Introducing Organizational Development (OD) Practices into a County Human Service Agency*

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ABSTRACT

Organization development (OD) is one approach to managing change within an organization. In this case study, organization development is defined as a top-management-supported, long-range effort to improve an organization's problem-solving and renewal processes, particularly through a more effective and collaborative diagnosis and management of the organization's culture. It is rare that a public county human service agency has the opportunity to incorporate an internal organizational development (OD) function to assist with managing organizational change. This is a case study of one such agency which hired an internal OD specialist to facilitate organizational restructuring related to the implementation of welfare reform. The case study is based on the first three years of implementation (1996–1999).

KEYWORDS: Organizational development, human services, change management

It is rare that a public county human service agency has the opportunity to incorporate an internal organizational development (OD) function to assist with managing organizational change. This is a case study of one such agency which hired an internal OD specialist to facilitate organizational restructuring related to the implementation of welfare reform. The case study is based on the first three years of implementation (1996-1999). It is organized into the following sections: highlights from the literature, the assessment center approach to hiring an OD specialist, an array of agency-based OD start-up initiatives and a concluding section on some of the "lessons learned" from this work in progress.

Organization development (OD) is one approach to managing change within an organization. While there are many definitions of OD, the following definitions are most relevant to this case study:

> Organization development is a top-management-supported, long-range effort to improve an organization's problem-solving and renewal processes, particularly through a more effective and collaborative diagnosis and management of organization culture-with special emphasis on formal work team, temporary team, and intergroup culture-with the assistance of a consultant-facilitator" (French & Bell, 1990, p. 17). Organization development focuses on assuring healthy interand intra-unit relationships and helping groups initiate and manage change through primary emphasis on relationships and processes between and among individuals and groups (designed) to effect an impact on the organization as a system. (McLagan, 1989, p. 7)

Rothwell et al., (1995) provide a brief description of the following key steps in an OD intervention:

1. **Entry:** A problem is discovered and the need for change becomes apparent in the organization. Someone in the agency looks for an individual who is

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capable of examining the problem and facilitating change.

2. **Start-Up:** The change agent begins to work with agency staff to identify issues surrounding the problem and to gain commitment from staff for participating in the change effort.

3. **Assessment and Feedback:** The change agent gathers information about the problem and provides feedback about the information to those having a stake in the change process.

4. **Action Planning:** The change agent works with decision-makers and stakeholders to develop an action plan to correct the problem.

5. **Intervention:** The action plan is implemented and the change process is carried out.

6. **Evaluation:** With the change agent, decision-makers and stakeholders assess the progress of the change effort.

7. **Adoption:** Members of the agency accept ownership of the change, which is then implemented throughout the agency or work unit.

8. **Separation:** The change agent is no longer needed for the change project because the result has been incorporated into the agency. Staff will assume responsibility for ensuring that improvements continue.

These steps are then carried out using a variety of OD interventions, or activities, such as those identified by Stacey (1992): diagnostic data collection, team-building, intergroup communications, survey feedback, training and education, restructuring, process consultation, coaching and counseling, and strategic management and planning.

Given the definitions of OD, the major steps in an OD process, and the array of OD techniques, it is important to note the following observations of Rothwell et al., (1995) when it comes to developing realistic expectations for what OD can and cannot accomplish:

- OD is long-range in perspective and not a "quick-fix" strategy for solving short-term performance problems.

- While OD efforts can be undertaken at any level within the agency, successful OD interventions need to be supported by top managers.

- OD expands worker's perspectives so that they can apply new approaches to old problems, concentrating on the work group or organization in which these new approaches will be applied.

- OD emphasizes employee participation in the entire process from diagnosing problems to selecting a solution to planning for change, and evaluating results.

- The process of organization development is most effectively facilitated by a consultant who is either external or internal to the agency.

With these caveats and guidelines in mind, the Human Services Agency of San Mateo County, California began the process of envisioning the involvement of an internal OD consultant. Before describing the process, it is important to note the highlights from the limited literature on OD in the human services.

Literature Review Highlights

While the OD literature reflects many more examples of applications from the private sector than from the public human services, this brief review highlights some of the challenges of using OD practices in a human service agency. The bureaucratic nature of public social service agencies and the general absence of leadership familiar with innovative processes for accomplishing change have created "closed systems" that are often inflexible and resistant to change. OD requires an "open system" in order to succeed (Norman & Keys, 1992). The organizational culture of maintenance and survival, along with the unique constraints imposed on public social service agencies, creates unique challenges for OD interventions (Resnick & Menefee, 1993; Golembiewski, Proehl, C., Jr., & Sink, 1981). Successful change processes in human service organizations require mechanisms and models that can deal with the organizational complexity as well as guide diagnosis, action planning, and implementation (Martinko & Tolchinsky, 1982).

Burke (1980) noted that "most OD consultants find working with bureaucracies, especially public ones, to be difficult at best" (Golembiewski et al., 1981, p. 679). Documented applications of OD in the public sector tend to focus on resolving: racial tension; conflict between individuals, specialties, and organizational units; community conflict; and tensions emanating from reorganization (Golembiewski et al., 1981). Research indicates that OD in public organizations can work particularly well with modest goals, acceptance of unexpected setbacks, and willingness to tackle manageable issues as opposed to attempting to change an entire system at one time. OD may be more useful for "fine tuning" and improving operations rather than bringing about massive change (Stupak & Moore, 1987).

While OD may confront unique challenges in the public sector, it is important to identify some of the reasons for these challenges before exploring specific OD applications in the human services. French et al. (1989) and

Golembiewski (1989) pointed out the following major factors that impact the application of OD to the public and service sectors:

1. Public and private organizations have different measures of organizational effectiveness than the for-profit sector, especially the lack of clear-cut, verifiable outputs that lend themselves to objective measurement (in contrast to the financial bottom-line in the for-profit sector).

2. The public sector places greater emphasis on regulatory constraints and a diffusion of power (legislative directives, civil service rules, confidentiality requirements) due to the complex system of checks and balances which make it difficult for top management to make long-term commitments (as is the case in the private sector).

3. The conditioning of executives in the public sector to favor management styles that maximize sources of control and minimize the discretion of subordinates. As Golembiewski (1989) noted, the chain of command characterized by competing identifications and affiliations, often producing a fragmented management hierarchy and old public sector management habits favor patterns of delegation that maximize the sources of information (as seen in the term "direct reports") and minimize the control exercised by subordinates.

4. There is far more public scrutiny of the decision-making process in the public sector related to open meeting laws and the role of the media. As Golembiewski (1989) noted, there is multiple access to an array of decision makers (political and managerial) that seeks to assure that the public's business gets looked at from a variety of perspectives. He also observed that a greater variety of individuals and groups are involved in decision-making, each with its own set of interests, values and reward structures, than in the for-profit sector.

5. There are outdated views of professionalism and change (e.g., taking the position that staff training is unnecessary if you hired people who have the abilities to do the job or using old fiscal procedures that include practices which no longer made sense) (Golembiewski, 1989).

These constraints clearly document the challenges facing the introduction of OD strategies into public sector organizations. While it is important to keep these constraints in mind, it is also useful to look more closely at a few case studies of the use of OD in public social service agencies provide some specific examples of OD applications. Norman and Keys (1992) describe their external OD work in the Department of Public Social Services in Riverside, California where they used process consultation and team-building to address the lack of teamwork, peer consultation, and change management capacities. It concluded with OD training for supervisors.

A second case, described by Martinko and Tolchinsky (1982), takes place in a state department of social services where a training needs assessment led to the planning and implementation of the following activities: (1) a role-clarification process for all levels of management; (2) training activities designed to foster greater integration of service delivery in a matrix organization; (3) performance review training; and (4) first-line supervisory training. During the intervention process, the consultants found that legislative action at the state and federal levels often superseded both program and managerial decisions (e.g. legislative mandates requiring uniform salary increases and mandated program reporting procedures) which required considerable sensitivity and flexibility from the OD practitioner in order to successfully conduct meaningful interventions in a highly politicized, bureaucratic system.

A third case, described by Glassman and McCoy (1981) features the Los Angeles County Bureau of Social Services (BSS) and its efforts to deal with budget cutbacks, increasing caseloads, and a loss of a sense of control among workers and administrators. In an effort to shift the culture of the organization from a "crisis-oriented" perspective to one that is forward-looking and proactive, the external OD consultant "teamed-up" with an internal change agent to assess organizational goals and programs; agency resources; existing managerial systems; staff training needs; staff commitment to the profession and the department; staff participation in decision-making; and job satisfaction. With this information, the change agents observed and facilitated staff meetings by assisting with defining goals and objectives, improving communication processes, and assessing group behaviors and identifying areas of influence. This work culminated in an OD plan developed in consultation with the Bureau's executive committee to work extensively with line supervisors as well as foster improved relationships between all managerial personnel and line workers.

The common themes emerging from these case examples relate to the need for an external OD consultant to provide technical assistance with goal setting, shared decision making, conflict resolution, work group cooperation,

and staff training on OD techniques (Norman & Keys, 1992). Similar themes are illustrated in this case study of San Mateo County Human Services Agency noted below.

Defining Organizational Development and the Need for a Specialist

Numerous factors contributed to the creation of a permanent, full-time organization development (OD) staff position within San Mateo County Human Services Agency. In 1992, a newly reorganized agency and a new director, followed by a new strategic plan completed in 1993, marked the beginning of a comprehensive organizational change process. All aspects of the agency were impacted including service delivery, increased use of teams, organizational structures, and community relationships. In 1995, following the implementation of many changes, the agency conducted a self-assessment involving all levels of staff in order to "take the pulse" of the agency and identify staff needs and perceptions. The self-study indicated that agency staff were struggling to keep up with the myriad of changes and 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, (4) attention to concerns about customer service and productivity; and (5) attention to job performance and workplace stress (Borland & Kelley, 1997).

Throughout this change process, an external OD consultant had been working with the agency to involve external community groups and internal agency stakeholders in the agency's strategic plan. This consultant worked with a group of staff who were to become internal change agents skilled in strategic planning, facilitation skills, and change methodology. In addition, the external consultant worked with the executive staff to expand their views beyond managing their particular job functions and assume new roles as agency-wide leaders. Because the strategic plan called for agency-wide change, the external OD consultant recommended the hiring of a full-time internal OD specialist which the agency director saw as a more cost-effective strategy for the agency. Such an individual would be available to work with staff on a regular basis, engage in "hands-on" problem solving, acquire and use an insider's view of the agency's future directions, and contribute to the skill base of staff at all levels with respect to learning and applying OD techniques.

The idea for creating an internal OD specialist was further helped by increased attention throughout the county in 1996 to the field of organization development. For the first time, the county sponsored an 18-month OD course for representatives from each county department to prepare them to work periodically as OD "consultants" throughout county departments. This development helped the director of Human Services present a convincing case to the County Manager for the creation of an internal OD position. The director documented the need for internal OD services to help implement a new model of service delivery (the SUCCESS program and school-linked service teams). The director also assured the county manager that creating this staff position would complement the county system by involving the OD specialist in teaching county OD courses and consulting with other county departments.

Hiring Process

Because of the high stakes associated with bringing a change agent into the agency through the creation of this new position, the executive team devoted considerable efforts to developing a job description, recruiting, and using an assessment center strategy to pick the best candidate. The position called for designing and facilitating processes to help the agency deal with significant change and required experience in process design, workflow analysis and re-engineering along with knowledge of OD theory and practice and public sector management systems. The major skill sets included the ability to establish collaborative relationships, build consensus, foster effective intra- and inter-group communication, and demonstrated ability in effectively utilizing an array of OD interventions. After an unsuccessful effort to recruit through local newspapers and informal human resource networks, it became clear that a national search was needed. By accessing the Organizational Development Network and university OD programs, a pool of qualified applicants was developed by identifying persons with OD training and experience.

The assessment center strategy included the process of presenting to top candidates an array of agency problems and role-plays in order to observe the candidates in a simulated OD consultant role. *Figure 1* reflects a matrix of the assessment criteria and activities. Candidates also engaged in private consultations with the agency director and were asked to develop and present a plan to senior staff which addressed specific agency problems. The assessment center approach included an opportunity to observe candidates in a "leaderless group" where they worked together to solve a problem, while being observed and evaluated by the executive staff and consultants. Another activity required applicants to facilitate a meeting among a group of staff members

FIGURE 1
Human Services Agency Senior Organizational Development Consultant Assessment Center

DIMENSIONS	Application Screening	Panel Interview	Facilitation Exercise	Leaderless Group Exercise
Adaptability	X	X	X	
Analytical	X	X	X	X
Awareness of Political Ramifications		X		
Career Orientation	X			
Decision Making	X		X	
Interpersonal Relations		X	X	X
Leadership				X
Oral Communication		X	X	X
Teamwork		X		X
Technical Experience	X	X	X	X
Written Communication	X			

who were intentionally resistant to having a successful meeting, based on pre-scripted roles. Third, each candidate met with various senior managers to review different presenting problems and, based on limited data, provide a response by framing the issues. Finally, the candidates were required to make a presentation to the executive staff about a previous client, reviewing his/her process of start up, data collection, feedback, intervention, and evaluation in working with this client.

The OD specialist who was selected came to her position with two masters degrees, one in counseling and the other in organizational development. Her primary OD experience was in a large state university and included: (a) organizational assessment (using focus groups, needs assessment surveys, team effectiveness surveys, action research related to sources of conflict and service inefficiency, and executive assessment and feedback); (b) inter and intra-departmental team-building and small group facilitation related to fostering collaboration, facilitating strategic planning, team start-up, and program design; (c) organizational training related to management development, diversity training, organizational change management, and quality management, and (d) individual coaching and consulting. Since her move to San Mateo, she is concurrently pursuing a doctorate degree in OD and is interested in developing a research focus in organization development in order to complement her work as an OD practitioner.

OD Entry

The entry phase for new managers is complex under the best of circumstances (Austin, 1989). Learning about a new organizational culture, clarifying one's job description, and assessing realistic start-up activities can be totally consuming. This process becomes even more complex when the senior management role is new and not well-understood by other senior managers, let alone staff at other levels of the organization. This was the case for the first OD specialist hired by the agency. It took awhile to fully develop a comprehensive OD job description and then find ways to communicate the OD function to the rest of the staff. *Figure 2* includes the updated job description as of 1999.

In the midst of this entry phase, the organization was going through a culture change of its own, where the vestiges of centralized autocratic management processes and scapegoating among staff were being replaced with a strong decentralized community focus based on teamwork and collaboration. It became apparent to the OD specialist that the organizational culture reflected significant capacities to identify problems but fewer skills in problem-solving. 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.

As a result of concerns about the loss or gain of power, early OD efforts were primarily framed as projects which would impact more than one unit or department in the

FIGURE 2
Program Service Manager Positions–Organization Development

Current Classification: Organization Development Manager
Current Position Title: Organization Development Manager
Report to: Agency Director

Primary Functions

Supervision

Supervise organization development work of internal and external consultants

Consultation Services–Organizational and Group Levels

- Consult to the agency directors, managers and supervisors on organizational structure, system and policies (reward, performance and career systems), organizational procedures (decision-making, communications), job design, practices and procedures that impeded efficient functioning, leadership behaviors, and group processes.

- Provide action research services to the agency directors, managers and supervisors about structure, technology, culture, performance management and organizational feedback systems.

- Provide consultation, training and education on process improvement to process improvement teams and self-directed work teams where applicable.

- Design organizational and group level questionnaires and focus group interview schedules.

- Conduct organizational and group level diagnosis using questionnaires and focus groups.

- Summarize and analyze data for agency directors, managers, supervisors, teams and community partners.

- Prepare and present status reports for purposes of action planning by the agency directors, managers, supervisors, staff and community partners.

- Design, develop, implement and evaluate interventions to address agency needs as identified through organizational and group level diagnosis, i.e., role negotiation intervention for agency directors, program and support managers, and supervisors.

- Design, develop, implement and evaluate team start-up, team development, and team maintenance retreats with agency directors, managers, supervisors, staff and community partners to decrease intergroup competition and enhance collaborative work efforts.

- Educate the SUCCESS ADVISORY STRATEGIC PLANNING COMMITTEE regarding the elements of strategic planning and implementation.

- Conduct an environmental analysis for the welfare reform industry, and the agency's environment, as well as external and internal stakeholders through research, focus groups and surveys in conjunction with the SUCCESS ADVISORY STRATEGIC PLANNING COMMITTEE.

- Research and educate the agency directors, managers, supervisors, staff and community partners about new methods of change management, planning and organization development processes.

- Design, develop, instruct and evaluate curriculums to support ongoing interventions, i.e., coaching, change management, etc.

- Deliver process consultation to intact teams and workgroups including the executive team, regional implementation teams, etc.

- Develop and implement evaluation tools and instruments to measure the effectiveness of organization development and interventions.

Consultation Services–Individual Level

- Mentor and instruct directors, managers and supervisors through on-the-job training how to do short and long term planning, strategic planning, process improvement, succession planning, performance analysis.

- Provide performance coaching to agency directors, managers, supervisors and staff.

- Assess performance of agency directors, managers, supervisors, and staff through the use of psychological tests, questionnaires, checklists.

- Administer instruments (see above item for complete listing), score, interpret and feedback data to client for performance related action planning.

Consultation Services–County-Wide

- Design, develop, instruct and evaluate San Mateo County's organization development curriculum for directors and managers in San Mateo County departments and other county agencies.

- Design, develop, instruct and evaluate course components, re: Interdisciplinary Practice for the Bay Area Social Services Consortium.

- Design and develop a case study, re: change management for the Bay Area Social Services Consortium.

- Consult to other agency directors, managers and supervisors on organizational structure, system and policies, organizational procedures, job design, and practices and procedures that impede efficient functioning, leadership behaviors, and group processes in conjunction with the San Mateo County organization development consultants. This work to be performed quid pro quo.

- Present at local, regional and national meetings and conferences on the organization development work performed for the agency.

Other Areas of Responsibility
Coordinate and write quarterly implementation report. Write articles for the newsletter.
Attend implementation team meetings.
Attend Executive and Management Team Meetings and provide process consultation. Special projects and assignments.

agency. Line supervisors were most responsive to this approach. Out of projects grew opportunities for individual coaching and consulting as staff at all levels became more comfortable with the role of an OD specialist.

The OD specialist was gradually introduced throughout the agency, in order to minimize staff resistance to her position. In recalling this period of her work, the OD specialist said that staff often did not welcome her because they saw her as "a spy for the management team." Yet she viewed her main objective as helping the "client," which she defined as the entire agency, rather than to serve an individual supervisor or worker. Her primary responsibility was to assist the "client" (agency) in accomplishing changes that were identified as desirable. Specifically, her first goal was to help staff change the service delivery system into a seamless, "one-stop" model that required substantial change in the agency's culture. She viewed her responsibility as helping the agency identify "points of leverage for the changes" and developing resources to sustain organizational changes, rather than as advocating for specific changes. As she was gradually introduced throughout the agency, she used many of the classic OD skills related to gaining acceptance, gathering and analyzing data, framing complex issues, developing options, and educating staff about OD principles and practices (Blake & Mouton, 1970).

The OD specialist applied these skills throughout the agency as illustrated in the following examples:

- *Fostering acceptance:* While some staff resisted efforts to address feelings about the workplace and difficulties in dealing with changes, other staff welcomed the opportunity to discuss their feelings with her.

  The OD specialist worked first with the Executive Team so that staff and top management could see how she operated to help improve staff meeting processes and priority-setting by gathering the perceptions of individuals, aggregating the findings, and collectively developing guidelines to deal with shared needs. The outcome was a new structure for presenting new ideas at meetings, a sponsor system to assist outsiders make presentations, and increasingly productive meetings based on sharply focused agendas and reduced interpersonal friction. Other outcomes included annual review of performance objectives (Key Results Areas linked to the agency's strategic plan) and the establishment of a new Policy Group related to Human Resources focusing on issues related to succession planning (powerful demographics related to a wave of future retirement),

leadership development, career development, and mentoring

- *Collecting data and information:* Valuable data was available when the OD specialist assisted staff in their preparation to work in multifunctional teams through the use of "team start-up" activities. Staff concerns simply bubbled up to the surface. For example, she sought to create a shared understanding between management staff and line workers about implementation of new job functions (e.g. assisting Income/ Employment Services Specialist identify the new case management responsibilities). In performing this type of assistance, the OD specialist was able to gather data and information based on what management staff wanted to know, and what line staff needed in order to function effectively, thereby helping identify gaps in understanding between the groups.

  Other OD-led data collection activities included the use of internal process evaluation to identify implementation issues. These efforts complemented the external program evaluation of service outcomes. The major benefit of these two approaches to evaluation was to demonstrate to staff that the evaluation of "what" is to be accomplished needed to be balanced with an ongoing evaluation of "how" objectives are being implemented. These are two key elements of continuous process improvement. These efforts have led to the development of a Comprehensive Guidebook to facilitate the linkage between contract agencies providing client services and the agency's automated case management information system.

- *Framing difficult issues:* Through the process of data collection and information gathering, the OD specialist determined that staff was not responsive to the term "strength-based services" (e.g., building on client strengths) which had been promoted by senior management. This was an area of disconnect between the expectations of management and the understanding of line staff. Management staff assumed that the staff had understood and adopted the concept of "strength-based services," while staff members were generally not familiar with the skills sets needed to implement this service delivery approach. By pointing out the tension between the various conceptual frameworks for the provision of services held by management and line staff, the OD specialist helped to create a readiness to

engage collaboratively in effective issue identification and problem-solving.

- *Developing options for group decision-making:* While OD specialists are positioned to identify many areas for improvement, the goal of an internal OD specialist is to provide senior management with a range of options for the effective implementation of change. The framing of options, and the shared thinking about additional options, maximizes flexibility and creativity. Being overly prescriptive can deprive staff of the ultimate ownership of their problem-solving process. In essence, the OD specialist developed recommendations in partnership with management staff.

  For example, creating the new matrix management structure (see *Figure 3*) required senior managers to shift from managing one service (e.g., child welfare) to an array of services in a region of the county linked to implementing the new geographically-based service delivery system. The OD specialist assisted the group of managers identify potential challenges, establish new accountability processes, facilitated the work of new cross-staff policy teams, and created communication systems related to improving information systems and meeting management through electronic calendaring.

- *Demonstrating OD principles and practices:* Before presenting data collected from staff focus groups regarding their responses to agency changes, the OD specialist prepared staff by focusing on how individuals commonly react when they receive survey results about themselves. The goal was to minimize defensiveness. Then if they did respond defensively, the OD specialist worked with the staff to explore their reactions by demonstrating OD principles and practices.

The OD specialist also engaged in a great deal of process consultation to help team members improve their capacities to function as team members. In particular, she helped staff deal with significant organizational change by validating their understandable resistance and framing problems as systems issues related to organizational change instead of personal issues related to job performance. It was striking to find so much internalization of change directives where the need for change was perceived to be related to poor worker performance. Facilitating open exchange between management and staff in meetings for all staff to attend began to model OD approaches for fostering open communications. One of the significant outcomes of these efforts was the staff

realization that they had more operational control of their areas of activity than they had realized and that they could take responsibility for initiating change.

Ongoing OD Consultation

Beyond the major activities just described, the OD specialist is also available as a consultant to respond to requests for assistance in dealing with team functioning or individual staff issues. These requests include:
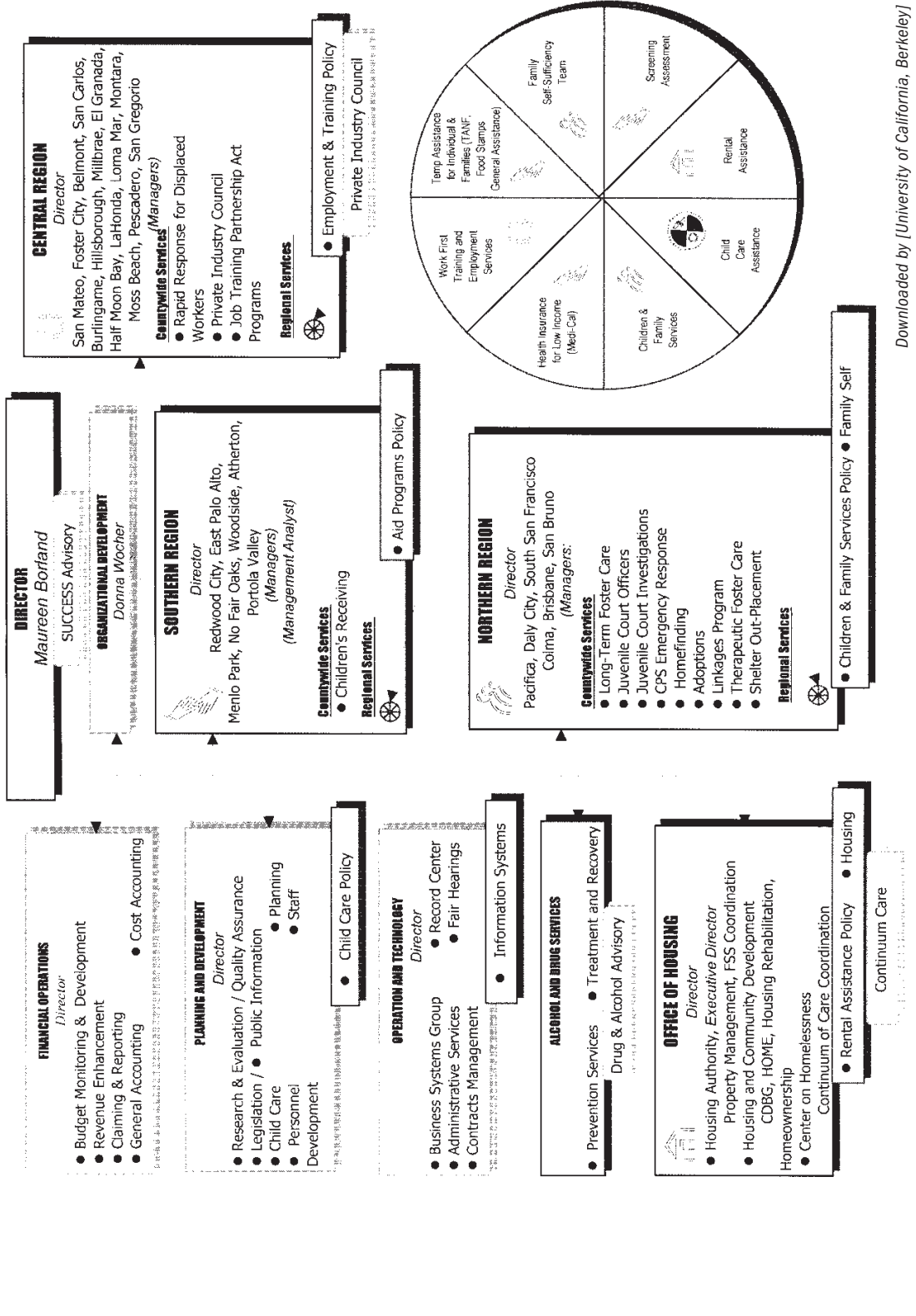
- **Periodic Strengthening of Team Building:** Assist team members in examining methods and procedures for working more effectively on problems and issues (offered to teams that have worked together for 4-6 months).
- **Expanding Meeting Management Skills:** Work with committee chairpersons to design effective meeting processes and procedures that accomplish the charge of the committee and motivate committee members to continue working together.
- **Developing an OD Training Course:** Foster OD skills and techniques among key staff throughout the agency.
- **Coaching:** Support staff in learning how to acquire the skills to get the desired results from others.

Given the successful completion of the entry phase (3 years) of introducing OD into the agency, the agency director decided it was time to fully integrate organization development into all aspects of human resource development by promoting the OD Specialist to Manager of Human Resource and Development (all staff development and personnel functions). The primary purpose of this change was to train and coach current "trainers" into new roles as internal consultants engaged in assessing organizational issues and providing coaching and training on workplace issues. This transition was completed with the assistance of an external OD consultant. A second purpose was to create a Human Resource Policy Team that would oversee the implementation of a leadership and management development structure consisting of orientation, succession planning, multi-source feedback, career development, and recruitment and retention strategies. All these elements are part of a new human resource strategy to be implemented by the new OD/HRD division and manager by March 2001.

Lessons Learned from a "Work In Progress"

There were numerous issues that the executive staff considered before hiring an OD specialist, given the high

FIGURE 3
Human Services Agency

DIRECTOR
Maureen Borland

SUCCESS Advisory

ORGANIZATIONAL DEVELOPMENT
Donna Wocher

CENTRAL REGION
Director

San Mateo, Foster City, Belmont, San Carlos, Burlingame, Hillsborough, Millbrae, El Granada, Half Moon Bay, LaHonda, Loma Mar, Montara, Moss Beach, Pescadero, San Gregorio

Countywide Services *(Managers)*
- Rapid Response for Displaced Workers
- Private Industry Council
- Job Training Partnership Act Programs

Regional Services
- Employment & Training Policy
  - Private Industry Council

SOUTHERN REGION
Director

Redwood City, East Palo Alto, Menlo Park, No Fair Oaks, Woodside, Atherton, Portola Valley
(Managers)
(Management Analyst)

Countywide Services
- Children's Receiving

Regional Services
- Aid Programs Policy

NORTHERN REGION
Director

Pacifica, Daly City, South San Francisco Colma, Brisbane, San Bruno
(Managers:

Countywide Services
- Long-Term Foster Care
- Juvenile Court Officers
- Juvenile Court Investigations
- CPS Emergency Response
- Homefinding
- Adoptions
- Linkages Program
- Therapeutic Foster Care
- Shelter Out-Placement

Regional Services
- Children & Family Services Policy ● Family Self

FINANCIAL OPERATIONS
Director
- Budget Monitoring & Development
- Revenue Enhancement
- Claiming & Reporting
- General Accounting
- Cost Accounting

PLANNING AND DEVELOPMENT
Director
- Research & Evaluation / Quality Assurance
- Legislation / ● Public Information
- Child Care
- Personnel Development
- Planning
- Staff
- Child Care Policy

OPERATION AND TECHNOLOGY
Director
- Business Systems Group
- Administrative Services
- Contracts Management
- Record Center
- Fair Hearings
- Information Systems

ALCOHOL AND DRUG SERVICES
- Prevention Services ● Treatment and Recovery
  Drug & Alcohol Advisory

OFFICE OF HOUSING
Director
- Housing Authority, *Executive Director*
  Property Management, FSS Coordination
- Housing and Community Development
  CDBG, HOME, Housing Rehabilitation, Homeownership
- Center on Homelessness
  Continuum of Care Coordination
- Rental Assistance Policy ● Housing
  Continuum Care

Temp Assistance for Individual & Families (TANF, Food Stamps General Assistance)

Family Self-Sufficiency Team

Screening Assessment

Rental Assistance

Child Care Assistance

Children & Family Services

Health Insurance for Low Income (Medi-Cal)

Work First Training and Employment Services

stakes associated with creating a staff position for someone whose primary job was to facilitate organizational changes. Although many of the executive team members were interested in filling the position, they were also aware of the potential for negative staff reactions to an internal OD specialist. One common concern was that the OD specialist would be viewed by staff as the administration's representative hired to enforce change, especially related to implementing the SUCCESS model. Anticipating this reaction, the executive team gave careful consideration to selecting a supervisor for the OD specialist, and selected the agency director so that every area of the agency could be open to OD consultation. In an effort to anticipate the feeling of being "spied on," staff were told that while the agency director would have a general knowledge of the projects and units utilizing the services of the OD specialist, the details of these projects would remain confidential. For example, if a supervisor requested the OD specialist's services, the director could be informed of the length of time required to complete the task and the geographic location where the OD specialist would be working, but the details surrounding a particular problem or conflict would not be shared with the director.

In retrospect, there have been few occasions that required completely confidential services. While the executive staff may make referrals to the OD specialist, asking her to evaluate functioning of teams when there is rumored to be a problem, they do not ask for the details of the intervention. This highly professional and confidential process was necessary, however, to minimize staff resistance to the OD specialist within the agency.

After three years of operation, several preliminary lessons can be gleaned from the experiences of the San Mateo County Human Services Agency. It is important to be cautious about applying them to other agencies, since each agency responds to organization development in a unique way.

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

The OD specialist described this relationship as "co-partnering," explaining that there must be constant efforts to continue to build trust and communication, and share information between the two groups.

- *Lesson 2: The internal OD specialist does not develop change recommendations for the agency.*

While it is appropriate for external OD consultants to be "prescriptive," by recommending specific changes that should be made, the internal OD specialist needs to help staff sort out their options by documenting feelings and needs, collectively developing action plans, and demonstrating how to confront and deal with problems.

- *Lesson 3: Provide information to all levels of staff, preferably at the same time.*

Guaranteeing staff input and feedback on data collected from staff, prior to sharing the data with the executive team, has given staff members a sense of assurance that they can share their experiences more openly with the OD specialist. It also allows them to make any changes in how their feedback is portrayed, helping them control its presentation to management.

- *Lesson 4: Organization development is not a solution to all of the agency's problems.*

There are limits to changing individual behaviors and the organization development process can not address every problem within the agency. Some staff feel threatened by OD practices and are not interested in using them as tools for changing organizational processes.

- *Lesson 5: Relationship-building and sustaining has several levels: (1) creating and nurturing; (2) trusting and supporting; (3) risk-taking and new learning.*

Early on in establishing the OD function, it became apparent to the OD specialist that relationship building and sustaining (worker-client, worker-worker, and worker-manager) were essential ingredients in successful agency service delivery (as well as in successful OD). Acquiring new risk-taking behaviors may require new learning experiences in order to transform bureaucratic organizations into learning organizations.

- *Lesson 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 others expand their capacities to see and sense.*

OD specialists are in a position to use their "antennae or radar" to sense the level of interest or disinterest in promoting change. Based on these capacities, they continuously focus on readiness and thereby circle and come back to issues where there is disinterest or resistance. It is the capacities to see and sense that need to be introduced and

cultivated among all levels of staff. OD specialists can demonstrate "seeing and sensing" through their role modeling in nearly all OD interventions. Another approach is to develop an informal OD network inside the agency based on staff completing in-service training on OD procedures and processes.

- *Lesson 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, both the formal and informal as well as the planned and unplanned. Positive and negative staff feedback are extremely important ingredients for improving the agency's OD operations. Since staff feedback may not be plentiful or continuous, the OD specialist also needs to find outside sources of support and learning related to ethical issues, confronting one's own biases, and avoiding the "blame-frame" often rampant in organizations undergoing massive change. OD colleagues (OD Network) and OD educators (graduate programs) are two of the most frequently used sources of outside support.

- *Lesson 8: Moving from pro}ect learning to individualized learning requires time and patience.*

Most of the OD activity in the first three years of operation involved projects which addressed issues in more than one area of the agency. As the trust level rises, it should be possible to increase the amount of individualized coaching and consulting to foster more staff learning and expand the ability to change old behaviors.

- *Lesson 9: Communication and collaboration with staff development is essential for the future viability of OD.*

Since many of the organizational issues identified indicate needs for additional training, on-going communication and collaboration between OD and staff development personnel are crucial.

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