This research addresses the functional characteristics of a single organization. It specifically investigates one of the largest festival organizations in the United States, The Portland Rose Festival Association (PRFA). In this case, three groups within the PRFA are its foundation: the paid staff, the executive committee, and the volunteer directors. This study identifies and analyzes the functionality characteristics of this organization. Swanson's (1996) theory of performance variables is used to assess and benchmark the PRFA. He provides five key areas in which functional, effective, and successful groups are proficient. These five areas are: mission/goal, capacity, systems design, motivation, and expertise. The research is qualitative and quantitative in nature by implementing two primary methods—interviews and questionnaires.

Phase one consists of interviews from the eleven staff members. The research discovers that the PRFA has numerous strengths. The weaknesses the staff mentioned have been acknowledged by management
and are being improved upon or solved. As a result of this phase, the PRFA was assessed as a functional organization.

Phase two determines the level of functionality according to appropriate organizational characteristics. The characteristics correspond to Swanson's performance variables. This phase was conducted through questionnaires to the staff members, executive committee, and volunteer directors. The research indicated that the “mission/goal” organizational characteristic received the highest combined mean. Although all areas were ranked very high, responses on the “expertise” questions indicate an area for improvement. Finally, the study discovers that the three groups are relatively familiar with each other.
Characteristics of a Functional Organization:
A Case Study of the Portland Rose Festival Association

by

Lisa M. Newbore

A THESIS
submitted to
Oregon State University

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the requirements for the
degree of
Master of Arts in Interdisciplinary Studies

Presented September 23, 1999
Commencement June 2000
I understand that my thesis will become part of the permanent collection of Oregon State University libraries. My signature below authorizes release of my thesis to any reader upon request.

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Lisa M. Newbore, Author
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To Robert R. Deardorff
My dad who will always be with me.
Characteristics of a Functional Organization:
A Case Study of the Portland Rose Festival Association

CHAPTER ONE

Introduction

Is it possible to have a successful organization comprised of more than 5,000 volunteers, a 100-member volunteer board of directors, and only thirteen actual paid staff, while generating more than 80 million dollars a year? Organizations like this exist. They are special event organizations that govern fairs, festivals, and other comprehensive community events. One such organization, The Portland Rose Festival Association, manages one of the largest festivals in the United States. The festival's variety of events attracts visitors from around the world. Production for such a large festival requires organization, coordination, and effective communication. In this case, three groups within the Portland Rose Festival Association (PRFA) are its foundation. The paid staff members, the executive committee and directors, and the volunteers all work to produce this annual event. With this massive amount of people contributing to the festival, is it possible for the organization to be functional? If so, what is the commonality or ‘glue’ that keeps each of these groups on the same path? This thesis examines this phenomenon by assessing the organization as a whole, but after focusing initially on the paid staff members. The study will identify and analyze the functionality factors that bond this organization.
The Festival

According to the International Festival and Events Association, the Rose Festival is one of the top ten festivals in the world (PRFA, 1999). In 1997, The American Bus Association rated the Rose Festival as the top event in the United States (PRFA, 1999). In June every year, twenty-five days of activities occur in the city of Portland. Each year the festival theme changes, but the longtime tradition and the overall excitement of the festival climate remain the same.

The signature event that attracts the attention of most spectators is the Grand Floral Parade. This parade is the second largest “all floral” parade in the United States. About 500,000 spectators crowd the 4.3-mile parade route to get a glimpse of the two dozen floats. Much work is put into the floats' creation since every inch of surface must be covered with natural organic fiber (Donahue, 1996). In addition to the floats, the fourteen-member Rose Festival Court is present at this affair. The female court members are graduating seniors chosen from Portland area high schools and receive a $2,100 scholarship from the PRFA. The court members are chosen based on community service, school activities, grades, and future aspirations. A queen is selected from the group, and is responsible to preside over the entire Rose Festival.

The Festival Center is another highlighted event during the Rose Festival. This event is PRFA’s highest revenue event because it is filled
with family-oriented entertainment to entice all types of people. The Festival Center covers over sixteen blocks of the McCall Waterfront by the Willamette River in downtown Portland. One may find a variety of things to do at this event; everything from rides to exhibits, to Northwest music acts and Portland food.

Other Portland Rose Festival events include the Opening Ceremony which consist of a fireworks show; Starlight Run and Parade which is the second largest illuminated parade in the Northwest; the Junior Rose Festival Parade consisting of over 10,000 children; a Cart 200 Race which is international world class racing; an Airshow with the Air Force demonstration squadron, Milk Carton Boat Races, Dragon Boat Races, Duck Races, Rose Show, Festival of Bands, Portland Arts Festival with over 120 artists, and the Rose Festival Kids.

Each of the eighty PRFA sanctioned events seems to bring something special to Portland. Perhaps it is the happiness and joy, or the excitement and energy or even the community comradeship and historical traditions that ties each individual to Portland (Donahue, 1996). *The Oregonian* stated it best, “Outstanding. Best ever. Diverse. Those are a few of the words used by letter writers and phone callers (and e-mailers) describing their reactions to the 1998 Portland Rose Festival” (Clark & Taylor, 1998).
History

When the Rose Festival began, it seemed to be a natural event for the Portland community. In addition, the name of the festival seemed very fitting. Fossils found in the Northwest suggest that roses were here before humans. However, the first verifiable rose bush arrived in Portland in 1837. Relatives sent the plant around Cape Horn to Anna Marian Pittman as a wedding gift. Soon pioneers were taking cuttings of the rosebush to decorate their log cabins. Throughout the years roses became very popular and many different breeds were created. This stirred competition and a need for comparison. In 1888, Mrs. Henry Pittock ordered her servants to erect a tent and cover it with flowers. She then invited friends and neighbors to bring their roses for everyone else to see. This was the city’s first rose show (Donahue, 1996).

In 1905, as a result of the successful Lewis & Clark Centennial Exhibition Worlds’ Fair held in Portland that year, Portland Mayor Harry Lane thought the city should have a symbol to be better known and remembered by. Because of the beautiful roses, it was fitting that roses would be the new symbol. This changed the ‘Worlds Fair’ to the ‘Festival of Roses’. But not until 1907 did the idea appear to celebrate the rose at the first floral parade. Following the first parade, a non-profit civic enterprise was established to finance the annual event. In 1914 this “Rose Festival”
established a festival queen to rule over the activities. From then on, the Rose Festival has blossomed into an annual extravaganza.

Although there have been many small changes over the years, the overall tradition of the Rose Festival has remained consistent. The faithful rose, for nearly a century, presides over the same feelings, tastes, smells, sights, and sounds of the festival.

**Association**

The Portland Rose Festival Association (PRFA) is a multifaceted organization. The association is a non-profit civic organization comprised of professional business sponsors and individual members. "The mission statement specifies the fundamental reasons for the existence of the Portland Rose Festival, establishes the scope of the Association, and provides overall direction" (1998 PRFA Board of Directors Handbook). The PRFA's mission is "to create and promote a civic celebration and festival involving community-wide participation revolving around the symbol of the rose which furthers the cultural, economic and social development of the greater Portland metropolitan area, and the state of Oregon" (PRFA Economic Impact Summary Report).

The headquarters of the association include thirteen permanent, paid staff members. The staff members have different job titles and
descriptions, yet they all work collaboratively together to create one huge celebration.

In addition, many volunteers, led by the volunteer directors, help with this twenty-five day event. This 100-member board of volunteer directors create, direct and facilitate over eighty events that attract more than two million people. The directors also establish Association policies and approve budgets. The cardinals of the directors are the Officers and the Executive Committee. This group consists of twenty-two individuals who make up the governing body of the entire Association. The remaining, but crucial 4,800 volunteers are directly involved with the events, from ticket sales to maintenance. All of the volunteers play a major role in the success of the festival. After the 1998 Rose Festival, The Oregonian reported that, “…the volunteers and board of directors should be praised for their gifts of time, energy, and money to make the Festival into a great success” (Clark & Taylor, 1998).

The Association is entirely self-supporting, deriving most of its income from corporate sponsorships, admission to events, and membership contributions. There are fourteen official Rose Festival Sponsors that contribute significantly to the Association. These official sponsors greatly assist in keeping many of the events free and open to the general public. In 1998 the Association generated more than $80 million for the region’s economy and local businesses (Clark & Taylor, 1998).
The 1998 Rose Festival was recognized with thirteen awards at the International Festivals and Events Association (Spicer, 1998). The International Festivals and Events Association (IFEA) is a 42-year-old international association, which is based in Port Angeles, Washington. Out of the 2,500 festivals and events representing 37 countries around the world, PRFA was the second most honored organization. PRFA received awards for the top environmental program, best full length TV program of the Coronation and Grand Floral Parade, most innovative radio promotion, best sponsor solicitation video, best educational program, best community outreach program, best event to benefit a charity, best website (http://www.rosefestival.org), best event photograph, best media kit, and best merchandise. The highlight was being designated ‘The Cleanest Festival in America’ for having the cleanest parades in United States.

**Purpose of Study**

The purpose of this study is to determine if and why the Rose Festival Association is an effective organization. An effective organization is one that has the capacity to achieve a desired result and is functionally capable of performing that result. This quest is a challenge because of the complex configuration of the Association. Is it possible for this organization to be effective and functional with only thirteen paid staff members and almost 5,000 volunteers? If so, what is the commonality or ‘glue’ that keep
these groups on the same path? These questions and more will be answered in this thesis.

The first goal is to identify if there are any particular areas to address within the staff to staff relations of the Association. Since the paid staff members are the constant foundation of the Association, it is necessary to analyze their effectiveness first. This will be determined through a preliminary focused internal assessment that involves each staff member. Secondly, the organization will be studied for its functional quality through a broad organizational inquiry. At this point the study will be expanded to the executive committee and the volunteer directors. The study will focus on five areas within an organization that measure effectiveness and functionality. A questionnaire will help determine the outcome. At the end of the study, the major strengths of the Rose Festival Association will be evident.

**Significance of the Study**

This study will help PRFA continue to improve as an organization. Through this study, the dominant strengths of the Association will be determined. Information, such as this, is vital to the success of any organization. Being successful in one particular area confirms to the organization that achievement is possible in those areas that are attempted and pursued. As a result, the Association can choose to reinforce their
strengths or focus on other areas in their organization to improve. Consequently, if a re-organization were to take place in the Association, members would be aware of the strengths of the organization so not to discard them or alter them greatly.

According to Festivals U.S.A. over 9,000 festivals take place every year in the United States (Thompson-Hill, 1988). Each festival requires incredible organization and communication between many individuals. Because of these unique dynamics, compared to profit organizations, special event organizations are fascinating to study. The 9,000 other festival organizations will benefit from the results of this thesis. They will be able to learn what makes one of the largest, most favorable festivals successful. They can then apply these successful principles to their organization. This thesis will help other nonprofit, festival organizations, which are similar to the Rose Festival, save time, energy, and costs when trying to determine the product of success.

I, too, will benefit from this study. I am very interested in nonprofit, festival organizations and see it fitting to study the PRFA. Not only will the data gathering and analysis help me with my future endeavors as a trainer or consultant, but also the entire process helps me gain perspective on this type of industry.
**Preview of Subsequent Chapters**

Chapter two presents a review of literature, including discussions of parallel organizations. This chapter also explores functional group literature, communication effectiveness and key areas of successful organizations. Chapter three details research methodology and chapter four is devoted to the research results. Chapter five offers the interpretation and analysis of research results. This final chapter also presents the limitations of the study, implications for future research, and ways in which this research can be applied.
CHAPTER TWO

Review of the Literature

Chapter one introduced the festival organization as the focus of this study. The Portland Rose Festival Association was reviewed in detail. Literature concerning nonprofit, festival organizations provides a foundation for this study. There are two purposes to this literature review. The first purpose is to present research directly related to nonprofit, festival organizations. The second is to present related research pertinent to understanding characteristics of effective organizations.

The first section of the literature review is devoted to nonprofit and festival organizations. This section first addresses nonprofit organizations, and secondly festival organizations. The final section is devoted to the characteristics of effective organizations. This section focuses on effectiveness, success and functionality of organizations. The characteristics of effective organizations used in this study are divided up into five areas: a) mission/goals, b) capacity, c) system design, d) motivation, e) expertise.
Nonprofit Organizations

To clearly understand the PRFA, one must first understand the realm of nonprofit organizations. PRFA is one of the largest nonprofit organizations in the Portland area and takes pride in upholding its nonprofit aspects and features. The history and journey of nonprofit organizations illustrates the historic patterns that have taken PRFA to the point where it is now.

Nonprofit organizations have existed for a long time, with their roots located historically in religion. "The motives and ethics of helping others in need and providing mercy or comfort to those less fortunate have always been associated with religion" (Kennedy, 1991, p.70). In the United States, nonprofit organizations became established through the church, defense militias, and institutions caring for the poor and sick (McLaughlin, 1986, p.6). The big rise in nonprofit organizations occurred with the coming of the Industrial Revolution. Because of greater wealth, urbanization and need, individuals and organizations began to donate their time and money. This encouraged the emergence of nonprofit organizations. Paid staff, managers and volunteers organized to give service to clients (McLaughlin, 1986, p.6-8).

A key feature of the non-profit organization has been its tax-exempt status. Prior to 1894, all entities, whether individual or corporate, were exempt from taxation under U.S. law unless they were named as being
subject to a particular tax. The Tariff Act of 1894 subjected all corporations to a flat two percent tax rate with exemptions for nonprofit charitable, religious, and educational organizations. The initial emphasis of tax exemption was to protect the enterprises of nonprofit organizations from taxation, and this has remained the central function of tax-exempt law to this day (Kennedy, 1991, p.109). From the 1950s through the 1970s the federal government identified services and levels of service to which all members of certain target groups were entitled (McLaughlin, 1986, p.7-8).

Today nonprofit organizations remain a big part of the US economy. The IRS reports that it has granted tax exemptions to 1.1 million organizations with a value of more than $21 billion in 1997 (Rodrigue et al; 1998, p.50). A tally by The Philadelphia Inquirer estimated total nonprofit revenues at $500 billion annually. (Rodrigue et al; 1998, p.51).

As an area of academic inquiry, the nonprofit sector was 'discovered' in the 1970s. In 1977, substantive research on nonprofit management began when the Program on Nonprofit Organizations was founded at Yale University. However, some uncertainty arose about whether this new sector was a nonprofit sector, voluntary sector, independent sector, or third sector. The 1980s was a decade in which the field of nonprofit management and leadership flourished. Degrees, graduate programs, books and research were emerging and increasing. The 1990s promised to
be a “decade in which serious research in this field is undertaken in a more comprehensive and organized way than ever before” (Young, 1993, p.3).

Even so, there is no one standard definition of the term "voluntary." It is generally used to mean "uncoerced" and "unremunerated," there are exceptions. For example, the US has historically boasted about having a "volunteer" or citizen army, but people who voluntarily enlist to serve as soldiers receive pay for doing so. So the term, at best, appears ambiguous as used currently and historically (Nonprofit, 1999).

Still, scholars generally agree on some defining characteristics of nonprofit organizations. Nonprofit organizations exist to meet the goals of the public at large or of the subset of the public that supports them. As a place to work, the nonprofit organization offers the greatest challenge and opportunity to the person who wants his or her life’s work to count for something on the social scale, but enjoys a business environment. Nonprofit organizations are not conducted or maintained for the purpose of making a profit and are not based on the profit motive or on capitalistic principles (McLaughlin, 1986; Kennedy, 1991; Young et al; 1993). Nevertheless, like all businesses, there is a need to avoid losses. However, nonprofit organizations do believe in productivity. Generally, productivity is measured in two categories: products delivered (such as numbers of counseling sessions held, brochures distributed, days of care provided) and people served. For example, the United Way of
America’s program classification system defined 587 human service categories and suggested product measures for each (Plantz et al; 1997, p.16). In the late 1980s client satisfaction was added within the scope of performance measurement. Elements of satisfaction included physical and cultural accessibility, timeliness, courteousness, physical conditions of facilities, and overall satisfaction (Plantz et al; 1997, p.16-17). Many nonprofit organizations specializing in service, such as PRFA, were affected by this element of quality assurance.

**Festival Organizations**

The Portland Rose Festival Association is a nonprofit, public-oriented, festival organization. By now it should be clear what a nonprofit organization is and the history behind the term. A public-oriented organization is one that exists to provide services to or on behalf of the public as a whole (McLaughlin, 1986, p.12). Festival organizations are a specific type of nonprofit organization. This section focuses on the festival organization as a category of nonprofit organization, which includes the PRFA.

According to the American Heritage Dictionary a festival is: “1) a time of celebration marked by special observances, 2) a periodic season or program of cultural events or entertainment” (American Heritage Dictionary, 1993). As mentioned in Chapter 1, PRFA fits both of these definitions, as
do many other festival organizations. According to the 1998 results at the International Festivals and Events Association, the five most similar festivals to the PRFA are Denver’s Cherry Creek Arts Festival, the Kentucky Derby (a horse racing festival), New York City’s Macy’s Thanksgiving Day Parade, the Pasadena, California Tournament of Roses Parade and the Fiesta Bowl (a collegiate football event) (Rose Festival, 1999).

It is possible to trace the phenomenon of festivity back to the beginning of time. “Cave paintings depicting celebration indicate lifestyles have incorporated festivities since the beginning of recorded history” (Green & Green, 1985, p.8). Paleolithic men garbed themselves in the skins of stags, placed antlers on top of their heads and took on the character of a four-legged animal. Upon completing this ritual, the celebrants stalked and killed the animal they imitated for dinner (Green & Green, 1985, p.8-9). Festivals today might be a bit different, never-the-less it is apparent that human beings possess an inherent need to celebrate and always have.

Festivals became an annual occurrence when the Egyptians invented the calendar. The earliest historical reference to a festival is the Jewish Passover in celebration of the Jews' escape to freedom from Egypt more than 3,000 years ago. The “Dragon Boat Festival” in China dates back more than 2,000 years, as does the Jewish harvest festival, Sukkot (Green & Green, 1985, p.8; Thompson-Hill, 1988, p.xxv; Kincade & Rank,
Some significantly historical events occurred during festivals. For example, as early as 776 BC, annual sports festivals were held, including the Olympic games; Julius Caesar was warned of the plot to kill him during the Festival of Lupercalia in 44 BC; and May Day festivals were held in Roman times, while selecting and crowning a May Day Queen dating back to medieval England (Thompson-Hill, 1988, p.xxv).

When the British, Spanish and French settled in North America the festivals continued to be celebrated. Soon immigrants moved west and north hauling their festive spirits with them. Festivals flourished in the United States because settlers relied heavily upon custom, heritage and nourishment for their festival themes (Green & Green, 1985, p.8-9). In the 1930's, improved transportation, shorter work weeks, longer vacations with pay, and labor saving devices on farms and in homes, offices, and factories helped with the increase of festival creation and participation (Meyer, 1967, p.vii).

Festivals have escalated rapidly in popularity as sources of entertainment, artistic display, and cultural enlightenment. Today attending a festival can be an integral part of a vacation or an inexpensive way to spend an afternoon or evening full of fun and recreations close to home. In addition, “festivals are the backbones of the cultural life of any country: unifying communities that prepare and execute the events, while at the same time showing the world their most cherished traditions” (Thompson-
Hill, 1988, p.xxv). As a result of the nation's history, festivals in the United States vary tremendously. One can easily enjoy or study American culture at festivals through their entertainment, arts, and foods. America's vast range of national origins and ethnic backgrounds is reflected in the costuming, pageantry, and foods of the festivals (Thompson-Hill, 1988, p.xxvi).

Many different types of festivals can be found throughout the world. An array of local, national and international performers grace the regions of festivals. Some are more popular and larger than others, however, they all contain their single uniqueness. Some examples of the more well-known types of festivals are—film, art, music, comedy, dance, science, television, theater, carnival, and parade festivals (Meyer, 1967; Green & Green, 1985; Thompson-Hill, 1988).

In addition, festivals are grouped by themes. For example, “Taste Treats & Eye Delights” includes food festivals and art fairs; “Farmers, Loggers & Cowboys” features country fairs, timber carnivals and rodeos; “Flowers & Fun” describes planting and gathering festivals as well as local flings; “Pickers, Pipers, Dancers & Actors” covers cultural events; and “A Peek into the Past” discusses celebrations of history and heritage (Green & Green, 1985, p.7).

Throughout the years festivals have established salient features that distinguish them from other nonprofit organizations. There are five primary
features that are found in every festival organization. First, festivals do not forget their history, however second, they also want to stay contemporary. Third, festivals want to stay as diverse as possible. Fourth, festivals tend to reflect the local community and entice all types of participants. Finally, festival organizations would not be possible without the organizational members.

 Tradition

Festivals have long-lived, cherished histories in which traditional themes are still celebrated. Customs, heritage, communities, historically created events, etc. are some of the traditional entities that festivals treasure and value in their history. One purpose that festivals serve is to remind participants of their heritage and to appreciate others. For example, the Macy's Thanksgiving Day Parade stems from European tradition. In the 1920's many of Macy's department store employees were first-generation immigrants. Proud of their new American heritage, they wanted to celebrate the American holiday with the type of festival they loved in Europe (Macy's Thanksgiving Day Parade, 1999; Matzer, 1997, p.10). Today the festival reminds participants of that history.

Another example of festival history can be found in the small town of Ashland, Oregon. Since 1935 this annual Shakespearean Festival has been synonymous with Shakespeare staged in the Elizabethan manner.
Ashland maintains the oldest of the current American Shakespearean festivals. Seminal influences within the history of the festival include glimpses of entertainment during Oregon territorial days, the growth of Ashland and the influx of cultured Easterners in the area (Oyler, 1971, p.xiv-xv). The history of the Shakespearean festival has somewhat become the communities identity and will remain with them as long as the festival survives.

Contemporary

Festival organizations exemplify both tradition and change. As new generations attend the events and different interests and trends appear, organizations need to continuously re-evaluate their events. Staying contemporary is indeed a theme among festivals. As every organization alters with the changes of time, festival associations are no exception. Communities appreciate the traditional events and ceremonies, however they also crave new, different and exciting events. Slowly creativity is replacing custom as the primary celebration motivator (Green & Green 1985, p.7-9).

For example, PRFA recognizes this need for new events and tries to incorporate something new each year. The first year for the three-day Arts Festival was in 1998. An estimated 15,000 people came to the South Park Blocks of downtown Portland to enjoy the art event. “All it took was an
amiable mix of fine art, cool music, good eats and a megadose of sunshine” (Mayes, 1998). Arts Festival chairwoman Jill Whittaker said, “It’s a huge, happy, appreciative crowd. I think they’re excited by what they’re seeing” (Mayes, 1998).

Diversity

Third, it is critical that festivals add variety and diversity. Festival organizations develop plans and goals to include everyone in their festivities. Providing events for different cultural and ethnic communities is important. The Kentucky Derby Festival celebrates spring when over 1.5 million people gather for a variety of events. For sports fans there is basketball, soccer, volleyball, football, golf and bass fishing activities. For music lovers the concerts are almost non-stop. Other various events include the Great Balloon Race, the Great Steamboat Race, the elegant Derby Ball as well as 70 additional events to fit anyone’s style (Kentucky Derby, 1999). The Fiesta Bowl Festival features more than 50 events, including the first unified national title game in college football history (Fiesta Bowl, 1999). The goal of festival organizations is to create and sustain events that spread across a gamut of interests.

Diversity is also evident through cultural and ethnic events. The International Showcase exemplifies the commitment to diversity in Portland. The PRFA Showcase features a local leader of Estonian culture helping
coordinate hundreds of dancers and singers to share their ethnic and cultural specialties at the Memorial Coliseum (Nkrumah, 1998).

Community

Fourth, festivals reflect the community’s lives and values. Festivals feature the local livelihood be it logging, fishing, or farming (Green & Green, 1985, p.9). In addition, festivals are known for featuring individuals from the community as participants. Local artists, musicians and restaurants generally partake by sharing their talents in the festive activities. The Pendleton Round-up in Pendleton, Oregon is an excellent example of this salient feature. Over 60,000 people join the town of only 15,000 people to add to the spirit and flavor of the Old West. Locals put on a parade and pageant and prepare some “down-home” cooking for the visitors. In addition, tourists are encouraged to dance, play games, and participate in many activities. The major feature of the festival is the round-up or rodeo. Approximately 500 cowboys compete for more than $60,000 in prize money. On the weekend, Main Street Cowboys take over downtown Pendleton with rides for kids, western displays, clowns, medicine shows, music and dancing (Green & Green, 1985, pp.18-19).

In addition to playing a significant role during the festival, local people are involved throughout the year in preparing the annual events. For example, PRFA encourages new ideas and constructive feedback from
members of the community. Every year the Rose Festival conducts a contest for the following year’s theme title. Last year it was ‘ticket to adventure.’ The 1999 festival will have the theme of ‘set sail for fun.’ This contest allows the community to not only take ownership in the coming theme, but also set the motif and style of the upcoming festival events (Rose Festival, 1999).

Participants

The fifth salient feature of festivals is participation—citizens, the local and out-of-town residents and tourists who attend the festival. They are the most important players in the festival. Most people would agree that meeting the needs of the client is the most important consideration in nonprofit work (Kennedy, 1991, p.26). If one participant in any event is enjoying herself/himself and is having fun then it feels as thought the entire production was well worth the labor (Kennedy, 1991, p.27). Every festival attracts tourists, who bring their appetites and pocketbooks with them. The influx of people and money boost the local economy, give citizens a rare opportunity to share their community with out-of-towners and, in return, provide guests with good times and perhaps, unique experiences (Green & Green 1985, p.7-9). In addition, most festivals benefit local charities, so they welcome and seek outsiders to visit and participate (Thompson-Hill, 1988, p.xxvi). For example, the Kentucky Derby Festival generates in
excess of $53 million annually for the local economy and raising nearly $250,000 for area charities each year (Kentucky Derby, 1999).

**Organizational Members**

The final salient feature of the nonprofit festival organization is its organizational members. A festival's fun and celebration comes from many individuals' time and effort. Many people are involved in the organization and preparation of the annual events. One of the most effective and very popular ways to achieve a goal is through the use of groups, where "...all members of a unit have the same individual motive, and gain strength as they work together toward this single-minded aim" (Zander, 1994, p.24). Every festival organization has different groups that play key parts in the festival's production. A tremendous amount of volunteers, a prominent volunteer board, and a solid group of paid-staff members are the principal groups throughout festival organizations.

Paid and volunteer staffs members, working in nonprofit organizations, account for perhaps one out of ten working Americans (Rodrigue et al; 1998, p.51). Each of these individuals is essential to the overall output of the festival. Collaboratively, as a group, these people make the entire festival happen. "Groups have different purposes, but all are alike in one respect: they intend to be beneficial to members, nonmembers, or both" (Zander, 1994, p.2). They design, organize, and
implement the details of the festival in order to meet the desires and needs of the community and participants. Hence, the quality experiences pursued by nonprofit workers and contributors take place when they effectively and specifically meet people’s needs (Kennedy, 1991, p27).

**Volunteers**

Volunteers are crucial to any festival organization. A volunteer is someone who performs or gives services of her or his own free will (Rose Parade 1999 Official Souvenir Rose Parade Program). “Volunteers are among the most important suppliers that nonprofit managers depend on to continue their work. They supply valuable human resources which, when properly engaged, can be worth tens of thousands of dollars in conserved personnel costs to even the smallest organizations” (Kennedy, 1991, p.77). Volunteerism is on the increase in our society, and can be the lifeblood of a nonprofit organization. Volunteers and contributors are drawn to a nonprofit group because of the opportunity to share in all the good and positive things that are done there for people (Kennedy, 1991, p.12).

Volunteers constitute a festival organization’s largest group of members, in comparison with the paid staff. The range of abilities, knowledge, and skills that are available to the group increases with increasing group size, as well as an increase in the sheer number of “hands” (Shaw, 1976, p.155). The primary function of the largest group in the Association, the volunteers, is to be the “hands” of the group. After the
events are organized and coordinated, the volunteers actually do the hands-on work at the events.

A festival’s compilation of volunteers is unique because some might consider them an aggregate instead of a group. An aggregate is a collection of people that gather together, such as at events, to equal a whole, but might never meet each other. On the contrary, voluntary groups are composed of individuals who join because they desire membership. “Belonging to this voluntary group meets the person’s individual needs” (Cathcart et al;1996, p3).

In 1986 roughly 37 million Americans served as volunteers (McLaughlin, 1986, p.245) and in recent years this number has increased. The Pasadena Tournament of Roses Parade and Rose Bowl Game utilizes about 935 volunteer members and about 65,000 hours of combined manpower each year (Pasadena Tournament of Roses, 1999). The Cherry Creek Arts Festival that is held annually during the July 4th holiday weekend in Denver receives support from over 1,200 volunteers (Cherry Creek Arts Festival, 1999). Approximately 2,500 volunteers assist in organizing, marketing, promoting and operating the 60 year-round Fiesta Bowl events (Fiesta Bowl Festival, 1999). Kentucky Derby Festival Chairman Tom O’Hearn says, “We are a community organization of 4,000 volunteers who work all year to provide quality entertainment that enhances the community” (Kentucky Derby Festival, 1999). The PRFA has about 5,000 volunteers
that help with the extravagant festivities (Rose Festival, 1999). Volunteers are an invaluable commodity because they donate their most precious resources—their time and energy—to creating a great civic event for their community.

**Volunteer Directors and Executive Committee**

An important volunteer is one who sits on the organization's board of directors. Increasingly boards are required to have a much broader degree of expertise represented so they can deal with all the business, financial, legal and programmatic issues facing the organization (Harrison, 1998, p.15). Typically this group directs the committees that oversee the festival events. The festival's executive committee is considered a governance group. According to Lumsden, these are people who represent larger populations. They meet on a regular basis to consider issues, gather information, make proposals, and report to larger groups. In this case the larger population would be the directors (1986, p.9). Other volunteers such as the directors are part of a group called 'outside reference groups.' Witherspoon explains that, “outside reference groups are leaders who belong to a variety of social collectivities” (1997, p.41). These individuals have highly acclaimed careers and also are participants in several groups. Because of their interests, beliefs, values, and/or perspectives they decided to be part of the festival organization.
Examples of the directors and executive committees can be found throughout every festival organization. The Thorobreds are the unique group of Kentucky Derby Festival volunteers who supervise over 70 exciting events (Kentucky Derby Festival, 1999). The Fiesta Bowl’s 29-member board is responsible for setting policy, overseeing finances, evaluating events, and determining the course of action to be taken by the Fiesta Bowl executive staff and volunteers (Fiesta Bowl, 1999). The Pasadena Tournament of Roses Festival has three primary, volunteer leadership groups. The Tournament of Roses Executive Committee, Tournament of Roses Chairmen/Chairwomen and Vice Chairmen/Chairwomen, and Tournament of Roses Foundation Board are all involved in the 33 committees that produce the festival. Finally, the PRFA has 78 volunteer Directors and 22 Executive Committee members who work together for the production of the festival.

Today’s volunteers, whether they are board members, trustees, adjunct staff, fund-raisers or workers, want to know two things: “how to derive the maximum satisfaction from service, and how to find the nonprofit organization in which their time and talents will be most effective” (Kennedy, 1991, p.2). Generally success with volunteers rests on four basic steps: recruitment, planning, motivation, and rewards, which are explained in the following section. Overall volunteers’ value open communication, shared
goals, and shared ownership of successful outcomes (McLaughlin, 1986, p.247).

Staff Members

The organizational staff, consisting of professionals, managers, and support employees, is a large and integral part of the production of the festival events (McLaughlin, 1986, p.234). Staff members give an incredible amount of time and energy to the organization. They are usually willing to accept low wages in order to be able to work with other interesting people in an environment that is not as impersonal or inflexible as a large corporation. Staff members endure a lot of pressure and work, but to many they are the foundation or nucleus to the entire organization. Despite all of the difficult endeavors, many staff members have a positive and caring attitude that reflects the respect and admiration that the employees have for the organization (Wolf, 1984, p.65).

Zander notes that "a group, such as staff members, is a set of persons who interact with and depend on each other- who collaborate in the activities of their unit and behave in ways that suit mutual expectations" (1994, p.9). The staff members can be considered obligatory groups. Obligatory groups, such as workgroups are facilitated by legal or moral constraints. According to Cathcart et.al, "In a professional setting, group
membership (in obligatory groups) can be mandated by a supervisor, and often leadership” (1996, p.3).

Typically the paid staff members of festival organizations comprise a smaller, more intimate group of individuals than any other festival organization group. For example the Pasadena Tournament of Roses has twenty staff members (1999 Official Souvenir Rose Parade Program) and PRFA has thirteen paid staff members (Portland Rose Festival Association Director). Generally the paid staff members have an Executive Director that oversees the entire production. Common departments within the staff organization are marketing, membership and sponsorship, special events, accounting, public relations, and finance. Organizational hierarchies differ for each organization (Cumfer & Sohl, 1993, p.258-259). Although festival organizations have similar departments, the structure of each festival organization varies.

All of the groups, within the festival organization, combined are predominately a coordinated coalition. According to Shaw, coordination is the possibility that the group can do better by coordinating their efforts than they can by acting alone. The term coalition is applied to mutuality of affective support and joint activity (1976, p.101). Without this coordinate coalition, the festival organization would not be able to produce spectacular events and fun times for everyone.
Functional and Effective Organizations

The purpose of this study is to determine if the Rose Festival Association is a functional and effective organization. Such a complex organization, such as PRFA, allows for many challenges. The multitude of organizational members, the diverse facets of salient features, and all of the different event aspects makes a functional and effective organization a difficult endeavor to accomplish. However, literature helps to determine the construct of functional, effective, and successful organizations.

Functional Organizations

A functional organization is one that has been designed and adapted to perform a particular purpose (American Heritage Dictionary, 1993). Functions are activities of a system that serve some purpose or objective (Daniels & Spiker, 1987, p.75). For example, the function of a refrigerator is storage and cooling; the function of a printer is to create hard copies of information, and the function of a car is to get from one point to another. In the same way, the function of a festival organization is to create, organize and implement events.

One of the goals of this study is to detect whether the PRFA festival organization is functional or dysfunctional. By labeling an organization functional, one is benchmarking the whereabouts of the organization at a given time (Waldo, 1986, p.120). For example, the results of this study will
determine if the PRFA organization was functioning according to its purposes at that given time.

Functional organizations will generally have numerous strengths and some areas that need improvement. The key to being a functional organization, is the organization's awareness and recognition of areas needing improvement, and acting to fix, improve or change those areas. When the outcome of an organization is unproductive or counterproductive, it is commonly labeled as dysfunctional (Burgoon et al; 1994, p.6). However, success comes when the outcome of an organization is productive and effective.

Another functional approach to festival organizations is to examine how the organization achieves its desired outcome. A functional organization is continuously evaluating the existence of a gap between the reality and the desired (Swanson, 1996, p.18). Functional organizations frequently are concerned with efforts to change the organization. Often, the change is intended to improve organizational effectiveness as management defines it (Daniels & Spiker, 1987, p.15).

Much research is available on dysfunctional organizations and advisable improvement measures. However, little information is written on functional organizations. Perhaps it is easier to discern what is wrong with an organization than unveil the positive functionality of an organization. Or perchance organizations rather know what to fix, than what not to fix and
highlight. In this study, examining a functional organization is intriguing, because precedence is created and can be analyzed for similar organizations.

**Effective Organizations**

Functional organizations are usually effective organizations because there is intent or desire to be effective while accomplishing the specific purpose. Thus most functional organizations are highly effective. Never the less, all festival organizations are alike in one way- they strive to be as effective as possible (Zander, 1994; Kennedy, 1991; Burgoon et al; 1994).

Effectiveness within a festival organization is generally defined as constantly meeting goals and objectives (Waldo, 1986, p.120). In other words, an effective organization is one that has the capacity to achieve a desired result and is functionally capable of performing that result (American Heritage Dictionary, 1993). Becoming effective is neither quick nor easy. Most organizations never get there or, if they do they can't sustain the lofty ranking very long, but it can be done (Waldo, 1986, p.123).

**Effective People**

Festival organizations exist because of the multitude of people who make up the organization. The more effective the individuals are, then the more effective the organization becomes. A person's effectiveness in
employing their attributes of leadership and strengths enhances the company and aptitude for communication (Galvin, 1996, p.137). This comes with employing effective or potentially effective individuals. Employees and volunteers are effective when they have the desire and willingness to participate in a successful organization and when they are satisfied with the outcome, festival events, due to their effort (Galvin, 1996, p.138).

Individuals bring to the organization their personal anticipations of the amount of effort they will expend compared to the amount of reward they will receive in the final product or outcome (Burgoon et al; 1994, p.158). Individuals with a good sense of responsibility, commitment, open-mindedness, flexibility, objectivity, cooperation, acceptance, and equality will facilitate a productive, satisfying outcome for themselves as well as the organization (Burgoon et al: 1994, p.161).

Not only do employees and volunteers need to be effective, but so do individuals who have leadership in the organization. It is critical for management to set the appropriate tone or climate within the demands of effectiveness. For example, effective executives know when a decision has to be based on principle and when it should be made pragmatically, on the merits of the case (Drucker, 1988, p.19). Effective executives do not make a great many decisions. They concentrate on what is important. “To be effective, the manager must be in a place of perspective where changes are
perceived and analyzed as a routine of management" (Kennedy, 1991, p.93). Management must focus on uncovering the causes of problems and then preventing future problems from happening. Prevention must be in place every day, all day, in every area of work (Kennedy, 1991, p.55). The effectiveness of any nonprofit festival organization can be enhanced by regular assessment of its activities and performance (Nonprofit, 1999).

**Characteristics of Effectiveness**

There are a variety of characteristics and qualities of effectiveness. Due to various organizational preferences, some characteristics might fit certain organizations more than others. However, viewing scholars' characteristics and qualities of organizational and group effectiveness is essential in order to understand the vast array of ideas available.

Both organizational and group literature is examined because of the relevancy to this study. This study tries to accomplish a systematic and thorough workplace diagnosis through the literature documentation provided. There are three groups represented in this study, thus group effectiveness helps explain the common patterns of independent performance measures that take place apart from the core organizational operation. In addition, this study examines the PRFA organization as a whole from a 'big picture' point of view. Thus the organizational literature is crucial to guide the study to key organizational performance variables. Finally, it is clear that both areas of literature, group and organizational,
work together. The groups in this study are loosely coupled in order to form the organizational perspective. Table 2.1 lists seven different scholars’ ideas of characteristics and qualities of effectiveness within organizations and groups.

Table 2.1 Characteristics and qualities of effective organizations

| Drucker, 1998                          | Maintain time management   |
|                                      | Strive toward results      |
|                                      | Build on strengths and not weaknesses |
|                                      | Set priorities and follow through |
|                                      | Make effective decisions   |
| Zander, 1994                         | Exchange ideas and collaborate on tasks |
|                                      | Create cooperative relationships |
|                                      | Provide satisfaction and cohesiveness |
|                                      | Maintain power to influence |
| Schultz, 1996                        | Recognize areas of improvement |
|                                      | Develop appropriate goals  |
|                                      | Strive to attain credibility, trustworthiness, competence, and sensitivity |
|                                      | Strive for excellence      |
| Shaw, 1976                           | Ensure motivation          |
|                                      | Demonstrate consciousness of mission and purpose |
|                                      | Strive for the ability to create a common goal |
| Lumsden & Lumsden, 1986              | Pick a diverse group of people |
|                                      | Share leadership responsibilities |
|                                      | Create an organizational identity |
|                                      | Realize member’s efforts are interconnected with one another |
|                                      | Operate to achieve a mutually defined goal |
|                                      | Operate within the context of other systems |
**Beebe & Masterson, 1989**
- Strive for a common purpose
- Feel a sense of belonging
- Exert influence
- Communicate face-to-face

**Swanson, 1996**
- Create a mission/goal
- Strive for a concrete system design
- Demonstrate the ability to have adequate capacity
- Strive for motivation
- Develop and demonstrate expertise

Although many of these characteristics and qualities are similar to one another, each of the scholar’s overall themes vary. Drucker’s characteristics of effectiveness are very bold and succinct. He is results oriented and is primarily focused on the for-profit industries (Drucker, 1998). Zander’s theme lies within the strength of the organization. He believes the strength of the organization starts with an understanding between employees. As a result of strength and understanding, effectiveness can be achieved (Zander, 1994). Schultz believes that organizational effectiveness comes with individual assessment. She notes that each member should ask herself an important question: “What can I do to help the organization perform well?” In addition she states, “if there is but one motto that members can adopt, it is the commitment to do their best for the organization” (Schultz, 1996, p.45). Shaw’s key area of effectiveness is in goal setting. With goals, purpose, meaning, aim and intent are achieved (Shaw, 1976). The Lumsdens believe that effectiveness comes when the
members learn to understand the organization and build communication skills. As a result of understanding and communication skills, wisdom is developed (Lumsden, 1986). The underlying premise of Beebe & Masterson is that effective organizations require knowledge of organizational dynamics and interaction. Practice in these areas will build trust leading to effectiveness (Beebe & Masterson, 1989). Despite the differences of each theory, all theories in this area have one commonality, the goal is to strive on the achievement of something attempted.

Swanson’s Performance Variables

Swanson’s theory of performance variables seems particularly useful for studying organizational effectiveness in the PRFA. Swanson, in his book *Analysis for Improving Performance* mentions five key areas in which functional, effective and successful groups are proficient. These five areas are: mission/goal, capacity, systems design, motivation, and expertise (1996). Swanson’s ideas focus on all of the essential elements within a nonprofit, festival organization. His theme is that organizational effectiveness is achieved when a balance in each of his five suggested areas is accomplished. Although his five areas are very thorough and cover the essential components to any group, the literature is primarily organizational in nature in order to ensure and overall assessment.
Not only are his performance variables appropriate, but he is also very credible. Swanson is a professor and director of the Human Resource Development Center at the University of Minnesota and senior partner of Swanson & Associates, Incorporated. Swanson has twenty-five years of experience and has written six books and more than 150 publications on the topic of education for work (1996, p.285-286). Swanson is endorsed by Kent Dubbe, Manager of Organization Development and Training of 3M Corporation and by Dan Thornton, CEO and President of Scoville Press. In addition, Swanson is endorsed by Oregon State University's Training and Development program.

Swanson notes that, "inside each goal and intervention there are multiple performance variables at work" (1996, p.252). According to Swanson, there are three viable reasons for the performance variables. Performance variables help guide the performance diagnosis, they focus the documentation of expertise, and they help to ensure the inclusion of the critical dimensions required of an effective intervention (p.253). In other words, performance variables help the organization design, develop, implement and evaluate all critical areas. Being able to positively respond to questions under each variable enables the performance improvement professional to move closer to success. Viewing each area in more detail will help understand the need for the variable.
Mission/Goal

The mission statement describes a group’s grandest and highest goal. “A general purpose or mission is a value-loaded statement because it describes the good things the body intends to accomplish or the benefits members wish to generate for themselves or other persons” (Zander, 1994, p.17). Since the mission statement establishes the desired goal, then steps need to be taken to reach that goal. “Every operational activity of a nonprofit organization should be focused on fulfilling the requirements set forth in the mission statement” (Kennedy, 1991, p.90). An article in Fortune Magazine revealed that top managers at the most admired for-profit companies take their mission statements seriously and expect everyone else to do likewise. Mission statements—often viewed by the troops as platitudinous—surprisingly got a lot of respect from this year’s winners (1997, 232).

Besides serving many other uses, a mission statement can draw everyone positively together. “The goodness of our mission draws volunteers to our side, and its link to virtue is an undeniable factor in the investment decisions made by contributors” (Kennedy, 1991, p.7). Goodness must be linked together with personal character, organizational honesty, and competence to have its full positive effect (p.7-8).

An effective mission statement contains some essential elements. The mission statement should be measurable, understandable, relevant
and reliable. A good mission statement says clearly and exactly what an organization expects to accomplish (Bailey, 1996, p.44). A typical team mission statement should have both an external focus and internal focus. An effective group mission statement defines who the group is, what the group does, and why. It is also important to keep the mission statement concise and simple (Emery, 1996, p.51).

Specific goals will help in striving towards a mission statement. These goals are usually particular directions within a roadmap of destinations. Zander asks the question, “What does a goal do for an organization” (1994, p.16)? Goals within mission statements can be used as standards of excellence. Organizations can be analyzed according to how they function to meet the community's goals, how they function to satisfy the individual groups' purposes, or how individuals function within them to meet their own individual goals (Burgoon et al; 1994, p.7). “By predetermining realistic criteria, each member has something with which to measure group output” (p.161).

Also, goals are a source of stimulation for arousing involvement in a task or for stopping action when it is attained. Goals are a guide for directing members' actions and integrating their moves. Organizational goals should establish mutuality of concern. Members' mutuality of concern is the degree to which members share a concern for the task (Beebe and Masterson, 1990, p.51). “The organization must select its responsibilities
and design its activities so that the members are collectively and individually satisfies with the relationship (Burgoon et al; 1994, p.158).

Organizational goals can be the basis for relations with sources outside the festival association, as in cooperating or competing with other units. Finally, organizational goals are a means for determining if members deserve rewards or penalties. Overall, goals within the mission statement are important in order to achieve or follow along the path of the mission statement.

Concerning mission and goal, Swanson poses three questions. First, does the organizational mission/goal fit the reality of the economic, political, and cultural forces? Second, do the process goals enable the organization to meet organizational and individual mission/goals? Third are the professional and personal mission/goals of individuals congruent with the organization's?

Capacity

Capacity pertains to the organization as a whole as well as each individual. Capacity focuses on the optimum amount of production possible for individuals and the organization (the American Heritage Dictionary, 1993). Swanson simply describes capacity as the goal to be sure that every resource is being used, stretched, or worked to their fullest potential. This performance variable should be assessed through the organizational level, the process level and the individual level (1996, p.52). Capacity and
productivity go hand in hand because so much of the work in nonprofit organizations is labor intensive and highly personalized, people do not normally think in terms of capacity (McLaughlin, 1986, p.365). In other words, the more productive one is, the greater capacity that they have obtained.

Another aspect of capacity deals with people knowing why things are done the way they are. Staff members will be asked to make sacrifices almost daily that require a clear understanding of “why” in order to maintain commitment. Volunteers have too many options from which to choose for service to be expected to follow leadership blindly. It is everyone’s right to say and know the capacity of the organization and its potential and expectations (Kennedy, 1991, p.53-54).

Consensus is a large determinant of capacity. Consensus is needed by the staff members to implement decisions into action. Shaw states this exactly, “in general, the larger the group the greater the difficulty in achieving consensus (p.159). In larger groups, as compared with smaller groups, there is less consensus about discussion issues. However, many festival organizations break up into small committees so that consensus is attained faster and easier.

As noted, capacity involves a wide spectrum of facets. Once aware of capacity levels and restraints, the organization must compare them to what is needed and design the system to try to meet those needs. This
process would reduce the gap between capacity and desired expectations and create a more effective organization.

Swanson offers three questions to help describe what capacity entails. First, does the organization have the leadership, capital, and infrastructure to achieve its mission/goals? Second, does the process have the capacity to perform (quantity, quality, and timeliness)? Third, does the individual have the mental, physical, and emotional capacity to perform?

System Design

System design consists of how festival organizations are comprised and the arrangement of the parts within the whole (American Heritage Dictionary, 1993). The hierarchy and structure of festival organizations plays a large role in the effectiveness of the organization. Problems could arise very easily. For example, keeping track of informal structures and politics of an organization can be very beneficial. It would not be unusual in a nonprofit environment to find that a volunteer who is lowest in the actual organizational chart may have more real influence with the top managers than anyone else. It is essential that members are aware of these informal dynamics. One will probably have more than one person of influence to convince, and maybe several from various levels of organizational authority (Kennedy, 1991, p.156).
Swanson says there are six essential properties that all systems have in common. First, systems are assemblies of parts or elements that are connected in an organized way. All of the elements in a system interact. Second, systems can be identified by their purpose. Third, systems are affected when the elements within the system are changed or eliminated. Fourth, systems do work and carry out processes. Fifth, systems have boundaries to identify those elements that belong and those that do not. Finally, complex systems are open systems. They are permeable so that forces in their environments, their contexts, will affect what goes on within the system (1996, p.14-15). Festival organizations follow these exact systemic patterns.

Organizational structure is often overlooked, however it is essential for continuous organizational assessment. It is crucial that festival organizations are aware of the six properties in order to understand their system and work effectively within the system. “We examine the organizational inputs that create the organizational structure, how it interacts within that structure to achieve its functions, and how well it meets its goals” (Burgoon et al; 1994, p.7). This type of structural evaluation will help meet the first performance variable, the mission statement, as well as help the organization become effective overall.

Swanson describes an organization’s system design through three questions. First, does the organizational system provide structure and
policies supporting the desired performance? Second, are processes designed in such a way as to work as a system? Third, does the individual face obstacles that impede job performance?

Motivation

Motivation is a key element in all organizations. Internal and external motivation are keys to many employees' productivity and enjoyment at the organization. Internal motivation focuses on intrinsic desires in which reward come from within. Examples of intrinsic rewards are self-satisfaction, self-accomplishment, and increased self-esteem. External motivation is derived from external forces motivating the individual. Rewards would include recognition, money, certificate, etc. No matter how skilled employees are, they will not perform effectively if they are not motivated (Hitt et al; 1979, p.233).

General motivators include such items as achievement, recognition, responsibility, opportunity for advancement, incentives, and the work itself (p.242). Creating incentives for employees is the sixth challenge in a list of ten by the Journal of Accountancy. This list rates non-profit top challenges over the last few years (1998, p.20).

Effort and reward comprise the usual sequence for motivation. However, there should be a proper balance between effort and reward. When effort exceeds the individual's expectations or rewards fall short,
experiences are unsatisfactory. Through effective participation, however, the effort can be reduced while the reward is increased. Producing a high ratio of reward to effort should be one ultimate goal of the organization” (Burgoon 1994; p.173).

One of the greatest insights in the field of human motivation is that satisfied needs do not motivate. It is only the unsatisfied need that motivates (Covey, 1989, p.241). For example, physical survival, a satisfied need, can not motivate, but psychological survival can help motivate. To be understood, affirmed, validated, and appreciated is the greatest need of any human being. These motivating factors are especially critical to festival organizations.

Swanson inquires about the essence of motivation through three questions. First, do the policies, culture, and reward systems support the desired performance? Second, does the process provide the information and human factors required to maintain it? Third, does the individual want to perform no matter what?

**Expertise**

The last of Swanson’s successful organizational characteristics is expertise. Expertise is defined as the level at which a person is able to perform within a specialized realm of human activity (Swanson, 1996, p.97). Developing expertise is not an event, it is a purposeful journey.
Organizations who do not view expertise with priority are faced with three dilemmas. The employees are emphasizing general knowledge versus specific expertise, hiring versus developing expertise, and applying nature versus nurture paths to expertise (p.98). Organizations can achieve appropriate expertise through employees' job descriptions, task inventory, and task analysis. A job description defines the boundaries of a job, while a task inventory highlights the discernible parts of a job and task analyses detail the expertise required to perform each task (p.100).

Effective management of people can produce substantially enhanced economic performance. Extensive training is one dimension that seems to characterize a producing system (Pfeffer, 1998, p.96). Recently organizations have recognized the need for continuous training throughout the employee’s career. Within nonprofit organizations, especially festival organizations, training is a necessity.

Specialized training should be designed for every person in the organization, including board members and volunteers. Five phases of training have been proven very useful over the years (Kennedy, 1991, p.135) and help develop empowerment within the organizational members. Phase one is transmitting information to the trainee through lectures, discussions, reading assignments, audio or visual aids. The second phase is actually doing what it is expected. Phase three entails watching the task being performed by the trainee. Allowing the trainees to partner up with
one another is phase four. The last phase empowers the trainee to
complete the task without supervision (p.135-138). These simple
procedures lead to effective organizations with high levels of expertise.

Within festival organizations good or bad volunteer situations are
primarily dependent upon the organization’s preparation to work with
volunteers and professes that are in place to manage them. All volunteers
should be instructed to understand fully the requirements that the
organization is designed to fulfill (Kennedy, 1991, p.77-78). “Poor
organization, training, and preparation for receiving clients can create
results drastically inconsistent with the compassionate intents of service”
(p.40).

Swanson’s questions focus on the area of expertise. First, does the
organization establish and maintain selection and training policies and
resources? Second, does the process of developing expertise meet the
changing demands of changing processes? Third, does the individual have
the knowledge, skills, and attitude to perform?

Summary of Swanson

Two questions should be asked of all festival organizational
members. The questions strike at the heart of the motivation and business
philosophy, but reveal the expertise of the individuals. “Why do I do my
work the way I do it?” “How can I do it better?” The answers will provide the
information needed for analysis of the practicality and reality of the organizations philosophies of service. This is particularly important for those who establish policies and procedures at the staff or management levels, because the whys definitely affect the hows” (Kennedy, 1991, p.65).

The organizational performance variables are critical for festival organizations’ evaluations as well as overall organizational effectiveness, success and functionality. Festival organizations should be sure that they have the aptitude (capacity) to perform; they have the know-how (expertise) to perform; they choose (motivate) to perform; They have the proper tools, equipment, or environment (systems design) to perform; or performance expectations (goals) are clearly defined in the first place (Swanson, 1996, p.70).

Success

Success is the achievement of something attempted (American Heritage Dictionary, 1993). Once an organization appropriately achieves each of the performance variables to their satisfaction, they have reached success. An effective organization should always be successful in its accomplishments. According to Zander, “when a organization is strong and successful, it is better able to move toward its objectives” (1994, p.4-9). All functional and effective festival organizations use levels of success as the judge at the end of their events.
The foundation of success can be found in literature more than 150 years ago. It used to be called character ethic and focused on attributes such as integrity, humility, fidelity, temperance, courage, justice, patience, industry, simplicity, modesty, and the Golden Rule (Covey, 1989, p.18). Recently success has become more of a function of personality, of public image, of attitudes and behaviors, skills and techniques that lubricate the processes of human interaction (p.19). In both cases, it is clear that success is necessary for the longevity of festival organizations.

Effectiveness Evaluation

To reach success, an organization must be evaluated in order to know if the success is deserved. The following chapters will evaluate PRFA's organizational effectiveness. The quest for effectiveness-assessment approaches can be seen back to 2200 B.C. when the emperor of China is said to have instituted proficiency requirements for his public officials (Taylor & Sumariwalla, 1993, p.94). The subjects of evaluation-effectiveness assessment, success measurement- have occupied the attention of lawmakers, fund raisers, business leaders, and social thinkers during most of this century, but more intensely during the last three decades (Taylor & Sumariwalla, 1993, p.95).

Evaluation is defined as “an activity to arrive systemically at objective, optimal evidence with regard to the degree to which a given action (or inaction) has or has not achieved its predefined (or hypothesized)
objectives (or consequences)” (Taylor & Sumariwalla, 1993, p.95). Also, evaluations help reach conclusions as to the nature and extent of the unintended consequences which may have resulted from such action (p.96). In short, evaluation means finding out whether a given effort has or has not produced the results it was suppose to, and how well or how badly.

**Research Questions**

In light of research/literature in the areas of nonprofit festivals and groups, this study is examining four research questions.

**R1: To what extent do staff members consider the PRFA to be a functional or dysfunctional organization?**

A functional approach is to examine how an organization achieves its desired outcome. A functional organization is continuously evaluating the existence of a gap between reality and the desired (Swanson, 1996, p.18). When the outcome of a group is unproductive or counterproductive, it is commonly labeled as dysfunctional (Burgoon et al; 1994, p.6). This study will investigate whether PRFA is viewed by its staff members as a functional or dysfunctional organization.
R2: Are there attributes of the PRFA that members view in similar ways?

Research indicates that the ability to positively respond to questions of organizational assessment enables the performance improvement professional to move closer to success (Swanson, 1996, Seels & Glasgow, 1998, Mager & Pipe, 1984). This study will help discover whether PRFA groups agree on desirable organizational attributes.

R3: Are there areas of the PRFA that members believe could be improved?

Assessments must focus on uncovering the causes of problems and ways to address them. Recognizing all of the areas of improvement and taking action to fix, improve or change these areas is a sign of a functional organization. The effectiveness of any nonprofit organization can be enhanced by regular assessment of its activities and performance (Nonprofit, 1999). This study will uncover any areas that improvement is needed.

R4: To what extent do members of PRFA's three prominent groups perceive an identifiable relationship with one another?

Paid and volunteer staffs [working in nonprofit organizations] account for perhaps one out of ten working Americans (Rodrigue et al; 1998, p.51).
Each of these individuals is essential to the overall output of the festival and, collaboratively, as a group, these people make the entire festival happen. This study will examine PRFA’s organizational structure in order to identify the relationships between the groups.

Chapter three will discuss the specific methodology in determining the effectiveness of the PRFA. Both qualitative and quantitative analysis was completed to determine the effectiveness, success and functionality of PRFA.
CHAPTER THREE
Methodology

This study seeks to describe and analyze the functionality and effectiveness of the Portland Rose Festival Association. The research is qualitative and quantitative in nature by implementing two primary methods—interviews and questionnaires—to study a single organization. The previous chapter has featured research and commentaries pertinent to this study of the PRFA. Chapter two concluded with the presentation of research questions. The objectives of this chapter are to discuss the methods used and phases followed to answer those questions.

This study employs a multiple-method approach in gathering information in two phases. Prior to the first phase, work includes preparation and orientation about the organization. Then the first phase begins with a preliminary internal assessment by means of interviews. The second phase features questionnaires in a broad organizational inquiry. This study investigates the needs of the individual members, the group within the organization that they belong to, and the entire organization as a whole.

Preparation and Orientation

Prior to conducting interviews and collecting survey data, it was imperative to become familiar with the organization. My mother has been
involved in PRFA since 1994, so I knew something about the organization. In anticipation of this study, I made an effort to attend as many 1998 Rose Festival events as possible. In addition, I researched some of the internal documents and joined the PRFA listserv online to stay current with its information. Finally, I held three meetings and many phone conversations with various staff members to brainstorm ideas for this research.

**Phase One**

**Focused Internal Assessment**

Semi-structured interviews were conducted with the PRFA staff members. The purpose of these interviews was to discover how the organization’s core group, its staff members, felt about key issues. Interview results provided a basis for developing the subsequent questionnaire.

What is a semi-structured interview approach? According to Rossett in *Training Needs Assessment*, an interview is, “interactive, verbal, real time communication” (1987, p.133). Someone with specific intentions is talking to someone else to fulfill those intentions. An interview is a powerful tool because it is flexible, it enables one to enlist support and assistance for the project, it provides more information than just words, and it is a prime agent for carrying out needs assessment and subject matter analysis (p.133-155).
A telephone interview was used instead of a personal, face-to-face interview. Telephones are frequently used to conduct interviews (Edwards et al, 1997, p.76, Rosenfeld et al, 1993, p.112). Telephone interviews are sufficient and appropriate if one is getting an "initial take" on something, saving money, getting information from many people and informing them about an upcoming project (Rossett, 1987, p.139).

Participants

First, the participants were identified. All staff members of the PRFA were invited to participate in this interview process. They hold paid positions and work year round for the PRFA. At the time there were thirteen full-time paid staff. Eleven interviews were conducted. Only two staff members did not participate in the interview because of conflicting schedules. Nine interviewees were female and two were male. The participants have been working at PRFA from two months to eight years.

Interview Design

The interview served three purposes. Rossett (1987) mentions that there are specific purposes for interaction during an interview. Specifically, these purposes are the reasons for contacting the individual. Three of her purposes were applied to this study. The first purpose of the interview was to find what Rossett has termed the interviewee’s “optimals.” According to
Rossett, "optimals" describe what the interviewee thinks ought to be going on in the organization, how she or he thinks the system should work, and what she or he knows about the organization. The second purpose was to find the "acutals" within the organization. The "actuals," Rossett says, consist of the details of why employees are and are not performing, the way the system is currently operating, and whether the interviewee perceives a problem. Revealing the way employees feel about the organization was the third purpose of the interviews. Determining how the interviewee feels about certain situations and how she or he thinks others feel is the main focus of this specific purpose (Rossett, 1987, p.137).

Interview questions were designed. The goal was to keep the questions as open-ended as possible in order to allow as much freedom as feasible when answering. All of the questions were open-ended except for question six, which involved rating.

The first two questions asked about demographics. The third question focused on the strengths of PRFA. The fourth, fifth and seventh questions were intentionally created to be similar. They asked for the weaknesses of PRFA, the challenges the PRFA faces, and what opportunities are not being met. The sixth question asked interviewees to respond to organizational metaphors. Four images were listed and interviewees were asked to rate each image from a scale of one to five. On the scale, one meant it does not apply to the organization and five meant it
does apply to PRFA. The images were: newly dating couple, dysfunctional family, synchronized swimmers, and working in the New York stock exchange. Question eight asked if there were any concerns with the volunteers. Finally, question nine focused on the future with the respondents’ feedback of possible critical issues that might arise in the organization. The interview questions are included in the Appendix.

Once the interview guide was created, it was reviewed by the Executive Director and the Director of Special Events for approval. They offered both feedback for the research instrument and suggestions for my approach with the staff members. Their feedback was incorporated into the final interview guide.

A pilot test was necessary to receive feedback on the interview instrument and method before it was administered. I tested the effectiveness and clarity of the interview on several colleagues. They offered advice and constructive comments that added to the interview guide.

The respondents were given as much time as needed to answer each question. Follow-up questions were often asked to validate the answers of the respondents and to clarify any misunderstandings I might have about the information being discussed. Each interview was targeted to take from fifteen minutes to half of an hour. However, the average length of the interview was about half of an hour.
Interview Protocol

The goal was to interview as many members of the staff as possible. PRFA supplied a list of staff members. The next step was attending the staff meeting. On October 19, 1998, I gave a presentation to all of the staff members about the study and the benefits that they would gain from the thesis. Also, I gave a detailed description of the interview. I attended the entire staff meeting in order to conduct a brief observation of the culture and climate. In addition, attending the staff meeting gave me the opportunity to interact with the staff members prior to the interview.

Using the staff list, initial telephone calls led to interview appointments. The interviews began with an informal introduction of the purpose of the study. Then the interviewee was asked if she or he had any questions about the study presentation that was given at the staff meeting. In addition, I explained that the interview results would remain completely anonymous and would only be seen as compiled results with the rest of the staff members. The full introduction can be found in Appendix A.

The questions were asked in consecutive order, but answers were re-framed or elaborated if asked. At no time was any indication of my expectation for answers given. After the interview was complete, I asked if they would be interested in viewing the compiled results. In addition, I asked permission to administer another survey if necessary.
Data Interpretation

Actual data recording was done through note taking during the interviews. Often the notes were exactly what the interviewee said in order to preserve the content and context of the answers. However, quotes, phrases and key words were also written down. Subsequent notes, such as participants’ correlation, and reflection were written after interviews were terminated. The written notes were then transcribed into a systematic chart on the computer. This media lent itself to uniform formatting of each interview. In addition, it organized and compiled all participants’ key words and phrases. Compiled results of the interview can be found in the Appendix. A presentation about the complied results was given to the staff members.

Phase Two

Broad Organizational Inquiry

The preliminary interviews indicated that the PRFA is a very functional and effective organization. As stated in Chapter 2, a functional organization recognizes areas needing improvement and takes action to fix, improve or change those areas. The next step was to investigate this phenomenon. What aspects of the organization make it effective and functional? The purpose of this questionnaire was to investigate five different areas of an effective organization. Swanson (1996) classifies these areas as mission/goal, system design, capacity, motivation, and
expertise. In addition to these areas, the questions also related to personal preference items such as attitudes, opinions, expectations, and intentions.

Rosenfeld et al (1993) say that questionnaires are the most extensively used research method in the social sciences (p. ix). Recently organizational questionnaires appear to be gaining immense popularity. Dutka and Frankel (1993) define organizational questionnaires as surveys where information is obtained from organizations. Questionnaires refer to, “both the instrument used to gather data and the processes employed when using the instrument” (Edwards et al, 1997, p.1).

“The demand for performance data, such as questionnaires, to demonstrate program results in nonprofit organizations offering all sorts of services, are high (Newcomer, 1997, p.10). As a result of this demand, organizational questionnaires are an excellent way to obtain self-reported information (Edwards et al, 1997, p.1). The purpose of many questionnaires is to describe the characteristics of the group or organization (Dutka & Frankel, 1993, p.58). For example, “the current emphasis in managerial training on employee involvement in decision making has led to a resurgence in the use of surveys, specifically questionnaires, as managers need to better understand the attitudes, beliefs, and opinions of employees before making decisions that affect their working lives” (Rosenfeld et al, 1989, p. 146). This allows employees to feel a part of the decision making process. This sense of empowerment and ownership may
enhance employee motivation, organizational communication, and productivity (Rosenfeld et al, 1993, p.xi).

One type of effective organizational questionnaire uses the responsive evaluation technique. Responsive evaluation focuses on the interests and concerns of stakeholders and produces information that organizations want and need for direct application and decision making (Taylor & Sumariwalla, 1993, p.97). This is the approach used in this study.

Survey questionnaires are often used as a prime data collection tool for many reasons. The researcher can reach many people at less cost than it would take to call or meet with them, especially due to email. The investigator can promise and deliver anonymity and respondents are allowed as much time as they prefer to ponder (Rossett, 1987, p.202-203). "No tool is more efficient for getting data from a large, dispersed population" (Swanson, 1996, p.82).

**Participants**

The questionnaire involved all of the primary groups within the PRFA. The phase two interviews assessed the organization by benchmarking the foundational group, and the questionnaire expanded and broadened the organizational research. However, the preliminary interviews were vital to construct the framework for the questionnaires. The
three groups targeted for the questionnaire were the staff members, the executive committee directors, and the volunteer directors.

The demographics of the staff members have been discussed earlier. The executive committee consists of twenty-two individuals, fourteen males and eight females. They have been involved in the PRFA between five and nineteen years. Their responsibility is to oversee many committees as well as the volunteer directors. There are seventy-eight volunteer directors. Forty-three are men and thirty-five are women. They range in age and their experience with PRFA. Some are more active than others.

All of the staff members and all of the executive committee were sent questionnaires, however not all of the directors received questionnaires. The goal was to have around the same number of questionnaires returned for each group so that the sample size would be similar across all three groups. "Mail surveys with a return of 30 percent or so are often considered satisfactory, but there are instances of more than 70 percent response" (Emory, 1985, p.172). In this case half of the directors were selected at random and questionnaires were mailed to them.

**Questionnaire Design**

The quantitative questionnaire was built from Swanson's performance variables, reviewed in Chapter 2. The goal was to compare
how each group felt about key areas in the organization. The first question asked about demographics. The second, third, and fourth questions focused on the mission and goals of PRFA. The fifth through seventh questions concentrated on the system design of PRFA. Capacity was the theme of questions nine through eleven. Questions twelve and thirteen dealt with motivation. Finally, questions fourteen through sixteen focused on the expertise of the organization. A section for comments was located at the end of the questionnaire. The questionnaire can be located in the appendix.

The questionnaire was written with Likert scale items. This is the most widely used response format (Edwards et al, 1997, p.43). The items ask respondents to select a category which reflects some ranking but lacks guaranteed, standard differences between ranks (i.e. very familiar to not familiar) (Rossett, 1987, 213, Hedderson, 1991, p.92). The participant was asked to provide ratings indicating how strongly she or he felt positively or negatively on an issue. There were five options on each question. For example, the second question in the questionnaire asked, “How familiar are you with the overall Portland Rose Festival Association mission statement?” The participant had the choice of five answers: not familiar, semi-familiar, familiar, greater than familiar, very familiar.

Attached to the questionnaire was an introductory letter. This letter explained why the respondent received the questionnaire; a clear statement
of the purpose; a reason for responding; directions about how and when to respond; what prior research has been done; and an expression of appreciation for participation (Rossett, 1987, pp.217-219). The Participant Informed Consent Form for Oregon State University human subjects was also attached. Both of these letters can be found in the Appendix.

The questionnaire was approved by the Executive Director and the Director of Special Events. They offered key improvements and helped focus and arrange the questionnaire to become more user friendly. A PRFA director, who was not selected as a participant, served as a pilot subject.

**Questionnaire Protocol**

Once approved, the Executive Director and Director of Special Events thought it would be beneficial to introduce the questionnaire to the participants before it was sent, so they would be aware of its arrival. The Director of Special Events offered to announce the questionnaire to the executive committee and the volunteer directors during their group meetings. I presented the questionnaire to the staff members during the staff meeting. We felt these preview presentations might help increase the percentage of questionnaires returned. "Prenotification of the survey prior to its arrival has been found to increase response rate by as much as 47.4 percent" (Frey et al, 1991, p.194).
Once the participants were briefed on the questionnaire, a copy was sent to them. The questionnaires were administered differently depending on the group. The staff members received them at the staff meeting when I presented the questionnaires. They were then asked to drop them off in an envelope on the door of the Director of Special Events. The questionnaire was completely voluntary and responses remained anonymous. Once the questionnaires were all collected, they were mailed to me.

The other two groups, the executive committee and the volunteer directors, received their questionnaires via mail. They were either emailed or traditionally mailed depending on their preference located in the PRFA directory. They were asked to complete and mail the questionnaire by the 22nd of February.

**Data Interpretation**

All answers were analyzed quantitatively. Data were analyzed through the process of coding and program computing. The Statistical Package for the Social Sciences Personal Computer (SPSS/PC) enhanced edition was used for quantitative analysis (Hedderson, 1991). Measures of means and correlations were determined. The results are revealed in the next chapter.
CHAPTER FOUR
Results and Discussion

This research examines the organizational effectiveness of the Portland Rose Festival Association. It does so by evaluating the functionality of the organization through the perceptions of the Portland Rose Festival Association's paid and volunteer members. In addressing this issue, the study has been conducted in two phases. The first phase involves a focused internal assessment by means of interviews. Interview responses are interpreted qualitatively. The second phase features a broad organizational inquiry via a 16-item questionnaire (see chapter 3 and appendix). Questionnaire data are analyzed statistically, using the Statistic Package for the Social Sciences (SPSS/PC) program.

In this chapter, results will be presented according to the study's two phases. Results from phase one will be discussed sequentially by significant questions. Phase two results will be organized according to Swanson's organizational characteristics.

Phase One
Purpose

The goal in this phase is to assess whether the PRFA, from the viewpoint of its staff members, is a functional or dysfunctional organization. As noted in the literature review, a functional organization is one that
maintains its strengths and recognizes its weaknesses. An organization is functional when the members of the organization are aware and recognize the areas needing improvement, and leadership acts to fix and improve those areas. A dysfunctional organization is one where the members and leaders overlook or do not improve the troubled areas of the organization. In addition, when the outcome of an organization is unproductive or counterproductive, it is commonly labeled as dysfunctional (Burgoon et al; 1994, p.6). In other words, whenever an organization produces negative results or results that go against its goals and objectives, it may be regarded as a dysfunctional organization. However, when an organization produces positive results and reaches its goals and objectives, it is regarded as a functional organization.

Results Overview

Eleven PRFA staff members were interviewed by phone. Interview lengths varied between twenty to thirty minutes. Each question was asked in the same way, in the same order, in each interview. In answering questions, respondents differentiated between the PRFA ‘internally’ and the ‘organization as a whole’. The participants emphasized ‘internally’ when they were only speaking of the paid staff members. ‘Organization as a whole’ indicated they were talking about the other groups in the organization or areas that relate to the organization. Some examples of
organization as a whole’ are the executive committee, volunteer directors, general volunteers, city officials, media, community, finances, and history.

Similar keywords and phrases emerged in the staff member’s answers. These keywords and phrases were compiled and used to classify the results. The answers in the compiled list are in sequential order according to frequency. The most answered response is placed first, the second most answered response is placed second and so forth. The appendix presents this compilation in detail.

Out of the compiled results, three specific areas arose that warrant discussion. These are the areas the participants seemed the most interested in and requested to know the final results. The three areas of interest include strength, the image that best fit the organization, and areas of improvement.

Staff Members’ Views of the PRFA

The first interview question asked respondents to consider the strengths of the Rose Festival Association as an organization. All staff members classified their questions by differentiating between the staff as a group (internal) and the organization as a whole. Some answers at least generated a majority agreement (over half of the responses) and other answers reached consensus.
The staff members responded positively about a number of internal organizational variables. Consensus emerged on these two:

- **Internal Motivation** - The staff feels that working at PRFA adds meaning and inner pride to their life. It is fun, interesting, upbeat, and exciting. The staff enjoys being part of a positive influence on the community.

- **Teamwork** - A positive environment, organizational support and coworker encouragement builds strong, effective department teams. The staff feels that productivity is a result of these teams.

The following results did not generate consensus, but were noted by a majority of the staff members. All in all, these results indicated a wide range of positive, well thought out strengths within the staff member group.

- **Treated Well** - The staff feels appreciated by being recognized with complementary days and excellent benefits. Both formal and unwritten benefits, such as free attendance to events, are included.

- **Ever-changing Environment** - The staff respects PRFA’s willingness to evolve and change with time. Both the organization and the events move forward as new demands, methods, and trends are discovered.
- **Good Communication**- Staff members feel that communication within PRFA is effective. There is a lot of interaction between management and employees as well as one-on-one communication between all staff members.

- **Friendships**- Friendships have been established and staff members feel like they are part of a big family. Friendships have carried outside the organization and into staff members' personal lives.

- **Professional Staff**- The staff feels that their coworkers are very knowledgeable, reliable and competent. They recognize the talent within their office.

- **Good Hiring Technique**: The staff is pleased that PRFA doesn't hire employees based only on their background and work experience, but also on personality and aspirations.

- **Positive Executive Director**- The staff feels that the Executive Director increases their motivation and helps create an environment that is a fun place to work.

- **Positive office environment**- Generally, the staff perceives that the office environment is upbeat, positive, energetic and productive.

- **Professional growth**- The staff feels that PRFA realizes the need for employees' personal development. Examples of personal development consist of seminars, personal tasks, and growth within specific job descriptions.
- **Great intern program** - The staff recognizes that the intern program has been a win-win situation. The staff members appreciate the help and the interns appreciate the experience.

When considering the organization as a whole, staff members identified a different set of strengths. Strengths of the overall organization highlighted by a majority of staff members are:

- **Strong Tradition** - The staff feels that PRFA has strong traditional roots established through longevity and loyalty to traditional events. Tradition is usually the focal point of many of the events.

- **Ties with the city** - The staff is proud to reveal their strong relations with city officials, their positive connection with many Portland based corporations, and the city’s overall enthusiasm for the festival. The staff works to be fair with the community and in return Portland sees PRFA as a strength and an established partner with the city.

- **Dedicated volunteers** - Staff members recognize that volunteers are the backbone of the festival. They are impressed with the volunteers’ caliber, work ethic, and energy at the events.

- **Good Reputation** - The staff feels that PRFA has established an exemplary reputation both locally and nationally.
• **Financial Stability** - The staff mentions that their cash reserve is at a decent level. The sponsors of PRFA continue to be supportive.

• **Ranked as a top 10 festival in the U.S.** - PRFA has received many awards for being one of the top festivals at the International Festival of Events Association Convention.

• **Creative Spirit** – The staff feels that PRFA evolves with the times appropriately. Adapting to change, thinking of new creative ideas for events and being open to new ideas is important.

These strengths, whether attributed to the staff group or entire organization, are indicative of a functional organization. Then contribute to the overall success of the organization. According to Zander, “when a organization is strong and successful, it is better able to move toward its objectives” (1994, p.4-9).

Second, staff members were asked to choose what image best fit their organization. Images such as metaphors and analogies are an excellent starting place for accessing the shared meaning of corporate culture (Geertz & Pacanowsky, 1997, p.276). Images help anchor understanding and interpretation of organizations. The four images were 1) a newly dating couple, 2) a dysfunctional family, 3) synchronized swimmers, and 4) working in the New York stock exchange. These particular images were selected based on an exploratory idea. The goal was to see if these
images revealed the same connotation and shared meaning for all of the participants. Each participant rated four images on a scale from 1 to 5, with 1 indicating that the image does not apply to PRFA, and 5 denoting a strong application.

The image receiving the highest mean score, 3.5, was “synchronized swimmers”. One could associate teamwork, reliance, output, and cohesiveness with that image. “Synchronized swimmers” was the most functional image from the choices available. Working in the New York stock exchange was ranked second at 3.2. Organized chaos can describe this image. These high ranked images seem to be compatible and consistent with one another. One organization can possess the adjectives of both images and still perform harmoniously.

The image that generated the lowest mean score (x=1.9) was ‘dysfunctional family’. Usually negative connotations are associated with this image. Staff members may have felt that their organization did not hide its problems or appear to be different externally than internally such as a dysfunctional family would. The image means are reported in Table 4.1.

**Table 4.1 Overall mean of metaphors**

<table>
<thead>
<tr>
<th>Image</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Synchronized swimmers</td>
<td>3.5</td>
</tr>
<tr>
<td>Working in the NY stock exchange</td>
<td>3.2</td>
</tr>
<tr>
<td>Newly Dating couple</td>
<td>2.1</td>
</tr>
<tr>
<td>Dysfunctional family</td>
<td>1.9</td>
</tr>
</tbody>
</table>
The last area of this internal assessment featured three similar questions. The first question asked, “What are some weaknesses you think the Rose Festival Association has?” Second, “What challenges does the Rose Festival Association face?” Finally, “In this organization, what opportunities are not being met?” Responses to the three related questions were combined. The answers presented by a majority of staff members are listed below.

- **Lack of Diversity**- The staff feels that a better balance and a more accurate representation of the city’s diversity would be achieved if more males and persons of ethnic diversity were hired as members. Out of the eleven participants, two are male and one person is African American.

- **Insufficient Recognition**- The staff knows that the PRFA tries and intends to recognize its members, but occasionally does not followed through with the process. Some groups in the organization do not fully appreciate all of the time, effort, and energy of the staff members.

- **Gaps between Departments**- The staff sees a need for increased interaction and communication across departments. More interaction among individuals from different departments would help eliminate miscommunication and confusion.
• **Limited Personal Growth** - Like most small business, the staff feels there is not a lot of opportunity to move positions and increase responsibility within their job description.

• **Non-interactive Staff Meetings** - The staff feels that the executive director monopolizes too much of the staff meeting's agenda, thus reducing the staff members from interacting and communicating.

• **Confused Seasonal Staff** - The staff recognizes that the seasonal staff are not as educated about PRFA as they should be. They should receive more training and be fully informed about changes and announcements just like the full-time staff.

From the standpoint of the organization as a whole, a majority of respondents feel a number of areas could be improved.

• **Staying contemporary** - The staff feels it is crucial to keep everything current with today's changing environment. They think it is important to evaluate old events, and without jeopardizing tradition, make sure the events fit the new generation.

• **Maintain a Positive Image** - The staff acknowledges difficulties in maintaining a positive organizational image in light of media coverage and the complexity of the festival itself. However, they want to constantly improve their image as much as possible.
- **Be Secure Financially**- Looking into the future, the staff feels that more corporate mergers means less control of sponsorship dollar. They want to create more ticket revenue and eliminate events that do not produce revenue.

- **Utilize All Volunteers**- The staff knows that they have trouble accommodating all of the volunteers' specific job wishes. Rather than focusing on the volunteer's wishes, they want to focus on making all of the volunteers feel significant and appreciated.

- **Number of Board Members**- The staff feels that the process of conducting business with a 100-member board is difficult. It is difficult and time consuming to get ideas approved.

- **Contradictory Press/Media**- The media play such a large role in the promotion of events that negative publicity severely hurts the festival. It takes a lot of work for the staff to show the community the truth.

- **Soften Traditional Expectations**- The staff occasionally feels that PRFA is not open to change in fear that the festival will lose some of its tradition.

As part of this first research phase, internal documents were reviewed and discussions were held with staff members, the Executive Director, and the Special Events Director to assess how the PRFA was addressing the areas that staff members identified as needing
improvement. All but three of these areas of improvements were already being investigated, worked on, or changed. The three areas not yet addressed were: need for improved staff meetings, the restructuring of board members, and improved procedures for seasonal staff. At a subsequent meeting (three months later), the Executive Director reported that staff meetings and seasonal staff changes were implemented and working successfully. The staff members' leadership was investigating the board member issue and solutions were being brainstormed.

The staff members feel PRFA has numerous strengths. In addition, all of the weaknesses the staff mentioned have been acknowledged by management and are being addressed. These results are consistent with the definition of 'functional' noted in the literature review. The functional organization must recognize all of the areas of potential improvement and take action to process those improvements (Burgoon et al; 1994, p.6). According to staff members and PRFA leadership, The Portland Rose Festival is a functional organization.

**Phase Two**

**Purpose**

The first phase of this study has assessed whether PRFA was generally a functional or dysfunctional organization. According to the PRFA staff members the PRFA is a functional organization. The next research
step determines the level of functionality according to appropriate organizational characteristics. The characteristics correspond to Swanson's (1996) performance variables, as discussed in Chapter Two.

The number of responses was adequate for analysis. "Many mail surveys achieve a response rate no larger than 50 percent" (Frankfort-Nachmias & Nachmias, 1992, p.221). In this study, two out of the three groups had a response rate larger than 50%. Of the 20 staff member surveys distributed, 12 were completed (60%). 9 of 17 executive committee members returned their surveys (53%). Of the 36 volunteer directors who received surveys, 17 filled them out (47%).

The survey included one demographic question. Participants were asked how many years they had been involved with PRFA. The ranges of years were coded on a scale from 1 to 7. Responses are reported in Table 4.2.

<table>
<thead>
<tr>
<th>Code</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Years of service</td>
<td>0-2</td>
<td>3-5</td>
<td>6-9</td>
<td>10-14</td>
<td>15-19</td>
<td>20-24</td>
<td>25+</td>
</tr>
<tr>
<td>Staff (12)</td>
<td>6</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Executive Directors (9)</td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Volunteer Directors (17)</td>
<td>0</td>
<td>2</td>
<td>4</td>
<td>4</td>
<td>1</td>
<td>4</td>
<td>2</td>
</tr>
</tbody>
</table>

Table 4.2 Years of PRFA service according to group
These responses indicate that the majority of the staff members have been with the PRFA for under five years. The majority of the executive committee members have been with the PRFA from a span of three to fifteen years. The table finally indicates that the volunteer directors very greatly on the number of years that they have been with the PRFA. All three groups have been, on average, with PRFA for six to nine years. The results in the above chart show that overall the volunteer directors have been with PRFA longer than the executive committee and staff members (volunteer directors $x=4.41$, 10-14 years; executive committee $x=3.44$, 6-9 years; staff members $x=2.08$, 3-5 years). The volunteer directors, who have been with PRFA on an average of 10-14 years, differ in experience to those staff members who have been with PRFA for an average of 3-5 years.

**Mission/Goal**

Questions two, three and four in the questionnaire address Swanson's concept of mission and goals. As mentioned in Chapter 2, "Every operational activity of a nonprofit organization should be focused on fulfilling the requirements set forth in the mission statement" (Kennedy, 1991, p.90). Therefore, a group's grandest, highest, and steadiest aim should be the mission statement. "A general purpose or mission is a value-loaded statement because it describes the good things the body intends to
accomplish or the benefits members wish to generate for themselves or other persons" (Zander, 1994, p.17).

Currently the PRFA has a very well established mission statement. The mission statement is written on the conference wall in the PRFA office and every organizational member, whether staff, executive committee or volunteer director, has received a copy of the mission statement either separately or as part of other documents, such as the PRFA roster. Based on the researcher's observation, the mission statement seems to fit each group and its purpose. It is evident that the PRFA does not take visionary or goal setting lightly.

The questions in the survey determined if members of PRFA were actually familiar with the mission statement, whether they felt it was an appropriate statement, and their connection with the “spirit” of PRFA. The spirit of PRFA is described as the overall mood, attitude and feeling that engulfs PRFA. Vivacity, energy, enthusiasm, vigor, and excitement are some of the adjectives staff members used to describe PRFA's spirit.

Table 4.3 shows how each of the groups responded on this dimension. All three questions for all three groups generated means higher than four. These results indicated that overall the groups feel familiar with the mission statement and approve of its purpose. However, Graph 4.1 reveals that the staff members are slightly more familiar with and in favor of PRFA’s mission statement than the other two groups. Graph 4.1 presents
Table 4.3 Means for the Mission/Goal organizational characteristic.

<table>
<thead>
<tr>
<th></th>
<th>Overall Mission Statement (Q.2)</th>
<th>Mission's Fit (Q.3)</th>
<th>Overall Spirit (Q.4)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$x$</td>
<td>s.d.</td>
<td>$n$</td>
</tr>
<tr>
<td>Volunteer Directors</td>
<td>4.47</td>
<td>.62</td>
<td>17</td>
</tr>
<tr>
<td>Exec. Committee</td>
<td>4.33</td>
<td>.70</td>
<td>9</td>
</tr>
<tr>
<td>Staff Members</td>
<td>4.75</td>
<td>.62</td>
<td>12</td>
</tr>
<tr>
<td>Total Population</td>
<td>4.52</td>
<td>.64</td>
<td>38</td>
</tr>
</tbody>
</table>

Graph 4.1 Mission/Goal grand mean by group

![Graph showing mission/goal grand mean by group](image)
each group's overall mean, that is, the grand mean. An overall mean of the individual question means, allows for a simple visual comparison on the mission dimension. Results pointed out that years with the organization did not have an effect on this organizational characteristic.

Graph 4.1 clearly shows that the staff members feel slightly more acquainted with PRFA's mission statement, its appropriateness and their connection to PRFA's spirit. However overall, all of the groups report being quite familiar with the mission/goal organizational characteristic.

**System Design**

Systems design, according to Swanson, pertains to organizational structure. Questions five through eight ask about systems design. As noted in Chapter Two, systems design plays a large role within interdependent groups. “Groups as a whole control and provide feedback to other groups or are controlled and receive feedback themselves” (Burgoon, 1994, p.7).

The staff members, as full-time employees, interact with the other groups within the PRFA often. It is part of their job to be as familiar as possible with all areas of the organization because they are the nucleus of all operation. In contrast, the volunteer directors and the executive committee choose to participate in the PRFA. Therefore, they decide what
they want to contribute and how they hope to interact with other PRFA groups.

To determine this second organizational characteristic, the members of the three groups were asked about the others groups' (other than their own) contributions to the PRFA structure. Table 4.4 and Graph 4.2 indicate that the staff members had the highest overall means for questions five through eight. The executive committee and the volunteer directors feel that the staff members contribute greatly to PRFA's organizational structure and they are very familiar with what the staff members do. However, the staff members, compared to the others, generate a comparably lower mean (x=3.91, x=4.0) when asked if they are familiar with the other groups. These results do not coincide with what is generally expected of the staff members. As full-time paid staff members they should know as much as possible about the other PRFA groups. Staff members cannot feel successful if they are uncertain about whether they have reached their group's objective or what they must do to attain the objective (Zander, 1994, p.36).

Table 4.4 shows the means for system design. The table is divided up by PRFA group and questionnaire response. For example, the top box shows the assessment of the volunteer directors. The executive committee feel that the volunteer directors contributes to the extent of 4.3 on the scale
Table 4.4 Means for the Systems Design organizational characteristic.

<table>
<thead>
<tr>
<th>Assessment of</th>
<th><strong>Volunteer Directors</strong></th>
<th></th>
<th><strong>Familiar</strong> (Q.7-8)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Contributions (Q.5-6)</td>
<td>x</td>
<td>s.d.</td>
<td>n</td>
</tr>
<tr>
<td>Executive Committee</td>
<td>4.3</td>
<td>.70</td>
<td>9</td>
<td>4.4</td>
</tr>
<tr>
<td>Staff Members</td>
<td>4.0</td>
<td>1.04</td>
<td>12</td>
<td>3.91</td>
</tr>
<tr>
<td>Total Population</td>
<td>4.15</td>
<td>.87</td>
<td>.79</td>
<td>4.15</td>
</tr>
<tr>
<td>Assessment of</td>
<td><strong>Executive Committee</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer Directors</td>
<td>4.41</td>
<td>.71</td>
<td>17</td>
<td>4.05</td>
</tr>
<tr>
<td>Staff Members</td>
<td>3.8</td>
<td>.93</td>
<td>12</td>
<td>4.0</td>
</tr>
<tr>
<td>Total Population</td>
<td>4.11</td>
<td>.82</td>
<td>29</td>
<td>4.02</td>
</tr>
<tr>
<td>Assessment of</td>
<td><strong>Staff Members</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer Directors</td>
<td>4.41</td>
<td>.71</td>
<td>17</td>
<td>4.41</td>
</tr>
<tr>
<td>Executive Committee</td>
<td>4.77</td>
<td>.44</td>
<td>9</td>
<td>4.6</td>
</tr>
<tr>
<td>Total Population</td>
<td>4.59</td>
<td>.57</td>
<td>26</td>
<td>4.51</td>
</tr>
</tbody>
</table>

Graph 4.2 Systems design grand mean by group.
and the staff members feel that the volunteer directors contribute to the extent of 4.0 on a scale of 5.0 and so on.

A relationship was discovered between participants' years of service with the PRFA and the system design variable. In every case, the less experienced the staff member, the less she or he knew about the other groups and vice-versa. Table 4.4 shows the staff member's responses towards the other groups as an average of 3.9. As a group, the staff members have the fewest years with PRFA so overall they know the least about the other groups. The volunteer directors and the executive committee have been, on average, involved for more years than the staff members have. Thus they know more about the other groups than the staff member do (volunteer directors x=4.32, executive committee x=4.51). Years of service did not affect any other response variable.

Graph 4.2 illustrates the difference between each of the group’s assessments. The results indicate that the staff members and the volunteer directors are less familiar with what the executive committee does versus any other group. However, the results indicate that the executive directors are most familiar with what the staff members and volunteer directors do.

Capacity

The goal in this section is to establish if PRFA’s members, as well as the organization as a whole, have the capacity to effectively perform.
According to the Discussion-Oriented Organizational Self-Assessment web page (1999), “capacity analysis enables an organization to readily observe its perceived relative strengths and weaknesses.” Analyzing capacity helps determine what specific initiatives that can improve individual and organizational productivity.

Capacity within an organization is assessed through individual self-assessment (DOSA, 1999). By having each person assess him or herself, one can clearly understand how to perceive him or herself and the organization. This allows every person to comprehend his or her capacity level. All organizations are comprised of these individual perceptions. Organizational capacity is a compilation of all of the individual self-assessments.

There are many areas of capacity, such as external relations, financial resources, human resources, organizational design, strategic management, sustainability, program quality, organizational consensus, governance/leadership, and program realignment. In addition, capacity is measured on all levels, such as individually, task groups, departments, organizational branches or subgroups, and the organization as a whole. This study’s assessment of capacity focuses in the areas of leadership, organizational consensus and organizational design. This study’s level of capacity entails organizational branches or subgroups, which include the staff members, executive directors, and volunteer directors.
All areas of capacity have one main goal. The goal of capacity is to be sure that every resource is being used, stretched, or worked to its fullest potential. For example, an individual with a very high level of capacity or aptitude is one who is challenging him or herself by constantly working harder each day in order to have more deliverables accomplished by the end of the day. An organization that is operating at a high level of aptitude is very effective, constantly improving all areas, using all the resources available (i.e. volunteers, facilities, sponsors, etc.), and producing or accomplishing the most amount possible. An organization with high aptitude fosters individuals the awareness and restraints of capacity levels, in order that they can design a system to try to meet the production needs.

Questions nine, ten and eleven focused on elements of capacity as an organizational characteristic. The questionnaire asked three different types of capacity questions: leadership, consensus, and organizational design. These three capacity areas were chosen from the results in phase one. Respondents evaluated only their own groups.

Leadership capacity focuses on the management or major stakeholders’ roles. Leadership capacity involves such functions as assessing needs, designing, implementing, and monitoring projects, assessing project impact, monitoring and evaluating practices, project sustainability (such as cultural, economic, political, environmental, and institutional), and the quality of technical support to field projects (DOSA,
Leadership may incorporate many behaviors that can be performed by any group member to maximize group effectiveness (Beebe & Masterson, 1990, p.238).

The staff members evaluated leadership adequacy strongest, with a mean of 4.41. This correlates to phase one because the staff members provide the foundational leadership for the entire organization. However, all of the groups scored high in this area, which indicates that PRFA's leadership has high levels of involvement within the organization. Examples of involvement could include project design, implementation and assessment, and strong monitoring and evaluation systems.

The questionnaire also examined consensus capacity, which focused on the degree to which an organization's group generates consensus. Reaching consensus within a group is important to maintain efficiency and effectiveness. Festival groups that stick together have an easier time facing outside distractions (i.e. press/media and community image) so they can concentrate on increasing their level of capacity. Some examples of areas that might need consensus are: issues dealing with sponsors, public relations, advocacy, financial oversight, policy definition, and strategic direction setting.
**Table 4.5** Means for the Capacity organizational characteristic.

<table>
<thead>
<tr>
<th></th>
<th>Leadership (Q.9)</th>
<th>Size for consensus (Q.10)</th>
<th>Organizational design (Q.11)</th>
<th>Q.9-10</th>
<th>Q.11</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>( x )</td>
<td>s.d.</td>
<td>n</td>
<td>( X )</td>
<td>s.d.</td>
</tr>
<tr>
<td>Volunteer Directors</td>
<td>4.17</td>
<td>.88</td>
<td>17</td>
<td>3.94</td>
<td>1.02</td>
</tr>
<tr>
<td>Exec. Committee</td>
<td>4.33</td>
<td>.50</td>
<td>9</td>
<td>4.66</td>
<td>.50</td>
</tr>
<tr>
<td>Staff Members</td>
<td>4.41</td>
<td>.79</td>
<td>12</td>
<td>4.36</td>
<td>.67</td>
</tr>
<tr>
<td>Total Population</td>
<td>4.28</td>
<td>.76</td>
<td>38</td>
<td>4.24</td>
<td>.86</td>
</tr>
</tbody>
</table>

**Graph 4.3** Capacity grand mean by group and PRFA as a whole.
The results for consensus were somewhat related to the size of the group. One of the smallest groups, the executive committee, had the highest ratings for achieving consensus \((x=4.66)\). Another small group, the staff members, generated a slightly lower mean for consensus \((x=4.36)\). The largest group of 100 members reported the lowest mean for reaching consensus \((x=3.94)\). “In general, the larger the group the greater the difficulty in achieving consensus” (Shaw, 1976, p.159).

Organizations with high means in this category, such as the executive committee and the staff members, are characterized as being active, participating and contributing groups. The volunteer directors did not respond as positively as the other two groups, which might imply a need for stronger leadership and direction. These inadequacies may be related to one or more areas of the group’s specific responsibilities (DOSA, 1999).

The final capacity question asked about the adequacy of PRFA’s organizational design. Determining the organization’s design is different than the system design performance variable. In the questionnaire, organizational design refers to the infrastructure and foundation of PRFA as a whole unit. Systems design concerns all of the elements of an organization as well as the organization as a whole. The key to a system is to recognize how the individual elements function, through methods and procedures, to create the system within the organization.
Specifically organizational design focuses on the overall flow of information, both horizontally and vertically. This flow of information entails elements such as: quality, timeliness, unity of shared information, the degree to which information is used to improve organizational performance, support for effective teamwork, and participatory management practices.

The groups rated the organizational design question from average to fairly adequate. The executive committee responded with a mean of 4.14 possibly indicating that this group is highly effective and productive. The staff members and volunteer directors responded with a mean below 4.0 (staff member=3.92, volunteer directors=3.70). Although these means are still above the midpoint, these groups should still look to improve their organizational performance by assessing their communication flow (DOSA, 1999). There was no correlation found between the years of service and this organizational characteristic. Overall, graph 4.5 indicates that capacity within the organization is functioning above the midpoint on the scale.

Motivation

Questions twelve and thirteen focus on motivating factors through recognition and rewards. Motivation is an essential organizational characteristic because it is a primary key to many employees' productivity and enjoyment in the organization. Motivation is the ability to find
satisfaction in the attainment of a specific state of affairs and a disposition to seek that satisfaction (Zander, 1994, p.30).

Motivation seems to be displayed in many different areas within the PRFA. All of the groups receive internal gratification as well as external incentives by working or volunteering at the PRFA. Volunteer directors do not receive compensation, but are constantly rewarded verbally. They also receive written appreciation in certificates and cards and gifts such as tee-shirts, free food, ribbons, pins, etc. It is obvious that most volunteers do not get involved with the PRFA for these rewards, but rather they appreciate the intrinsic reward that a community service has to offer. Knowing they are helping their community in some way commonly rewards volunteers. Both external and internal motivators encourage the staff members. Receiving a paycheck for their efforts is an example of an external motivator. However, just like the volunteer directors and executive directors, the employees are generally more motivated and rewarded based on their inner drive and self-gratification.

The volunteer directors and the staff members agreed that they are recognized fairly well by PRFA (x=4.0). The staff members felt they are not rewarded as much as the other two groups (x=3.9), however the difference is only slight. This result is the same as one of the areas that needed improvement mentioned in phase one. The staff members expressed their
Table 4.6 Means for the Motivation organizational characteristic.

<table>
<thead>
<tr>
<th></th>
<th>Recognition (Q.12)</th>
<th></th>
<th>Rewards (Q.13)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$x$</td>
<td>$s.d.$</td>
<td>$n$</td>
<td>$x$</td>
</tr>
<tr>
<td><strong>Volunteer Directors</strong></td>
<td>4.0</td>
<td>1.17</td>
<td>17</td>
<td>4.0</td>
</tr>
<tr>
<td><strong>Exec. Committee</strong></td>
<td>4.4</td>
<td>.52</td>
<td>9</td>
<td>4.5</td>
</tr>
<tr>
<td><strong>Staff Members</strong></td>
<td>4.0</td>
<td>1.04</td>
<td>12</td>
<td>3.9</td>
</tr>
<tr>
<td><strong>Total Population</strong></td>
<td>4.10</td>
<td>1.01</td>
<td>38</td>
<td>4.10</td>
</tr>
</tbody>
</table>

Graph 4.4 Motivation grand mean by group.
need for more reward. In addition, the staff members felt that they are not recognized as much as the executive committee. Table 4.6 shows how the groups vary.

Table 4.6 reveals that the executive committee responded with the highest rankings on both questions. They felt that they are recognized and rewarded very well by PRFA. There was no correlation between years of service with PRFA and group scores. Overall, the total means of all of the groups is above the midpoint on the scale.

**Expertise**

Questions fourteen, fifteen and sixteen address the expertise organizational characteristic. These questions focus on resource and training support as well as providing adequate knowledge and skills to perform a job. Becoming an expert in one’s job is imperative in order to do the job successfully. As job responsibilities change, training needs to occur. Recently organizations have recognized the need for continuous training throughout the employee’s career. For example, good or bad volunteer situations are primarily dependent upon the organization’s preparation to work with volunteers and the processes that are in place to manage them. All volunteers and staff should be instructed to fully understand the requirements that the organization is designed to fulfill (Kennedy, 1991, p.77-78).
Table 4.7 Means for Expertise organizational characteristic.

<table>
<thead>
<tr>
<th></th>
<th>Resources and training (Q.14)</th>
<th>Knowledge (Q.15)</th>
<th>Skills (Q.16)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>x</td>
<td>s.d.</td>
<td>n</td>
</tr>
<tr>
<td>Volunteer Directors</td>
<td>3.23</td>
<td>1.14</td>
<td>17</td>
</tr>
<tr>
<td>Exec. Committee</td>
<td>3.66</td>
<td>.86</td>
<td>9</td>
</tr>
<tr>
<td>Staff Members</td>
<td>4.25</td>
<td>.86</td>
<td>12</td>
</tr>
<tr>
<td>Total Population</td>
<td>3.65</td>
<td>1.07</td>
<td>38</td>
</tr>
</tbody>
</table>

Graph 4.5 Expertise grand mean by group.
Expertise within the PRFA is generally gained from experience. The philosophy that seems to surround each group is, ‘when you know you know how to do the job then you can take it on.’ The training and learning for each position comes from observing and being trained from the previous person with that job. A volunteer director does not become chair of a committee until she or he has participated in that event for at least two years. This policy also applies to the executive committee. Everyone in this group has been a volunteer director and chaired many committees prior to becoming an executive director. Staff members are trained in more traditional ways. Managers generally train new hires and others use techniques such as seminars, personal development activities, and experience to add to their expertise.

The ratings received for this performance variable were the lowest in the entire survey. For each of the questions, the volunteer directors felt as though they were only provided adequate resources, knowledge and skills. The mean of the means for the volunteer directors was 3.16 (resources and training 3.23, knowledge 3.2, skills 3.05). Out of the three groups, they ranked the lowest overall score. In contrast, the staff members reported that they received sufficient expertise, 4.14 (resources and training 4.25, knowledge 4.0, skills 4.18). The difference between the staff members and the volunteer directors is statistically significant by the .5 level. As mentioned above, the staff members' mean of means is 4.14 and the
volunteer directors' mean of means is 3.16 a difference of .98. Table 4.5 and graph 4.5 illustrate that the staff members felt that PRFA provides adequate resources, training, knowledge and skills, but the volunteer directors felt the contrary.

In conclusion, this chapter discussed, in detail, the results of phase one and two. Specific areas were highlighted and discussed in depth. Swanson's organizational characteristics provided a useful ideal framework for this study. This chapter presented responses to the four research questions. The final chapter will report the answers to each of the research questions as well as the key findings of this investigation, limitations of the study, implications for the future, and recommendations.
CHAPTER FIVE

Summary

This study has examined the nature and effectiveness of the Portland Rose Festival Association as an organization. Chapter Two reviewed pertinent literature in the fields of nonprofit and festival organizations. This review revealed the need to consider the staff members, executive committee, and volunteer directors as three interdependent but separate Rose Festival groups. These three groups were studied via interviews and/or a questionnaire, the results of which have been presented in the previous chapter. This final chapter will discuss the implications of these results. This chapter will be organized in five parts: findings, limitations, future research, recommendations, and reflections of the author.

Findings

The PRFA as a Functional Organization

The interview and questionnaire data results shed light on each of the research questions. The first research question asked: “To what extent do staff members consider the PRFA to be a functional or dysfunctional organization?” Staff member interview responses indicate that the Portland Rose Festival Association is a functional organization. Staff members believe that the PRFA maintains its strengths and recognizes areas
needing improvement. None of the weaknesses or areas that need improvement revealed in the interviews surprised the PRFA leadership. The PRFA was already taking action to fix, improve, or change all the areas the interviewees identified. For example, the staff members expressed that the seasonal staff members should have more formal training and more structure. PRFA management had already recognized this need and was in the process of creating a manual for assisting with training the seasonal staff.

Conducting the focused internal assessment was beneficial for two reasons. First, the interview enhanced ownership, empowerment and morale in the staff members. The interview helped staff members realize that their views and concerns were important to the organization. For example, during one interview, a staff member expressed concern about the lack of cohesiveness between the departments. She suggested that encouraging interaction between departments during staff meetings might help dissipate the departmental gaps. This suggestion was communicated to the PRFA leadership and was implemented immediately. As a result, this action assured the staff member that her concerns were important and viable enough to implement.

The second reason the focused internal assessment was beneficial was because the questions acted as a very appropriate reflection tool. The interview provided the staff with time to think about the organization. This
reflection was important because staff members could focus on familiar and unfamiliar aspects of the organization. For example, when the staff members were asked about the strengths of the organization, they were encouraged to address their department's strengths, other department's strengths, the overall staff members' strengths, and the strengths of the organization as whole.

The interviews generated numerous positive responses. Comments about the PRFA's good attributes outweighed comments identifying weaknesses or areas that needed improvements. This is noteworthy because only one question was asked about the strengths of the PRFA, yet three similar questions were asked about the weaknesses. Due to the high number of responses, one can conclude that overall the staff members think very favorably about the PRFA.

Even before the results were consolidated, there were clear indications that the organization was functional. First, some of the participants mentioned that they had previously thought about and discussed with others some of the topic areas in the interview. This indicates that the employees are taking personal responsibility for their own career and are staying knowledgeable about the organization's latest information.
Second, throughout the questionnaire many of the staff members' answers touched on different aspects of the organization. As mentioned earlier, the staff members commented on departments other than their own. This indicated that they were well aware of what the other departments were facing. Employees who can see the holistic view of an organization benefit because they understand the piece they play in the overall puzzle. Swanson describes this as the first essential property that all effective systems have in common. He says systems are assemblies of parts or elements that are connected in an organized way. The goal is to have all of the elements in a system interact effectively (1996, p.14-15). However, this finding is tempered by one of the weaknesses noted in Chapter four. Although staff members were well aware of and familiar with other departments, they thought that there were gaps between the departments. Through staff meetings and informal communication they are trying to eliminate these gaps. Overall, the PRFA, as perceived by the staff members, was a very functional organization.

The PRFA's Attributes

The second research question inquired: “Are there attributes of the PRFA that members view in similar ways?” While the first research question relied on phase one interviews, this question involved questionnaire data from all three PRFA groups. The executive committee,
volunteer directors and staff members participated in the second phase of this study. The questionnaire consisted of questions pertaining to Swanson’s performance variables. According to Swanson, responding positively to each of the variables indicates a functional and effective organization that is moving toward success (1996, p.252). Swanson’s five performance variables are mission/goal, systems design, capacity, motivation, and expertise. Out of the five variables, the mission/goal organizational characteristic received the highest combined mean of 4.42 out of a five-point scale.

The PRFA has a very clear organizational mission statement. The mission statement reads as follows: “To create and promote a civic celebration and festival involving community-wide participation revolving around the symbol of the rose which furthers the cultural, economic and social development of the greater Portland metropolitan area and the state of Oregon” (PRFA Roster, 1999). The results show that the staff members, compared to the volunteer directors and the executive committee, are most familiar with the mission statement and think it is very appropriate for the organization. This is important because one must know and understand the mission statement before she or he tries to fulfill it. “Every operational activity of a nonprofit organization should be focused on fulfilling the requirements set forth in the mission statement” (Kennedy, 1991, p.90). Fortunately, each of the groups scored very high in this section. Because
all of the groups scored above a 4.0, it is evident that they all are very familiar with the mission statement, thus making the organization very effective in this area.

Besides the overall organizational mission statement, each of the three groups has its own individual mission statement. These group mission statements are specific and explicit for each particular group. For example, prior to administering the questionnaires, the staff members had just completed a new staff mission statement. Earlier in the year they had re-evaluated and brainstormed their staff member mission statement and agreed it needed to be changed. They decided to rewrite the statement by utilizing employee interaction and feedback in the form of internal focus groups. The staff members’ mission statement now reads, “To produce a world-class community celebration through teamwork, leadership and pride.” Following that statement are five values: creativity, honesty, openness, flexibility, and mutual respect. As a result of this process many of the staff members were very familiar with the mission statements. This coincided with the results that showed that the staff members were most familiar with the PRFA mission statement.

The mission statement was not the only attribute that the groups’ viewed positively. Systems design, capacity, and motivation were the other performance variables that the groups’ ranked highly. As noted in Chapter two, systems design plays a large role within interdependent groups.
System design consists of how festival organizations are comprised and the arrangement of the parts within the whole. The questionnaire results indicated that the systems design questions, which focused on the groups evaluating each other, generated a combined mean of above 4.0. From these results Swanson would say that the PRFA groups are designed in such a way as to work as an effective system (1996, p.252).

In addition, the capacity performance variable was rated highly by the groups. According to Swanson, capacity is the ability to effectively perform (1996, p.253). The goal of capacity is to be sure that every resource is being used, stretched, or worked to its fullest potential. The groups felt that their level of capacity was adequate for the organization.

Finally, as an organization, motivation was rated very favorably. Chapter two mentions that motivation is a fundamental key to many employees' productivity and enjoyment in the organization. The PRFA's results concur with Swanson's ideas that recognition and rewards support a desired performance and motivates the individual to perform (1996, p.253). The results supported the conclusion that motivation is sufficient in the PRFA.

Improving the PRFA

The study also posed the question: "Are there areas of the PRFA that members believe could be improved?" A functional organization, such
as the PRFA, recognizes that all areas in the organization should constantly be evaluated and improved. The PRFA Executive Director endorsed this study because of his commitment to organizational improvement. He realized the importance for consistent benchmarking and compatible improvements. From the previous question it is clear that this benchmarking study exposed many performance variables that were ranked very favorable. The data presented in Chapter four demonstrate the positive regard the PRFA staff and volunteers have for the organization. However, responses on the "expertise" questions indicate an area for improvement.

As discussed in Chapter two, expertise refers to the level at which a person is able to perform within a specialized realm of human activity (Swanson, 1996, p.97). The expertise questions focus on resource and training support as well as providing adequate knowledge and skills to perform a particular job. The mean of means for the expertise questions was 3.6. Consequently, expertise was the only organizational characteristic that generated a rating below 4.0.

According to Chapter four, the staff members gave the highest responses for each of the questions in the expertise section. They felt that their expertise level was above average. However, the executive committee and volunteer directors answered within the three-point range; volunteer directors were lower than the executive committee.
There are many possible reasons for the differences between the three groups. Perhaps one reason has to do with the difference of availability and time for training. Providing adequate resources and training to increase knowledge and skills for one's job might be more difficult for some groups than others. Thorough training is more likely to occur with the paid staff members than the volunteer directors. Training seems more feasible for the staff members because a smaller group makes it easier to schedule and assess what training is needed. In addition, many staff members see the importance of training in their career and will make time for training as well as request additional training.

On-the-other-hand, volunteer directors choose their schedule and volunteer as a hobby for pleasure. Many times training is thought of as a bonus and not a requirement. In addition, frequently directors choose different committees to chair each year because of the variety available. Although it is necessary to be adequately trained within each committee, often observation and on-the-job experience is used as the primary tools. Naturally, pure training, without experience, adds cost, time and additional resources, which might hinder the organization's efficiency. At the same rate, experience should not supplement knowledge and skills training. Extensive training is one dimension that seems to characterize a producing system (Pfeffer, 1998, p.96).
There are a number of ways in which the PRFA could improve the expertise of its members. First, because of the nature of the organization, a lot of the training for the volunteer directors and executive committee comes from observation and experience. There are many facets to planning and executing events, thus the directors need to be self-motivated, determined, and resourceful in order to learn and get their questions answered. In addition, the training should become more formal and more structured.

Second, the directors should be familiar with the event before they chair it. Attending the event as a general volunteer for more than two years will help the future committee head feel competent and familiar with the territory. In addition, attending the committee meetings to become familiar with all aspects of the events prior to becoming committee chair should be mandated. The meetings are a valuable way of learning the responsibilities of the job. All of these methods will help increase expertise and develop the volunteer directors’ knowledge and skills.

The PRFA’s Relationships

The last research question asks: “To what extent do members of PRFA’s three prominent groups perceive an identifiable relationship with one another?” This study discovered that the three groups are relatively familiar with each other. Each group felt that the other groups contribute to and participate adequately in the PRFA. Perhaps this is the reason why the
groups responded very similarly to many of the questions. The three
groups always had less than a full point difference between their answers.
The groups answering so similarly to one another is another indication of
the functionality of the entire organization. Overall, it was revealed that the
three prominent groups of the PRFA indeed have an identifiable
relationship with one another.

Although all three of the groups noted the PRFA's functional
qualities, the staff members ranked the strongest responses across all of
Swanson's organizational variables. The staff members rated most
knowledgeable and effective, compared to the other two groups, in three
organizational characteristics; mission/goal, systems design, expertise. In
other words they had the highest rating in those three characteristics. The
executive committee rated at the highest mean for the other two
organizational characteristics, which were capacity and motivation. They
ranked most competent in those two characteristics.

Limitations

Two major limitations and some minor limitation became apparent
during the study. Both were inevitable and based on the situation. Even
though they were not preventable, they are still worth mentioning.
Limitations include the researcher's association to the organization and past
surveys completed at the organization.
The first limitation deals with my connection to the Association. Some answers might have been influenced because of my link to the PRFA. My mother is a volunteer director, but was not one of the participants in this study. Due to my married name almost all of the participants of the questionnaire did not recognize the connection. However, because I interacted more with the staff members during the phase one interview, they might have made the association. However, no one verbally made the connection in front of me. It was important to keep my relationship with my mother low-key so that people did not assume there was some hidden motive to the study.

The second limitation relates to an event that occurred before this study took place. Prior to this project, the PRFA had other individuals study the organization. A symbiotic relationship between researcher and the Association is mutually beneficial. The researcher learns from studying a nonprofit, festival organization and the Association learns from the researcher’s results. However, a previous researcher had not kept the survey information confidential, thus losing the Association’s trust. This feeling of betrayal carried over to this study. During phase one, some of the staff members admitted to being cautious about their answers. To compensate for the mistrust, the confidentiality issue was emphasized. Prior to the interview, I told the interviewees exactly what was going to happen to their answers and that I would give them all a copy of the
complied results. In phase two, the questionnaires contained a consent form that needed to be signed as well as a detailed letter of explanation (see Appendix).

Some minor limitations occurred in this study due to the exploratory nature of the study. For example, the methodology of the metaphors in phase one was exploratory. I created the metaphors that I best thought could fit the organization. The metaphors did help gather crucial information about the perceptions of the staff members; however, each staff member perceived the metaphors differently which lead to confusion. In the future, I would not define the metaphor at all, but rather allow the participants to prescribe their own metaphor.

One final minor limitation was using Swanson as the primary source of the study. Although Swanson’s performance variables were appropriate for the PRFA, they were also somewhat limiting. Swanson was a bit vague in his descriptions about each performance variable. In addition, he did not cross-reference his material with other scholarly literature. This added for a lack of external framework as well as empirical support.

Even though these limitations existed, the overall study proved to be very effective and necessary for both the researcher and the Association to learn more.
**Recommendations**

This study indicates that the PRFA is an organization that is functional, effective, and successful. Consequently, the primary recommendation is that the PRFA should continue to do what it does well. As a functional organization, the PRFA takes precautionary measures for problems that might arise in the future. These precautionary steps help make the organization strong and successful. Chapter two mentioned that, "when an organization is strong and successful, it is better able to move toward its objectives" (Zander, 1994, p.4-9).

There is one particular area within Swanson’s performance variables, which may call for improvement. The expertise organizational characteristic involves the knowledge and skills that one obtains for her or his particular job. Training is usually the most efficient and effective way of transferring knowledge and skills. According to the questionnaire results in Chapter four, the executive committee and the volunteer directors could use additional skills and knowledge for their jobs. Although this is a difficult task, there are many methods, mentioned earlier, to accomplish this feat. The PRFA should take the necessary steps to improve in this area.

**Future Research**

As this study answers the current research questions, it generates new questions for future investigation. There are a number of issues that
affect this type of organization and deserve further research. Primarily alternative analytical frameworks may lead to different interpretations. Studying parallel organizations would provide more insight into this industry. Finally, a continued study on areas such as ethnic and gender diversity within nonprofit, festival organizations would be interesting.

The first area of future research could be within each of Swanson's performance variables. It would be interesting to study each of Swanson's characteristics in depth such as to break the performance variables down to their individual characteristics. Extensive literature and studies are available on each organizational characteristic. Then conduct specific studies targeting only one characteristic. For example, this study indicates that the expertise performance variable could be better addressed. The PRFA could conduct future research in this area to determine the specific factors that need attention.

The second interesting research study would involve other nonprofit, festival organizations. Administering the same surveys, as given in this study, to parallel festival organization would be intriguing. Just as with the PRFA, this study would allow other organizations to rank the characteristics of their organization. The results could help other organizations and their members learn from one another and improve in many areas. In addition, other organizations could learn from the PRFA if they knew which performance variable needed improvement. In other words, dysfunctional
organizations or those organizations lacking in particular organizational characteristics could learn from the PRFA.

The final area of further research deals with gender and ethnicity in the organization. It is interesting that the staff members have only two males (out of thirteen members) in their group. Studying gender relationships among nonprofit organizations would help identify this difference. It would be interesting to know if the members of the PRFA are in the norm with their gender and ethnicity. In addition, studying the ratio of ethnic diversities in the Portland area and comparing them to the ethnic diversity among the staff members would be intriguing.

**Reflections of the Author**

As of this writing, the 1999 Portland Rose Festival has come to an end. As I reflect on this study and the recent festival, I become awe struck by the complexity and intricacies of the entire organization. There is so much detail, coordination, and stasis that has to occur within the organization in order to make the festival successful. It amazes me that every year the PRFA is a success. However, the truly phenomenal aspect is not only the fabulous festival events, but that the organization is fully functional and effective.

One can not imagine Portland without the Portland Rose Festival. The festival authentically captures Portland's charm and character. The
festival reveals Portland’s history and tradition, it displays the contemporary
trends of the city, it shows the diversity of the city, and enhances the
unification and participation of the community. The PRFA is clearly an
impressive multifaceted organization.

This year the Portland Rose Festival was even more spectacular
than last year. Although it was difficult to choose, my two favorite 1999
events were the Grand Floral Parade and the Portland Arts Festival. “Over
500,000 spectators turned out in the 80-plus-degree heat on Saturday
morning for the Grand Floral Parade…and the stacking shady sidewalks
were fifteen rows deep” (Trevison, 1999). What an incredible event! In
addition, the Portland Arts Festival crowded the South Blocks of Portland.
This second annual event had over 120 artists and featured the famous
Danny Dent entertainment. Just imagine, these are just two examples of
the PRFA’s twenty-five days of fun-filled celebrations.

Clearly the PRFA is a model, nonprofit, festival organization for all
others to follow. The PRFA is an excellent organization for struggling
festival organizations to learn from and perhaps emulate. In addition, the
PRFA is an excellent resource for new festival organizations just starting
out. The PRFA has set high standards that produce exemplary results. I
appreciate the opportunity to have studied the Portland Rose Festival
Association.
References


Danks, H. & Mandel, M. (1998, June 15). The three-day attendance total of 86,600 is the lowest turnout for the Rose Festival event in years. The Oregonian.


Pasadena Rose Parade 1999 Official Souvenir Rose Parade Program.


Appendices
Appendix A
Phase One - Interview Introduction

Staff Presentation

A five minute presentation in front of the entire PRFA staff on Monday, Oct. 19, 1998 was given. I explained my purpose for the study and the interview that I am conducting.

Preliminary Interview

My name is Lisa Newbore and I am the graduate student who is studying this organization. Were you in the staff meeting when I gave my presentation? Do you have any questions about what my goal is for me? This interview will take about fifteen minutes and your name will remain confidential. Would you like to participate in this study? Is now a good time or should I call you back at a better time? First, I wanted to thank you for agreeing to participate in this interview. I have about nine general questions to ask you. Please feel free to be open and honest. I'll just jot some notes down as you talk. In a couple of weeks, I would like to follow up with you and interview you again.
Preliminary Interview

1. How long have you worked for the Portland Rose Festival Association?

2. What other events or volunteer experience do you have?

3. What are some strengths you think the Rose Festival Association has?

4. What are some weaknesses you think the Rose Festival Association has?

5. What challenges does the Rose Festival Association face?

6. Here are some images of an organization. Think of these in terms of your paid staff members. Rate each one on a scale from 1 to 5, 1 means it does not apply to this organization and 5 means it does apply to this organization.

   - Newly dating couple 1 2 3 4 5
   - Dysfunctional family 1 2 3 4 5
   - Synchronized swimmers 1 2 3 4 5
   - Working in the NY Stock Exchange 1 2 3 4 5

7. In this organization, what opportunities are not being met?

8. Do you have any concerns related to the volunteers?

9. What are the critical issues you think this organization faces?
### Portland Rose Festival Association

**Preliminary Interview Compilation**

- Eleven PRFA staff members interviewed by phone for about 20-30 minutes each.
- Answers are divided up into two sections: internal and org as whole. Internally indicates just the internal staff members. Organization as a whole refers to the directors, volunteers, events, city, press, etc.

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How long have you worked for the Portland Rose Festival Association?</td>
<td>Months- 2,9,10,10,11&lt;br&gt;Years- 2,3,3,4,8,8</td>
</tr>
<tr>
<td>2. What other events or volunteer experience do you have?</td>
<td>None-2&lt;br&gt;Oregon Area Project&lt;br&gt;Intern with PRFA&lt;br&gt;Peter Jacobson Productions&lt;br&gt;PSU Foundation&lt;br&gt;POVA&lt;br&gt;Health Care&lt;br&gt;Pittock Mansion&lt;br&gt;Radio&lt;br&gt;Church&lt;br&gt;Schools&lt;br&gt;Professional Baseball&lt;br&gt;Boy Scouts</td>
</tr>
<tr>
<td>3. What are some strengths you think the Rose Festival Association has?</td>
<td><strong>Internally:</strong>&lt;br&gt;• <strong>Internal motivation</strong>- people are here because they want to be here (fun, interesting, upbeat excited), they like making people happy, PRFA means something to their lives, pride to work here&lt;br&gt;• <strong>Teamwork</strong>&lt;br&gt;• <strong>Treated well</strong>- benefits (unwritten benefits for staff), recognize employees with comp days&lt;br&gt;• <strong>Ever-changing environment</strong>- moving forward, willing to evolve with change&lt;br&gt;• Good <strong>Communication</strong>- a lot of interaction, Hands on- One on</td>
</tr>
<tr>
<td>Established <strong>friendships</strong>- like a family</td>
<td></td>
</tr>
<tr>
<td><strong>Professional</strong> staff- know what they’re doing and are reliable</td>
<td></td>
</tr>
<tr>
<td><strong>Hire:</strong> not just for background, but also personality</td>
<td></td>
</tr>
<tr>
<td><strong>Executive Director:</strong> positive, makes staff motivated, fun place to work</td>
<td></td>
</tr>
<tr>
<td>Positive office <strong>environment</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Professional growth:</strong> time allotted for personal development (seminars)</td>
<td></td>
</tr>
<tr>
<td>Great <strong>intern</strong> program</td>
<td></td>
</tr>
</tbody>
</table>

**Org as a whole:**

| **History:** visible long term events, longevity, established in the community as credible events, Ptd. loyalty to events |
| **Ties with the city** of Ptd.- across the board (from mayor to police to downtown association to directors), staff works to be fair with the community and produce quality events, Ptd sees PRFA as a strength, established partnership with the city |
| **Dedicated volunteers:**- great quality and commitment |
| **Good directors:**- part of the community |
| **Good Reputation** (PRFA as whole) |
| **Financially** solid- sponsors and cash reserve at decent level |
| **Top 10** festival in US |
| **Spirit of Creativity:**- adapts to change |

### 4. What are some weaknesses you think the Rose Festival Association has?

| **Internally:** |
| Gaps between **departments**- interaction and communication |
across depts. (i.e. Marketing promises sponsors something, events directors say no)

- **Diversity**- Only 2 males and 1 African American, 14 women
- **Personal growth**- not a lot of opportunity to move positions, increase responsibility, promotions
- **Long hours**- with work and events
- **Staff meetings**- Executive director dictates too much, need ‘reports’ given from every dept.
- **Salary**- could be increased

**Org as a whole:**

- Too many **board members**- everyone can’t be taken into account, too many opinions on the way things should work, target problem takes too long to implement, staff doesn’t feel appreciated, directors delegate and staff does the work
- **History**- so deep, not adaptable to change (don’t do it as quickly as we could), too rich on tradition, ‘its always been done that way’
- **Board**- ultra-conservative, not receptive to change, connection between board and staff
- **Community opinion**- People either love PRF or hate it, have to wait a year to prove themselves again
- **Contemporary**- marketing needs to stay on top of things
- **Complexity**- decentralize to committees and volunteers, but challenge to maintain control
- **Separating PRFA**- so community can see what is PRFA and what isn’t
5. What challenges does the Rose Festival Association face?

- **Financial Constraints** - need to find creative resources

<table>
<thead>
<tr>
<th>Internally:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diversity - seeing a new and different approach to things</td>
</tr>
<tr>
<td>Seasonal staff - not informed (tradition, changes, answer questions, environment)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Org as a whole:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updated/contemporary - keep everything current (ex. Redesigning festival center, ground events for airshow), changing business environment, sponsors want ways to hear their name, evaluate old events (new market, new generation)</td>
</tr>
<tr>
<td>Good relations with community - meeting their needs, i.e. Police, an investment for the community (for operating revenue)</td>
</tr>
<tr>
<td>Directors - too many, no one gets recognized</td>
</tr>
<tr>
<td>Financial - make events affordable, but also make revenue, long term commitments</td>
</tr>
<tr>
<td>Press/Media - overcoming negative</td>
</tr>
<tr>
<td>Overcome what has already been set - ex. individuals stop going because of past instances</td>
</tr>
<tr>
<td>Outside org - difficult to rely on outside orgs to do staff stuff for outside events</td>
</tr>
<tr>
<td>Officers - too business focused and not event focused (could be more involved)</td>
</tr>
<tr>
<td>Image - connect everything to PRFA</td>
</tr>
</tbody>
</table>

- Focus on all demographics - need to target young adults
- Staying as apolitical as possible
6. Here are some images of an organization. Think of these in terms of your organization. Rate each one on a scale from 1 to 5, 1 means it does not apply to this organization and 5 means it does apply to this organization.

<table>
<thead>
<tr>
<th>Image Description</th>
<th>Rating</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newly Dating couple</td>
<td>1,1,1,2,2,2,3,4,4</td>
<td>mean=2.1</td>
</tr>
<tr>
<td>Dysfunctional family</td>
<td>1,1,1,2,2,2,2,2,3,3</td>
<td>mean=1.9</td>
</tr>
<tr>
<td>Synchronized swimmers</td>
<td>1,2,2,3,4,4,4,4,5,5,5</td>
<td>mean=3.5</td>
</tr>
<tr>
<td>Working in the NY stock exchange</td>
<td>1,2,2,3,3,3,4,5,5,5,5</td>
<td>mean=3.2</td>
</tr>
</tbody>
</table>

7. In this organization, what opportunities are not being met?

- Many people indicated: **All opportunities** are being met

**Internally:**
- **Diversity** - within staff
- **New programs** - too many people to go through, so don’t get implemented
- **Strategic Planning** and event evaluation - not enough time
- **Seasonal staff** - difficult to think about future changes because they won’t be there

**Org as a whole:**
- **Outside communities** - reaching the outskirts of Portland (such as urban areas), focus on Wash. And surrounding states (i.e. senior citizen bus trips)
- **Media** - increased positive media
- Focus on the **whole** rather than the **parts** - see the big picture of the org.

8. Do you have any concerns related to the volunteers?

- Many people indicated: **No concerns**
- Clear **expectations** - presented when they join/sign up
- **Utilize volunteers** - need to find a job for everyone
- **Too many** - difficult to be a staff member to 100 directors. They make the decisions and we end up doing it.
- **Educate** them - be sure they are clear about financial policies,
| 9. What are the critical issues you think this organization faces? | Internally:  
- **Personalities** all work together, new and ‘old’ staff  
- **Risk**  
- **Putting on a great event**  
- **Teamwork**  
- Decrease **high turnover** rate  
- Maintain positive **staff & board** relations  
- **Office space**- adequate  
*Org as a whole:*  
- **City**- Adjusting to the changes (i.e. congestion, violence), become more contemporary, diversity of events  
- **Finances**- more mergers less control of sponsorship dollar, create more ticket revenue, eliminate events that don’t produce revenue  
- **Image**- keep it as it is or improve it  
- **Media**  
- **Safety** |
| risk management, public perspective  
- Show **community**- that we care about volunteers  
- **Follow through** with recognition and appreciation (this involves being on track)  
- **Communicate** year round with them |
Portland Rose Festival Association

Preliminary Interview Compilation Synthesis

- Combining questions 4 (RF weaknesses), 5 (challenges RF faces), and 7 (opportunities aren’t being met).

- These are the key areas mentioned most

- The number signifies how many people mentioned that area in any of the three questions. Each person can only have one tally per area (i.e. if they mention the area in all three questions they still get one tally)

**Internal - Staff members**

- Diversity – 5
- Recognition- 3
- Gaps btwn departments- 2
- Personal Growth- 1
- Staff Meetings- 1
- Seasonal Staff- 1

**Organization - Entire association; all volunteers, directors and events**

- Contemporary- 8
- Image- 6
- Financial- 6
- Utilize volunteers- 6
- Board (decisions)- 5
- Expansion- 4
- Press/Media- 3
- History- 2
Portland Rose Festival Association
Preliminary Interview Compilation Suggestions

- **Staff Meetings**
  Dick Clark, Executive Director, was mentioned as a very positive, motivating individual who makes PRFA a fun place to work. However, at the same time, staff members mentioned that there seems to be communication and interaction gaps between the departments. One very effective and efficient solution was mentioned to narrow this gap. During the staff meetings, that Dick chairs' each week, each department ‘head’ could give a quick summary (a couple of minutes) of the highlights in their department that week. This summary would help each department not only understand what the other departments are working on, but it would also encourage communication and interaction. The department ‘updates’ could become a permanent item on the agenda, so the entire staff can expect them weekly.

- **Board Members**
  The board members were described by the staff as quality individuals who have incredible commitment to PRFA. Overall, the staff recognizes the need for the directors and seems to appreciate them greatly. However, the issue of too many directors was a concern to staff members. Some of them mentioned that there are too many opinions on the way things should work and target problem takes too long to implement. To solve this issue a re-organization will probably need to occur. Two possible ideas were mentioned. The first is to increase the number of meetings/gatherings the directors have, so to conduct business more frequently. The second idea involves dividing the directors up into two separate groups. One group would remain the ‘directors’ and continue the director role. This group would be made up of very involved individuals who work hands on with the Association. The other group would include those individuals who support and protect the Association, but due to other obligations do not have the time to give to the Association. This group of individuals could be called ‘patrons’ of the Portland Rose Festival Association.

- **Seasonal Staff**
  Seasonal staff feel honored and appreciate working for the PRFA. It is an opportunity that not many can experience. However, it seems that initially in their job, accurate expectations are not communicated to them. Creating a manual for seasonal staff to read prior to joining the team might be helpful. This manual could explain PRFA’s tradition, expectations, recognitions, descriptions of the culture and climate of the organization and maybe advice from past seasonal staff.
Appendix B
Dear Portland Rose Festival member,

The Portland Rose Festival Association has been gracious enough to allow me to study your organization for my Master’s thesis at Oregon State University. The purpose of my study is to examine a functional non-profit organization and to discover the essence of the ‘glue’ that holds the organization together.

I am sending this questionnaire to the staff members, the executive committee, and a random selection of directors. The ideas and choices in this questionnaire are based on a preliminary interview with each staff member as well as organizational literature. Your response to this questionnaire will greatly help me learn more about your organization. In addition, this questionnaire will help your organization verify where the strengths lie within the Rose Festival Association.

The attached questionnaire gives you a chance to express your perspective about the Rose Festival Association. A stamped envelope with my address is attached to the questionnaire. Please mail it back by February 22nd so I can deliver the results back to your organization as soon as possible. Do not include your name with the questionnaire.

Please give a few moments of your attention to this questionnaire. I intend to look carefully at your responses to ensure that the functionality of this organization remains strong.

Thank you very much for your time and effort.

Sincerely,

Lisa Newbore
Oregon State University
MAIS- Graduate Thesis
H: 503-570-2132
W: 541-737-5395
Participant Informed Consent Form

Sponsoring Department at Oregon State University
The Department of Speech Communication

Dear Participant,

The practice of protecting human subjects involved in research is supported by the sponsoring Departments of this project at Oregon State University. The following information is provided for you to make an informed decision about your participation in this project. Your participation is completely voluntary and you are free to withdraw from this research at anytime without penalty.

The purpose of this study is to determine why the Rose Festival Association is an effective organization. This questionnaire asks you questions about your perceptions regarding characteristics of successful organizations. There are no right or wrong answers. Answer the questions by honestly representing your experiences.

All responses to this questionnaire will be kept confidential and anonymous. This consent form will be removed from the questionnaire and will not be kept with your responses. The data collected will be used to further help improve the Rose Festival Association as well as help similar organizations become stronger, effective and more successful. This project poses no physical or emotional risks.

Your participation in this survey is greatly appreciated. If you should have any questions or comments about this project or your rights as a participant, contact Lisa Newbore at 541-737-5395 or 503-570-2132 or Marilyn Clint at the Rose Festival Office, 503-227-2681.

I have read this consent form. I understand my rights and responsibilities, and agree to participate in this research project.

Signed: ________________________________

Date: ___________________________
Staff Questionnaire

Please circle the number that best reflects your response to each item. Please do not write your name on this questionnaire.

1. Approximately how many years have you been involved with the Portland Rose Festival Association?
   1-2  3-5  5-9  10-14  15-19  20-24  25+

2. How familiar are you with the overall Portland Rose Festival Association mission statement?
   Not familiar  1  2  3  4  5 Very Familiar

3. To what extent does PRFA’s mission fit the reality of Portland’s current economic, political, and cultural forces?
   Not at all  1  2  3  4  5 Very Well

4. To what extent do you feel you are connected with the “spirit” of PRFA?
   Not at all  1  2  3  4  5 Greatly

5. To what extent does the executive committee contribute to the organizational structure and policies of PRFA?
   Not at all  1  2  3  4  5 Greatly

6. To what extent do the volunteer directors contribute to the organizational structure and policies of PRFA?
   Not at all  1  2  3  4  5 Greatly

7. How familiar are you with what the executive committee does for PRFA?
   Not familiar  1  2  3  4  5 Very Familiar

8. How familiar are you with what the volunteer directors do for PRFA?
   Not familiar  1  2  3  4  5 Very Familiar

9. How adequate is your group’s (staff members) leadership?
   Not at all  1  2  3  4  5 Very adequate

10. How adequate is your group’s (staff members) size for reaching consensus?
    Not at all  1  2  3  4  5 Very adequate

11. How adequate is PRFA’s organizational design (infrastructure)?
    Not at all  1  2  3  4  5 Very adequate
12. To what extent does PRFA recognize the work you do?
   
   Not at all 1 2 3 4 5 Very Well

13. Do you feel that PRFA rewards you both intrinsically and extrinsically?
   
   Not at all 1 2 3 4 5 Definitely

14. To what extent does PRFA provide adequate resources and training to support the work you do?
   
   Not at all 1 2 3 4 5 Very Well

15. To what extent were you provided, by PRFA, adequate knowledge to perform your specific job?
   
   None 1 2 3 4 5 Greatly

16. To what extent were you provided, by PRFA, adequate skills to perform your specific job?
   
   None 1 2 3 4 5 Greatly

Comments:

Thank you again for your time. Please place this questionnaire in the envelope and mail by February 22nd.
Executive Committee Questionnaire

Please circle the number that best reflects your response to each item. Please do not write your name on this questionnaire.

1. Approximately how many years have you been involved with the Portland Rose Festival Association?
   1-2   3-5   5-9   10-14   15-19   20-24   25+

2. How familiar are you with the overall Portland Rose Festival Association mission statement?
   Not familiar   1   2   3   4   5   Very Familiar

3. To what extent does PRFA’s mission fit the reality of Portland’s current economic, political, and cultural forces?
   Not at all   1   2   3   4   5   Very Well

4. To what extent do you feel you are connected with the “spirit” of PRFA?
   Not at all   1   2   3   4   5   Greatly

5. To what extent do the staff members contribute to the organizational structure and policies of PRFA?
   Not at all   1   2   3   4   5   Greatly

6. To what extent do the volunteer directors contribute to the organizational structure and policies of PRFA?
   Not at all   1   2   3   4   5   Greatly

7. How familiar are you with what the staff members do for PRFA?
   Not familiar   1   2   3   4   5   Very Familiar

8. How familiar are you with what the volunteer directors do for PRFA?
   Not familiar   1   2   3   4   5   Very Familiar

9. How adequate is your group’s (executive committee) leadership?
   Not at all   1   2   3   4   5   Very adequate

10. How adequate is your group’s (executive committee) size for reaching consensus?
    Not at all   1   2   3   4   5   Very adequate

11. How adequate is PRFA’s organizational design (infrastructure)?
12. To what extent does PRFA recognize the work you do?

Not at all  1  2  3  4  5  Very adequate

13. Do you feel that PRFA rewards you both intrinsically and extrinsically?

Not at all  1  2  3  4  5  Definitely

14. To what extent does PRFA provide adequate resources and training to support the work you do?

Not at all  1  2  3  4  5  Very Well

15. To what extent were you provided, by PRFA, adequate knowledge to perform your specific job?

None  1  2  3  4  5  Greatly

16. To what extent were you provided, by PRFA, adequate skills to perform your specific job?

None  1  2  3  4  5  Greatly

Comments:

Thank you again for your time. Please place this questionnaire in the envelope and mail by February 22nd.
Volunteer Director Questionnaire

Please circle the number that best reflects your response to each item. Please do not write your name on this questionnaire.

1. Approximately how many years have you been involved with the Portland Rose Festival Association?
   1-2  3-5  5-9  10-14  15-19  20-24  25+

2. How familiar are you with the overall Portland Rose Festival Association mission statement?
   Not familiar  1  2  3  4  5  Very Familiar

3. To what extent does PRFA’s mission fit the reality of Portland's current economic, political, and cultural forces?
   Not at all  1  2  3  4  5  Very Well

4. To what extent do you feel you are connected with the “spirit” of PRFA?
   Not at all  1  2  3  4  5  Greatly

5. To what extent does the executive committee contribute to the organizational structure and policies of PRFA?
   Not at all  1  2  3  4  5  Greatly

6. To what extent do the staff members contribute to the organizational structure and policies of PRFA?
   Not at all  1  2  3  4  5  Greatly

7. How familiar are you with what the executive committee does for PRFA?
   Not familiar  1  2  3  4  5  Very Familiar

8. How familiar are you with what the staff members do for PRFA?
   Not familiar  1  2  3  4  5  Very Familiar

9. How adequate is your group’s (volunteer directors) leadership?
   Not at all  1  2  3  4  5  Very adequate

10. How adequate is your group’s (volunteer directors) size for reaching consensus?
    Not at all  1  2  3  4  5  Very adequate

11. How adequate is PRFA’s organizational design (infrastructure)?
    Not at all  1  2  3  4  5  Very adequate
12. To what extent does PRFA recognize the work you do?  
\[ \text{Not at all} \ 1 \ 2 \ 3 \ 4 \ 5 \ \text{Very Well} \]

13. Do you feel that PRFA rewards you both intrinsically and extrinsically?  
\[ \text{Not at all} \ 1 \ 2 \ 3 \ 4 \ 5 \ \text{Definitely} \]

14. To what extent does PRFA provide adequate resources and training to support the work you do?  
\[ \text{Not at all} \ 1 \ 2 \ 3 \ 4 \ 5 \ \text{Very Well} \]

15. To what extent were you provided, by PRFA, adequate knowledge to perform your specific job?  
\[ \text{None} \ 1 \ 2 \ 3 \ 4 \ 5 \ \text{Greatly} \]

16. To what extent were you provided, by PRFA, adequate skills to perform your specific job?  
\[ \text{None} \ 1 \ 2 \ 3 \ 4 \ 5 \ \text{Greatly} \]

Comments:

Thank you again for your time. Please place this questionnaire in the envelope and mail by February 22nd.