the organization's wiki and Basecamp, and a survey of the workgroup.

Distribution

This report was shared with the Board prior to being published publicly. The Board had the opportunity to correct factual errors in review, but not to remove or edit the summary of what was revealed by the information gathering process.

Participation

All 21 Survey Workgroup members (including the leads) were invited to participate in a survey and follow up with us in August 2013. 10 Survey Workgroup staff members filled out at least one survey question. One team lead answered interview questions.

Nota Bene

This report is a living document and will remain that way until all OTW teams have been surveyed, at which point this report and all others will be locked for the writing of the strategic plan.

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Overview and History of the Survey Workgroup

The Survey Workgroup was created to process the results of the Community Survey¹ created by the Board and the Internationalization & Outreach Committee. The survey was opened for responses on 18 April 2012 and closed 2 May 2012.

5986 people answered at least one survey question; 4921 completed the entire survey, for a completion rate of 82.2%.

The members of the Survey Workgroup as a whole did not participate in the creation or deployment of the survey²; the workgroup was created specifically to process the survey's results.

Volunteers to process the Community Survey were a mix of current OTW staff and volunteers and people volunteering with the OTW for the first time. No training was provided to volunteers.

Over the course of the Survey Workgroup's one-year existence, it had several changes of team lead, but the operations of the workgroup remained the same. Volunteers were allowed to pick which questions they wanted to work on, and then worked in teams with little to no oversight from the workgroup lead(s).

¹ A list of the survey questions: <http://transformativeworks.org/survey-sunday-1-all-questions> (Accessed August 31, 2013)

The final survey report, available as a PDF:

<http://transformativeworks.org/sites/default/files/2012%20OTW%20Community%20Survey%20Report.pdf> (Accessed August 31, 2013)

² "The members of Internationalization & Outreach have spent most of the last year gathering ideas for questions from the OTW's many committees." <http://transformativeworks.org/announcing-otw-community-survey> (Accessed September 28, 2013)

Strengths

The Survey Workgroup had a singular goal: to analyze and publicize the results of a community survey. The team accomplished this goal; with the help of the Communications Committee, the workgroup was able to complete and release an extensive report despite the many challenges they faced organizationally and with the data itself (see below for “Challenges”), which speaks to the dedication and perseverance of the members.

In addition to processing the data, the workgroup was also tasked with:

- Branding the appearance of the report and associated charts and graphs
- Enabling two-way communication regarding the emerging results
- Interacting with the survey’s population
- Publicizing the results of the report

Challenges

Major Problems

Many volunteers reported two major problems with the Survey Workgroup:
the analysis of the survey results was inadequate and flawed
the process was very frustrating for those involved

Planning and Organization

Respondents cited a lack of planning and poor organization as flaws from the start of the workgroup. The group experienced problems with organization, communication, leadership, and balancing workload. Lack of planning haunted the project, as the survey was supposed to be “something small and informal”; additionally, the fact that “no one knew how to create a survey [that would provide] quantitative results” created a survey that was difficult to analyze after the fact. This created an unnecessarily large workload, turning the Survey Workgroup into a project that could not have had adequate staffing.

Leadership

The workgroup experienced a change of leadership two times while it was working on the report. All of the leads occupied other roles in the organization, and two of them resigned due to burnout. The lack of continuity and consistency in leadership further exacerbated the problems with planning and organization that the workgroup was experiencing.

Lack of Skilled Staff/Needed Expertise

The project lacked the needed amount of data analysis expertise. This led to many problems, including an imbalance of work. One staffer explained, “I principally volunteered to do manual classification of freeform answers, but there was a complete dearth of volunteers with much more knowledge than I had, so I ended up taking whole sections (to do both the classification and the analysis).”

The survey report ended up needing emergency help to be completed; one staffer told us, “The final report was essentially assembled by 4 people, two of whom weren’t even on the Survey Workgroup.”

Future of Survey Workgroup

Before future surveys are contemplated, there will need to be a substantial restructuring.

Recruitment

The Survey Workgroup’s team leads should focus on recruiting people who already have the skills necessary. These skills include:

- Documentation
- Large-scale data analysis
- Report-writing (business writing)
- Statistics
- Survey construction

Survey Construction

The survey should be planned and constructed by the same team that will be doing the final analysis of the survey. The survey itself should have fewer qualitative/free response questions and should be organized with data analysis in mind.

Additionally, the goals of the survey should be clear and focused so the survey itself can be a clear and focused document, more easy to process *and* fill out.

Workgroup Team Goals

The team's goals should be as clear and focused as the survey goals. An organized yet flexible schedule should be laid out as the survey is constructed, so the results can be processed in a quick and useful way without overburdening the workgroup members.

Appendix A: Quantitative Data

Note: All graphs and tables are presented according to internal guidelines set by the Survey Workgroup.

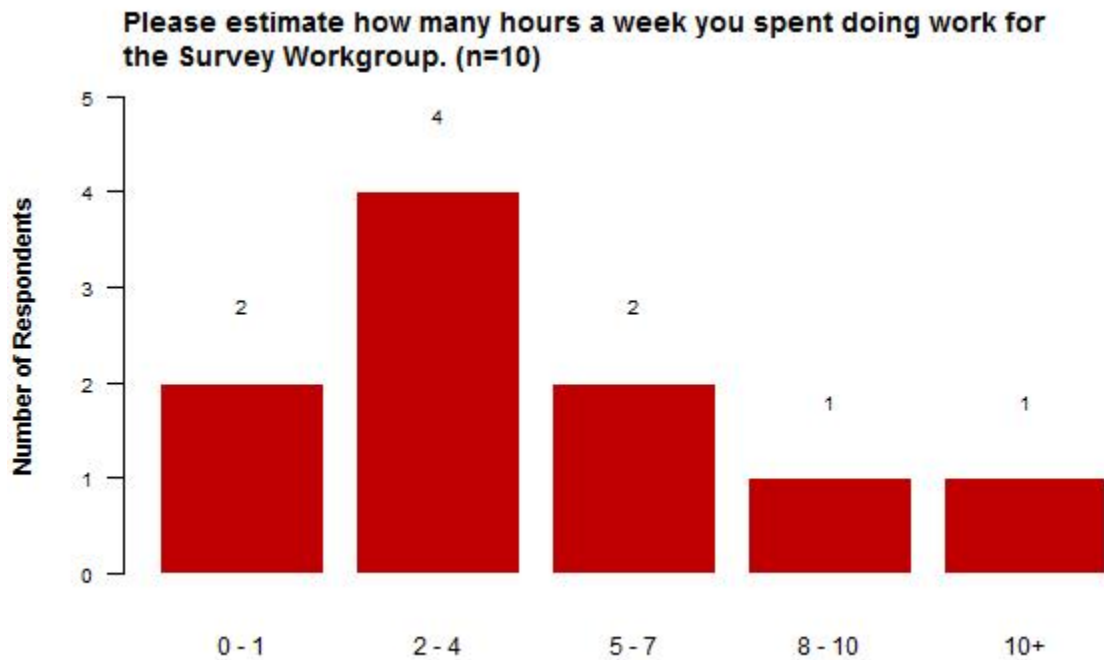
Figure and Table 1. How long were you a part of the Survey Workgroup?



How long were you a part of the Survey Workgroup?	Respondents
< 1 month - 6 months	5
6 months - 12 months	3
1 year - 2 years	2
2 years - 3 years	0
3 years - 4 years	0
4+ years	0
Total	10

All respondents worked on the Survey Workgroup for less than 2 years (the workgroup was only active for one year).

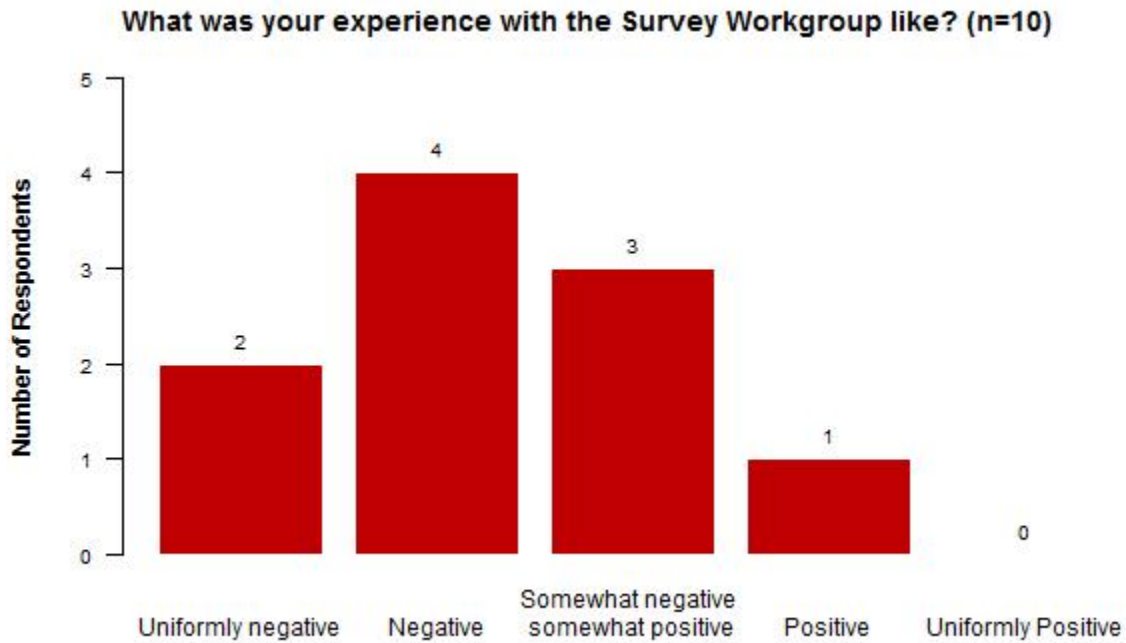
Figure and Table 2. Please estimate how many hours a week you spent doing work for the Survey Workgroup.



Please estimate how many hours a week you spent doing work for the Survey Workgroup.	Respondents
0 - 1	2
2 - 4	4
5 - 7	2
8 - 10	1
10+	1
Total	10

Most respondents (6 out of 10, 60%) spent 4 hours or less per week on Survey Workgroup work, but some spent over 8.

Figure and Table 3. What was your experience with the Survey Workgroup like?

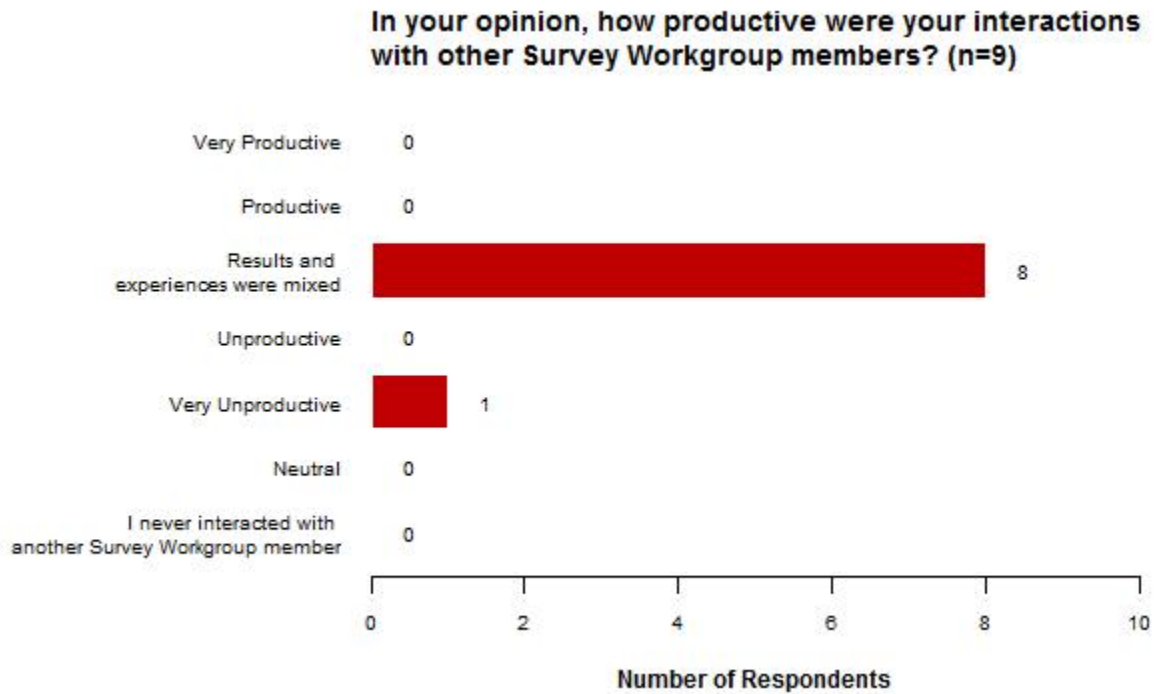


What was your experience with the Survey Workgroup like?	Respondents
Uniformly negative	2
Negative	4
Somewhat negative, somewhat positive	3
Positive	1
Uniformly positive	0
Total	10

Most respondents had had a negative (6 out of 10, 60%) or mixed (3 out of 10, 30%) experience in the Survey Workgroup.

When asked whether they felt the workload in the group was balanced between all members, most (7 out of 9, 78%) respondents felt that it was not. Most (7 out of 9, 78%) also felt that the workgroup was not utilized properly, but that it was (7 out of 8, 87%) recognized by the OTW for the work they did.

Figure and Table 4. In your opinion, how productive were your interactions with other Survey Workgroup members?

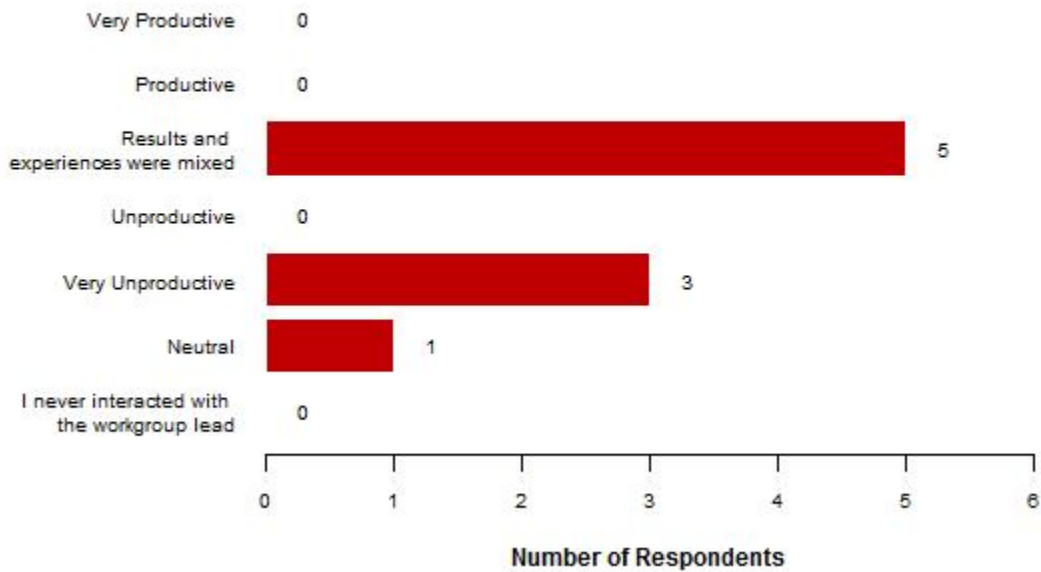


In your opinion, how productive were your interactions with other Survey Workgroup members?	Respondents
I never interacted with another Survey Workgroup member	0
Neutral	0
Very Unproductive	1
Unproductive	0
Results and experiences were mixed	8
Productive	0
Very Productive	0
Total	9

Most respondents (8 out of 9, 89%) had mixed results and experiences of interacting with other workgroup members.

Figure and Table 5: In your opinion, how productive were your interactions with your workgroup lead?

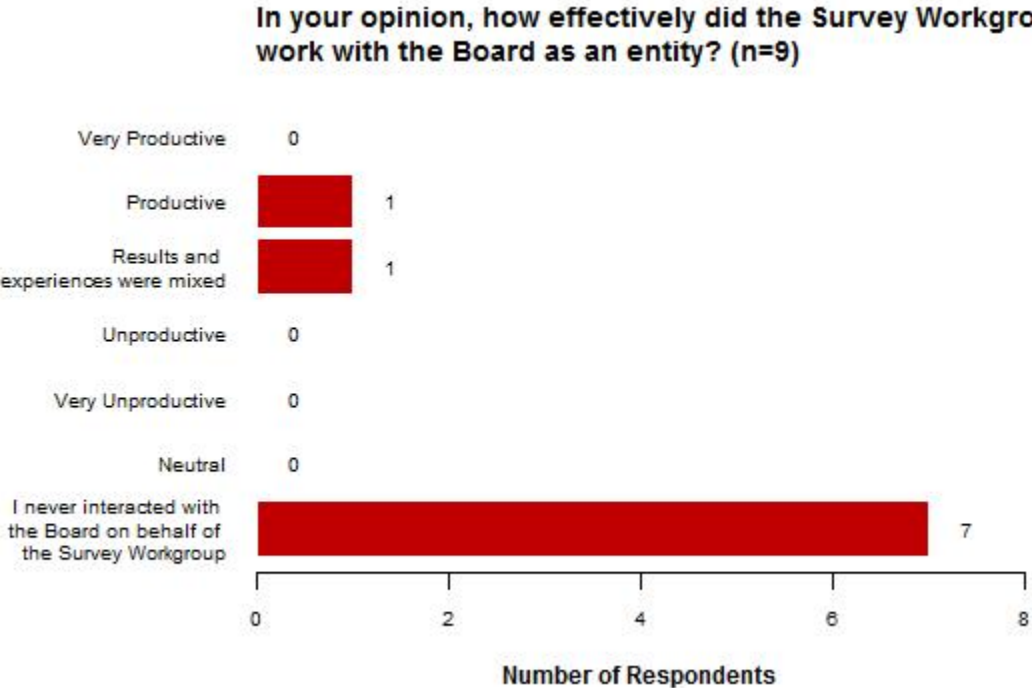
In your opinion, how productive were your interactions with your workgroup lead? (n=9)



In your opinion, how productive were your interactions with your workgroup lead?	Respondents
I never interacted with the workgroup lead	0
Neutral	1
Very Unproductive	3
Unproductive	0
Results and experiences were mixed	5
Productive	0
Very Productive	0
Total	9

Workgroup members found interacting with their lead mixed (5 out of 9, 56%) or very unproductive (3 out of 9, 33%).

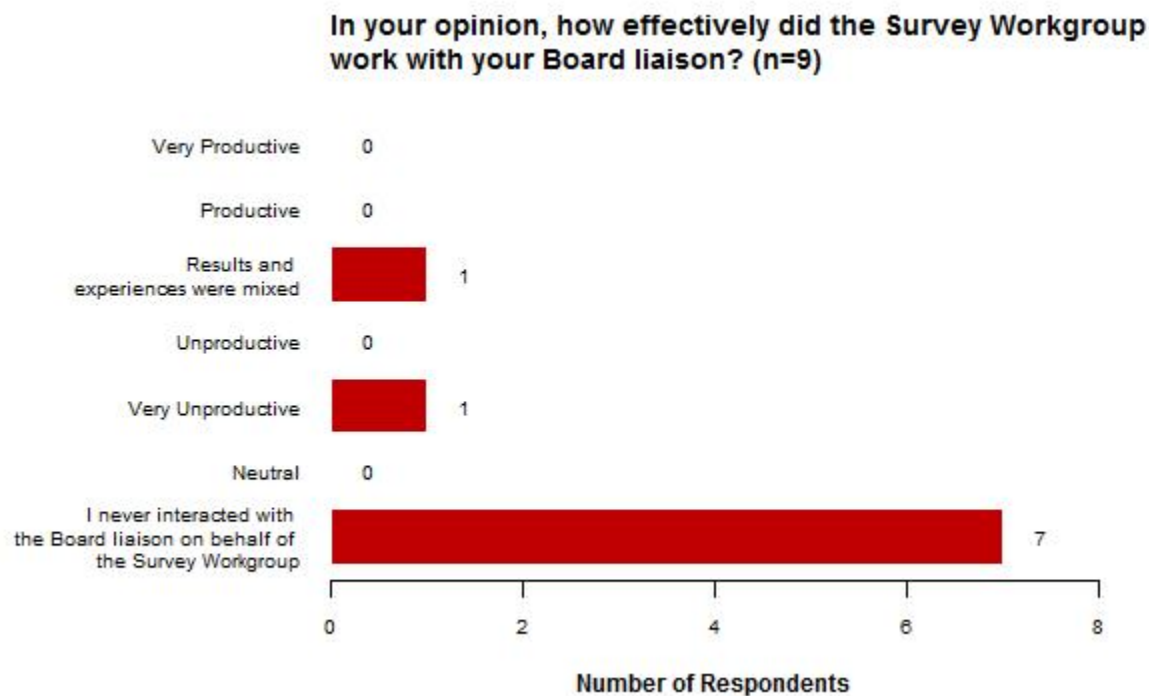
Figure and Table 6: In your opinion, how effectively did the Survey Workgroup work with the Board as an entity?



In your opinion, how effectively did the Survey Workgroup work with the Board as an entity?	Respondents
I never interacted with the Board on behalf of the Survey Workgroup	7
Neutral	0
Very Unproductive	0
Unproductive	0
Results and experiences were mixed	1
Productive	1
Very Productive	0
Total	9

Most respondents (7 out of 9, 78%) had never interacted with the Board. If they had, their experiences were either mixed or positive.

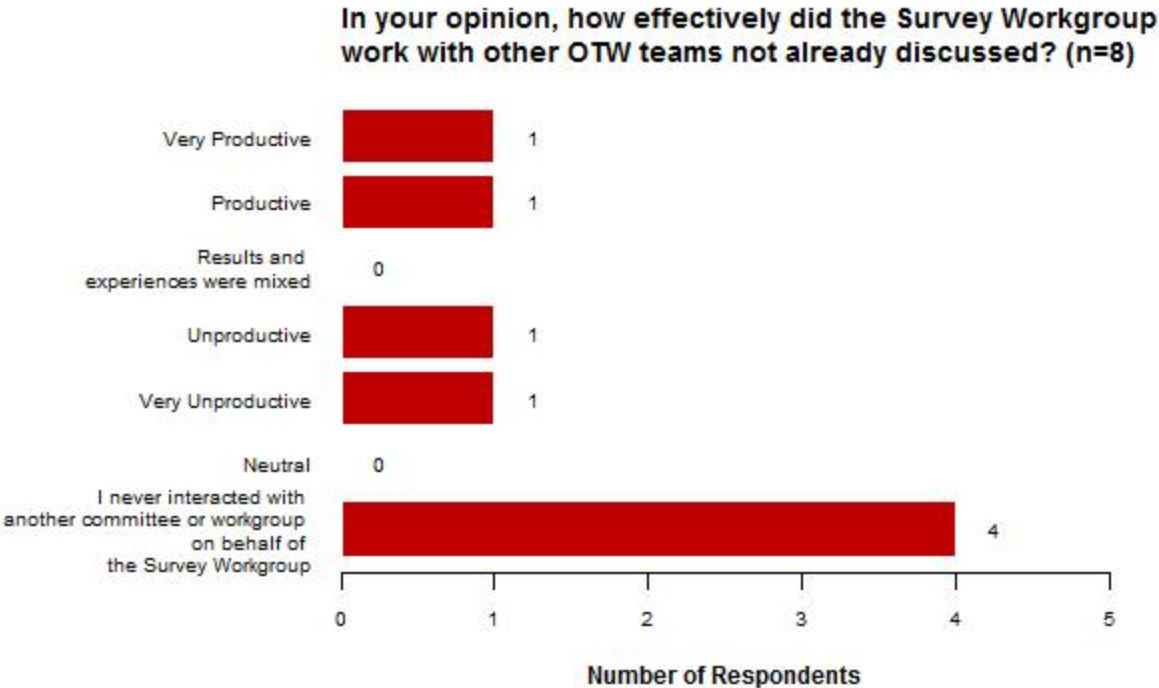
Figure and Table 7: In your opinion, how effectively did the Survey Workgroup work with your Board liaison?



In your opinion, how effectively did the Survey Workgroup work with your Board liaison?	Respondents
I never interacted with the Board liaison on behalf of the Survey Workgroup	7
Neutral	0
Very Unproductive	1
Unproductive	0
Results and experiences were mixed	1
Productive	0
Very Productive	0
Total	9

Most respondents (7 out of 9, 78%) had never interacted with the Board liaison. If they had, their experiences were very unproductive or mixed.

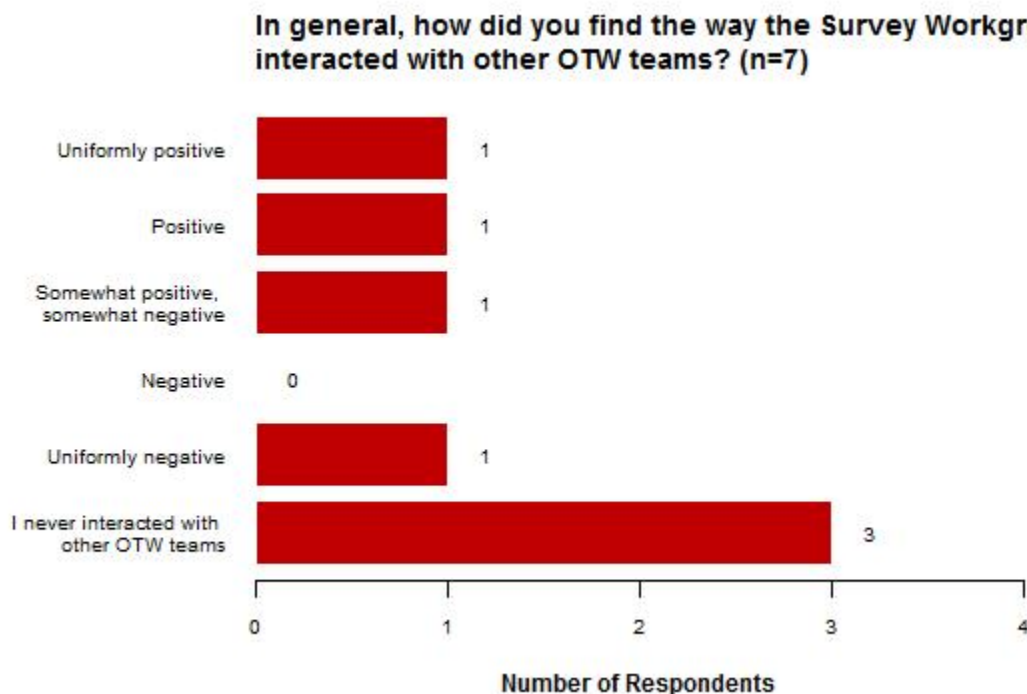
Figure and Table 8: In your opinion, how effectively did the Survey Workgroup work with other OTW teams not already discussed?



In your opinion, how effectively did the Survey Workgroup work with other OTW teams not already discussed?	Respondents
I never interacted with another committee or workgroup on behalf of the Survey Workgroup	4
Neutral	0
Very Unproductive	1
Unproductive	1
Results and experiences were mixed	0
Productive	1
Very Productive	1
Total	8

Half of the respondents (4 out of 8) to this question had never worked with another team, and half had had highly varied experiences.

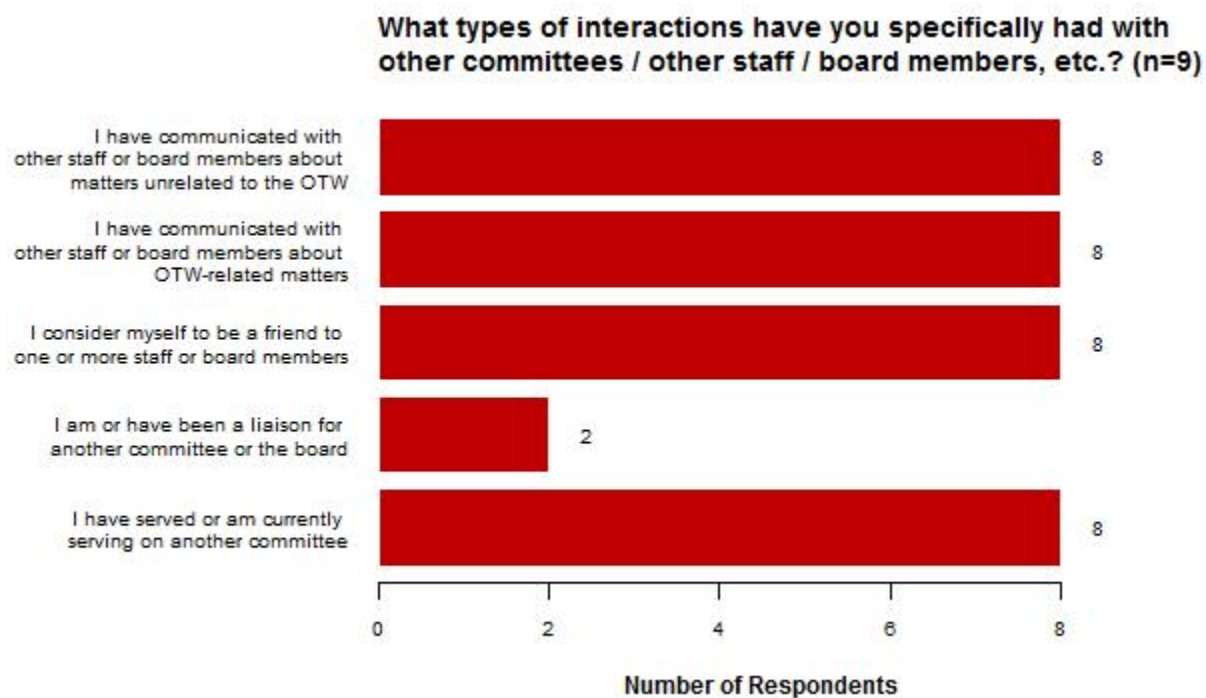
Figure and Table 9: In general, how did you find the way the Survey Workgroup interacted with other OTW teams?



In general, how did you find the way the Survey Workgroup interacted with other OTW teams?	Respondents
I never interacted with other OTW teams	3
Uniformly negative	1
Negative	0
Somewhat negative, somewhat positive	1
Positive	1
Uniformly positive	1
Total	7

Many respondents (3 out of 7, 43%) had never interacted with another team. Out of those who had, their experiences ranged from uniformly negative to uniformly positive.

Figure and Table 10: What types of interactions have you specifically had with other committees / other staff / board members, etc.?



What types of interactions have you specifically had with other committees / other staff / board members, etc.?	Respondents
I have served or am currently serving on another committee	8
I am or have been a liaison for another committee or the board	2
I consider myself to be a friend to one or more staff or board members	8
I have communicated with other staff or board members about OTW-related matters	8
I have communicated with other staff or board members about matters unrelated to the OTW	8
Total	9

Most respondents (8 out of 9, 89%) had served/were serving on another committee, had OTW friends, and communicated with staff or board members about matters both related and unrelated to the OTW.

Appendix B: Textual Data from Surveys Used to Create Aggregate Numbers

Survey Workgroup Survey Textual Data

What was the most positive part of your Survey Workgroup experience?	Respondents
Clear deadlines	1
Completing the project	1
Learning to step away	1
Seeing the survey's results	4

What was the most negative part of your Survey Workgroup experience?	Respondents
Frustrated by "grunt work"	1
Ill-conceived survey	1
Last minute work	1
Not having the skills needed	1
Unprofessional lead who "actively bred negativity" about the OTW	1
Disorganization	4

How could your Survey Workgroup experience have been improved?	Respondents
Better communication	1
More staff	1
More experienced leads	3
Better planning	6

Do you know why your team is no longer active? Did you find out via official OTW channels or another source?	Respondents
Assumed lack of leadership to continue	1
"The report is done. But the team went inactive prior to that when the previous lead left the workgroup in such a state of disarray that no one knew how to pick it back up and get it going again."	1
Found out through official OTW channels	4
The work was completed	6

What was your primary focus within the Survey Workgroup?	Respondents
Excel	1
Public information releases	1
Observing and being available to address members' concerns	1
Data analysis	5

Did you feel the workload of your workgroup was balanced between all its members?	Respondents
Yes	2
No	8

Did you feel the Survey Workgroup was utilized properly? (i.e., did people request help when needed? Were you asked to do too much or for things outside the Survey Workgroup mandate?)	Respondents
A lack of planning	1
Workload was unbalanced	1
The task was accomplished	1
Yes	2
Did not receive necessary expert help	4

No	7
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Do you feel the Survey Workgroup was recognized by the rest of the OTW for the work you did?	Respondents
People seemed to enjoy the posts	1
The wrong people received credit	1
There was no good work to recognize	1
People did not know what was happening with the workgroup	2
The work took too long to get to the public	2

What factors contributed to you leaving the Survey Workgroup?	Respondents
Leadership	1
Poor management and organization	2
Organization workload	2

Was there anything that could have convinced you to come back?	Respondents
Better leadership	1
Better organization	2
Better workload distribution	2
No	4

What is something (or many things!) you thought the Survey Workgroup did really well?	Respondents
Got the job done	1
Organizing and working on large amounts of data	1
Publicizing the survey	1
Standards for graphics and branding	1

Tried to make the best of unhelpful results from the survey	1
Nothing	3

What changes, if any, would you have made to the Survey Workgroup procedures?	Respondents
Remove volunteers who did not produce work	1
Better survey development	2
Better recruitment (for survey design expertise)	4
Better procedures (including check-ins, progress reports, better deadlines, regular meetings, training plan)	9

In your opinion, what were some of the greatest challenges or stumbling blocks facing the Survey Workgroup?	Respondents
Disorganized	1
Insufficient staffing	1
Lack of follow-up	1
Lack of leadership	1
Unbalanced workload	1
Lack of planning	2
Lack of skilled team members	4
Statistically unsound survey	4

Did you have any training in surveys or data processing or managing this type of project before or after taking that position within the OTW?	Respondents
No	3
Some	3
Yes	3

Did you feel that the training you received for the OTW's internal tools was sufficient?	Respondents
Yes	1
Yes for me, no for others	1
Yes, only because I already knew the tools	2
No	4

What changes, if any, would you make to ensure that someone taking your position received enough OTW-specific training to feel comfortable?	Respondents
Better real-time communication with committee chairs/leaders	1
Not sure/no issue	2
More training	4

In your opinion, how productive were your interactions with other Survey Workgroup members?	Respondents
Highly productive	1
Negative	2
Depended on the person	3

In your opinion, how productive were your interactions with your workgroup lead?	Respondents
Lead seemed inexperienced	1
Lead seemed resistant to feedback	1
Lead seemed stressed/busy	1
Lead was uncommunicative	1
N/A	1
Difficult/not good	3

What do you wish other OTW teams or the userbase knew about the Survey Workgroup ?	Respondents
Does anyone/the OTW teams use the survey results?	2
Survey Workgroup worked hard but lacked a leader	2
Survey Workgroup was (a) badly organized, (b) a waste of resources, (c) "set up to fail"	3

Do you think Survey Workgroup should be revived? Why or why not?	Respondents
It is important to survey the OTW's external stakeholders	1
Maybe	1
Yes, with a real statistics team and different leadership	1
No	2
Yes	3

If you think Survey Workgroup should be revived, what are the top 3 things the Survey Workgroup should prioritize internally going forward? (e.g., improving documentation, improving communication, changes in certain procedures, development of new procedures, etc.)	Respondents
Better communication	1
Better documentation	1
Clear roles in the workgroup	1
Lead should be focused on survey work	1
Data analysis plan	2
More skilled, cohesive team	3
Better procedures	4
Better survey construction	6

What was the biggest issue within the Survey Workgroup that you would like to see addressed going forward?	Respondents
Better leadership	1
Better recruiting	1
Clarity of purpose	1
Improved survey methodology	1
More organization	1
Better communication	2

What is the best thing about the way Survey Workgroup operated when it was active that you would like to call out or that you wish other OTW teams knew about/would adopt?	Respondents
Nothing	5