

UTILIZING ORGANIZATIONAL DEVELOPMENT TO FACILITATE CULTURAL CHANGE IN SAN MATEO

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EXECUTIVE SUMMARY

BACKGROUND

Organizational Development (OD) is a managerial strategy rooted in the behavioral sciences that has been used in the private sector to increase organizational and personal effectiveness. It is receiving increasing attention from social services directors, who have ultimate responsibility for moving their organizations forward during this period of monumental change.

I selected the topic because in my preliminary research I found a scarcity of information related to Organizational Development in the public sector. I wanted to know more about what other counties were doing and I also wanted to have the opportunity to share what we were doing in Monterey County.

THE ORGANIZATIONAL EXPERIENCE IN SAN MATEO COUNTY

Maureen Borland, Director, was instrumental in introducing the use of Organizational Development strategies to San Mateo County Department of Human Services. As a result of successful lobbying of the Board and CAO, Donna Woche was hired for a new position dedicated to Organizational Development.

Ms. Borland voiced strong, positive beliefs that using Organizational Development strategies and

creating an internal Organizational Development Manager position in the agency to function as a "change agent" played a significant role in the successful facilitation of the **Year 2000 Strategic Plan for San Mateo County Human Service Providers**, and for helped to implement the agency's new service delivery model.

Ms. Borland stated that managers and supervisors are now able to successfully employ many OD methods with less support from the Organizational Development Manager. San Mateo has, therefore, operationalized and integrated Organizational Development processes by creating a Human Resources and Development Section which includes Organizational Development, Staff Development and Personnel.

RECOMMENDATIONS FOR MONTEREY COUNTY

Recommendation #1: Maintain Organizational Development as it is currently positioned in the organizational structure, reporting to the director, and as a member of the executive team.

Recommendation #2: Continue to build trust and an environment of safety with staff and managers by emphasizing, as San Mateo did, the confidential nature of Organizational Development sharing for individuals and groups.

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Recommendation #3: Build support networks with other counties that are developing Organizational Development programs to share knowledge and experience.

Recommendation #4: Continue to strengthen the ties among Organizational Development, Staff Development and Personnel.

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BACKGROUND

Organizational Development (OD) is one strategy that has been used by many private sector employers to increase organizational and personal effectiveness through the use of behavioral science principles and practices. Until recently, the use of Organizational Development strategies by the public sector appears to be rare.

In recent years, particularly with the implementation of welfare reform, the need to transform the culture of public assistance organizations has become increasingly evident. In an article written by Jeanette Hercik entitled "Organizational Cultural Change In Welfare Reform" she refers to a recent needs assessment conducted for the U.S. Department of Health and Human Services, state Temporary Assistance to Needy Families (TANF) administrators listed the issue of culture change within state government as one of their key concerns about TANF implementation. Most observers concur that achieving success in welfare reform requires radical organizational culture change, especially in shifting employees' focus from eligibility assessments to job placements and retention.¹

In May of 1999, I was assigned to the position of Organizational Development Manager for the Monterey County Department of Social Services. The Director, Marie Glavin, announced my appointment as an important step in our commitment to create an organizational culture that consistently honors individuals and where there is a shared

responsibility and accountability for service excellence. The department had already completed cultural change training for all staff where individual accountability was stressed and a common language around the change process was understood.

I selected the topic of utilizing organizational development strategies in changing the culture of public organizations because in my preliminary research I found a scarcity of information on this topic. I wanted to know more about what other counties were doing and I also wanted to have the opportunity to share what we were doing in Monterey County.

WHAT IS ORGANIZATIONAL DEVELOPMENT?

Perhaps one of the most frequently asked questions of OD practitioners, and one of the most difficult to answer, is "What is Organizational Development?" People have often looked at me quizzically and asked "Just what is it that you do?"

OD has a variety of definitions. It is a recognized school of managerial theory rooted in the behavioral sciences. For the purposes of this paper, I have chosen three views that I noticed operating in both San Mateo and Monterey County.

In *Organization Development: Strategies and Models*, Richard Beckhard defines OD as follows:

1. It is a planned change effort.
2. It involves the total "system".

¹Hercik, J. (1998) Organizational Culture Change in Welfare Reform. *Welfare Information Network*, 2 (4), p. 1.

3. It is managed from the top.
4. It is designed to increase organization effectiveness and health.
5. Its goals are achieved through planned interventions using behavioral science knowledge.²

The second view defines OD by the kind of organizational conditions and operational goals that it strives to produce.

Lou Morse, in his Master's thesis on Organizational Development wrote that "the commonality of goals are cooperative group relations, consensus, integration, and commitment to the goals of the organization (task accomplishment), creativity, authentic behavior, freedom from threat, full utilization of a person's capabilities, and organizational flexibility."³

The third view I included is entitled *Organizational Transformation* (OT). OT and OD overlap in some areas and are, conceptually, quite different in others. OT arose, however, as an outgrowth of the discipline of Organizational Development. I mentioned OT in this paper because I found that those actively involved in utilizing OD concepts in social service agencies also regularly utilized OT approaches. J.D. Adams⁴ identified six themes that were used to organize the first book of readings on OT:

- Vision (Most often occurring as part of strategic planning processes);
- New Perspectives (Expanding awareness of potentialities beyond those conditioned through habit);
- Energy Fields (A metaphoric model borrowed from quantum physics describing energy in organizations by states such "fear" and "flow");

- Leadership (creating and sustaining the vision as well as encouraging individual learning);
- Performance Excellence (high performance programming and reinforcement as individual, team and organizational norms);
- Human Empowerment (By focusing on individual well-being, self-responsibility, development of the spiritual self, and alteration of self-limiting beliefs environmental conditions are created that tap individual potential);

THE ORGANIZATIONAL DEVELOPMENT EXPERIENCE IN SAN MATEO COUNTY

Director Maureen Borland was instrumental in introducing the use of OD strategies to San Mateo County Department of Human Services. In 1996, she successfully lobbied the Board of Supervisors for a dedicated OD position to function as an internal "change agent" to help with comprehensive changes related to implementation of a new service delivery model "Shared Undertaking to Change the Community to Enable Self Sufficiency" (SUCCESS). The organization had already experienced several years of substantial change related to reorganization, a change of directors, and a new strategic plan. Another compelling, contributing factor to the request for an OD position was the results of a self-assessment of all levels of staff that indicated they "needed more:

1. Understanding of the strategic plan;
2. feedback on how staff were doing in implementing the plan;
3. honest and open communications from bottom up and top down;

²Beckhard, Organization Development: Strategies and Models (Article, Addison-Wesley Publishing, 1969), pp. 9–14.

³Morse, L.H. "Task-centered Organization Development." (Master's thesis, Sloan School of Management, MIT, June 1968).

⁴Adams, J.D., ed. (1986) Transforming Leadership. Alexandria, VA: Miles River Press.

4. attention to concerns about customer service and productivity; and
5. attention to job performance and workplace stress.”⁵

When I met with Elsa Dawson, Program Manager II, and the facilitator for my 15-Day BASSC project, she was quite knowledgeable about the agency’s OD efforts. She indicated that she had been involved with OD implementation in conjunction with her strategic planning responsibilities. She provided me with copies of a case study that documented the experiences of the first few years of OD implementation in San Mateo⁵ and an information paper authored by Donna Wocheer about the strategic planning process.⁶

Donna Wocheer was hired in 1996 to head up the implementation of OD in San Mateo Department of Human Services after an extensive recruiting “search”. She came from a state university outside of California, and held two masters degrees, one in counseling and the other in organization development.

Wocheer understood her role to be “assisting the director to implement her vision”. She stated that her initial responsibilities centered around team building, including working with the executive team. She was also involved in the start-up activities for SUCCESS. SUCCESS implementation required the kind of changes that are often referred to as “paradigm shifts” such as changing from a centralized, autocratic organization to a regional, multi-disciplinary, multi-functional structure. Job concepts and functions changed as well as the way

staff worked with the community. Conditions such as shared job responsibilities emerged that had been rare in the “old” organization. Teamwork and collaboration skills became critical for all staff.

Two challenges that quickly surfaced involving the use of OD strategies were “it was not easy for senior managers to incorporate OD approaches into their domains because OD symbolized the potential for redistributing power within a unit or division; whereby staff could be empowered to voice their concerns without fear of retribution” and “staff often did not welcome her because they saw her as “a spy for the management team.” (Page 6 of the Case Study)

Several strategies were employed to minimize staff resistance to the OD position. The most important involved the sharing of information. A highly professional, confidential process was necessary whereby only general information was shared with the director or executive staff surrounding OD interventions. This process permitted managers and supervisors to refer concerns to the OD manager for evaluation but not to obtain details about the intervention.

EVALUATING THE RESULTS

In August 1999, the San Mateo case study was completed, the following preliminary lessons were recorded⁶:

1. *It is important for the internal OD specialist to invest the necessary time and energy in developing a close working relationship between staff*

⁵Borland, M. & Kelley, J (1997). How are we doing? San Mateo County’s organizational assessment and service survey. Guiding Organizational Change: A casebook for executive development in the human services. Bay Area Social Services Consortium, Fourth edition. Berkeley, CA.

⁶Austin, Dubrow and Wocheer, (August, 1999) Introducing Organizational Development (OD) Practices into a County Human Service Agency. Bay Area Social Services Consortium. Berkeley, CA

and management. This referred to building trust, communication and sharing information between the two groups.

2. *The internal OD specialist does not develop change recommendations for the agency.* It was believed that OD was modeled by helping staff to “sort out their options by documenting feelings and needs, collectively developing action plans, and demonstrating how to confront and deal with problems.” In Monterey County the Organizational Development Manager participates more fully in this process including participating in the developing of recommendations.
3. *Provide information to all levels of staff at the same time.* This is an important point for group facilitations and interventions, but may not apply in all situations.
4. *Organization development is not a solution to all of the agency’s problems.* Individual behaviors may not respond to OD methods. “Some staff feel threatened by OD practices and are not interested in using them as tools for changing organizational processes.”
5. *Relationship-building and sustaining has several levels: (1) creating and nurturing; (2) trusting and supporting; (3) risk-taking and new learning.*
6. *While OD specialists are in a unique agency position to see both sides of an issue since they are not in the chain of command to manage or deliver agency services, they need to help other expand their capacities to see and sense.*
7. *It is crucial to monitor the changing and multiple staff perceptions of the OD function.* OD specialists need to continuously monitor their work in

order to identify the different ways in which staff perceive their interventions.

8. *Moving from project learning to individualized learning requires time and patience.*
9. *Communication and collaboration with staff development is essential.* Since many of the organizational issues identified indicate needs for additional training, on-going communication and collaboration between OD and staff development are crucial.

In April, I met with Maureen Borland to discuss San Mateo’s OD experience. Ms. Borland voiced a strong, positive belief about the part that a commitment to the use of OD strategies and the addition of an internal OD manager in the agency had played in the agency’s successful transition to a new service delivery model and the successful development of the **Year 2000 Strategic Plan for San Mateo County Human Services Providers**. She believed, however, that San Mateo’s success with OD had depended on an agency-wide commitment that was strongly supported from the top. For this reason, the OD position’s reporting responsibility was assigned to the director in a consulting role. Now, however, after several years of experience learning and utilizing OD concepts, she believes that managers are able to function more independently and that the agency is ready for more direct exposure to OD strategies at the operational level. Toward this goal, Ms. Borland recently assigned supervision of the agency’s staff development and personnel operations to the OD Manager.

OTHER INTERESTING DEVELOPMENTS RELATED TO OD IN THE PUBLIC SECTOR

In a progress report that was presented to the

Directors by the BASSC Human Resources Committee in February 2000, it was noted that “Organizational Development has emerged as a crucial aspect of the learning organization” and that it is increasingly clear that learning organizational principles and practices are linked to organizational development activities...Our ability to succeed depends, in part, on our willingness to question and challenge the old ways of doing business and to be open to new ideas.”⁷

The Human Resource Subcommittee to CWDA had its first operational meeting on January 27, 2000. Careful integration of OD programs so that “a coherent approach is used to change for the better the ways in which people carry out their work and interact with others” was determined to be a top priority for the committee during the coming year.⁸

RECOMMENDATIONS FOR MONTEREY COUNTY

Recommendation #1: Maintain OD as it is currently positioned in the Department, reporting to the director, with membership on the executive team.

Under Marie Glavin’s leadership, Monterey County Department of Social Services has committed significant resources and made great strides toward implementing OD. OD operates in Monterey County similarly to San Mateo County during the first three years in that the Organizational Development Manager reports to the Director and acts as consultant to the executive team. As a result, many innovative developments are taking shape within the department. OD staff and processes are gaining credibility with staff as familiarity and trust grow.

Because San Mateo has operationalized and integrated OD, they have created a Human Resources and Development Section which includes Organizational Development, Staff Development and Research. Monterey County’s experience with OD is more recent and OD management principles have not yet been fully implemented. Consequently, there is still a need in Monterey County for a strong presence and direct connection of OD to the office of the Director. When OD has been solidified in the culture of the organization, this point could be revisited.

Recommendation #2: Continue to build trust and an environment of safety with staff and managers by emphasizing, as San Mateo did, the confidential nature of OD sharing for individuals and groups.

Although confidentiality in OD processes is practiced and has a high value in Monterey County, its importance in the establishment of trust and safety in the organization cannot be underestimated.

When processes and staff have strong support from the director and are positioned in close proximity with executive staff, OD consultants must be able to assure those with whom they work that the process has a high level of freedom from management scrutiny in order for people to be comfortable to discuss and develop ways to deal with conflicts.

San Mateo’s OD Manager assured those with whom she worked that she would verify that information accurately represented the staff involved in interventions before it was shared. I recommend that Monterey include references to “confidentiality” as a marketing point in materials and discussions about OD processes.

⁷Becoming Learning Organizations: A Progress Report. (February, 2000) Prepared by the BASSC Human Resources Committee for the Bay Area Social Services Consortium.

⁸CWDA HR & Staff Development Committee Meeting Minutes (January, 2000). Mailed to all CWDA Directors by Kathleen Irvine, Director, Kern County and Chair of the Committee.

Recommendation #3: Build support networks with other counties that are developing OD programs to share knowledge.

OD is a growing methodology that is receiving increasing attention from social service directors who have the ultimate responsibility for moving their organizations forward during these times of monumental change. It is a relatively new strategy within the public sector for which there are few sources of information. Developing networks and sharing information and knowledge will help to document the validity and applicability of this emerging discipline. It will also provide a support network for OD practitioners, who may have few other resources available to them.

Recommendation #4: Continue to strengthen the tie with Staff Development and Personnel.

San Mateo County stressed the importance of the OD/Staff Development link since many of the organizational issues identified indicate a need for additional training. There are also strong links between the roles of OD and Personnel with respect to hiring, retention and employee relations.

The Triad Committee was established to increase collaboration among OD, Staff Development and Personnel in Monterey County. Management support of this committee will emphasize the importance of collaboration among these functions and strengthen the natural connections that exist.

CONCLUSION

With Ms. Glavin's recent resignation, a new director will soon assume leadership of the department. Under Ms. Glavin's leadership, OD has earned a positive reputation with staff, managers and supervisors. It is effectively positioned to be of assistance to a new director to facilitate a smooth leadership transition and the movement forward of a new vision.

ACKNOWLEDGEMENTS

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I am also grateful for my affiliation with the BASSC Human Resources Committee where I established relationships with others who have an understanding of what is involved in bringing Organizational Development functions to a social services agency!

And my heartfelt gratitude to Marie Glavin for her vision and for giving me her support and the opportunity to do such interesting and exciting work.