

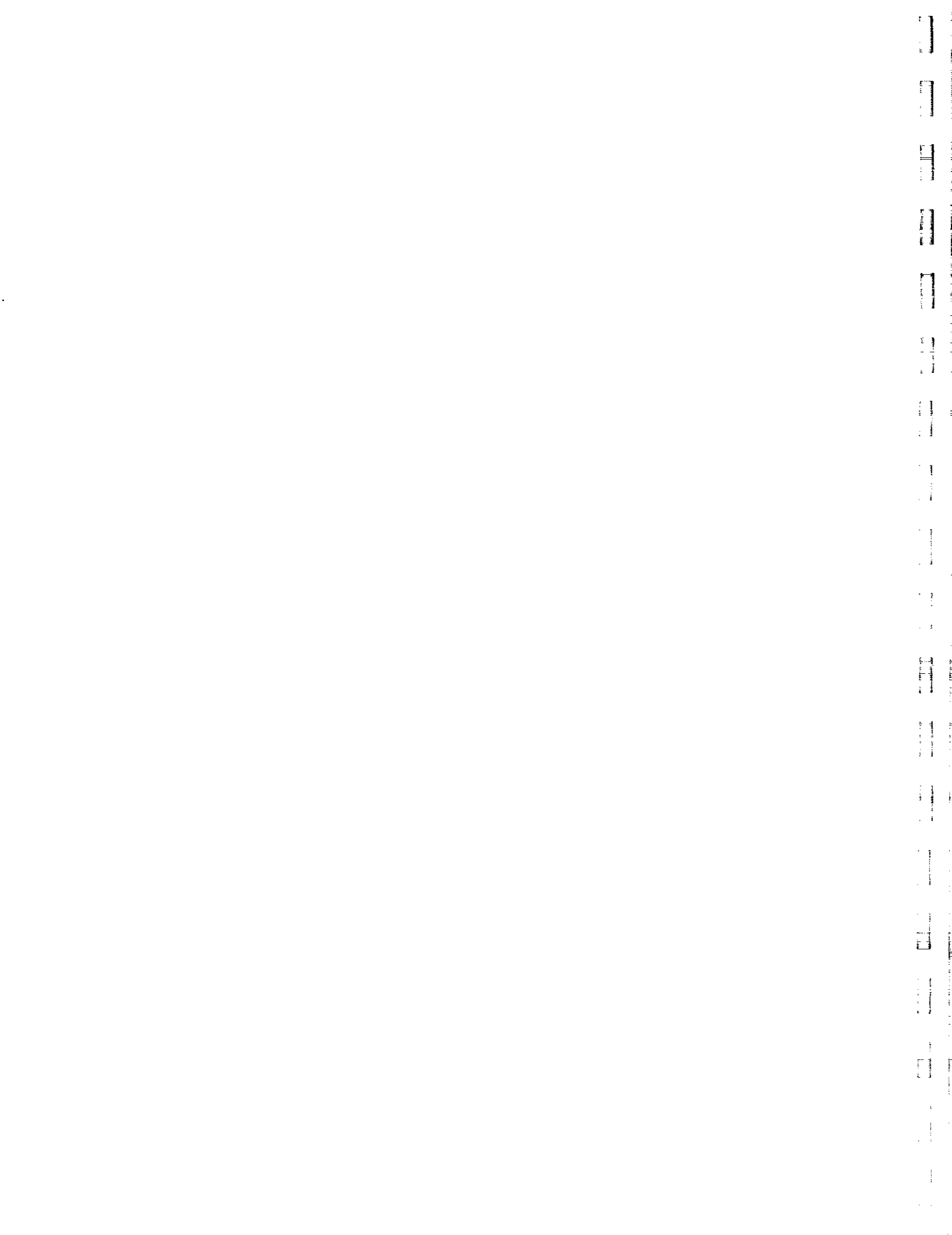
**EDMONTON WOMEN'S SHELTER**  
**ORGANIZATIONAL EVALUATION**

**by**

**THE EDMONTON SOCIAL PLANNING COUNCIL**

*Prepared by:*  
*Diana Salomaa*

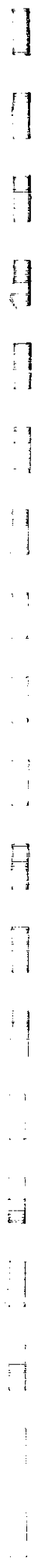
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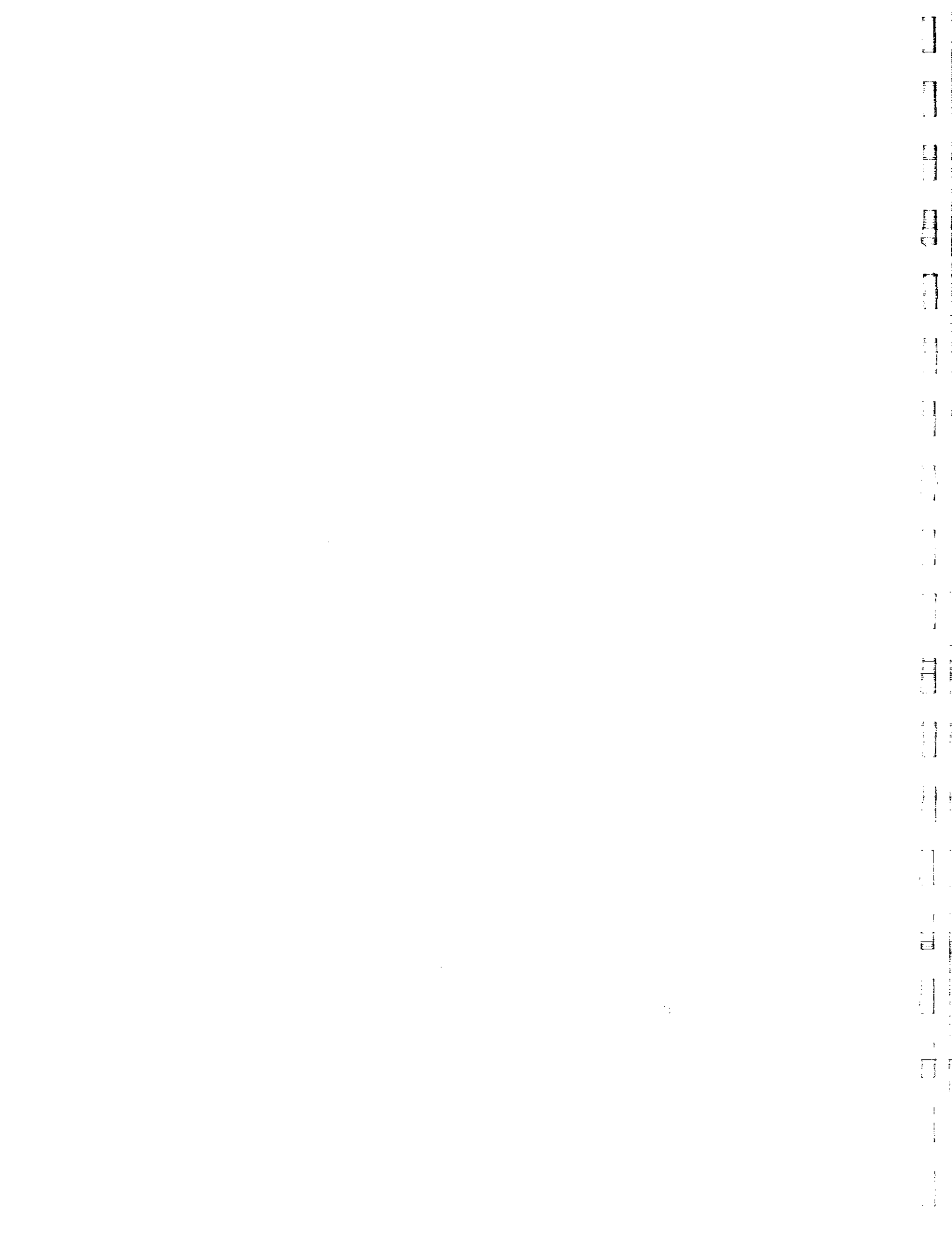
Edmonton Women's Shelter  
Organizational Evaluation

Table of Contents

SECTION ONE - INTRODUCTION	
Background	Page 4
Purpose of the Evaluation	Page 4
Organization of the Report	Page 5
SECTION TWO - HOW THE EVALUATION WAS DONE	
The Evaluation Approach	Page 7
The Evaluation Process	Page 7
SECTION THREE - EVALUATION FINDINGS	
Description of Edmonton Women's Shelter	Page 12
Evaluation Findings	Page 13
I Long Term Goals and Planning	Page 16
II Organizational Effectiveness	Page 20
a) Issues Related to the Board	Page 21
b) Issues Related to Staff and Volunteers	Page 27
III Business Office Administration	Page 35
IV Program Effectiveness	Page 39
V Role in the Community	Page 44
SECTION FOUR - SUMMARY	Page 46
SECTION FIVE - RECOMMENDATIONS	Page 48
APPENDIX A - EVALUATION QUESTIONS	Page 52
B - Board Questionnaires	
C - Staff and Volunteer Questionnaires	
D - Client Questionnaires	
E - Outside Agency Questionnaires	



**SECTION ONE**  
**INTRODUCTION**



## BACKGROUND

Edmonton Women's Shelter is a non-profit corporation which, according to its mission statement, was formed to "promote the well-being, health, development and welfare of women regardless of circumstances.". The major project of the agency is WIN House which provides temporary accommodation, counselling and follow-up services to women with children who are experiencing domestic violence. In July 1987, the Board of Directors contracted with the Edmonton Social Planning Council to conduct an evaluation of their administrative and organizational structure. The evaluation took place from mid-August to the end of November 1987. This report describes the evaluation, outlines the findings of the study and offers recommendations for the consideration of the Edmonton Women's Shelter Board of Directors.

## PURPOSE OF THE EVALUATION

As mentioned above, the primary purpose of the evaluation was to focus on the organizational and administrative structure of Edmonton Women's Shelter. A comprehensive evaluation of the programs and services offered was not done as previous studies have already examined these areas.

Discussions with the board and staff of Edmonton Women's Shelter narrowed the evaluation down to the following five areas of concern:

- 1) the process of long term planning used by the board;
- 2) organizational effectiveness related to board, staff and volunteer roles and responsibilities;
- 3) management of the business office;
- 4) client satisfaction with their overall experience at WIN House;
- 5) the image and perception of Edmonton Women's Shelter by outside agencies in the community.

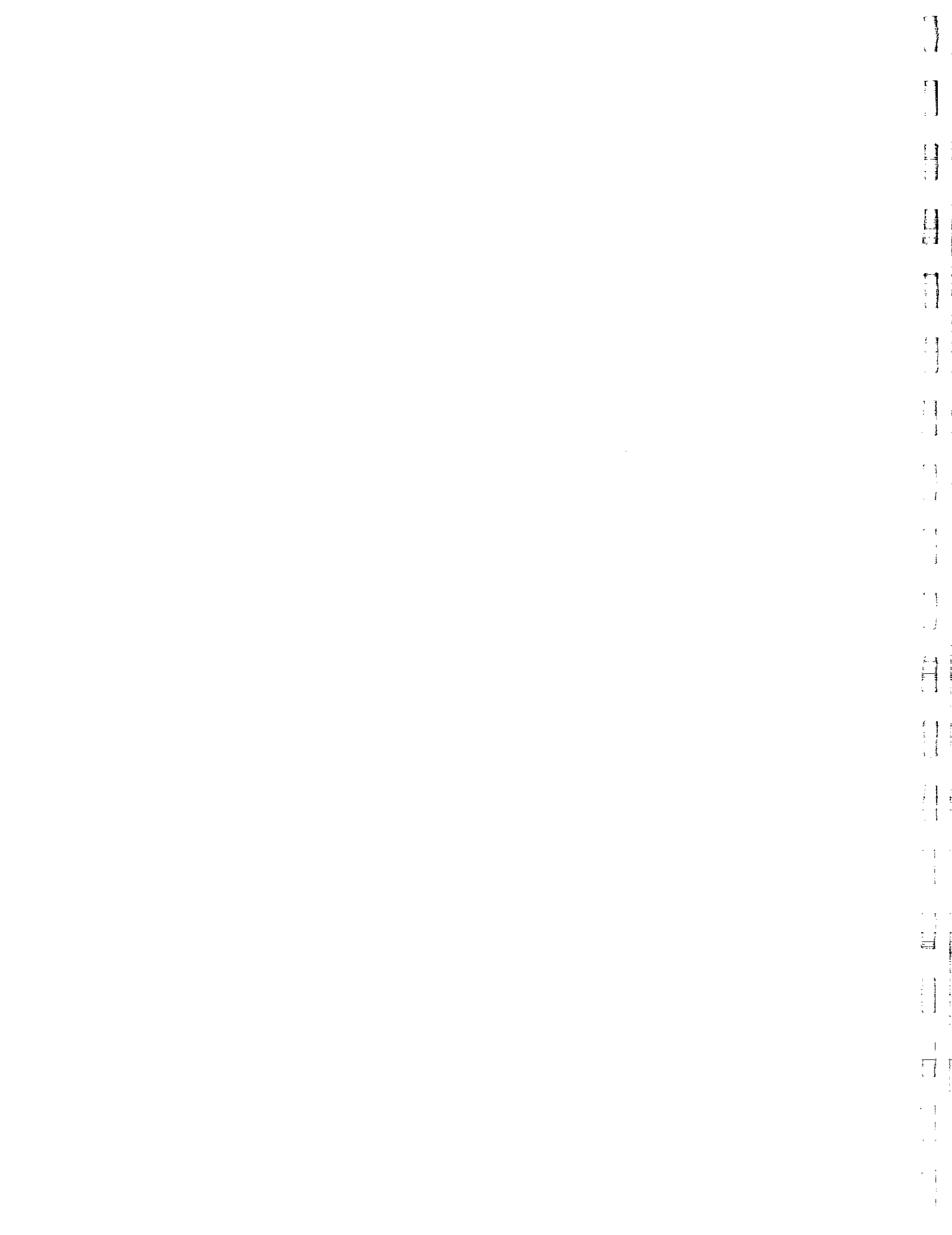
It is hoped that the outcome of this evaluation will be useful to the board in setting future directions for the agency as well as in finetuning their organizational structure related to board, staff and volunteer functioning.

## ORGANIZATION OF THE REPORT

This report consists of five sections. The first contains information on the background, purpose and organization of the study. Section Two describes how the evaluation was done. Section Three outlines the issues that were identified during the course of the study. Section Four summarizes findings of the study and Section Five offers recommendations for dealing with the issues identified.



**SECTION TWO**  
**HOW THE EVALUATION WAS DONE**



## THE EVALUATION APPROACH

Our approach to this evaluation was a consultative one. We felt that in order for an evaluation to be useful, it must be tailored to meet the specific needs, issues and concerns of the agency being studied. For this reason we suggested that an advisory committee be formed to ensure ongoing communication between ourselves as the evaluation team and the board and staff of Edmonton Women's Shelter, the users of the evaluation results. This committee consisted of representatives from your board, WIN House staff, a volunteer and a representative from an outside agency. The purpose of the committee was to assist in providing direction to the study and to identify and clarify issues and concerns as they arose.

Another feature of our approach was that rather than a research design being finalized prior to beginning the evaluation, it would emerge as the issues and concerns were identified. We also used a variety of data collection techniques and sources of information. Because of the nature of this evaluation, an important source of information was interviews with agency staff, volunteers and board members of the Edmonton Women's Shelter. These people were intimately involved in the day-to-day operation of the agency and consequently were in the best position to identify concerns.

The recommendations we have made are based on what the board, staff and volunteers of Edmonton Women's Shelter told us, in addition to our own observations and experience in working with non-profit agencies. Ultimately, the acceptance or rejection of these recommendations is the prerogative of the board of Edmonton Women's Shelter. The intention of the recommendations is to serve as a starting point for discussion.

## THE EVALUATION PROCESS

Initial discussions with representatives of Edmonton Women's Shelter identified some of the issues and concerns of board members and agency staff. Based on these discussions, a proposal was developed and presented for the approval of Edmonton Women's Shelter Board of Directors. Once the proposal had been accepted, the work of the evaluation began.

The evaluation team assembled to conduct the study consisted of six members. Peter Faid and Diana Salomaa, from the Edmonton Social Planning Council, examined issues related to long term planning and organizational effectiveness with regard to board, staff and volunteer functioning. Dr. Al MacKay, from the Department of Educational Administration at the University of Alberta, coordinated the work of three volunteer researchers (June MacKay, David MacKinnon and Beth Young) who examined the areas of program effectiveness and the role of Edmonton Women's Shelter in the community. They interviewed past and present clients as well as external agencies. Al Jacobson, a partner with W.J. Page and Associates Ltd. looked at issues related to the management of the business office as well as the operation of the Windfall Store.

Final responsibility for designing and coordinating the study, analyzing the data and preparing the final report is assumed by the Edmonton Social Planning Council.

The process followed in conducting the evaluation is described below.

1. Establishing the Advisory Committee

A small advisory committee made up of board, staff and a volunteer from Edmonton Women's Shelter, as well as a representative from an outside agency, was formed to work with the evaluation team. This committee consisted of six members.

It consisted of Ardis Beaudry, a member of the board and Chairperson of the committee; Barbara Himmel, a board member; Frances Cearns, a staff person from WIN House; Jean Mucha, a board member; Marilyn McClung, a WIN House volunteer and Vicki Strang, the Director of the Victorian Order of Nurses.

The tasks undertaken by the committee included:

- a) reviewing and commenting on the evaluation proposal;
- b) developing and clarifying the overall evaluation questions which served to guide the study;
- c) identifying potential sources of information;

- d) discussing evaluation results and assisting in the formulation of recommendations.

## 2. Reviewing Relevant Documents

In order to gain an understanding of Edmonton Women's Shelter, the evaluators reviewed a number of documents including newsletters, brochures, annual reports, minutes of board meetings, job descriptions, orientation materials, personnel policies, the Board Manual, current objectives and other studies pertaining to WIN House programming such as Children in Domestic Violence and Battered Women: Who Are They and What Are Their Needs?. As well, the evaluators familiarized themselves with all aspects of Edmonton Women's Shelter operations including WIN Houses I and II, the Windfall Store and the business office.

## 3. Interviews With Key Informants

A major part of the evaluation consisted of interviews with individuals identified as key informants. The sample consisted of:

- a) six present and three past board members;
- b) fourteen WIN House staff including the Director, an Assistant Director, four crisis intervention workers, two child support workers, a housekeeper, two follow-up workers, the volunteer coordinator and two volunteers;
- c) business office staff;
- d) management staff of the Windfall Thrift Store;
- e) five current and eleven former clients;
- f) fifteen external agencies and individuals who have direct involvement with Edmonton Women's Shelter including Legal Aid, AADAC, City of Edmonton Social Services, a doctor, a lawyer, a teacher in R.J. Scott School, a VON nurse, Indian and Northern Affairs, City Police Crime Prevention Unit, Alberta Social Services, Child Welfare, Family Court, WINGS, Forensic Assessment and Community Services, and Safe Place in Sherwood Park.

Interviews were based on a structured interview format but all questions were open-ended and respondents had the opportunity to add any issues that were not directly covered. The interviews ranged in length from fifteen minutes to two hours, with the majority taking forty-five minutes to one hour.

4. Board Audit

In order to gain a general picture of the overall functioning of the board, all board members were asked to complete a board audit form. Although the questions were close-ended, room for comments was left at the end of each section to allow for discussion of any issues or problems identified. Twelve out of twenty-two questionnaires were completed and returned. The results provided some useful insights into board functioning and were incorporated into the evaluation results.

**SECTION THREE**  
**EVALUATION FINDINGS**

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DESCRIPTION OF EDMONTON WOMEN'S SHELTER

Edmonton Women's Shelter was incorporated as a non-profit corporation in 1973, although it officially has been in existence since 1968. Their primary purpose is "to promote the well-being, health, development and welfare of women regardless of circumstances." The agency has spent many years researching the needs of homeless women, particularly women with children suffering from domestic violence. Until 1978, there was little shelter available for women in Edmonton to meet this need, let alone any counselling services, referrals or emotional support.

The primary project of Edmonton Women's Shelter is WIN Houses I and II. Both houses provide temporary shelter, with a maximum stay of three weeks, to women and children who have experienced family violence and require emergency accommodation. WIN House I was officially opened in December 1978. It is a seven bedroom, twenty-one bed facility which is leased from the Clifford E. Lee Foundation for one dollar a year. It has a ten year renewable lease which is due next year. WIN House II was officially opened in November 1982 because of the tremendous need demonstrated for a second shelter in Edmonton. It is owned by Edmonton Women's Shelter and is an eight bedroom, twenty-four bed facility. Both houses not only meet the basic short term needs of women and their children by providing shelter, food and clothing, but they also offer a number of free support programs such as:

- a) crisis intervention workers on call twenty-four hours a day, fifty-two weeks a year who provide support, information and referrals;
- b) follow-up workers who assist families to settle into the community after they choose to live independently;
- c) trained child care workers who provide a non-violent structured play atmosphere and also work with the children and their mothers to help them cope with the violence and abuse they have experienced;
- d) a volunteer program which provides a support service to all workers in the house;
- e) a weekly women's support group led by a trained counsellor;
- f) a weekly parenting support group;

- g) free legal information and referrals offered by volunteer lawyers who come to the house.

In addition to WIN Houses I and II, Edmonton Women's Shelter has initiated a number of other projects which include:

- a) a study of children in domestic violence;
- b) a proposal in support of second stage, or longer term, housing which ultimately led to "WINGS (Women in Need Growing Stronger) of Providence" being incorporated as a new society with their own board of directors;
- c) the operation of a secondhand thrift store ("Windfall");
- d) research into abuse of the elderly;
- e) research into a mobile drop-in and information center for teenagers living on the streets.

Edmonton Women's Shelter is run by a twenty-two member volunteer board of directors. According to their audited financial statements for 1987, their revenue for the year ended March 31, 1987 was \$1,027,097. The main source of this revenue (62%) was through an annual grant from Alberta Social Services. Other major sources of revenue included donations (20%) and fundraising events (12%), with the remaining 6% from interest, fees for service, thrift store sales and subsidy, and memberships.

Edmonton Women's Shelter operates its programs with a paid staff of thirty-nine. This includes a full-time house director, two assistant directors, a volunteer coordinator, twenty-four crisis intervention workers (of whom eight are full-time, four are part-time and twelve are casual), two follow-up workers, four child support workers, three full and part-time housekeepers, a business office manager and a secretary. As well, volunteers aid in the day-to-day functioning of the organization.

### EVALUATION FINDINGS

Over the course of the evaluation it became readily apparent that Edmonton Women's Shelter board, staff and volunteers should be commended for their

accomplishments. They were seen as providing a valuable and much needed service to the community through the excellent work they have done to meet the needs of battered women and their children through WIN Houses I and II. There was also a high degree of commitment, enthusiasm and personal satisfaction expressed by those individuals directly involved with the agency. There was unanimous consensus on the findings identified in points 1 to 7. The source of these observations was from external agencies and WIN House Clients. The following highlights some of the observations and comments made:

1. WIN House was well known and respected in the community.
2. It was seen as providing a unique service not found elsewhere in Edmonton as it made available physical and support/counselling services for its clients all in one place.
3. There was a unanimous consensus that WIN House was needed. It provided the only secure, safe place for battered women and their children in an emergency. Many said more of the same services were needed.
4. The channels of communication between WIN House and outside agencies were excellent. The present Director was a key factor in this assessment as she was well known and respected by outside agencies.
5. WIN House staff were perceived as competent, caring, warm and friendly.
6. All aspects of WIN House service were rated by clients as "good" or "excellent".

*"It's a safe, clean and comfortable place. The main thing is that my children and I are safe here."*

*"All staff are caring. They were like sisters to me, or like the way I wish my real sisters were."*

*"I don't know what I'd have done if not for this place."*

7. WIN House programs and staff had a positive effect on its clients. As a result of being in WIN House, clients described themselves as being more self-confident and more in control of their own and their children's lives.

*"I feel like I'm in a real family at WIN House. At home, my husband beat me up every day. But now I'm stronger and more independent."*

*"My children were sexually assaulted by my husband. My friends, that is, our friends, don't believe that he could do a thing like that. WIN House has helped me take control of my life and to find new friends and support groups."*

8. Most board members were perceived as being dedicated, hard working and committed.
9. Most board, staff and volunteers found a great deal of personal satisfaction in being involved with Edmonton Women's Shelter/WIN House.

*"Extremely satisfied - one of the best volunteer experiences I've had."*

*"Very worthwhile experience - found it satisfying and challenging."*

*"Would miss this place if I left."*

*"Have a rewarding feeling when I go home. Feel good about my job."*

*"Love coming in here. Get up in the morning and feel good."*

*"Would not hesitate to recommend to someone from becoming involved."*

Overall, Edmonton Women's Shelter board, staff and volunteers were perceived as doing an excellent job in providing services for battered women and their

children. The issues that follow are not indicative of any serious shortcomings of the agency that threaten its future viability. Rather, they are suggestions for finetuning its operations. Changes are particularly needed in some areas as Edmonton Women's Shelter has rapidly grown and requires more formalized operational procedures as well as some organizational re-structuring in order to function more effectively.

The issues identified through the evaluation are broken down into the following areas:

- Long Term Goals and Planning
- Organizational Effectiveness
  - a) Issues Related to the Board
  - b) Issues Related to Staff and Volunteers
- Business Office Administration
- Program Effectiveness
- Role in the Community

## I LONG TERM GOALS AND PLANNING

This part of the evaluation examined the planning process followed by the Board of Directors at Edmonton Women's Shelter. Three issues became readily apparent and are listed below:

1. There is a discrepancy between the mission statement and many of the projects undertaken by the board.
2. The process of long term planning needs to be improved.
3. There is no financial plan which guides short and long term spending.

Each issue is discussed in more detail below.

1. There is a discrepancy between the mission statement and many of the projects undertaken by the board.

The mandate of Edmonton Women's Shelter as stated in their mission statement is to:

- a) promote the well-being, health, development and welfare of women regardless of circumstances;
- b) provide a place where women may come to rest for protection, companionship, help; a place which can provide the basic needs of food, shelter, clothing, but does not infringe upon one's right to refuse rehabilitation;
- c) provide an information-referral service to women who request it;
- d) collect and evaluate information regarding the needs and aspirations of women, to disseminate this information to the community and to act upon this information in appropriate ways;
- e) engage in and promote charitable works of any kind in the interest of women.

Mission statements are not meant to be all-encompassing for the life of the agency. It is generally recognized that a board's mandate should be periodically reviewed at least every five years to determine whether any adjustments are necessary. Often boards expand their scope and become involved in new areas or external circumstances have changed so that the original role and purpose of the agency are no longer valid.

The mission statement of Edmonton Women's Shelter as outlined above has not been reviewed nor revised by the board since its inception in 1968. It is time the board now did so. Recent activities of the board now include not only the needs of battered women but those of children living in violent domestic situations, the needs of the abused elderly as well as the needs of teenagers. These groups are not reflected in the mission statement, nor, for that matter are battered women. The mission statement refers to the needs of all women whereas in reality its

activities are largely directed to a specific group. While it is generally accepted that a mission statement can be broad in scope, too much generality makes it virtually meaningless.

Another reason for board members to review their mission statement is that there appears to be a diversity of opinion regarding how far the board should go in meeting the needs of battered women. Some members feel a third shelter should be developed. Other board members feel that eventually WIN House should have an independent board of its own while Edmonton Women's Shelter moves on to other concerns. This is an important issue that must be discussed by the board as its resolution will have major ramifications on the future direction of the agency. It is imperative the board decide whether battered women and their children will continue to be their primary area of concern or whether they wish to devote their energies to broader issues related to family violence. It is unlikely they will be able to do both due to limitations in funding as well as board members' time. By spreading themselves too thin, the needs of battered women will not be well served.

#### RECOMMENDATION

*That the board review what the primary purpose of Edmonton Women's Shelter should be and revise their mission statement accordingly.*

2. The process of long term planning needs to be improved.

No formal process of planning appeared to be followed at Edmonton Women's Shelter. This seems to be largely due to the board's current role as an administrative board. A large proportion of the board member's time has been spent on the daily operational details of running the agency. The problems associated with this type of role are discussed in the section dealing with Issues Related to the Board.

While each sub-committee of the board did have written objectives, there was no overall long range plan in place for the agency. Such a plan is essential for any organization to function effectively. A plan provides clear direction on where the agency is heading and is useful in making staff and budget decisions. Moreover, this plan needs to be reviewed annually to adjust the organization's goals to an every changing external environment.

The board appears to be aware of the need for long term planning. This is evidenced by their request for this evaluation study and by the fact that a facilitator was brought in in 1983 to initiate the process. The result of the latter workshop for board members was a "wish list" of future objectives for the agency. It is apparent that this process needs to be repeated as well as carried one step further. The board needs to define and prioritize specific long-term goals for the agency and to identify measurable objectives to realize each goal. As well, it is important that the goals are related to a timeframe and long term financial strategy. Such a process should involve both board and staff members, other than just the House Director. As mentioned earlier, it is important that this plan be reviewed annually and revised and/or updated as needed.

Through interviews with board members, it became readily apparent that many newer members were not aware of any long range planning efforts. Discussion of the long range plan should be an important part of any future orientation process for new board members.

### **RECOMMENDATIONS**

*That the board arrange for a series of workshops to address board/staff roles and long range planning.*

*That the board institute a process of long range planning which clearly defines and prioritizes specific goals*



*to be achieved, identifies measurable objectives to realize goals and relates goals to a timeframe and financial strategy.*

*That the long range plan be reviewed annually.*

3. There is no financial plan which guides short and long term spending.

The budgeting process appeared to be done on an ad hoc basis as each committee submitted their individual budget for the year. There was no overall financial plan in place which related spending to future goals or long term needs. A financial plan would be useful as it could target money and future fund raising efforts for specific items such as major renovations and office computerization, for example. Currently it seems that money is raised for projects as they arise rather than planning for them in advance.

Developing a financial plan and budgeting process should be an important activity for Edmonton Women's Shelter to undertake. This is particularly true as the agency is expanding and now has an annual revenue of over one million dollars (1987).

**RECOMMENDATION**

*That a more formalized budgeting process and financial plan be developed and related to the long range plan of Edmonton Women's Shelter.*

II **ORGANIZATIONAL EFFECTIVENESS**

This part of the evaluation examined areas related to organizational effectiveness. Specifically it looked at the roles and responsibilities, qualifications, orientation/training and general satisfaction of board, staff and volunteers. As specific issues were related to board members only, and other issues were related to staff and volunteers only, each area will be discussed separately.

A. ISSUES RELATED TO THE BOARD

Through the course of the evaluation, the following concerns related to board functioning became apparent:

1. The board is an administrative board rather than a policy board.
2. Board orientation and training could be improved.
3. The board lacks a recruitment strategy.
4. Board and staff communication could be improved.

Each issue is discussed in more detail below.

1. The board is an administrative board rather than a policy board.

A problem common to many boards is the difficulty they have in making the transition from a "hands on" administrative board to a policy board. This is particularly true of human service agencies. They are often founded by a group of interested individuals who not only establish the agency but *are* the agency. They are heavily involved in its day-to-day operation right from its inception. Frequently they have difficulty adjusting their behavior to more of a policy role as the organization moves from an informal, non-bureaucratic structure to one that is more formal with a more secure source of funding and a paid staff.

While members who are founding individuals usually prefer a "hands on" role, it is important for the long-term interests of the agency to make the transition to policy-making. Instead of dealing with the day-to-day issues, board members need to focus on the long term objectives of the agency.

Edmonton Women's Shelter has not yet made this transition. Their board is still functioning at an administrative level rather than a

policy level. This has appeared to create some conflict between older "founding" members and newer members in terms of their expectations for the board. Currently, an inordinately large time commitment is required of board members to carry out the work of the agency. This is an unrealistic expectation given the volunteer, unpaid nature of the work.

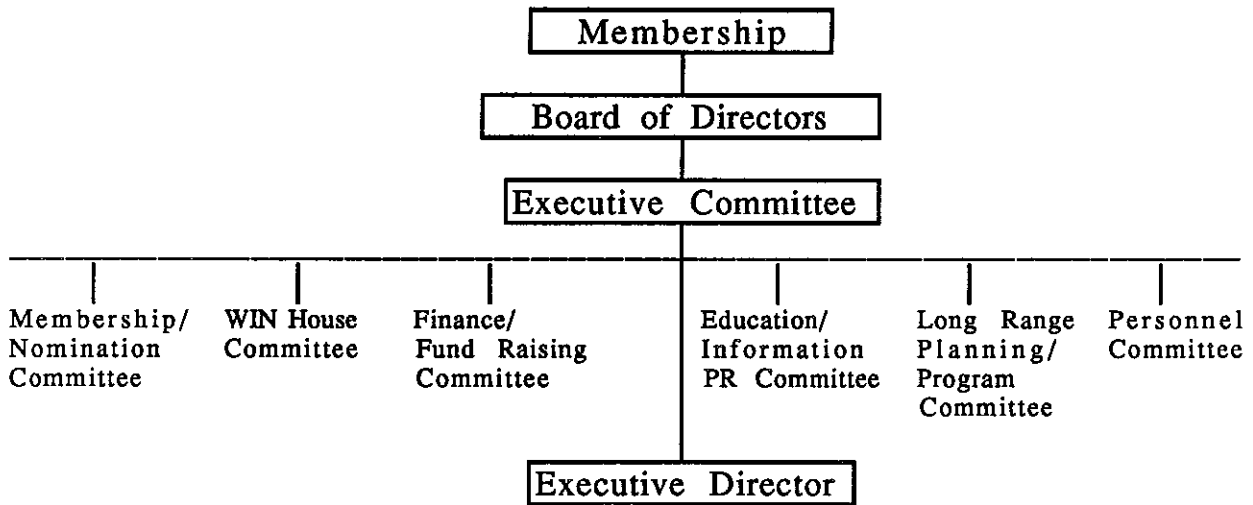
In order to make the transition to a policy board, the sub-committee structure of the board requires some modification. Currently, there is a two tiered sub-committee structure with one level responsible for general matters pertaining to Edmonton Women's Shelter and the other responsible for the administrative matters pertaining to the operation of WIN House. There are also a large number of sub-committees for the size of the board, many sub-committees are administratively rather than policy oriented and the reporting structure is time consuming and complicated.

Good board organization is extremely important as the sub-committee structure affects the type and quality of work an agency is able to do. The role of sub-committees is to ensure that the board's decisions are carried out as well as to develop proposals for board action. Without an appropriate sub-committee structure it is very difficult to carry out the decision-making role of the agency.

The following is a suggested list of sub-committees the board of the Edmonton Women's Shelter could consider utilizing. Note that some of these sub-committees are already in place while it is suggested that others be eliminated.

1. Executive Committee - This committee would coordinate the work of the other sub-committees and take overall responsibility for the operation of the board itself.
2. Membership/Nomination Committee - The responsibilities of this committee would include recruiting new members and preparing a recruitment strategy and nomination grid in order to bring

people with specific backgrounds and skills into the organization. As well, they would be responsible for preparing and delivering a comprehensive orientation program for new board members as well as annually revising the board manual. If the work so dictates, this committee could be split into two distinctive committees.



3. The WIN House Committee would be responsible for formulating policies for all aspects of the operation of WIN House, with the aid and direction of the Executive Director. The committee would also keep abreast of major renovation and expansion needs as well as program and service gaps. The current facilities and volunteer committees would then be abolished with their tasks delegated to the Executive Director, Assistant House Directors and Volunteer Coordinator. Final approval in all of these areas would rest with the board through the WIN House committee.
4. The Finance/Fund Raising Committee would be involved in fund-raising as well as reviewing and approving details of the budget and monitoring the financial affairs of the agency. Responsibility for actual preparation of the budget would be left primarily to the Executive Director. Budget preparation is a highly specialized area and it is not feasible to expect volunteer board members to do this.

5. The Education, Information and Public Relations Committee would function as currently outlined in the Board Manual.
6. A Long Range Planning Committee should be formed and tied in with the present program committee. Its major responsibility would be to coordinate work on a long range plan, ensuring board/staff input, and to coordinate an annual review of the plan.
7. The Personnel Committee would deal with all personnel matters and ensure that personnel policies are developed, regularly reviewed and implemented.

The proposed committee restructuring described above, or something similar, would free the board to operate at more of a policy-making level. The operational details of running the agency could then be left to staff.

Another problem identified through the course of the interviews was that board meeting times at noon hour made it difficult for many members working outside the home to attend. This could present an obstacle to board recruitment as it does tend to restrict involvement to only those individuals available for afternoon meetings.

### RECOMMENDATIONS

*That board committees be restructured and committee responsibilities be revised to encourage the board to operate at more of a policy-making level.*

*That board meeting times be reviewed to enable all board members to attend.*

2. Board orientation and training could be improved.

Most board members felt that the current orientation process was adequate as far as it went. However, it appeared to be too brief and it did

not cover all of the issues members needed to know to function effectively, as the comments below illustrate:

*"Orientation didn't work."*

*"Often new members don't attend orientations."*

*"Good as far as it went."*

*"Not long enough."*

*"Board meetings often turn into training sessions for new members as old issues are rehashed."*

A thorough and ongoing orientation program for new members is essential as new members are unlikely to know what is expected of them.

One problem related to the orientation process followed by Edmonton Women's Shelter is that the current board manual does not contain enough information. It should be revised and updated to include a copy of the board's long range plan (once completed), current budget and funding sources, information and statistics related to WIN House, an updated mission statement, expected responsibilities of membership including the role of each member and the duties and purpose of each sub-committee, board meeting schedules, a brief history of the organization and a compilation of annual reports.

As well, the orientation should include an organized tour of both WIN Houses rather than leaving this the responsibility of each new member. This will ensure each member is aware of the philosophy, programs and services offered by the shelters and they will have an opportunity of being formally introduced to staff.

**RECOMMENDATIONS**

*That a more detailed orientation process and materials be designed for board members, including an updated board manual.*

*That all board members be required to serve on a committee as a condition of membership.*

3. The board lacks a recruitment strategy.

The board did not appear to have a formalized recruitment strategy. Such a strategy would enable the board to pre-plan the kinds of skills and backgrounds that they need represented and to recruit accordingly. The board would then be ensured of a well balanced mix of board members that meet their particular needs.

A side-issue that arose from board interviews were varying opinions regarding the number and role of males on the board. This is an issue that the recruiting strategy should also address.

**RECOMMENDATION**

*That the board design a recruiting strategy with a nominating grid.*

4. Board and staff communication could be improved.

Although this by no means appeared to be a major problem, there did seem to be a "them-us" feeling between board and staff members.

This could be due to the fact that board and staff were not familiar with what each other does nor did they have the opportunity to work together as a team. The following were some comments received:

*"Board members should be more visible in the house."*

*"We don't know a lot of what they're doing."*

*"When you go to the house (as a board member) sometimes you feel like an intruder."*

This problem could be partly alleviated by including staff members, other than the Director, on board committees. Staff would be able to provide valuable input and perspective to board decisions. In addition, social functions should continue to be periodically arranged between board and staff, although it was suggested that a format other than dinners might encourage more mixing. Combined board-staff workshops were also seen as an excellent idea that should be continued.

### **RECOMMENDATIONS**

*That a strategy for improving board/staff communication be designed.*

*That most board committees include at least one staff person other than the Director.*

### **B. ISSUES RELATED TO STAFF**

The evaluation identified the following issues related to staff:

1. The operation of Edmonton Women's Shelter is fragmented as no one person is in charge of overseeing program, financial and administrative matters at the staff level.
2. Orientation and training for staff could be improved.



3. There are too many casual and part-time staff.
4. Staff are expected to take on a number of responsibilities, often making it difficult to fulfil their primary responsibilities.
5. Communication between staff could be improved.
6. Volunteers could be better utilized.
7. There is a large turnover of staff and volunteers.

Each issue is discussed in more detail below.

1. The operation of Edmonton Women's Shelter is fragmented as no one person is in charge of overseeing program, financial and administrative matters at the staff level.

It is generally agreed that the role of boards is to make policy decisions and to see that those decisions are carried through. In order to do this, boards work closely with the director of the agency who is responsible for administrative matters. This usually includes tasks such as implementing policy and programs, hiring staff, educating the board regarding policy options and needs of the agency, supervising and evaluating staff, public relations, liaison between board and staff and budget development and control.

The current director position at WIN House has involved both a "hands on" counselling role as well as a somewhat limited administrative role. This has created problems in the past because of the separation of program and financial responsibilities between the director and business manager. Because both reported directly to the board, day-to-day conflicts had to be resolved at the board level.

The board should consider delegating both program and financial responsibilities to one staff person, an Executive Director. Currently,

the structure is too dependent on personalities for its success. A structural change would ensure that historic problems relating to the division of these areas would not arise again. As well, programming and budgeting are inseparably related and are best coordinated by one person.

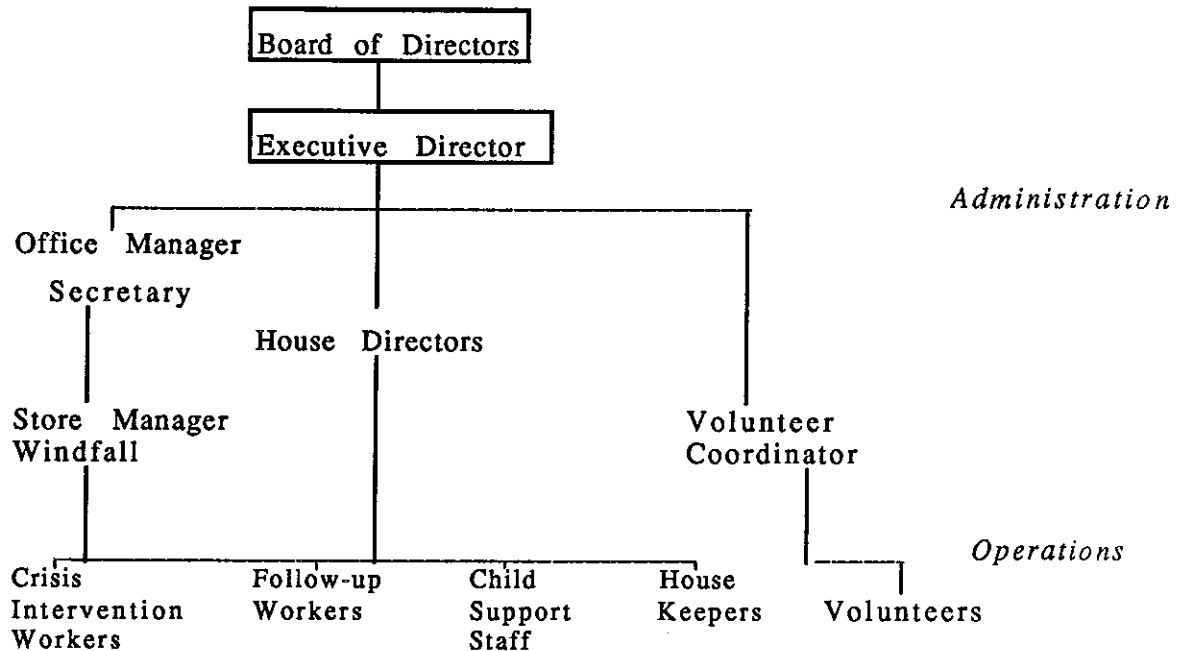
The Executive Director would report directly to the board and have overall responsibility for budget, program and administrative matters of Edmonton Women's Shelter. She would oversee the business office, the Windfall Store and WIN House Operations, as well as other projects of the board. Qualifications for an executive director would include organizational and management skills, "people" skills in order to relate to board, staff, clients and outside agencies and a knowledge of the social services area.

The role of the business manager could then be changed to that of an office manager. She would assist the executive director in preparing the budget, look after bookkeeping matters and coordinate the day-to-day activities of the business office. She would report to the executive director.

The secretary would work closely with the business manager and play a support role to the executive director and others as needed. Since the office manager would still be responsible for the overall functioning of the business office, the secretary would still report to the office manager.

The assistant director positions would be re-named house directors. They would be responsible for the on-going operation of the houses. This would include supervision, evaluation and training of staff, maintaining accurate records and coordinating the physical needs of the houses in terms of major renovations and maintenance. Their role would become more administrative and serve as a support function to the executive director.

The staff organization chart below illustrates the revised reporting structure we have suggested.



**RECOMMENDATIONS**

*That the Director's job description be expanded to that of an Executive Director and include program, financial and administrative responsibilities for Edmonton Women's Shelter.*

*That the Business Manager position be re-defined to that of an office manager who reports to the Executive Director who in turn reports to the Board.*

*That the Assistant Director positions become House Directors with their role serving as a support function to the Executive Director.*

2. Orientation and training for staff could be improved.

The present staff and volunteer orientation programs appeared to be fairly extensive. The only concern expressed by staff and volunteers was that more practical information was needed. Suggestions included more information on handling crisis intervention calls, how to properly interview women when staff suspected child welfare concerns, where to find referral information necessary to properly deal with clients, how to deal with discipline, as well as more information on childcare, particularly as volunteers currently spend the majority of their time in this area. It was suggested this information be presented over a longer time period using several shorter sessions, rather than one long session, in order to better assimilate the large amount of information presented.

Staff also made the observation that new staff were often left too much on their own. It was suggested this could be alleviated by pairing a new staff person with a more experienced staff member.

**RECOMMENDATION**

*That orientation and training for staff and volunteers be reviewed to balance further theoretical and practical information needs.*

3. There are too many casual and part-time staff.

There was some concern expressed that, for the size of the organization, there were too many casual and part-time staff. This seemed to be particularly true of crisis intervention workers. Eight out of twenty-four were full-time, while twelve were casual and four were part-time. It was felt that clients could have difficulty relating to crisis intervention staff due to the steady influx of new faces. As well, it was suggested that it created some administrative problems in terms of allocating salaries and benefits. A more consistent core of full and part-

time staff would help create more of an "esprit de corps" among staff, as well as provide more consistency to clients in the house.

**RECOMMENDATION**

*That future staffing should aim towards achieving a consistent full-time complement of staff with less casual and part-time staff.*

4. Staff are expected to take on a number of tasks, sometimes making it difficult to fulfil their primary responsibilities.

Because of the nature of the work at WIN House, it seems to be difficult to rigidly separate job responsibilities. Some concerns were expressed by staff, however, about some of the tasks they were expected to fulfil. The major issue was the amount of time staff were expected to babysit, particularly on weekends as no child support staff were available at this time. Another problem, identified by child support workers, was that two child support staff should be scheduled to work together per shift. The demands on one person were felt to be excessive whereas two workers could provide better care and programs.

Ideally, more staff should be hired in the child care area, particularly on weekends. If budget considerations do not realistically allow for this, better use of trained volunteers, who have a specific interest in child care, could help alleviate this problem.

**RECOMMENDATION**

*That more child care workers be hired or better use be made of trained volunteers to work in the child care area.*

5. Communication between staff could be improved.

Staff appeared to be fairly satisfied with the amount of input they had into decisions that were made at WIN House and the number of

regular meetings that were held. There was some concern, however, that not all staff could take part in daily client updates because of the way shifts were arranged, particularly in the child care area. As well, volunteers tended to be excluded from staff meetings as they were expected to answer the telephones and babysit during this time.

As it seems to be important for all staff to take part in daily client updates, shifts should be rearranged or other measures examined in order to allow for this. As well, more effort should be made to include volunteers in staff meetings. This would help alleviate the feeling they are a peripheral part of the organization.

### **RECOMMENDATIONS**

*That shifts be re-arranged or other arrangements made so that all staff are able to participate in daily client updates.*

*That more effort be made to include volunteers in staff meetings.*

#### 6. Volunteers could be better utilized.

Orientation and training for volunteers generally appeared to be fairly good. It was suggested, however, more emphasis should be put on practical skills as well as skills needed in the child care area. A number of problems relating to the management of the program itself were identified by staff and volunteers. These are listed below, although we understand many of these concerns are currently being addressed:

- a) there was nothing specific set out for volunteers to do when they arrived;
- b) staff were not clear about how much or what they could delegate to volunteers;
- c) volunteer expectations were often higher than what they were allowed to do;

- d) volunteers were often excluded from social events and regular staff meetings;
- e) the volunteer list was not kept up-to-date and it did not appear to match each volunteer's background, interests or skills to the jobs that needed to be done;
- f) staff often did not know who the volunteers were and volunteers did not always know who the staff and clients were.

Managing a volunteer program is a difficult task. Volunteer turnover often tends to be high and volunteers cannot always be relied upon to come in at specified times. To overcome these problems, volunteers must be made to feel challenged, appreciated and, most importantly, a part of the team. Staff must also be better informed about the volunteer program. It is hoped these concerns will be addressed by current changes to the program.

#### RECOMMENDATION

*That volunteers be used more effectively and more effort be made to help volunteers feel a part of the "team" at Edmonton Women's Shelter.*

#### 7. There is a large turnover of staff and volunteers.

Many staff stated there was a problem regarding the high turnover of staff and volunteers. The reason most frequently given for staff turnover was low wages as illustrated in the comments below:

*"I stay because the job is challenging. I enjoy it. But if I was a single mom, I couldn't afford to work here."*

*"I couldn't afford to work here if I didn't have a husband who worked."*

*"Wages would be the major reason why I would leave."*

Stress and burnout were cited as other factors.

This is a difficult area to address as any recommendations that are made, such as higher salaries or longer holidays, cost money and may not be possible to implement easily. However, the board should be aware of the problem and attempt to upgrade salaries and benefits wherever possible.

Most staff appeared satisfied with the programs in place for stress and burnout. An area generally agreed upon by staff that needed improvement were staff support meetings. It was felt these meetings did not provide an outlet for venting problems nor for building staff support. Problems identified with the meetings included the lack of an agenda, the fact no one chaired them and the presence of management staff which often served to constrain staff. In order to begin the process, a facilitator should be brought in to "break the ice" for the first few meetings.

### RECOMMENDATIONS

*That staff salaries and/or benefits be regularly reviewed and improved in order to attract and maintain qualified staff.*

*That staff support meetings be reorganized to more effectively provide "staff support".*

### III OFFICE ADMINISTRATION

This part of the evaluation reviewed the administrative operations of Edmonton Women's Shelter. The following issues were identified.

1. Many office procedures could be automated.
2. Filing, accounting and other record keeping systems could be improved.
3. There is a lack of privacy at the business office.



Each issue is discussed in more detail below.

1. Many office procedures could be automated.

Many procedures that are currently done manually such as routine correspondence, and membership and mailing lists could be automated. A mailing list is critical to any organization's ability to communicate with members and raise public donations. The current system seems unnecessarily cumbersome.

A micro-computer data base could effectively handle the mailing lists and a micro-computer word processing package could handle the standard correspondence. It may also be possible to obtain a word processing package that has the capacity to store the organization's mailing list in its own data base file structure. This latter option would likely be easier to implement and also be of the lowest cost. The total cost of the system could be justified in light of staff time saved, faster turnaround time, and more personalized correspondence.

If the board decides to proceed with automation, we would recommend the following:

- a) the micro-computer processor should be an Apple Macintosh or IBM or 100% IBM compatible (eg. Compaq, Epson) with 512K of internal RAM memory, at least one floppy disk storage unit and a hard disk storage capacity of at least twenty megabytes;
- b) the printer should be of letter quality or if possible a laser printer;
- c) the software required should consist of a word processing package and a data base system, such as Microsoft Word and Reflex for the Macintosh or Wordperfect and DBase III for the IBM/IBM compatible.

We would recommend using the services of a reputable systems consulting firm to assist in introducing the computer equipment and in providing the necessary training. This would likely require only a day of consultant's time.

The costs of automating will vary. If Edmonton Women's Shelter is prepared to shop around, they should be able to obtain a system of reasonable quality from \$5,000 to \$12,000. An additional \$500 to \$1000 will be required for professional services to help get the system established.

### RECOMMENDATION

*That the business office automate procedures previously done manually such as routine correspondence and membership and mailing lists.*

2. Filing, accounting and other record keeping systems could be improved.

In the past, the filing, accounting and record keeping systems had not been kept up-to-date nor readily available. While this area is currently being addressed by the present business office staff, the key areas to keep in mind that we would suggest need improvement are:

- a) eliminating the backlog of outstanding accounting issues such as lost invoices, miscoded journal entries and uncompleted bank reconciliations;
- b) more full financial accounting of "arms-length" operations is needed such as the Windfall Store and fundraising efforts such as the Variety Show;
- c) separating between administration and program accounts/coding in order to ensure full costing of administration expenses.
- d) avoiding duplication in and simplifying the filing system;

- e) developing a system for prioritizing work done in the business office as there is currently a lack of any system for prioritizing requests from program staff or board members;
- f) program statistics could be compiled by business office staff, particularly if the office is automated;
- g) amalgamating correspondence and fundraising files to avoid duplication of information - currently four separate systems are maintained: member lists, label, card files and donation files.

It is important for the board to maintain up-to-date information as it is fundamental to the board's decision-making and fundraising activities.

### **RECOMMENDATIONS**

*That the filing and record-keeping systems be reviewed to avoid duplications and to ensure they are current and readily available.*

*That the board not take on "arms length" fundraising activities without having access to full financial information of those operations.*

### 3. There is a lack of privacy at the business office.

While this is not an issue for business office staff, we observed that there is a lack of private space for meetings and individual work activities. With the numerous meetings held by the board and various committees, there is often little time when business office staff can work undisturbed.

The board may wish to consider finding a new location for the business office. However, they must strike a balance between the travel

time of board members versus the travel time of house staff as well as weigh the cost of new administrative space. This may not be an issue the board wants to address immediately, but it is something they should keep in mind as a future concern. New office space could eventually become necessary, particularly if the new Executive Director opts to work out of the business office, as the position becomes more administrative.

### RECOMMENDATION

*That in the longer term, the board investigate a new business office location or board and committee meetings be held in an alternate location.*

#### IV PROGRAM EFFECTIVENESS

The issues identified by the evaluation relating to this area were:

1. The Windfall Store has serious problems relating to a lack of planning, absence of clear objectives and insufficient board monitoring.
2. Board members could spend more time familiarizing themselves with WIN House and its programs.

Each issue is discussed in more detail below.

1. The Windfall Store has serious problems relating to a lack of planning, absence of clear objectives and insufficient board monitoring.

The board initially identified a need for the creation of a second hand clothing store because of the large volume of donations received, the lack of space at either of the WIN Houses to accommodate the donations, and the tremendous amount of staff time required to sort through these donations. The store has been in operation for a year and

is managed by a private firm, Rainbow Productions, with its contract to expire in November, 1987.

There are a number of problems associated with the operation of the store. It appears to have been developed too quickly and consequently lacks clear goals which define its primary purpose. The board has never clearly defined whether the store should be managed to make a profit or whether it should be managed to primarily serve the needs of WIN House clients. The current management, Rainbow Productions, appears to be operating the store with the former objective in mind. They have instituted restricted hours for WIN House clients (Mondays only) and the women must use vouchers to obtain donations. The manager was asked to develop a volunteer program to help run the store but this has apparently never materialized. Lately there has been a freeze on donations because of the lack of space and staff to sort through them. As well, there appeared to be a conflict of interest regarding the relationship between the manager of Rainbow Productions and the past board. This has created an awkward situation for the board.

Board, staff and clients interviewed all expressed dissatisfaction with the operation of the store. Board members tended to feel a loss of control and dissatisfaction with the current management. Negative comments were also expressed by staff, such as:

*"...don't like dealing with the store. The women aren't treated very well."*

*"The store is overpriced. Very few women go back once they leave. The store is too small, there's little variety. We often phone and there's no answer."*

*"The place is degrading."*

It seems apparent that the board must make some major decisions regarding the operation of the store. First, they must decide whether it

is a project they want to continue with. If so, the board must then clarify the purpose and objectives for the store as this decision will have a major impact on its management style.

We would recommend that the board continue operating the store on a trial basis for an additional year. The present treasurer has indicated that the store is currently operating with expenses of \$32,000 and sales of \$20,000 for an expected loss of \$12,000. This is likely still less than the cost of paying a staff person to coordinate the pick-up, delivery and sorting of donations. The board should hire a staff person who is familiar with both retail operations and is sensitive to the needs of battered women and their children to manage the store. As well, better use should be made of trained volunteers to help sort donations and aid in the store's day-to-day operation. We would recommend against using "fines option" volunteers, as has been done in the past. These volunteers may not have the same commitment to the organization as volunteers who have chosen to donate their time to WIN House.

If, after a year, the board finds the costs of operating the store are excessive, they may wish to pursue less costly alternatives. One option would be to rent low cost warehouse storage space and use volunteer staff to sort clothes.

### RECOMMENDATIONS

*That the board clarify the goals and objectives for the Windfall Store.*

*That the Windfall store operate on a trial basis for an additional year and be managed by a staff person under the supervision of the Executive Director.*

*That trained volunteers be used to aid in the operation of the Windfall Store.*

*That conflict of interest guidelines be clarified and board members be made aware of them.*

2. Board members could spend more time familiarizing themselves with WIN House and its programs.

It was interesting to note during the interviews the fact that board members generally felt there were less gaps in service for battered women and their children than did staff, clients or outside agencies. The gaps identified were:

- a) more shelters are needed, particularly in light of the number of families turned away each year (517 for the first ten months of 1987);
- b) a follow-up program for children should be established;
- c) counselling services for children are needed;
- d) native staff are needed and there should be a better liaison with native counselling services;
- e) the three month follow-up period should be extended, possibly through a "companion program";
- f) a support group for ex-residents should be established;
- g) more public education about family violence is needed;
- h) more inservices for staff to acquire better counselling skills should be made available;
- i) more extended time facilities are needed.

Not all board members were aware of the services provided at WIN House nor, we were told, had all board members visited the houses.

There appears to be a need for more liaison by the board with WIN House. The houses are by far the major project of Edmonton Women's Shelter in terms of both the funding received and public recognition of what the board does.

An improved orientation program for new board members as well as staff representation on board committees could largely address this problem.

**RECOMMENDATION**

*That greater effort be made to ensure board members are aware of WIN House and its programs.*



V ROLE IN THE COMMUNITY

In this section of the evaluation, there was only one issue that was identified.

1. There is little public recognition of the name Edmonton Women's Shelter.

While WIN House is well known and respected in the community, we found few people who were aware of what Edmonton Women's Shelter is. As the relationship between WIN House and Edmonton Women's Shelter can be confusing to the general public, board members may wish to publicize the programs and services of Edmonton Women's Shelter to a greater extent.

RECOMMENDATION

*That greater effort be made to promote the aims and objectives of Edmonton Women's Shelter and its relationship to WIN House.*



**SECTION FOUR**

**SUMMARY**

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SUMMARY

In terms of program delivery, reputation in the community and usefulness of the services provided to battered women and their children, Edmonton Women's Shelter is perceived as contributing a valuable and highly respected service to the community. The issues we have identified in the evaluation study apply to the organizational structure itself. They are no reflection on the excellent work done by the board, staff and volunteers. The issues described do, however, suggest that the board needs to finetune several aspects of their organizational structure. In particular, the board needs to review the purpose and goals of Edmonton Women's Shelter, place greater emphasis on long term planning and restructuring board committees in order to emphasize the board's primary responsibility which is to determine policies for the organization. A transition to a policy board requires staff to take on more administrative duties. We feel this can best be done through an Executive Director who is responsible for all administrative functions of Edmonton Women's Shelter.

We hope the issues and recommendation we have suggested are helpful to the Board of Directors in charting the future course of the agency. The board should keep in mind that the primary purpose of this evaluation was to stimulate discussion of the issues. The recommendations are intended to serve as a starting point for this discussion.

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**SECTION FIVE**  
**RECOMMENDATIONS**

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## RECOMMENDATIONS

### I LONG TERM GOALS AND PLANNING

#### Recommendations

- \* That the board review what the primary purpose of Edmonton Women's Shelter should be and revise their mission statement accordingly.
- \* That the board arrange for a series of workshops to address board/staff roles and long range planning.
- \* That the board institute a process of long range planning which clearly defines and prioritizes specific goals to be achieved, identifies measurable objectives to realize goals and relates goals to a timeframe and financial strategy.
- \* That the long range plan be reviewed annually.
- \* That a more formalized budgeting process and financial plan be developed and related to the long range plan of Edmonton Women's Shelter.

### II ORGANIZATIONAL EFFECTIVENESS

#### A. Issues Related to the Board

- \* That board committees be restructured and committee responsibilities be revised to encourage the board to operate at more of a policy-making level.
- \* That board meeting times be reviewed to enable all board members to attend.
- \* That a more detailed orientation process and materials be designed for board members, including an updated board manual.

- \* That all board members be required to serve on a committee as a condition of membership.
- \* That the board design a recruiting strategy with a nominating grid.
- \* That a strategy for improving board/staff communication be designed.
- \* That most board committees include at least one staff person other than the Director.

B. Issues Related to Staff

- \* That the Director's job description be expanded to that of an Executive Director and include program, financial and administrative responsibilities for Edmonton Women's Shelter.
- \* That the Business Manager position be re-defined to that of an office manager who reports to the Executive Director who in turn reports to the board.
- \* That the Assistant Director positions become House Directors with their role serving as a support function to the Executive Director.
- \* That orientation and training for staff and volunteers be reviewed to balance further theoretical and practical information needs.
- \* That future staffing should aim towards achieving a consistent full-time complement of staff with less casual and part-time staff.
- \* That more child care workers be hired or better use be made of trained volunteers to work in the child care area.
- \* That shifts be re-arranged or other arrangements made so that all staff are able to participate in daily client updates.
- \* That more effort be made to include volunteers in staff meetings.

- \* That volunteers be used more effectively and more effort be made to help volunteers feel a part of the "team" at Edmonton Women's Shelter.
- \* That staff salaries and benefits be regularly reviewed and improved in order to attract and maintain qualified staff.
- \* That staff support meetings be reorganized to more effectively provide "staff support".

### III OFFICE ADMINISTRATION

- \* That the business office automate procedures previously done manually such as routine correspondence and membership and mailing lists.
- \* That the filing and record-keeping systems be reviewed to avoid duplications and to ensure they are current and readily available.
- \* That the board not take on "arms length" fundraising activities without having access to full financial information of those operations.
- \* That in the longer term, the board investigate a new business office location or board and committee meetings be held in an alternate location.

### IV PROGRAM EFFECTIVENESS

- \* That the board clarify the goals and objectives for the Windfall Store.
- \* That the Windfall store operate on a trial basis for an additional year and be managed by a staff person under the supervision of the Executive Director.
- \* That trained volunteers be used to aid in the operation of the Windfall Store.
- \* That conflict of interest guidelines be clarified and board members be made aware of them.

- \* That greater effort be made to ensure board members are aware of WIN House and its programs.

V ROLE IN THE COMMUNITY

- \* That greater effort be made to promote the aims and objectives of Edmonton Women's Shelter and its relationship to WIN House.

**APPENDIX A**  
**EVALUATION QUESTIONS**

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## *EDMONTON WOMEN'S SHELTER LTD.*

### *Evaluation Questions*

#### **I Long Term Goals and Planning**

1. What is the mission statement and the goals and objectives of Edmonton Women's Shelter Ltd.? Do these correspond with the programs in place?
2. What is the process of short-term and long range planning used by Edmonton Women's Shelter Ltd.?
3. Does Edmonton Women's Shelter Ltd. have a long range plan and a process of evaluation in place?

#### **II Organizational Effectiveness**

1. How clear are the responsibilities of board, staff and volunteers?
2. What improvements can be made in the functioning of board, staff and volunteers?
3. Are the qualifications and skills required for board, staff and volunteers appropriate for the needs of Edmonton Women's Shelter Ltd.?
4. Is there an effective orientation procedure in place for board, staff and volunteers?
5. How satisfied are board, staff and volunteers with their experience at Edmonton Women's Shelter Ltd. (in terms of overall job satisfaction, opportunities for professional development, measures to deal with stress and burnout, salaries and benefits, etc.)?

#### **III Office Administration**

1. How could the administrative operation of the office be improved?
2. Is the ratio of administrative costs to program costs appropriate?
3. Is there a process in place to regularly evaluate the effectiveness of the office procedures?
4. Could the location of the office be improved?

#### IV Program Effectiveness

1. How effectively do the various programs provided by the Edmonton Women's Shelter Ltd. contribute to the overall purpose of the agency?
2. How can Edmonton Women's Shelter Ltd. best demonstrate financial accountability with respect to its programs?
3. How satisfied are clients with their overall experience at Edmonton Women's Shelter Ltd.? What could be improved?
4. Are there gaps in service?
5. Are the approaches used for referring clients to other agencies achieving the desired result?
6. In what ways do clients benefit from Edmonton Women's Shelter Ltd. programs?

#### V Role in the Community

1. Do the services offered by Edmonton Women's Shelter Ltd. overlap with others currently offered in the community?
2. What formal or informal processes allow for coordination with other agencies in the community? How effective are these mechanisms?
3. How is Edmonton Women's Shelter Ltd. perceived in the community in terms of its visibility, credibility and image?

September 1987



**APPENDIX B**  
**BOARD QUESTIONNAIRES**

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EDMONTON WOMEN'S SHELTER LTD. EVALUATION

QUESTIONNAIRE (Board Members)

1. What type of involvement do you have (or have you had) with Edmonton Women's Shelter? For how long?

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2. Did you receive any orientation or training as a new Board member?

\_\_\_\_ Yes \_\_\_\_ No.

Was the training/information you received adequate? Please explain.

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3. What do you feel the role of the Board should be?

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4. What do you feel the role of the Director should be?

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5. What do you think should be the Board's responsibility with respect to:

a) fund raising \_\_\_\_\_  
\_\_\_\_\_

b) public relations \_\_\_\_\_  
\_\_\_\_\_

continued on next page

13. Do you feel there are gaps in service in terms of what WIN House offers its clients and what they actually need? Please describe.

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14. Are there any ways in which you feel the services or facilities provided at WIN House could be improved?

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15. Do you think there are any problems with the use of both Edmonton Women's Shelter Ltd. and WIN House when referring to the agency in terms of public recognition?

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16. Do you have any other comments?

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Edmonton Women's Shelter Ltd.  
Self-Evaluation for Board Members

We would like to know how you feel about various aspects of the Edmonton Women's Shelter Ltd. Board. Please check Yes or No for each of the following statements. In addition, for those statements that you feel describe an area that the Board still needs to work on, check the category Need to Work on This. In the comment section, explain briefly what the problem/issue is. **\*PLEASE RETURN THIS QUESTIONNAIRE TO THE BOARD MEETING ON OCTOBER 14TH\***

**A. PLANNING AND EVALUATION**

	Yes	No	Need to Work On This
1. The organization has a written statement of its Purpose and current Goals.			
2. The organization has a concise set of bylaws which clearly spell out the procedures by which the Board transacts its business.			
3. Plans of action are made and kept in written form by the Board, the staff and/or committees.			
4. The Board reviews its Goals, its own organization and its work annually.			

Comments \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**B. ORGANIZATIONAL STRUCTURE**

1. The organization has working committees through which action is channeled.			
2. Committee assignments and responsibilities are in writing.			
3. Committee personnel includes staff or community members working along with Board members.			
4. A committee's work and its assignments are reviewed and evaluated periodically.			
5. Some committees are struck on a short-term "ad hoc" basis.			

Comments \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

	Yes	No	Need to Work On This
<b>C. ENCOURAGEMENT OF HUMAN RESOURCES</b>			
1. The Board staff and committee members know and feel comfortable with one another.			
2. A brief outline of each member's skills, background and interests is kept on file.			
3. There is laughter at meetings!			
4. New members are often invited to Board membership because they have a particular skill to offer.			
5. Committee membership includes those outside the Board who are most closely connected to the work of that committee(e.g., social worker, public relations person, etc.)			
Comments _____			

<b>D. NOMINATION OF NEW MEMBERS</b>			
1. The Nomination Committee solicits suggestions from staff, Board members, professional resource people and others in preparing nominations for the Board.			
2. The organization is always thinking ahead and has a pool of potential Board members for the future.			
3. There is a written statement of qualifications for new Board members.			
4. There is a satisfactory combination of experienced and new Board members to guarantee both continuity and new thinking.			
5. There is a formal plan for limiting the tenure of Board members which specifies rotation so as to assure a steady stream of new Board members.			
Comments _____			

	Yes	No	Need to Work On This
<b>E. <u>ORIENTATION AND TRAINING</u></b>			
1. The organization has a written statement outlining the duties and responsibilities of new Board members.			
2. There is a written plan to be followed in the program of orientation for new Board members.			
3. There is a Board Manual distributed to all Board members. The manual is revised periodically.			
4. There is a plan for training and upgrading offered to Board and staff members throughout the year.			
5. Board and staff members participate in community and regional training opportunities.			
Comments _____			
_____			
_____			

<b>F. <u>BOARD/STAFF RELATIONSHIPS</u></b>			
1. Board and staff members are clear about their specific tasks and responsibilities.			
2. Board and staff members work as a team towards accomplishment of the organization's goals.			
3. There are Board-Staff meetings where general discussions can take place.			
4. There is some "fun time" for members of Board and staff together.			
Comments _____			
_____			
_____			

G. THE BOARD AT WORK

1. There are regularly scheduled Board and executive meetings at least 8 times a year.
2. Meetings begin on time and end on time as per agreed-upon schedule.
3. There is adequate preparation of materials including agendas, study documents, etc., in advance of meetings.
4. Meetings are characterized by free discussion, general participation, active thinking together and shared decision-making.
5. Board meetings deal primarily with policy formulation, review of plans, evaluating the work of the agency.
6. Regular reports of committee work are made to the Board.

Yes

No

Need to Work  
On This

Comments \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



**APPENDIX C**

**STAFF AND VOLUNTEER QUESTIONNAIRES**



Edmonton Women's Shelter Ltd.  
Questionnaire

Program Staff, Volunteers

1a) What type of work do you do at WIN House?

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1b) How long have you been involved with WIN House?

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2. Did you receive any orientation or training as a new staff member? volunteer?

\_\_\_ Yes \_\_\_ No

Was the training/information you received adequate? Please explain.

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3. Do you feel that your job description is clear? Does it describe what you actually do?

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4. Generally, do you feel that there is a clear distinction in terms of what board, staff and volunteers do or do their roles tend to overlap? Please explain.

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5. Are there any ways that you feel staff, volunteers or Board members could be used more effectively?

a) staff \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

b) volunteers \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

c) Board members \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. In terms of the work that needs to be done, do you feel there are enough:

a) staff members? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

b) Board members? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

c) volunteers \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Are there formal or informal channels of communication in place between and among board, staff and volunteers? Please explain.

a) Board and staff \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

b) Among staff \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

c) Staff and volunteers \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. Do you feel communication could be improved in any of these areas? Why or why not?

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9. Do you feel there is enough communication between the administrative office and WIN House? Why or why not?

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10. Do you feel that you have any input into decisions that are made at WIN House? Please explain.

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11. Are you provided with any opportunities for personal growth and development at WIN House? Please explain.

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12. Do you regularly receive feedback on the work you do? Please explain.

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13. Generally, how happy are you in the role you play at WIN House? Is there anything that could be done to make your work experience more satisfying?

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14. Do you feel the salary and/or benefits you receive are adequate for the work you do? Please explain.

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15. Do you feel there is enough (if anything) done to keep up staff moral and deal with staff burnout? Please explain. What should be done?

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16. Do you feel there is a high turnover of staff? Board members? volunteers? If yes, why do you think the problem exists?

a) Staff \_\_\_\_\_

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b) Volunteers \_\_\_\_\_

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c) Board Members \_\_\_\_\_

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17. What would you say the strengths and weaknesses of the present Board are?

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18. Do you feel that WIN HOuse is generally recruiting the type of staff, volunteers and Board members it needs (with regard to their background and experience)? Please explain.

a) Staff \_\_\_\_\_

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b) Volunteers \_\_\_\_\_

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c) Board Members \_\_\_\_\_

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19. Do you feel there are gaps in service in terms of what WIN House offers its clients and what they actually need? Please describe.

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20. Are there any ways in which you feel the facilities or services provided at WIN House could be improved?

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21. Do you feel that Edmonton Women's Shelter Ltd. is overextending/under-extending itself in terms of the number and type of programs it offers?

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22. Are you aware of any confusion on the part of clients or outside agencies with the use of Edmonton Women's Shelter Ltd. to refer to the agency?

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23. Do you think there are any ways in which the administration office could be used more effectively?

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24. Do you have any other comments?

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**APPENDIX D**  
**CLIENT QUESTIONNAIRES**

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EDMONTON WOMEN'S SHELTER LTD. EVALUATION

Questionnaire

CLIENTS (Past and Present)

1. If someone were to ask you about Edmonton Women's Shelter Ltd., what would tell them about the types of programs and services they offer?

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2. How did you first hear about WIN House?

Friend \_\_\_\_\_ Social Worker \_\_\_\_\_ Police \_\_\_\_\_  
Referral \_\_\_\_\_ By Whom? \_\_\_\_\_  
Other \_\_\_\_\_

3. Did you have any problems initially contacting WIN House? Please explain.

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4. During your stay at WIN House, what kind of help did you receive?

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5. Did you get the kind of help you needed at WIN House? \_\_\_\_\_ Yes \_\_\_\_\_ No.

If not, what other kinds of help would you like to see made available for:

a) yourself?

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continued on next page

5. b) your children?

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6. What would you say are the most positive things about WIN House?

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7. If you could change one thing about WIN House, what would it be?

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8. Is there anything else that could be improved at WIN House?

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9. Were there services available at WIN House that you didn't use? Why didn't you?

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10. How would you rate the following aspects of WIN House?

	Excellent	Good	Fair	Poor
Facilities	_____	_____	_____	_____
Staff	_____	_____	_____	_____
Child Care	_____	_____	_____	_____
Follow-up Program	_____	_____	_____	_____
Access to counselling	_____	_____	_____	_____

Comments \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. Have you been involved in the Follow Up program at WIN House

\_\_\_\_\_ Yes    \_\_\_\_\_ No

12. If you answered Yes, how helpful do you feel this program is in terms of:

a. the types of referrals made (was this the type of help you needed?)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

b. the usefulness of the referrals (did they help you deal with any problems you have/had?)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

13. How do you feel the Follow Up program could be improved?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

14. Do you feel the house rules are fair? overly restrictive? Please explain.

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15. Do you feel the amount of time (21 days) you are allowed to stay at WIN House is enough? What would you like to see?

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16. Overall, how would you rate the quality of service you received at WIN House?

Excellent \_\_\_\_\_ Fair \_\_\_\_\_ Good \_\_\_\_\_ Poor \_\_\_\_\_

Comments:

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17. As a result of your stay at WIN House, do you feel in a better position to deal with your current situation? In what way?

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18. When you left/leave WIN House what did/do you plan on doing?

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19. Do you have any other comments?

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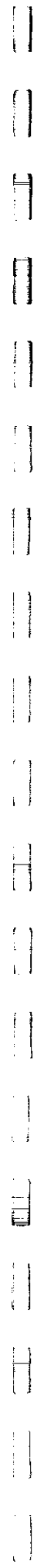
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**APPENDIX E**  
**OUTSIDE AGENCY QUESTIONNAIRES**



EDMONTON WOMEN'S SHELTER LTD.  
EVALUATION

Questionnaire

External Key Informants

1. What is your professional designation?

\_\_\_\_\_ Physician

\_\_\_\_\_ Social Worker

\_\_\_\_\_ Nurse

\_\_\_\_\_ Teacher

\_\_\_\_\_ Lawyer

\_\_\_\_\_ Other (Please specify) \_\_\_\_\_

2. What type of involvement do you have (or have you had) with Edmonton Women's Shelter Ltd.?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. What services does Edmonton Women's Shelter Ltd. provide that you are aware of?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. What has/have been your main source(s) of information about Edmonton Women's Shelter Ltd.?

\_\_\_\_\_ EWS Brochure

\_\_\_\_\_ EWS House Newsletter

\_\_\_\_\_ Speaker's Bureau

\_\_\_\_\_ Colleagues

\_\_\_\_\_ Clients

\_\_\_\_\_ Other (please specify) \_\_\_\_\_

5. Do you think the use of the terms Edmonton Women's Shelter Ltd. and WIN House to refer to the agency have created any problems in terms of public recognition?

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6. How adequately have you been informed about the services provided by Edmonton Women's Shelter Ltd.?

- Not at all adequately.
- Less than adequately
- Adequately
- Very adequately

7. How do you think Edmonton Women's Shelter Ltd. could become better known in the community?

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8. Do you feel that Edmonton Women's Shelter Ltd. duplicates other services that are currently available in the community?

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9. Are there any other services that you feel ought to be provided for battered women and their children that presently do not exist?

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10a. Are there any formal or informal channels of communication between your agency and Edmonton Women's Shelter Ltd.?

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10b. Could communication between your agency and Edmonton Women's Shelter Ltd. be improved in any way?

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11. Do you feel that having the services of Edmonton Women's Shelter Ltd. is helpful to you in your work? Please explain.

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12. Why do you refer women to Edmonton Women's Shelter Ltd. instead of other facilities?

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13. Are there any reasons you may have for not referring women to Edmonton Women's Shelter Ltd.?

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14. In general, how satisfied are you with the programs/services and staff at Edmonton Women's Shelter Ltd.?

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15. Are there any ways in which you feel the facilities or services provided at Edmonton Women's Shelter Ltd. could be improved?

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16. What do you think would be the effect of discontinuing the services of Edmonton Women's Shelter Ltd?

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17. Do you have any other comments?

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