

Creating and Implementing Vision: **Transforming Workplace Culture**

KARI BEUERMAN

EXECUTIVE SUMMARY

Vision is an important starting point in any journey as it provides a roadmap and sets a course. It also shapes a sense of belonging and identity for those traveling together on a particular path. Sonoma County has taken a progressive and innovative approach of discovering new ways to administer social services programs. In the last few years, the Sonoma Human Services Department (HSD) has undergone a shift in leadership. The director and the majority of the executive team assumed their current roles in the last few years. With the director at the helm, and with a great deal of staff and stakeholder input, Sonoma County has established a strong collective vision and has managed to effectively transform workplace culture.

With the focus on client, staff, and community satisfaction, each division has found its own unique way to strive for success in these three areas. The

creation of the Planning Research and Evaluation Division (PRE), with its emphasis on the acquisition and analysis of data, has been instrumental in looking at ways to foster growth and improvement, which has spanned agency-wide.

Marin County also finds itself at a time of change. The need for essential services continues to increase during these difficult times, and the administration of social services has, perhaps, never been more challenging. Effective gathering and analysis of data continue to be germane to the success of Marin's Health and Human Services (HHS) programs. The merging together of Adult Social Services and the Division of Aging in late 2008 created Marin County's Aging and Adult Services Division. Still in its early stages, this recent merger provides an exciting case study in how to transform the culture of the workplace.

**Kari Beerman, Unit Supervisor,
Marin County Aging and Adult Services**

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Introduction

Sonoma County, which is the home to approximately 470,000 residents, encompasses over 1500 sq. miles. Within these borders can be found a myriad of lifestyles and demographics, from rich to poor, rural to urban, the very old to the very young. The local economy is supported by both agriculture and tourism. Those who speak Spanish as their first language, which represents the most predominant minority group, comprise 13.8% of the county's population.

The Sonoma County Human Services Department (HSD) is made up of six divisions: (1) Family, Youth, and Children, (2) Adult and Aging, (3) Economic Assistance, (4) Employment and Training, (5) Administration, and (6) Planning, Research, and Evaluation. It employs 644 people and serves over 50,000 individuals on at least a monthly basis.

As the population demographics and needs of California shifts, so does the administration of social services. Sonoma County exemplifies these dramatic changes. The poverty rate has increased from 8.1% in 2000 to 11.5% in 2007. Unemployment is at 9.1%. Calls to Adult Protective Services have increased 81% from 2000 to 2008. Individuals receiving In-Home Supportive Services have increased 71% from 2002 to 2008. In fact, every program under HSD has registered an increase with the exception of child welfare.

Along with the increase in need has come the seemingly inevitable decrease in resources. Sonoma County, along with every jurisdiction around the state has been subject to the economic downturn and has been asked to find creative solutions to the age-old dilemma of how to do the same or more with less. This need for creative thinking, along with shift in priorities, has coincided with the necessary replenishment of leadership at the agency's highest levels due to retirement. In Sonoma County, this has meant

the establishment of a new administration over the last couple of years including a new director and a largely new executive team. The appointing of this new administration has had a ripple effect and has trickled down to every aspect and nuance of how business is conducted. The following, then, is a study of Sonoma County's current vision: how it was established, its implications for the present and for the future, and how it can be generalized to be made applicable to its neighboring county of Marin. Specifically, the focus will be on the necessity and benefit of transforming workplace culture and how this can be effectively and meaningfully achieved and made applicable in Marin County's newly formed Aging and Adult Services Division as well as more broadly across Marin County Health and Human Services (HHS).

Seeing HSD Director, Jo Weber, at work, whether it be in a community meeting, interacting with her staff, advocating at the state level at Child Welfare Director's Association meetings, or one-on-one in her office, it is clear that one has encountered truly effective leadership. Her simple yet all-encompassing three-pronged vision can be articulated as "clients feel welcomed and get help to meet their needs; staff feel valued, safe and are happy to work at HSD; the community looks to HSD as a resource and values human services." In exploring the origins of this vision, Weber contends that although shaped by her, it is in fact a collective vision for which she has sought both input and buy-in from members of her executive team. In interviews with the immediate members of her team, all would agree that the vision has indeed been a collective endeavor and a work in progress. All feel included and inspired by its intentions and implications. The development of this collective vision then seems to be the first step in the arduous process of transforming workplace culture. In order to show

how vision has permeated the workplace culture, additional detail will be given and specific examples cited on each aspect of this three-pronged approach. As one will see, examples of striving for satisfaction overlap and impact more than one area. Additionally, the inception of the Planning, Research, and Evaluation Division (PRE), conceived of and initiated by Weber, has been a concrete and meaningful step forward in striving to achieve the vision and to meet the goals of satisfaction at every level.

Client Satisfaction

Each division is working in its own way towards increased client satisfaction. There is an attempt to identify and to capture demographics which speak to who are the clients being served by HSD. By re-evaluating the population on a yearly basis, the county remains current and abreast of pressing needs. Nick Honey, Division Director of Family, Youth, and Children's Services described various ways that he ensures his program is client-centered. For example, something as basic and tangible as providing a family with a bus pass they have requested can begin to build a trusting relationship and can make the difference of that family seeing HSD as a resource rather than as a threat. Other progressive measures, such as hosting community events, resource fairs and foster parent trainings or having social workers out-stationed at local elementary schools, the Santa Rosa Police Station and SonomaWORKS all ultimately contribute to individual client as well as to community satisfaction.

In an attempt to be realistic and to shift additional burden away from the working poor, Karen Fies, Division Director of Employment and Training, has recently applied for a state waiver to reduce the level of documentation required by the clients served. This creative idea strives to address the needs of a population already plagued by multiple stressors as well as attempts to be cognizant of staff workload issues.

Walking into Marion Deeds's economic assistance site first thing in the morning, one is immediately struck by the huge volume as well as the desperation of those sitting in the waiting room and

lining up at the doors. Along with increased volume has come increased volatility as the client composition has shifted to include more single adults as well as more mentally-ill applicants. Deeds has attempted to increase the level of safety both for staff as well as for the other clients waiting to be served by utilizing creative measures to ensure client comfort and safety. Procedures, such as requesting that agitated clients return at a different day or time or exercising flexibility in being able to interview applicants on a different site or in a more secure setting, has resulted in a more comfortable and safe environment for service seekers.

Staff Satisfaction

With regard to staff satisfaction, HSD has conducted two staff satisfaction surveys, one in 2007 and the other in 2008. The survey was designed "to solicit employee opinions about leadership, working relationships, communication, professional development, diversity, and quality of HSD services". The surveys were done anonymously across all divisions. In the initial survey, several key issues emerged which became the focus over the next year. The most striking thing to note was that from 2007 to 2008, the participation rate in the survey went from 57% to 72% after management took concrete measures to address areas of common concern. One could conclude that staff obtained an increased level of hope that change was a true possibility in their work areas. As stated by Executive Team Member Deeds, "there was a cultural change from cynicism and skepticism to expectation." Weber then had to contend with and attempt to manage this increased level of staff expectation. However, she was able to do this effectively by continuing to solicit input on a variety of levels and by making meaningful attempts to incorporate that input whenever feasible. When that was not possible she has been open and willing to make staff privy to her decision-making processes in order to give them a realistic sense of what may be at stake with regard to the big picture.

Sonoma's Aging and Adult Services Division provides an interesting study of staff satisfaction.

Both current director, Dianne Kaljian, as well as the former director, Robin Schaef, spoke of the initial “growing pains” on the part of staff during their merger and creation in the mid-nineties

Perceived concerns included loss of autonomy, an end of a direct link to the Board of Supervisors, and a clash of cultures among programs. However, through a great deal of hard work and effort—which included retreats, meetings, and a gathering of staff and supervisory input—management was eventually able to get a sufficient amount of buy-in, enabling the division to move forward in an effective manner.

Finally, with regard to staff satisfaction, Weber has gone to great lengths to manage from a strengths-based approach. She has incorporated a variety of tools to allow staff to identify and utilize their innate talents in order to reach their maximum potential as employees.

Community Satisfaction

Some of Sonoma’s most exciting and progressive work has been in regard to community satisfaction. With the birth of the PRE Division under the leadership of Marla Stuart, HSD has come a long way in improving and expanding its relationship with the community in a very meaningful way.

For example, one goal of the division is media outreach. In Sonoma, as well as in other counties, often times social service programs are only given attention when there has been some type of scandal or perceived failure. PRE has turned this around by initiating press releases and by inviting the media to cover exciting human interest stories generated by HSD. Weber has taken the personal opportunity to write opinion/editorial pieces on a variety of topics, which has enabled the community to get to know her and to understand and appreciate the work being done by the Human Services Department.

PRE’s motto is “transforming data to action,” and they have done a remarkable job in this regard. One executive team meeting per month is now devoted to data analysis. In this manner, managers are able to move away from the more emotional decision, often arrived at under pressure from staff,

stakeholders and constituents’ biases and are able to take a realistic look at what the data yields in terms of trends, shifts in community need, and program evaluation, including measuring success and quality. According to Weber, the work done by the PRE Division has added a level of credibility for the department with the County Administrator’s Office. The gathering of data has also enabled PRE to identify gaps where grant funding may be an applicable and viable solution.

Finally, the PRE Division has taken the lead on upstream (preventative) thinking models. HSD is currently partnering with the Departments of Health and Probation to address overcrowding at the local detention facility from the standpoint of how to identify and prevent first-time criminal offenses. This project is an example of how HSD continues to further its relationship with the local community and economy by making itself available as a support, a leader, and a valuable resource.

The Fiscal Impact of Transforming Workplace Culture

Assistant Director of Sonoma HSD, Jerry Dunn, combines being a visionary with being a talented fiscal analyst. When asked about “return on investment” of the PRE Division, he remarked that the division is too new and that it is too soon to tell. So far, the focus of the division has been largely internal rather than upon grant acquisition, but the focus may shift as time goes on. To date, a recent grant written has yielded \$197,000 to study the effects of methamphetamine use on child welfare. Thus far, the costs associated with the division have been very minimal. Only the division head was brought in as new staff, while the remaining positions constituted re-assignment of existing staff. There are a variety of long range, far-sighted ways in which PRE has exhibited significant cost-benefits, one being in regard to accessing federal stimulus monies. PRE staff will be responsible for the task of finding ways to tap into these much needed funds. Without the existence of such a division, this could have easily fallen by the wayside as a missed opportunity.

The transformation of workplace culture is always a work in progress, and the work seems to get that much harder during difficult economic times. During recent budget meetings with line staff, some have suggested eliminating the PRE Division as a cost-saving measure since it is an entity not tied to specific programs. Many staff see the division as having a purely administrative function, and they have little or no personal connection seeing how it fits in with their day-to-day work. Dunn saw this as being an opportunity and a wake-up call. He continues to meet the challenge of “not shying away” from having the conversation with staff and listening to their input but also enlightening them as to the benefits of such a division and the implications of “running things by data rather than by anecdote.”

Recommendations for Marin County

Studying Sonoma County has led to two distinct recommendations for Marin County:

- expanding and formalizing existing work being done to create a PRE Division, and
- creating a vision for Aging and Adult Services.

Marin County’s structure is different than Sonoma’s. HHS is the over-arching entity, which includes Social Services, Aging and Adult Services, Mental Health, Public Health, Drug, Alcohol and Tobacco, Administrative Services, and Office of Finance. Taking this structure into account, recommendations, then, are as follows:

CREATING A PRE

Marin County should consider expanding and formalizing existing resources and expertise to create a PRE Division. This would address the need to research and keep up with current community and societal trends and to remain modern and vital. Through essential data, it would provide a comprehensive way to evaluate the success of the various HHS programs, across divisions and professional disciplinary lines. Due to the fact that four analyst positions already exist, fiscal impact would be extremely minimal. Implementation should be as follows: a director should be selected (again utilizing current staffing that ex-

ists so associated costs would be negligible). Priorities should then be as follows:

- The PRE Division would search for duplication among divisions in order to come up with the most efficient use of HHS staff and to identify some cost savings recommendations without having to compromise quality or level of service.
- The division would apply for grants in order to tap into funds available from for-profit entities. These local businesses could be persuaded to partner with social services (both for their own publicity, for economic stimulus, and for the greater good of society). This recommendation would continue and expand the endeavors already undertaken in HHS.
- Outreach to local media would be expanded in order to create opportunities for human interest stories that would reflect positively upon HHS.
- At some point in the future, possibly when economic conditions stabilize, consideration could be given to conducting a staff satisfaction survey in order to obtain an effective measure of success in that regard.

As far as timelines, due to the relatively low cost of beginning to operate such a division, Marin County should consider implementing this recommendation in the next six to twelve months. Since continued state and county fiscal challenges are anticipated, this would be the most important time to utilize the potential benefits of such a division

A VISION FOR AGING AND ADULT SERVICES

As stated previously, vision is important because it provides a roadmap and strongly shapes identity. Since this division is a result of a very recent merger, great opportunities exist to build a foundation where staff shares a collective vision and where there is buy-in and understanding of how each person’s daily work fits in with the big picture. Recommendations would include:

- Continuing discussions on how to merge together. With input from staff, supervisors, and managers, creating a joint mission statement for the division.

- Providing opportunities for staff input on a regular basis.
- Convening all-staff meetings on at least a quarterly basis.
- Continuing evaluating programs for possible duplication.
- Encouraging and supporting staff's ability to work together collaboratively outside of their immediate program areas on special projects that will utilize their talents and be of joint benefit and interest.
- Utilizing data to pave the direction for the future.

The timelines for these recommendations could begin immediately and could ideally take place over the course of the next twelve to eighteen months. For the best outcomes, these objectives should be monitored, evaluated, and discussed on an on-going basis.

The management and implementation of modern day social services are fraught with challenges, regardless of the county in question. However, returning again and again to the vision that guides the work is what will ultimately transform the workplace culture in the most positive manner and will ensure success at every level in the years ahead.

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