

# Opportunity Knocks Update and Membership Survey Results

6 November 2015

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## Overview of this document

This document begins with a summary of the Opportunity Knocks organization. It then provides a summary of the Member Survey distributed in September of 2015. The information here paints a picture of the organization through the comments of current members. This summary will be used by the OK Board of Directors and Facilitators to improve on the delivery of high quality peer mentorship for leaders in Central Oregon, to benefit the economic development of the region.

## Opportunity Knocks Overview

Opportunity Knocks (OK) is a 501c6 nonprofit organization that serves the Central Oregon business and organizational community. We believe in supporting the economic growth of Central Oregon and we take pride in offering our service at a fraction of the cost of most professional development courses and programs. All membership dues go toward our administrative costs, and all of our facilitators are volunteers. OK members are matched with a trusted, local, facilitated group of peers who, in effect, become each other's Board of Advisors. The OK member's Board of Advisors team provides expertise and insight to help drive professional, personal and business growth.

The program can be viewed as having two goals:

### Business Development and Professional Growth

Goals: OK members rely on their team to provide insight, support, guidance and accountability in their business development. OK members hone their leadership and professional skills, and achieve measureable goals with the assistance of their team.

### Community Development and Economic Growth

Goals: OK members, facilitators, board members and sponsors are leaders in the development and economic growth of the Central Oregon community. They provide jobs, and give back to their community through participation in Opportunity Knocks.

## Functions of the Organization

Opportunity Knocks consists of 19 teams, 166 members, 41 facilitators and 19 Board Members (as of November 6, 2015). The organization serves two main functions, outlined below followed by specific tasks.

### Administrative functions: Membership growth and maintenance

- Meets potential members and communicates with facilitators to place members on teams
- Selects skilled facilitators to run the meetings, and trains new facilitators
- Selects and arranges guest speakers to visit team meetings, to share their expertise
- Communicates with facilitators and provides them with facilitation support and suggestions
- Communicates with members to ensure their needs are being met; helps members move teams so that they receive the most benefit
- Keeps a finger on the pulse of economic development in Central Oregon and creates teams to address specific industries or areas of expertise

Note: OK does not offer educational events – i.e. lectures, seminars. We *do* promote educational and networking events hosted by our *partners* (i.e. EDCO, Bend Chamber, City Club, SBDC) and by our *sponsors* (i.e. US Bank, Alpine Internet, Combined Communications, Cascade Business News)

### Community impact functions

- Partners with other local nonprofits whose purpose is to create a strong, engaged and vibrant local community and economy in Central Oregon
- Hosts an annual event, open to the public, to recognize the successes of members and teams, and celebrates the Central Oregon business community
- Offers social gatherings for members, facilitators, sponsors and anyone interested in the organization to meet in an informal, social setting

## Survey Questions and Results

Results of the member survey were collected during September of 2015. 25% of current members responded. The survey can be viewed here: <http://goo.gl/forms/DN5dObe3zM>. The results that follow include members' open-ended responses and the percentage response rates to multiple choice questions.

### General Membership Questions

What is your favorite aspect of OK membership?

*Open ended responses*

- **Honesty** and being forthright communication with one another all in an effort to help one another succeed.
- **Getting great ideas** from smart people who think differently than I do. I feel our team is genuinely interested in helping each other achieve our personal and professional goals.
- My group has changed a lot over the past year, so it's hard to sum up. But I definitely feel comfortable sharing my issues, **gaining advice** on potential solutions, and trying to help with other member issues.
- The development of the relationships with members of our team
- In my first OK group in 2010-2011, I thoroughly enjoyed the support, encouragement, accountability, structure and advice I received within the group. After leaving and returning to my current group, **my favorite aspect would be the 1-on-1 meetings I've had with individuals in the group and the friendships I've made.**
- Camaraderie
- OK is my Board of Directors, keeps me working ON my business, and makes me **accountable** for my business planning and follow-through.
- I am more enthusiastic about the potential of OK than the reality. However, it is a great concept and potentially a great resource for the local community.
- Getting another business person's perspective on my issues.
- **You are not an island.** You are connected to an entity that is larger than yourself, that is growing and morphing, that is supportive, that is helpful. Not only a place to belong but a place to both give and receive help.
- An ongoing means of addressing my business issues and networking with others.
- Ideas I take away and problems it helps me solve with working on the business. Also learning about what is going on in business that I may not have thought of. There are many parallels between businesses even with very different industries that can be incorporated into. I also like **being accountable** for the goals.
- **The accountability.**
- The **relationships** I've built, and the support, encouragement and suggestions I've received.
- The **support network**
- Building **relationships** with other business owners

- The people
- Diverse **opinions and brainstorming**
- New ideas
- Ideas/networking/relationships
- I go for the thought sharing, but walk away appreciating the people.
- There is someone who knows what I'm dealing with.
- **Great peer-to-peer support/mentorship**
- Uncertain, team members would have to be it. Admiring spirit of starting managing growing own business
- The people I have met, and the opportunity to learn from others.
- Sharing
- Learning about other businesses
- Applying advice received to my businesses
- I get to learn from business owners that have been in business for more than 20+ years. You can't buy that experience.
- Helping others improve their business while learning to improve mine
- The sharing of important aspects of marketing strategy - gaining understanding of what others are doing and why & if applicable to my own job/business. Learning new ways to approach systems, applications.
- Having a board of advisors and a confidential place to grow my business.
- The **relationships** I'm building and the give-and-take-support of the group.
- Group discussions about business strategy and planning

### What do you want from OK membership?

#### *Multiple choice*

- |     |                                     |
|-----|-------------------------------------|
| 86% | Feedback/ideas/advice               |
| 76% | Problem solving/brainstorming       |
| 75% | Business growth                     |
| 69% | Diverse ideas/creativity            |
| 69% | Confidentiality/Safe space to share |
| 69% | Strategic planning                  |
| 66% | Accountability                      |
| 55% | Professional development            |
| 50% | Networking                          |
| 47% | Encouragement/support               |
| 42% | Personal growth                     |

Other: Resources/education avenues / peer to peer COACHING, NOT networking

What stands out to you as the most significant benefit of being an OK member?

*Multiple choice – select only one*

- 19% Board of advisors
- 16% Strategic problem solving
- 14% Relationships developed/support
- 14% Working ON the business
- 14% Different perspectives
- 14% Resources/ideas
- 8% Accountability
- 0% Honesty
- 0% Inspiration

What improvements would you suggest for Opportunity Knocks as an organization?

- **Accountability** for homework, possibly longer term strategic direction for the members to create a path that works best for everyone to achieve all member needs in time of defined plans / objectives.
- At least for our group, we need more members. I also think a **hard 80% mandatory meeting** attendance requirement be put in place to bring more consistency to the meetings. Overall, I'm very happy with our group and what I get out of it.
- Perhaps the ability to **mix up groups and facilitators more often**. Keep things fresh. Like every two years or so. Otherwise I think it's run very well and provides a great benefit.
- **Assure that the facilitators are well prepared and trained** to add value to the team members.
- **I would recommend a proven, consistent format for each meeting congruent with the mission, vision and values of OK and execution of this format in every OK group.** We are all extremely busy and in order for us to continue seeing value in OK we need extremely productive, effective and efficient use of that time. We could time each section to ensure we get through the entire format in each 3 hour session, which would also **prevent needless rambling**. It also holds members accountable to the time we have, which encourages them to plan prior to the meeting for what they are going to say in their 3-minute updates, how they are going to phrase their key issues, what outcome they want from the feedback and what action steps we are going to walk away with.
- **More interaction among groups** - I am not sure who is in OK other groups and it would be fun (keeping confidentiality in mind) to see how other groups operate and who they are. Even social interaction with other OK members would be good.



- OK should offer/**provide education and training opportunities for its group facilitators**, who should be encouraged to visit other OK groups to see how meetings are conducted by others.
- There needs to be more effort or awareness toward COACHING....."bringing up" new members of the business community. Also, **TEAMS SHOULD NOT BE STATIC. MEMBERS SHOULD ROTATE OUT TO OTHER TEAMS - OR INTO LEADERSHIP ROLES - AFTER SOME INTERVAL. Having people stay in the same group forever creates clique culture, not performance culture.**
- None
- Figure out a way for members to understand that 1) they **can move between groups** as needs change 2) a **process by which to do so.**
- Continue to focus on strategic problem solving.
- Improve attendance and group member turnover.
- Not sure what value the organization itself provides. Appreciate my group, but I'm **not sure what my membership fees pay for.**
- More **parties!**
- I like the changes that are being made, the membership directory, and the recognition of members.
- I would love to see **stronger membership development for groups that are shrinking.** More assistance in keeping our team healthy and strong.
- **I liked the educational events**
- **Quicker placement of members. Better training for facilitators.**
- **More network events** with other OK groups.
- **Speakers?**
- **More outside speakers**
- Perspective/balance - what are agencies doing right, vs. what they are doing wrong?
- **Improve product (team) consistency -- members, format and facilitation**
- **Adding a social events designed for networking and lead generation** that blend all groups a few times a year. Not just a Holiday gather, a lead generation gathering.
- Happening as we speak: well-defined market, product/service and encouraging peer-to-peer support/mentorship
- **Facilitators are the key. Keep us on track, on time, provide accountability checks** via note taking, and stimulate insight, penetrating questions
- Don't let the groups get too big.
- **Offer guest speakers** for all OK members
- Outline **specific assignments** for each meeting
- If it ain't broke, don't fix it.
- Create a compelling story as to the benefits of being an OK member.
- Have a division which helps startups, from conception.
- **Keep meetings productive and on track**
- **Efficient meetings and strategic problem solving incorporated into the meetings.**
- Differentiate the organization from the individual team; 2) Focus on making EVERY team a success; 3) **Provide 'members only' tools & resources** (on website)
- More selective in accepting members

## Questions about OK Meetings

What would you suggest to your facilitators for improvement?

*Multiple choice*

- 37% Focus on goals and outcomes
- 30% Stop "off subject" rambling
- 29% Hold people accountable for attendance, arriving late or leaving early
- 26% Better time management
- 23% Hold people accountable for their homework
- 17% Make sure "talkers" don't dominate meetings
- 17% Tighter meeting agenda
- 11% Make sure everyone gets their time allotment
- 11% Encourage team members to offer advice and hold each other accountable
- 8% Make sure everyone gets time to share

Other: All the above are handled well / I think more focus on making sure we are achieving goals and moving forward when stuck / none of the above / better coffee / holding people accountable and being willing to let go of folks who are not following through / my facilitators were great

If you could change anything about your team's meeting, what would it be?

*Multiple choice*

- 41% Have topical guest speakers
- 22% More structured meetings/time management
- 22% Demonstrate how to execute a strategic plan
- 11% Less time spent on "check-ins"
- 11% Quarterly check-ins on goals
- 7% Share about challenges
- 7% Enforced attendance
- 3% Mid-meeting breaks
- 0% Move meetings to different business locations to see other member's operations
- 0% Have "check-ins" at end of meeting, instead of at the beginning

## Questions about OK Teams

What three topics does your team focus on most often?

*Multiple choice – choose only three*

- 69% General business development
- 53% Strategic planning
- 33% Business and personal development combined
- 31% Employee relations
- 28% Company culture
- 25% Work/life balance
- 22% Company finances
- 8% **Accountability**
- 8% Personal development
- 8% Specific skill development

How would your team define growth?

*Multiple choice*

- 48% Achieving stability
- 45% Aggressive growth of revenue
- 39% Maintaining work/life balance
- 16% Adding employees
- 3% Learning specific professional skills

Other: Unclear / Defined by Each Member, which I think is correct / Achieving defined goals which could be any or all of the above / Not sure / None of our team members are strictly focused on aggressive rev. growth / Each of our member's businesses is in a different phase of the life cycle, so most discussions are around personnel and strategic issues

How would you describe the character or personality of your team?

*Multiple choice*

- 50% Lively
- 50% Compassionate
- 44% Fun
- 31% Serious
- 14% Lighthearted
- 0% Competitive

Other: We embody a lot of emotions by a diverse effective group / regionally or nationally focused / authentic, supportive, accountable to each other / seasoned / smart, thoughtful in comments, experienced

## Summary

### Benefits of OK Membership

- Accountability for business owners and leaders to take action toward achieving their goals
- Facilitated Board of Advisors that provides insight, guidance and feedback to support the OK member company's growth and the individual's professional development
- OK fosters relationships among peers who otherwise may not have met each other; trusted confidants in business and professional development

### Areas to Improve

- Meetings are not as engaging and time-efficient as they could be
- Members do not feel connected to the organization – they want to hear more from the org, and be offered more benefits, social gatherings, arrange guest speakers
- Facilitators are not trained to a sufficient standard

### What do members want?

- More structured and better run meetings/more efficient facilitators
- More social interaction
- More guest speakers
- Movement among the groups the rule rather than the exception

## Recommendations

Recommendations for supporting facilitators, members, and sponsors

### New OK facilitators: mentor-based training options

- Shadow a strong facilitator for 2-3 meetings
- Provide new facilitators with an official OK meeting agenda to use starting out. We will continue to support the flexibility of teams – meetings are not a one-size fits all approach. The agenda is a sample of what can be done in a meeting
- Meet with 2 or 3 'master facilitators' to ask questions about OK facilitation
- Pair new facilitators with experienced OK facilitators only
- Start new teams with facilitators who have been co-facilitating already, or on a team with a master facilitator

### Facilitation refresh: options for current facilitators

- Current facilitators are strongly encouraged to visit meetings of other OK teams twice per year – to gain a fresh perspective, new tips and ideas
- Develop KPIs for facilitators
- Develop a real-time assessment system – randomly distributed to members – not after every meeting.
- Communicate regularly with facilitators – offering tips and suggestions for facilitation and caring for their teams.

### Create strong connection to the organization and nurture current members

- Clearly communicate the mission and direction of the org – in writing and in person by visiting teams and meeting with facilitators
- Send monthly newsletters to members
- Develop and execute social media strategy
- Collect ‘real time’ feedback asking members about their meetings
- Provide facilitators with ‘News about OK’ to share with their teams each month
- Begin monthly social gatherings in December 2015 for facilitators and Board Members. After building momentum and dedicated attendees among the facilitators and board, invite all members to join these monthly meetings – beginning in February 2016 – “more parties!”
- Communicate regularly with members – offering news, celebrating their successes and announcing local events of interest
- Encourage members to switch teams as needed
- Team highlights at the annual event – elevator pitches from each team so they get to know each other – so knowledge of teams resides with everyone in the org, not just E.D.
- Provide scholarship options to potential members who cannot afford dues

### Creating connection with sponsors

- Clearly communicate the mission and direction of the org – in writing and in person
- Develop strong relationship between E.D. and each sponsor
- Communicate regularly to gather content from sponsors and ensure it’s distributed. Track response from blasts – i.e. how many OK members attended a sponsor’s event after we sent out an announcement?

## OK Member Companies

*As of November 6, 2015*

100+ Women Who Care	Composite Approach
Abilitree	Cursor Control, Inc.
Agency Revolution	Cutting Edge Design
Alpine Internet Solutions	Deschutes Children's Foundation
Astir Agency	EarthCruiser Overland Vehicles
Autonomy Technology Inc.	Earthwood Timber Frame Homes
Awbrey Dental Group	Eclipse Engineering, Inc.
Bellatazza	Economic Development for Central Oregon
Bend 2030	Edwards Law Offices PC
Bend Accounting	Eric Meade Consulting
Bend Chamber	Fincham Financial Group
Bend Commercial Glass	Five Talent Software
Bend Dutch Vacation Rentals	Flick Five Films
Bendistillery	Fowler & Co., Inc. CPA
Beulah's place	Frogger, LLC
Bicycle Rides Northwest, Inc.	G. Pollack Financial
BioPharma Resource Groups	GB2
Blackmore Planning & Development Services, LLC	Giant Loop LLC
Bloom Well	GL Solutions
BlueBird Strategies	Green Savers
Boys & Girls Club of Bend	GreenLoop IT Solutions
Brooks Resources	Healing Reins Therapeutic Riding Center
Bryant, Lovlien & Jarvis	healthy hoohee
Cairn	High Desert Promotions & Printing
Cardinal Services Inc.	Home Care IV
Cascade Business News	Horse Guard
Cascade Crest Transitions	Humm Kombucha
Cascade Financial Strategies	Hydro Flask
Cascade Integration & Development, Inc.	Hydaway Collapsible Bottle
Cascadian Group	Ideal You Weight Loss Center
Central Financial Services of Oregon	Instant Landscaping Products
Central Oregon Veterans Ranch	Insurance Partners
Centro Print Solutions	Invite Excellence
Cascade Custom Pharmacy	J Bar J Youth Services
Cies Inc.	July Nine
City Club	Kialoa Canoe Paddles, Inc
Classic Coverings and Design, Inc	Lee-Built Construction
COIC	Lewy College Consulting
ColeBreit Engineering	Lifetime Vision Care, LLC
Combined Communications	LionHeart Consulting
Compass Commercial Real Estate Services	Merrill O'Sullivan, LLP

Michi Designs  
 Mountain View Heating, Inc.  
 My Fun List  
 Myluckyhouse Inc  
 Net Worth Strategies, Inc.  
 New Era Homes  
 Norman Building & Design  
 Northwest Laundry Services  
 Ocean Equipment  
 Old Mill District  
 One Stop Writing Shop  
 Opportunity Foundation of Central  
 Oregon Adaptive Sports  
 Paladin Data Corp  
 Picky Bars, Inc.  
 Pneuma33 Brand Development  
 Precise Flight, Inc.  
 Precisely Payroll Inc  
 Premier Builders Exchange  
 Premier Real Estate  
 Press Pros Printing  
 Promotional Products Northwest  
 R & H Construction  
 Reach Another Foundation  
 Real Time Research, Inc  
 Red Jacket West  
 RicketyRoo Inc  
 Rockin Daves Bagel Bistro & Catering  
 Ruffwear, Inc. - Young Joen  
 Ruth Williamson Coaching  
 Safe Haven Care  
 SageCoach Inc  
 Savory Spice Shop  
 SeQuential  
 Sherpa Wealth Strategies LLC

Silipint  
 Simply Baked  
 Sisters Vacation Rentals  
 Small Business Development Center, COCC  
 Smith Brothers Racing Products Inc.  
 Specialty Cigars International, Inc.  
 Sportsvision  
 Stereo Planet  
 StingRay Communications  
 Structus Building Technologies ???  
 Sublime Creative Agency  
 Sudara  
 Swag off Road  
 Swiss Mountain Log Homes  
 TDS Telecom  
 TechSoft 3D  
 Tekneek Architectural Design Studio P.C.  
 The Center Foundation  
 The Signal Spot  
 Therapeutic Associates  
 Timothy L. Park Photography, Inc.  
 Treehouse Therapies  
 Trueline Capital  
 Twist Cocktail Catering  
 US Bank  
 Vantage Clinical Solutions  
 Velox Systems  
 Vernon Construction Inc  
 Via Delia  
 Volunteer Connect  
 Volunteers in Medicine  
 Wahoo Films  
 WebCyclery  
 Z'Onion Creative Group