



Board Assessment
And Development System

Supervisory Committee Assessment
And Development System

ADMINISTRATION GUIDE

Second Edition

Developed By

Nice Enterprises, Inc.



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COORDINATOR'S "QUICK START" CHECK LIST

- Complete THE ENTIRE Credit Union Information Sheet (*without this information, we cannot process your assessments*).
- Write your credit union's name on the front of each survey in the appropriate box. Make sure you are completing the right survey for your group (i.e., Board of Directors or Supervisory Committee).
- Fill in one participant's name on the front of each survey and each "confidential" survey envelope.
- Write in the complete list of participants for your group (either Board of Directors or Supervisory Committee) in the spaces along the top of the inside of each of the survey forms, **IN THE SAME ORDER ON EVERY FORM.**
- Highlight that person's name and the column of 26 ratings boxes below that name on the inside of the survey form.
- Review this Administration Guide and prepare to present the *Board Assessment & Development System* and / or *Supervisory Committee Assessment & Development System* surveys for completion by participating volunteers.
- Have participants verify the names are spelled correctly and listed **IN THE SAME ORDER** on EVERY survey.
- Have participants fill in the demographic information on the front of their survey form.
- Review the rating system (1-4) and how it should be applied to the questions.
- Have participants enter their self-assessment ratings in the boxes in the highlighted column below their names.
- Participants should then complete assessment ratings for the other group members. Remind them to do this independently to maintain confidentiality.
- Direct participants to insert their completed surveys into the "confidential" envelopes provided and return them to the credit union coordinator.
- Gather all completed surveys (already in sealed envelopes) and submit them in a single batch, along with the completed Credit Union Information Sheet, to Nice Enterprises, Inc. for processing.

SECTION 1

INTRODUCTION

Congratulations! The decision by your credit union to participate in the *Board Assessment & Development System* and / or the *Supervisory Committee Assessment & Development System* is a strong indication of the commitment and dedication needed to ensure credit union success. The Systems are designed to provide a substantial benefit to each volunteer, and the organization as a whole, without requiring a significant investment of time or money.

This cost-effective System was developed in response to requests by credit union leaders from across North America. They expressed a need for an easy-to-administer program that creates positive accountability for volunteers, while acknowledging individual effort and contributions. In addition, these leaders asked for a tool that would facilitate the ongoing education and development of volunteers demanded by the dynamic, rapidly changing environment within which all credit unions must now operate.

A successful credit union cannot exist without the dedicated efforts of knowledgeable volunteers who clearly understand their roles and possess the necessary leadership and decision-making skills. The Systems have been designed to address those needs in a confidential, non-threatening manner, which produces positive results within the organization. We appreciate the valuable insights shared with us by the many volunteers and CEOs who have helped to shape this program.

The *Board Assessment & Development System* and the *Supervisory Committee Assessment & Development System* were developed by Nice Enterprises, Inc. Since 1983, Nice Enterprises, Inc. has provided credit unions with information, education, facilitation, and solutions that work, while meeting the highest standards of quality and integrity.

Nice Enterprises, Inc.'s Associates combine years of practical experience in credit unions with advanced education and training. Over the past 15 years, the staff of Nice Enterprises, Inc. has worked with hundreds of volunteers and CEOs. The experience gained through working with credit unions of all sizes has created the knowledge base that formed the foundation for developing the *Board Assessment & Development System* and the *Supervisory Committee Assessment & Development System*.

The Systems have been developed to meet the needs of volunteers from credit unions of all sizes and service profiles. This *Administration Guide* is intended to guide your credit union's designated coordinator through the process of administering the assessment surveys and returning them to Nice Enterprises for tabulation and preparation of reports for individual volunteers and the board of directors or supervisory committee as a whole. Through this process, you and your credit union will receive substantial benefits that far exceed the minimal investment required to participate in this innovative program.

SECTION 2

SYSTEM BENEFITS

The *Board Assessment & Development System* and the *Supervisory Committee Assessment & Development System* were designed as comprehensive and definitive sources for ongoing volunteer evaluation and performance enhancement. They fill a gap in the performance appraisal processes already in place in most credit unions. Despite the fact that board and supervisory committee members are non-compensated volunteers, the ramifications of their decisions and actions have a significant impact on the credit union's overall success. Therefore, the issue of volunteer performance becomes critical, particularly in light of challenges created by the ever-changing external environment.

The Systems establish key criteria for measuring volunteer effectiveness, providing a concrete outline of volunteer performance expectations. A peer evaluation process is implemented through the use of a confidential survey, tabulated and analyzed by an objective third party. Reports of individual and aggregated group results identify current strengths and areas where additional development is needed. The *Blueprint for Success* describes an overview of the various components of volunteer effectiveness, as well as information and additional resources for enhancing performance in each of the performance categories discussed.

The Systems were created as a subscription program and are designed for annual administration. Individual and group results in the second, and subsequent

years, will provide comparisons to previous assessment results, along with valuable peer comparisons and overall results for all volunteers participating in the Systems.

Credit union leaders can expect to receive many benefits from using the Systems, including:

- *an educational tool to enhance volunteer effectiveness and reduce the potential for personal liability;*
- *a simple, practical, and cost-effective method to identify volunteer training needs and design effective development plans;*
- *a way to measure progress and effectiveness of individual and group development;*
- *a confidential, objective, and easy way to measure and track leadership improvement over time;*
- *a unique opportunity to measure volunteer effectiveness with aggregate ratings for a nationwide pool of participating credit union volunteers; and*
- *an effective method to begin implementing total quality management principles at the volunteer level.*

SECTION 3

SYSTEM DESIGN OVERVIEW

The *Board Assessment & Development System* and the *Supervisory Committee Assessment & Development System* were designed as easy-to-administer programs requiring a minimal time investment by credit union volunteers. Participation in the Systems begins with placing an order with Nice Enterprises, Inc. This establishes the credit union as a participating organization. As a participating organization, the credit union receives an Administration Kit which includes this *Administration Guide*, a Credit Union Information Sheet, the appropriate number of survey instruments, envelopes for maintaining assessment confidentiality, and a pre-addressed envelope for returning the completed surveys.

The *Administration Guide* is intended to serve as a guide for the credit union's designated coordinator (usually the Board / Supervisory Committee Chairperson or CEO.) This guide provides suggestions for presenting the benefits and features of the System, administering the survey, and submitting the completed surveys for tabulation and analysis.

The foundation of the Systems consists of two assessment surveys (questionnaires), one used for directors and the other for supervisory committee members. These questionnaires simply require participants to rate themselves and each of the other group members in a variety of areas.

These ratings are based upon a four-point scale:

- 4 = Excellent / Very Strong**
- 3 = Meets Requirements / Good**
- 2 = Improvement Needed / Some Development Required**
- 1 = Problem Area / Significant Development Required**

Each questionnaire will consist of 26 questions covering five basic aspects of volunteer performance. For each question, volunteers will rate themselves and every other board or committee participant. In most cases, completing the survey should take no more than 30 minutes. Specific questions will vary between the two questionnaires. However, the five performance categories remain consistent in order to analyze performance and development needs at the organizational level. The five aspects of volunteer performance are:

- ***Preparation & Participation***
- ***Relationships & Communication***
- ***Knowledge & Understanding***
- ***Leadership & Planning***
- ***Commitment & Results***

After completing the survey, each participant seals it in the envelope provided to maintain confidentiality and returns it to the credit union coordinator.

The sealed survey envelopes are not to be opened.

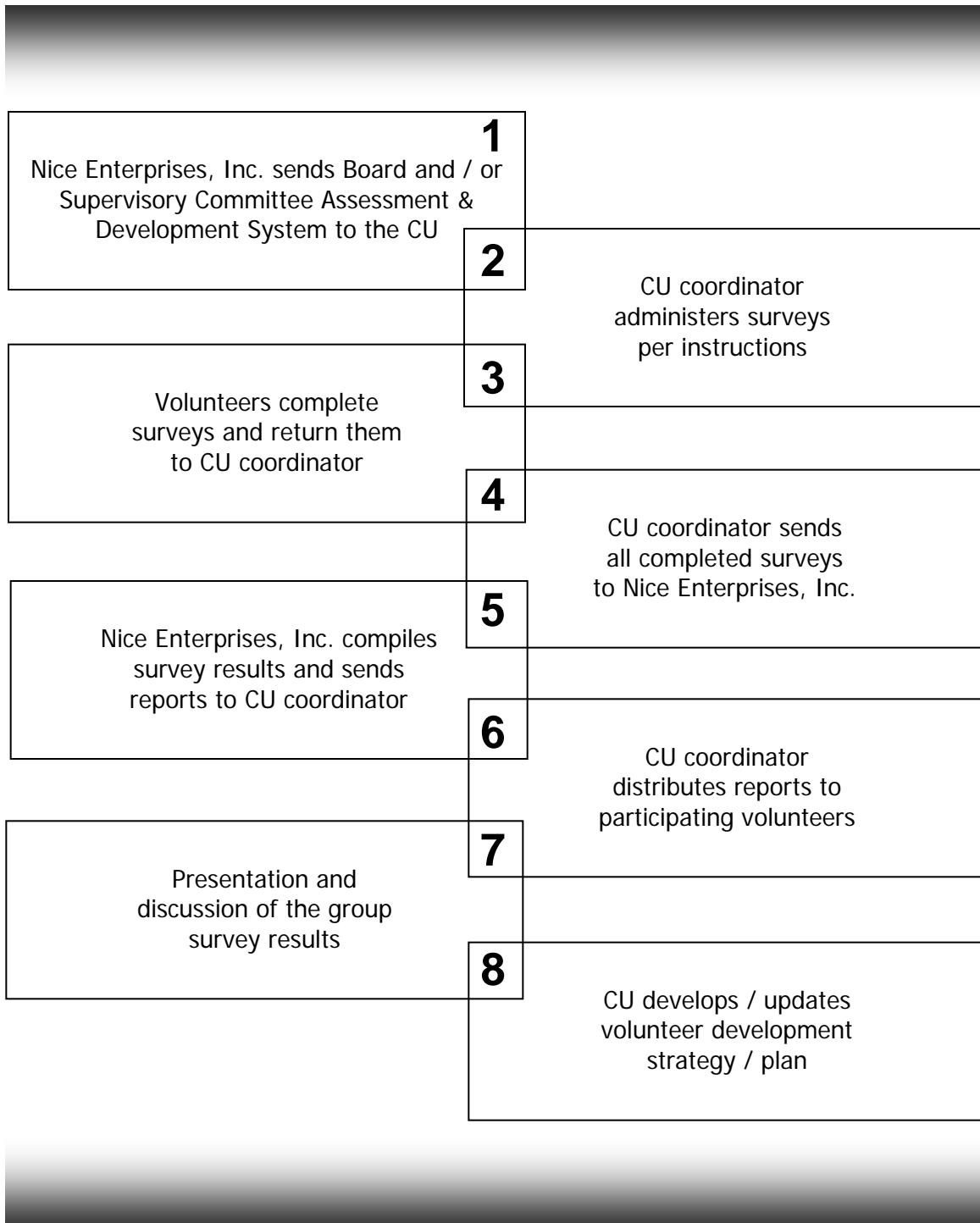
The coordinator is responsible for gathering all completed survey envelopes and forwarding them to Nice Enterprises, Inc.

The survey responses are then keyed into a computerized scoring system which produces standard graphical output reports of individual performance, as well as overall group averages. These confidential reports highlight individual and group strengths, as well as identifying developmental and training needs. A separate, sealed envelope is prepared for each participant. These envelopes are then returned to the credit union coordinator for distribution and group discussion.

As previously discussed, the Systems have been designed as a subscription to an ongoing annual service. The assessment reports will be expanded in the second year of participation to include useful comparative data. The individual results will include a comparison with that individual's aggregate scores (for each question and each performance category) from the previous year, showing the progress the individual and organization has made. The group assessment reports will include not only prior year comparisons, but also an overall peer comparison based upon the aggregated results for all participating credit unions.

The *Blueprint for Success* provides the coordinator with information on presenting the assessment results and designing appropriate development ideas, strategies and action plans, focusing on individual and group needs.

SYSTEM STEPS



SECTION 4

YOUR ROLE AS COORDINATOR

As the designated credit union coordinator, you play several important roles that are critical to successful participation in the *Board Assessment & Development System* and / or the *Supervisory Committee Assessment & Development System*. The degree of benefit individual volunteers, and the credit union as a whole, will receive depends upon your ensuring that all participants complete their surveys and that all surveys are submitted at one time for tabulation and analysis. It is particularly essential that complete confidentiality of individual response and performance ratings be maintained in all phases of the System.

The role of the coordinator will normally be assigned to the Board and / or Supervisory committee chairperson. However, the CEO or another person willing to ensure that the Systems are properly administered, may also be an appropriate choice to act as coordinator. It is most important that the individual selected be respected by all participants, demonstrate the highest standards of personal integrity, and possess strong oral communication skills.

The individual serving as coordinator will perform the following functions:

1. Complete the Credit Union Information Sheet, which provides information necessary for proper processing of your reports.
2. Prepare the Assessment Surveys and confidential survey envelopes, filling in such information as the name of the credit union and participants' names on each survey form.
3. Review the *Administration Guide* and reproduce recommended handouts necessary to effectively present the System(s).
4. Present the System(s) to all participants and provide any assistance requested regarding completion of the surveys.
5. Gather all completed surveys (already in sealed envelopes) and submit them in a single batch to Nice Enterprises, Inc. for processing.
6. Receive confidential individual and group reports and distribute to all participants.
7. Present group results and lead discussion based upon the *Blueprint for Success*. This will result in helping to establish development plans for individual volunteers and the board and / or the supervisory committee as a whole.

SECTION 5

PREPARATION – THE KEY TO SUCCESS

Advance preparation by the credit union coordinator is essential to achieving meaningful and candid participation in the *Board Assessment & Development System* and / or *Supervisory Committee Assessment & Development System*. In total, it is anticipated that the coordinator will invest approximately 1 ½ to 2 hours in advance preparation, consisting of the various activities detailed below. These activities are to be completed before the 30 to 45-minute meeting when the System is presented and participants complete the assessment surveys.


The first phase of advance preparation consists of administrative tasks required to complete various forms and reproduce the necessary handouts. It is critical that all forms be *fully completed* and either *typed or printed neatly* to ensure accurate processing. Nice Enterprises, Inc. is not responsible for misspellings of names or data accuracy due to illegible forms.

The second phase involves reviewing the information provided in this manual and preparing to present the benefits and features of the System(s) to participants, as well as administering survey completion.

The Credit Union Information Sheet

The information requested on this form (included with your Administrative Kit) is used for processing your credit union's surveys (see sample, this page). It is essential that the form be accurately and fully completed. Please write in "N/A" for any informa-

tion requested that does not apply (such as an individual's telephone extension number).

| | | | |
|-----------------------------------------------------------------------------------|----------------------|-------------------------------------------------------------------------------------------------------------------------|----------------------|
|  | | Nice Enterprises, Inc's Board Assessment & Development System 7114 W. Jefferson Ave. Suite 203 Lakewood, CO 80235 | |
| | | Information Sheet | |
| Due Back To Nice Enterprises By | | 0-0-00 | |
| Credit Union Information | | | |
| Credit Union Name | <input type="text"/> | Please mark the one that applies with a "X" | |
| Asset Size | <input type="text"/> | | |
| Number of Members | <input type="text"/> | | |
| This is the First Time My Organization Has Taken This Assessment | | <input type="checkbox"/> | |
| My Organization Has Taken This Assessment Before | | <input type="checkbox"/> | |
| Physical Address | | Mailing Address | |
| Street | <input type="text"/> | Street | <input type="text"/> |
| City | <input type="text"/> | City | <input type="text"/> |
| State | <input type="text"/> | State | <input type="text"/> |
| Zip | <input type="text"/> | Zip | <input type="text"/> |
| CEO Information | | | |
| Name | <input type="text"/> | | |
| Phone Number | <input type="text"/> | Ext: | <input type="text"/> |
| E-mail Address | <input type="text"/> | | |
| Coordinator Information | | | |
| Name | <input type="text"/> | | |
| Title | <input type="text"/> | | |
| Phone Number | <input type="text"/> | Ext: | <input type="text"/> |
| E-mail Address | <input type="text"/> | | |
| Physical Address (If Different From Above) | | Mailing Address (If Different From Above) | |
| Street | <input type="text"/> | Street | <input type="text"/> |
| City | <input type="text"/> | City | <input type="text"/> |
| State | <input type="text"/> | State | <input type="text"/> |
| Zip | <input type="text"/> | Zip | <input type="text"/> |

Note the date at the bottom of this sheet. You have 90 days from this date to have all participants complete their respective surveys and return them to Nice Enterprises, Inc. *as a group*. If the packet of completed surveys is received after the 90-day period, your credit union will be required to pay a second set-up fee before tabulation and analysis can be completed.

For example, if you purchased both Board and Supervisory Assessment Surveys, and you have nine board members and three supervisory committee members, your nine Board Assessment Surveys would each have nine names listed along the top of the inside of each form.

Your three Supervisory Committee Assessment Surveys would only have three names listed along the top. There is room to accommodate up to 15 participants, although it is unlikely that you will need this much space.

SURVEY PREPARATION CHECKLIST

- ✓ Write your credit union's name on the front of each survey.
- ✓ Make sure you are completing the right survey form for your group (i.e. board of directors *or* supervisory committee).
- ✓ Fill in one participant's name on the front of each survey and one confidential envelope.
- ✓ Write in the complete list of participants for your group (*either* board or supervisory committee) in the spaces along the top of the inside of the survey form, **IN THE SAME ORDER ON EVERY FORM.**
- ✓ Highlight that person's name and the column of 26 ratings boxes below that name on the inside of the survey form.



Survey Num.

ASSESSMENT SURVEY

Board Assessment & Development System

Demographic Questions *(Please print in the appropriate box. All eight questions must be answered.)*

1. What is your full name?
2. What is your credit union name?
3. What is the title of the position you currently hold on the board of directors?
4. What was the year you started as a member of this credit union?
5. What was the year you started to serve as a member of the board?
6. What is your birthday (month / day / year)
7. What is your current occupation or job title?
8. How many times (if any) have you participated in the Board Assessment & Development System?

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Preparing Your Presentation

This phase of advance preparation involves reading and reviewing the information provided in your Administration Kit. You will want to become very familiar with all these materials and the *Administration Guide* in particular. A solid understanding of the benefits and design of the System(s) will enable you to determine the best approach for presenting this information to your organization's volunteers.

A positive, enthusiastic presentation style is always well received. By preparing an interesting and informative presentation, you will help position the assessment process positively, paving the way for increased involvement and commitment to individual and group results.

An effective presentation will help encourage participants to be both honest and objective in completing the assessments.

Anticipate developing a presentation that will take approximately 10 to 15 minutes, including the time needed to explain how to properly complete the Assessment Surveys. Be sure to include sufficient time for participants' questions. The next two sections of this manual provide more detailed information for your presentation and the administration of the Assessment Surveys. You may wish to modify the presentation structure outlined in the recommended handouts or place greater emphasis on certain areas based upon the specific needs and interests of your volunteers.

MEETING PREPARATION SUMMARY CHECKLIST

- ❶ Complete BOTH SIDES of the Credit Union Information Sheet.
- ❷ Prepare Assessment Survey forms and envelopes for participant completion.
- ❸ Review this *Administration Guide* and prepare to present the System and administer the survey to participating volunteers.

SECTION 6

PRESENTING THE SYSTEM

To ensure universal support for the *Board Assessment & Development System* and / or the *Supervisory Committee Assessment & Development System*, the decision to participate in the System(s) and select the credit union coordinator should be made by the board of directors or supervisory committee as a whole. Since you have received this *Administration Guide*, it is presumed that this process has taken place and that all volunteers are in general agreement that participating in the System is a worthwhile undertaking.

In presenting an overview of the System, your focus as credit union coordinator should be to increase understanding of the processes involved in the System's assessment and development phases and to reinforce the perceived benefits of the System. In addition, emphasizing the confidentiality of the assessment process and the developmental intent of the System will help to minimize apprehension and encourage candor in completing the survey.

Begin your presentation by providing positive reinforcement to the group that their decision to participate in this program identifies them as a progressive group of dedicated volunteers. Their commitment to ongoing personal and professional development will provide a foundation for ensuring a successful future for their credit union.

Next, cover why the System was developed and the credentials of the organizations responsible for its development. It is important that participants understand that the format and content were shaped by

input from credit union leaders like themselves. In learning about the unique experience and perspective that Nice Enterprises, Inc. has after serving credit unions for so many years, volunteers can feel confident in the quality and value inherent in the System. Detailed information on these areas is provided in Section One of this guide.

The potential benefits of the System, for both individuals and the entire group, is the next area to be discussed. Some of the key benefits that should be highlighted include:

- A simple, practical and cost-effective method to: (1) identify volunteer training needs and (2) design effective developmental plans.
- A practical tool to enhance volunteer effectiveness and reduce the potential for personal liability.
- A confidential, objective and easy way to measure and track leadership improvement over time.

A significant portion of your presentation about the System(s) will deal with explaining how the System works.

This is described for you in Section 3. The key components of the systems which should be covered include:

- the role of the credit union coordinator;
- the structure of the surveys;
- Nice Enterprises' role in producing confidential reports of survey results;
- the contents of Individual & Group Assessment Results Reports; and
- using the *Blueprint for Success* to plan effective individual and group activities.

Ideally, you will want to encourage questions by participants throughout your presentation. However, at this point in your program, you will want to specifically invite any questions or feedback regarding how the System(s) is designed and the benefits to be derived from participation. When questions and discussion are completed, you will administer the survey, a process covered in the next section.

SECTION 7

ADMINISTERING THE SURVEY

Before you begin explaining how participants should complete the survey, you should distribute the appropriate form to each participant along with the appropriate envelope. Next, have participants check their personal survey form to verify that:

- ✓ the spelling of their name on the front cover is correct;
- ✓ only the “self-assessment” box above their name (on the inside of the survey) has been checked;
- ✓ their name and the column of 26 “rating” boxes below it have been highlighted; and
- ✓ the list of participants across the top of the inside of the survey is in the same order on everyone’s survey.

Once the above information has been verified, ask each participant to complete the demographic information requested on the front of the survey. All responses should be rounded to the nearest year. For example, if a participant has been a volunteer official for one year and eight months, he or she would answer “two.” If a participant is not sure about how long he or she has been a member or exactly the number of years served as a volunteer, he or she should write in an estimate. The question regarding occupation and title pertains to the type of

work and job title of the participant’s current, *paid* employment. Other appropriate responses to this question might include: “retired,” “homemaker” or “student.”

After the demographic information has been completed, ask participants to once again open up to the inside of the assessment survey. Review the scoring system and *allow participants to discuss* what they think each of the four ratings (1-4) means to them. Do not leave any rating areas blank. This discussion will help to increase consistency between how each individual applies the ratings to the individual questions.

Remind participants that the survey is confidential and should represent their personal assessment of actual performance only over the last year. Surveys should be completed individually, without group discussion of the ratings given. Although participants may want to discuss the survey questions among themselves, *strongly* encourage them to save this discussion until they receive the survey results and review the information in the *Blueprint for Success*.

It is recommended that participants rate themselves first, filling in their rating for themselves in each of the boxes in the highlighted column below their name. Participants should then rate the first 25 questions and answer question 26 for all other participants.

When participants fully complete their survey, they should place it in the envelope provided, seal it, and return it to the credit union coordinator. To simplify your administration of the survey, it is recommended that all participants complete their

surveys at the meeting. Although this is not required and may not be practical (i.e., if a volunteer is absent), it will streamline the process and ensure that the coordinator is available to answer any questions that may arise.

SURVEY ADMINISTRATION CHECKLIST

- ✓ Have participants verify that names are spelled correctly and listed **IN THE SAME ORDER** on **EVERY** survey.
- ✓ Have participants fill in the demographic information on the front of their surveys.
- ✓ Review the rating system (1-4) and how it should be applied to the questions.
- ✓ Have participants enter their self-assessment ratings in the boxes in the highlighted column below their names.
- ✓ Participants should then complete assessment ratings for the other group members. Remind them to do this independently to maintain confidentiality.
- ✓ Direct participants to insert their completed surveys in the envelope provided and return it to the credit union coordinator.

SECTION 8

AFTER SURVEYS ARE COMPLETED

To produce a complete and accurate assessment for each volunteer, it is critical that Nice Enterprises, Inc. receives a completed survey form from *every* participant. To ensure that you have received all the completed surveys, check off the names on each confidential survey envelope against the list of the participants you provided on the Credit Union Information Sheet.

Once you have received a completed survey (in the sealed envelope) from *ALL* participants in the group (i.e., all board and or supervisory committee members), return them *with* the completed Credit Union Information Sheet in the pre-addressed envelope provided. Before mailing, double check that you have the same number of completed survey envelopes as there are names listed on the Credit Union Information Sheet.

Remember that all completed surveys should be returned to Nice Enterprises, Inc. at **ONE TIME**, in **ONE ENVELOPE** within 90 days from the date on the Credit Union Information Sheet. You may wish to send the envelope via certified mail or express courier to ensure confirmation of delivery to Nice Enterprises, Inc. Because all surveys for a given group must be processed at one time, it is essential that all surveys arrive together in one envelope. Any surveys received separately will be processed as if they were separate groups, with only an individual's results report being produced. *If they are processed as separate groups, the credit union will be billed an additional set-up fee and annual ad-*

ministration fee for each separate mailing received after the first group. In addition, the results from any separately received survey will not be included in the group results already prepared.

Nice Enterprises, Inc. will process all surveys received at one time and return to the credit union coordinator a separate, confidential envelope for each participant. These envelopes contain the confidential report for the participant's individual assessment results, as well as the group results report showing the aggregated results for the entire group (i.e., board of directors or supervisory committee). You will receive the assessment results within 30 days of Nice Enterprises, Inc. receiving your package of completed surveys and the properly completed Credit Union Information Sheet.

IMPORTANT:

All completed surveys and the Credit Union Information Sheet must be returned together in *ONE envelope* to Nice Enterprises, Inc. within 90 days of the date on your Credit Union Information Sheet.

SECTION 9

IF YOU NEED FURTHER ASSISTANCE

Contact Nice Enterprises, Inc.

At 800 / TRY-NICE If You Have Questions About:

- any items missing from your Administrative Kit;
- ordering additional Assessment Surveys or *Blueprint for Success*;
- your invoice or payment processing;
- renewal orders to participate in the System(s) next year;
- your role as credit union coordinator or about survey preparation and administration procedures;
- clarifying information contained in the *Blueprint for Success*;
- the individual or group assessment results reports; or
- further assistance regarding volunteer development and education.