	
<h2 style="text-align: center;">Social Analysis Systems²</h2> <p style="text-align: center;">Concepts and Tools for Collaborative Research and Social Engagement</p> <p style="text-align: center;">http://www.sas2.net</p>	
Title	The roles and mutual expectations of workgroups in the CUSO Regional Office <hr/>
Key Words	Role Dynamics, Costa Rica, Canada, organizational development <hr/>
Author and Acknowledgement	Chevalier, J.M. The roles and mutual expectations of workgroups in the CUSO Regional Office. Social Analysis Systems ² Technique Report #16, 5 pp. Retrieved from: http://idl-bnc.idrc.ca/dspace/handle/123456789/29887 . The author wishes to acknowledge the efforts of Daniel Buckles who helped to analyse the information and write the report. <hr/>
Context	CUSO is a Canadian non-governmental organization that supports international development by placing Canadian volunteers in partner organizations around the world. After recent changes in organizational structure and workgroups, CUSO's regional office for Latin America and the Caribbean convened a meeting at its regional office in San Jose, Costa Rica to review how the office works in that region. Staff from its offices in Latin America and the Caribbean and in Canada attended for several days of discussion. The meeting used a series of SAS ² techniques to review goals, values and roles guiding the organization. <hr/>
Purpose	To assess the level of role expectations and role satisfaction of workgroups in one of CUSO's regional operations.

<p>Process Summary</p>	<p>The participants organized themselves into workgroups sharing common roles in the organization. All workgroups collectively developed a scale of 5 indicators of possible contributions of each workgroup to other workgroups. Using the scale, each workgroup assessed on its own the level of contribution it would like to make to other workgroups (role expectation) and the level of contribution it felt it was actually making (role satisfaction). They also rated the level of contribution (actual and expected) among members <i>within</i> the workgroup. The results were compiled in a large table and role expectations discussed. Workgroups then identified other workgroups that were not satisfied with their actual level of contribution and sought them to discuss and negotiate how they could work differently to meet their expectations. This step was called a ‘negotiation fair’. Agreements reached between workgroups were put in writing and then shared in a plenary meeting at the end of the exercise. The report, prepared by the facilitator/author, was later circulated among the participants for comment. Participants understood that it would be published, and agreed to share their information.</p>
<p>Analysis</p>	<p>The scale of possible levels of contribution developed by the participants was: 1 = little direct involvement; 2 = provides information; 3 = involved in analysis and planning; 4 = influences implementation; and 5 = direct involvement in decisions. This was used to generate the ratings row-wise for each of the workgroups listed in Table 1.</p> <p>The workgroups are: Financial Systems, Information Management Systems, Program Operations, Planning and Special Projects, Office Administration, Human Resources, and Senior Management. The upper-left value in each row is the level of contribution workgroups would like to make. The lower-right value in each row is the level of contribution workgroups feel they are currently making. Gaps between the two values considered particularly significant to the participants</p>

are highlighted.

The last column in the table shows how much each row workgroup would like to contribute (upper-left value) and believes it actually contributes (lower-right value) to all other workgroups. The last row shows the extent to which each column workgroup is expected to depend (upper-left value) and actually depends (lower-right value) on other workgroups. Gaps between totals appearing in the same cell show the extent to which each workgroup actually fulfills the expectations of the other workgroups.

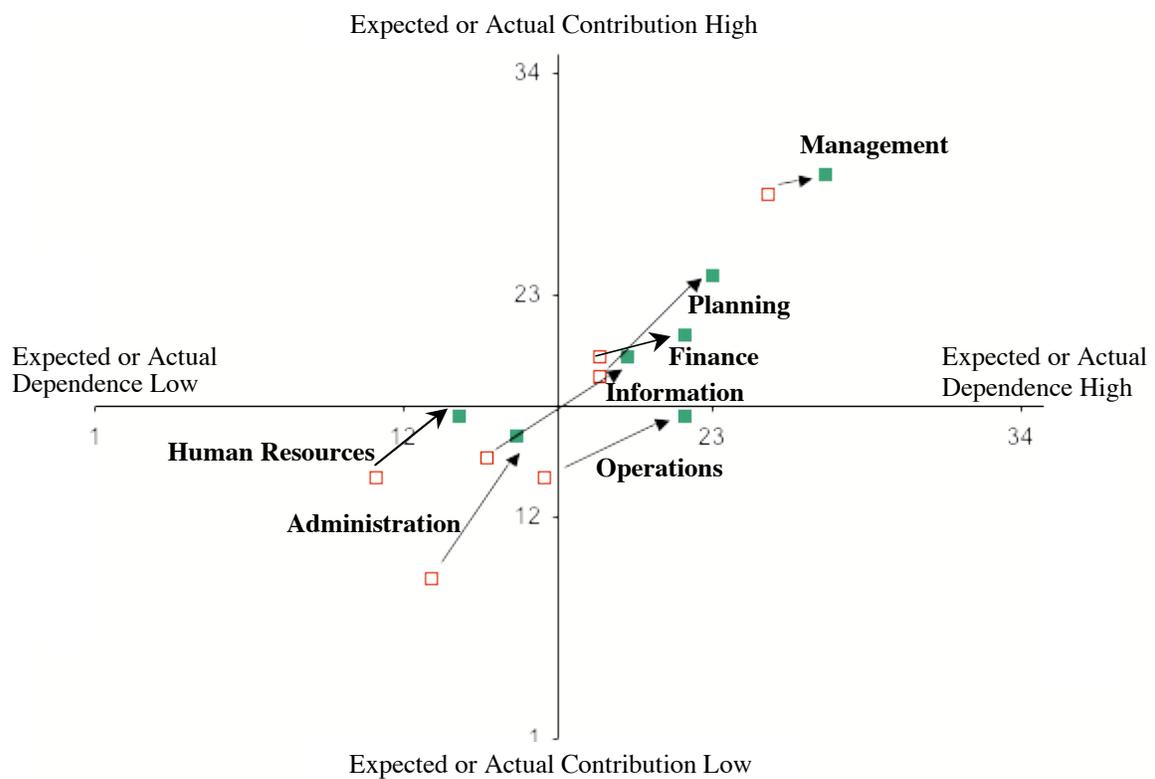
Table 1: Role expectations and role satisfaction of CUSO workgroups

Workgroups	Financial Systems	Information Systems	Program Operations	Planning and Special Projects	Office Administration	Human Resources	Senior Management	Contribution Index (total score)
Financial Systems	4 4	4 3	2 2	4 4	2 2	2 2	3 3	21 20
Information Systems	4 3	5 4	2 1	3 2	2 1	1 1	3 3	20 15
Program Operations	2 2	2 2	4 2	4 3	1 1	1 1	3 3	17 14
Planning and Special Projects	3 2	4 2	5 5	3 3	2 2	2 1	5 4	24 19
Office Administration	1 1	1 1	3 1	3 1	3 2	2 1	3 2	16 9
Human Resources	3 2	1 1	1 1	1 1	3 2	3 2	5 5	17 14
Senior Management	5 5	3 2	5 5	5 5	3 3	3 3	5 5	29 28
Dependency Index (total score)	22 19	20 15	22 17	23 19	16 13	14 11	27 25	144 119

Chart 1 graphs the arrows showing the desired shifts from actual to expected contributions and dependency for each workgroup. The level of overall interaction among workgroups currently is relatively low, with all but Senior Management contributing little to other groups and depending little on them. This suggests that most workgroups actually work quite independently of other workgroups. The Chart also shows

that there are some gaps between this currently low level of interaction and role expectations, shown by shifts in location on the graph both horizontally and vertically. The biggest expected shifts are for Information Systems, Program Operations, Planning and Special Projects, and Office Administration. By contrast, Senior Management is almost fulfilling expectations, while other workgroups are operating close to expectations.

Graph 1: The interaction of contributions and dependency for role expectations and actual role satisfaction among CUSO workgroups



Discussion of these findings during the ‘negotiation fair’ led to the following agreements (see highlighted relationships in Table 1):

- The Information Systems workgroup should play a stronger role in helping to structure and improve the flow of information needed by the Planning and Special Programs workgroup and by Senior Management.
- The Program Operations workgroup needs to apply and share

	<p>information on procedures more uniformly within the workgroup both in Costa Rica and in Canada. Better flows of information about these procedures with the Office Administration workgroup would also improve the performance of the system.</p> <ul style="list-style-type: none"> • The Office Administration workgroup needs to share information from planning meetings more uniformly within the group. The Planning and Special Programs workgroup and Senior Management agreed to ensure that both office staff and executive assistants are present in future planning meetings. • The Financial Systems and Human Resources workgroups need to work more closely together to analyze and plan the financial aspects of personnel benefits.
<p>Interpretation</p>	<p>The relatively low level of interaction among workgroups is acceptable to most workgroups because roles and responsibilities are clearly defined and staff communicate well among themselves. Improvements on the margins are needed because of recent changes in the way the organization is structured, and the hiring of new staff.</p>
<p>Action</p>	<p>The group decided to follow up on selected improvements in role definitions identified during the assessment. It also conveyed to Senior Management the need for their leadership in scheduling periodic discussions regarding role expectations and role satisfaction.</p>
<p>Observations on the Process</p>	<p>Senior Management was surprised at how satisfied workgroups were overall with their roles and responsibilities. In a secret vote, people ranked the degree to which the new structure of the regional office served their personal interests and personal values. When these scores were displayed, they showed high levels of satisfaction for both factors. This upheld the positive picture that emerged from the <i>Role Dynamics</i> assessment. The participants said they also found the exercise useful as a process for building greater understanding and appreciation of the work of colleagues. It reduced the anxiety some had felt regarding the perceptions of their work held by other groups.</p>