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Implementing Welfare Reform and Guiding Organizational Change

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MANAGEMENT NOTES

Implementing Welfare Reform and Guiding Organizational Change

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ABSTRACT. Federal welfare reform has provided the impetus for profound changes at the level of county public social service agencies as they respond to mandatory work requirements and time limits for their clients. At the forefront of this change are the directors of these agencies, who are leading a process of cultural, systemic and community change. This study looks at qualitative data drawn from interviews and ongoing consultation with ten county social service directors as they reflected on the first two years of welfare reform implementation. The key findings include: (1) identification of major organizational challenges; (2) the core values guiding the directors' leadership of the change process; and (3) lessons emerging from reflection while engaged in the change process. The learning organization principles outlined by Senge (1990) form the framework for interpreting the findings. *[Article copies available for a fee from The Haworth Document Delivery Service: 1-800-342-9678. E-mail address: <getinfo@haworthpressinc.com> Website: <http://www.HaworthPress.com> © 2001 by The Haworth Press, Inc. All rights reserved.]*

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INTRODUCTION

Following the passage of the federal welfare reform legislation in 1996, California responded with the enactment of its CalWORKS program in August 1997. Counties have spent the last several years engaged in the planning and implementation of welfare reform. Members of the Bay Area Social Services Consortium (BASSC), a consortium of county social service agency directors, social work deans, and foundation executives, have sought to capture the dynamic process of change occurring in county social service agencies in the era of welfare reform. The goal of this exploratory study was to identify the core organizational challenges faced by the BASSC directors in implementing welfare reform along with the values and strategies employed to address these challenges. The ultimate goal was to document some of the preliminary lessons learned from implementing a "work in progress."

The county directors had a specific interest in this exploratory study. In the early 1990s, they had challenged themselves to develop a vision of social services in the year 2000. That vision included such themes as fostering family self-sufficiency amidst extensive diversity, engaging clients and the community in neighborhood-based service planning and delivery, and fostering prevention-oriented integrated services utilizing blended funding. For many directors, the massive scope of welfare reform implementation seriously challenged their abilities to implement this shared vision. They wanted to use the findings of the study to update the vision by taking into account the impact of welfare reform on such internal operations as human resources (job redesign and expanded training), fiscal and information systems (performance-based budgeting and outcome assessment), and greatly expanded community partnerships.

METHODS

This exploratory study focused on the experiences of ten county social service directors in the San Francisco Bay Area of Northern California. The data were collected in the Spring of 1999. The primary goal of the study was to identify the first set of perceptions and impressions emerging from the early phase of implementing federal and state welfare reform legislation. The following research questions served as the foundation for in-depth interviews of one to two hours with each director conducted by the first author:

1. How have your prior work experiences and education impacted your efforts as the agency director to implement welfare reform?
2. What are the major organizational changes in your agency that are emerging from welfare reform implementation and how would you describe the implementation processes?
3. What are the major values which underlie these organizational changes and guide your actions?
4. What are some of the lessons learned from implementing welfare reform as you reflect on your role as director?

These general questions, with follow-up probes, were developed in collaboration with the ten directors prior to the interviews, resulting in increased clarity and focus. The interviews were recorded, transcribed, and edited. The editing process included input from each director to check on the accuracy of each case description and to capture the "voice" of each director. The cases were then content analyzed by using the four categories reflected in the major questions and a cross-case matrix was developed to facilitate data analysis.

It is important to note the several limitations to this exploratory study. First, it reflects only the perceptions and views of the social service agency directors. The views of senior management, middle management, line staff, elected board members, contract service providers, clients, and local opinion leaders are not included in this study. While efforts to triangulate these multiple perspectives would have made an interesting study, it would have resulted in a much larger investigation. Second, this study captures only one point in time (January, 1999), namely twenty-eight months following the August 1996 passage of the federal welfare reform legislation and twelve months following the implementation of California's welfare reform legislation (passed in August, 1997 for January, 1998 implementation). While there is value in reflecting on a change process in mid-stream, there are significant limitations given the fast pace of change and the absence of documented staff reactions to implementing major change. And third, it is difficult to generalize from the perceptions of ten county social service directors in Northern California. While their experiences may parallel those of directors in other counties or states, the variability in local economic, political, social and population characteristics greatly limits generalizability. Despite these limitations, this study captures the rarely documented perceptions of busy administrators in order to add to our knowledge base of public sector organizational change and program implementation.

MAJOR FINDINGS

The findings discussed here relate to the directors' description of organizational change and culture, the guiding values they articulated, and the lessons they identified in reflecting on implementing welfare reform. The primary themes identified in the content analysis are illustrated with quotes from the interviews with the directors. The findings are then interpreted with the use of Senge's (1990) learning organization framework as the directors sought to transform their agencies into learning organizations. While the study did not originally seek to assess the change process with reference to learning organization principles, the learning organization framework emerged as a useful tool for interpreting the findings.

ORGANIZATIONAL CHANGE AND CULTURE

In the area of organizational change, the directors identified five primary challenges. First, cultural change has been a fundamental goal in implementing welfare reform, as agencies move from determining eligibility to fostering employability and self-sufficiency. Second, the demands of delivering the new self-sufficiency oriented services have required substantial organizational restructuring. Third, agencies are engaging in partnerships and collaborations with a wide range of partners, including other county departments, community-based organizations, and for-profit businesses. Fourth, integrated services linked to the collaborations and inter-disciplinary teams are being developed in a number of counties. Finally, the demands of welfare reform have increased the importance of data-based planning and evaluation for staff at all levels of the organization.

Cultural Change: Changing the culture of the organization emerged in the interviews as the dominant theme. The new culture being sought was described in terms of a transition to a customer service orientation, a shift from people processing to fostering self-sufficiency, and transforming an insular bureaucratic organization into an open, community-based agency as reflected in the following comments from the interviews:

- "Our bureaucracy was seen in the county as an indifferent federally-funded operation. When I first got here, the mission statement

indicated that the primary goal of the agency was to administer state and federal programs in a legally efficient and ethical manner . . ."

- "The old routines that eligibility workers do, and do very well, are now totally out of place in the context of welfare reform. . . . In our business, you have long-term civil servants and we can count on the union culture to clash with the new demands for systems change. For example, it's a big change to move someone from eligibility case processing and regulation compliance to assessing employability, providing initial counseling, and developing a case plan to foster self-sufficiency."
- "The new agency mission indicates that we're here to improve the quality of life in the community through the services and programs that we provide, using strategies that include collaboration and partnership designed to handle the current wave and future waves of reform . . ."
- "The organization had a history of being very punitive and dictatorial . . . I would call the climate a 'fear-based environment'. . . . The new organizational culture needed to operate on mission related-principles, whereby: (a) everyone needs to be treated with respect; (b) diverse opinions are to be valued; (c) the emphasis on customer services was non-negotiable; and (d) risks are inherent in creativity and innovation. . ."
- "First, I think I'm trying to create an organization that can learn as it functions . . . issue number one is trying to build a learning culture in the agency."

In many agencies, staff resistance to changing the organization's culture was a significant phenomenon, often appearing at all levels of the organization. One director noted that "resistance to change went from the top of the organization to the bottom." In contrast, others stated that their staffs presented very little resistance to the redefinition of the agency's mission. A number of methods are being used by directors to address staff resistance including the extensive use of staff training on customer service orientation (shifting from a recipient to a customer orientation) and the use of role modeling and coaching by senior managers to instill in staff a customer-friendly service philosophy.

Organizational Restructuring: Many directors are engaged in major restructuring of their agencies, including the creation of new departments, merging of old departments, integrating previously separate divisions, and redesigning job classifications. In some counties these structural changes preceded welfare. The primary goal of restructuring

has been to create agency structures more responsive to client and community needs. As with cultural change, extensive training has been required to assist staff throughout the restructuring process.

Major restructuring in one urban county took the form of reorganizing two major departments, the Department of Economic Services (AFDC, General Assistance, Food Stamps, MediCal) and the Department of Employment Services (the GAIN program, Food Stamp Employment Training Program, and Private Industry Council) into two new departments. The Department of Welfare to Work now integrates benefit determination and employment services to create a more holistic approach to serving families in need. The smaller Department of Workforce and Resource Development uses the recent workforce legislation to help the Private Industry Council operate as a community resource department working closely with community groups to promote early intervention and prevention programs, especially through the use of school-based services. The director noted that organizational restructuring helped to reduce the historic tension between employment services and economic services staff.

Community Involvement and Collaboration: All of the directors described a shift in the focus of their own work and the activities of their agency to fostering more community involvement. An extensive array of new collaborations and partnerships were being formed, with significant financial resources being contracted to community groups, and outposting of agency staff into neighborhood-based service centers. These collaborations included new relationships with the business community, as well as with other county departments and community-based organizations. For example, one director noted that:

> "In an effort to rally the management team to proactively respond to Welfare Reform, we engaged immediately in a joint planning process with the Human Service Commission, which was a new role for both them and us . . . I had never undertaken a community planning process on this scale before, although I had chaired various task forces and committees on special projects. The effort was a success for both the management team (supporting the agency goal of shared decision-making) and community members (affirming a commitment to partnership) . . . We're also working very closely with the community-based organization that provides para-transit services under a contract with the tran-

sit district . . . We're working to develop some collaborative efforts around housing with other commissions and coalitions that frankly we've never worked with (the Housing Commission that is advisory to the Planning Department, and another commission that works with the Redevelopment Agency) . . . Our community college has been a major partner–I can't speak highly enough of our local community college . . . We believe strongly in fostering open communication and in partnering with the community and the client. We try to involve clients in all aspects of our work, including the community planning sessions, work groups, or task forces."

Service Integration and Teamwork: A central element of the restructuring and culture change involves the integration of services, the use of inter-disciplinary teams to deliver services, and efforts to consolidate and blend funding streams to support integrated services. A suburban county director described a comprehensive integration initiative as follows:

> (W)e began working with neighborhoods, particularly those which had a high concentration of our clients. We created school-linked services by outposting our staff and working together with the health department and education systems, using multi-disciplinary teams to work with at-risk families . . . We weren't reforming just one thing, but were really trying to reform the entire system of services, using prevention and early intervention approaches to strengthen families and communities . . . We were very clear that the Family Self-Sufficiency Teams had to work in a multi-disciplinary environment, with a prevention and early intervention orientation. The changes for our eligibility workers were also significant because we created a comprehensive screening and assessment process and had to retrain staff to become effective in interviewing and assessment . . . The way our eligibility workers had functioned had been quite fragmented, with workers responsible for either AFDC eligibility, MediCal eligibility, or food stamp eligibility. We changed all this, creating a generic eligibility worker position, and offered training initially on a voluntary basis.

Data Based Planning and Evaluation: A number of directors described the importance of data in the planning process as well as in eval-

uation. Data permits effective targeting of resources and development of predictors to guide interventions. Several directors pointed out the many problems associated with trying to use the externally-reported state and federal data for local and/or internal decision-making. One director noted:

> The planning wasn't driven from the federal or state level. It was grassroots work, building on what we had done through the community strategic planning process. Our strategic plan called for using data to inform the planning process . . . To ask, "What do we know?" and then planning on the basis of information. Particularly with welfare reform issues, people take ideological positions and that's not always helpful when you're trying to build common understanding and directions . . . There were a lot of stereotypes about the large sizes of families on welfare, when actually the majority were moms with two kids reflecting a real mix of races and ethnicities. People also had incorrect assumptions about the length of time families spent on welfare. What we found was that we had two populations, one group that wasn't on aid for very long, and a second group that was on a long time, concentrated in about six communities. We also created a geo-map showing exactly where the families lived according to zip code that really was an eye opener for people. The use of this kind of data in the planning process allowed us to target resources and programs.

Throughout these examples of organizational changes related to culture, restructuring, partnerships, teamwork, and data-based decision-making, the core values guiding the implementation process can also be traced.

GUIDING VALUES

The core values articulated by the directors as guiding their work in implementing organizational changes included: social and economic justice; self sufficiency; dignity and respect; equity; and building a learning organization. The values, noted in Figure 1, provided personal guidance to the directors, and often became part of the agency's revised mission statement.

FIGURE 1. Values Guiding the Change Process

   I. Promoting client self-sufficiency and moving away from dependence, blame, and people processing
  II. Fostering community involvement, shared responsibility and outreach, outcome based community control, and integrated partnerships
 III. Demonstrating participatory management (respect, risk-taking, collaboration, antici-patory cross-system thinking and planning, flexible and open communications and problem solving, dealing with diversity and conflict, fairness and honesty, and balanc-ing creative chaos with structured implementation)
 IV. Empowering staff to participate in change processes, internalize change values, and build a learning organization
  V. Valuing clients with a customer service orientation that invests in clients by treating clients and staff with dignity
 VI. Focusing on outcomes for adults and children using performance-based assessments
VII. Advocating major social values related to equity and a living wage, adequate health care and child care, and social and economic justice

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A number of directors also noted their desire to promote these values as a central feature of the agency's culture:

- "The core values guiding the agency, and my personal work, are *social and economic justice*."
- "*Self-sufficiency* is a central value; I firmly believe that we need to hold people accountable and that parents ought to be expected to support their children and that self-sufficiency is a value that we should all be encouraging people to work toward."
- "I focus on *respecting the client* and I teach at all of the staff induc-tion sessions that when people come to this agency for service, in the great majority of cases they have given up a great deal of dig-nity to get to this point. We have it in our power to build on their strengths to help restore their sense of dignity. I also recognize that staff cannot treat clients with dignity if they are not also treated with dignity."
- "I'm really interested in *building a learning organization,* where we gain insights from our mistakes, and develop a culture where individuals feel valued and take calculated risks, where honest dia-logue is encouraged and respected, and creativity and innovation are the norm."

LESSONS LEARNED

The directors identified a number of lessons that they had learned from guiding the agency's change process (see Figure 2). Some of the

common themes include the difference between the demands for strategic and incremental change; responding to staff resistance; developing patience and realistic expectations; relinquishing control; and the need to work in an environment of uncertainty. In describing the striking difference between the traditional agency approach to incremental change and the new demands of strategic change, one director used the metaphor of a hurricane, an avalanche, a tornado and an earthquake all rolled into one to describe the magnitude of change and noted, "I think there's a need for a new definition of change here . . . we're not used to this depth and breadth of change. We're used to dealing with incremental change such as a new mandated program, a new classification of staff, or a new child care contract. We really were not prepared to deal with the depth and breadth of concurrent change required in nearly all of our systems."

Although the directors generally thrive on promoting change, they have recognized that many members of their staffs have very different responses. The directors reported that some staff members expressed sadness at the change of old relationships following major restructuring, as well as doubt about their abilities to maintain good job performance in an environment which demanded new skills and responses. Some staff feared that the new changes were a response to the staff's poor performance in the past. In contrast to this kind of apprehension, several directors noted that staff members were excited and pleased about new job assignments because of the new found freedom to address the needs of clients.

In order to guide agency staff through a massive change process, a number of directors noted that patience has been essential, although not always easy to find. One director stated "I've learned to have much more patience and it's probably a good thing that this is happening as I'm getting older and less driven. The slower pace of change is hard for me since I'm the type of person who really likes to see things get done." Directors often initiated small changes by allowing staff to engage voluntarily at their own pace rather than the pace that public policy seemed to dictate. It was also important for many to learn to set more realistic expectations for themselves and others. This was necessary to reduce stress levels among staff, as well as protect against loss of credibility if unrealistically high expectations were not met. One director noted that "one of the lessons I've learned is that more attention needs to be given to setting realistic expectations, internally and externally, in terms of significant change. We do a lot of educating of others about what's

FIGURE 2. Lessons Learned

I. *The Nature and Pace of Change*

- Massive and rapid change cannot be completely planned
- Change takes time, requires patience and incremental steps, and some agreement on the value of change
- Comprehensive change is very different than incremental change, especially in unfamiliar territory
- Change yields tension, as interests shift and stress levels rise

II. *Adapting One's Management Style*

- Control must be replaced by influence, featuring the participatory styles of negotiating, educating, persuading
- People have limits on the amount and pace of change they can tolerate
- Need to set realistic expectations, internally and in the community
- Need to get comfortable with the inability to accurately foresee all that will occur in the change process
- Need to relinquish some management control in light of volume and pace of change in order to trust the collaborative process
- Sometimes need to be more directive in articulating and modeling core values
- Importance of relying on staff for information and delegation

III. *Balancing Internal and External Relations*

- Implementing change requires attention to internal operations, especially internal customers
- External and internal relations need to be balanced since they can no longer be separated
- Importance of senior managers being out in the community

IV. *Dealing with the Political Environment*

- Agencies are in a political environment which requires special skills
- Increasingly political nature of agency director's job
- The community leadership role goes beyond traditional human services

V. *Handling the Demands for Leadership*

- Need to persevere in order to affect massive change
- Need to exercise power with caution by being aware of perceived power
- Need a vision to help staff view the agency as a temporary way station for clients in order to avoid fostering dependency
- Difficult to create climate conducive to change without generating fear among staff
- Value of peer support, especially when it gets lonely at the top

coming and what we're going to be doing, but we do not develop realistic expectations on what we will get accomplished and by when."

Additionally, the volume and pace of change led many directors to the realization that it was necessary to relinquish some control, or the illusion that they could maintain control. This involved trusting partners in collaborations, delegating responsibility to staff, and embarking on initiatives without having fully completed the planning process. As one director stated, "One of the biggest lessons I've learned is that welfare reform and related changes have helped me to put more trust in the collaborative process, where partnering is built on the values of true collaboration, which doesn't require a lot of management control . . . The volume and speed of the changes related to new and modified programs makes it impossible to use the old command and control accountability model." Another noted that "An important aspect of my administrative style is that I don't expect to do it all myself and really have learned how to rely on staff. I try to select and hire staff who are self-starters, able to keep me informed and comfortable handling delegated responsibilities." However, some directors noted the importance of providing direction and modeling a change management style. One director noted that at times she had to be far more directive than she really wanted to be, in order to ensure that implementation was successful.

For several directors, the rapid pace of change required endurance and skill since the policy changes required numerous and extensive adjustments in both internal and external operations. Other directors focused on the need to take risks in decision-making in the absence of clear data or relevant precedents. Several directors emphasized the complexity of the change process, which in their words required the ability to thrive in chaos or the capacity for "multi-tasking." And finally, several directors relied heavily on their experience and seniority to draw upon an extra dose of steadiness amidst uncertainty as they negotiated among competing interests, unraveled the complexity of the change process, or engaged in strategically planned change initiatives.

REFLECTING
ON THE ORGANIZATIONAL CHANGE PROCESS

As noted at the beginning of the article, this study was undertaken inductively in an effort to explore and describe the change process from the unique perspective of the agency directors. The goals of the study and the interview structure and questions were developed in collabora-

tion with the directors; they were not drawn from the extensive academic and professional literature on organizational change processes. In analyzing the findings, however, the learning organization model developed by Senge (1990) began to emerge as a potentially useful framework. Not only were the directors describing processes of organizational learning, some made explicit reference to their interest in "building a learning organization" or to "trying to build a learning culture in the agency." While describing organizational learning directed at developing the concrete staff skills and knowledge required by new roles throughout the agency, the directors were also describing processes that represent the fundamental characteristics of learning organizations.

This section looks at the study findings from a learning organization perspective, identifying examples in which the changes described by the directors of these ten agencies reflect Senge's (1990) five learning organization principles: (1) systems thinking, (2) mental models, (3) shared vision, (4) personal mastery, and (5) team learning. Although these principles are familiar to many in organizational practice and studies, it is helpful to describe them briefly.

- Systems thinking refers to a process in which people identify complex interrelationships and underlying patterns of causation, rather than simple linear "cause and effect" relationships.
- Mental models include the internal images we hold about how the world works; in a learning organization, these mental models are continually surfaced, tested and reformulated.
- Shared vision is created through the integration of the visions of all members in an organization, and is based on individual choice rather than compliance or persuasion.
- Personal mastery refers to an ongoing process involving the juxtaposition of an accurate picture of one's current reality and a clear vision of a desired future.
- Team learning describes a process in which team members become aligned and function as a whole with a common direction, achieved as a result of operational trust, insightful thinking about complex issues, and dialogue and discussion (Senge, 1990).

Systems Thinking: A number of the directors described the importance of data in planning and evaluating their programs, especially to base decisions on information rather than ideology or stereotypes. It is important to be able to identify underlying patterns of relationships when the organizational mission involves the complexity of helping hu-

man beings make changes in their lives. The process of systems thinking requires agencies to look at the numerous factors related to client outcomes, including economic, service, and personal characteristics, and explicitly engage in identifying patterns that result in particular outcomes.

Mental Models: All the directors emphasized the importance of cultural change taking place in their agencies. Intentional cultural change involved a change in staff's mental models about clients, the role of the agency and community support. However, as one director noted, this process continues to evolve: "It's still hard to get some staff to think differently. . . to get them to conceptualize work in a different way and to build something new." Although Senge (1990) notes that systems thinking is the central principle defining a learning organization, the directors in this study described the changing of mental models as the key element in the organizational changes required by welfare reform:

> The most significant change in this agency is the change in culture. I stress culture because I think welfare to work or CalWORKS is synonymous with changing the culture of the organization to make it more adaptable and flexible to handle the current wave and future waves of reform, such as child welfare and adult protective service reform.

Shared Vision: The importance of vision in effective leadership is a persistent theme in much of the organizational change literature (see, e.g., Tichy & Devanna, 1990; Schein, 1986). Senge (1990) argues that vision in a learning organization must be a shared vision that integrates the perspective of all members. The directors in this study described a number of initiatives directed at developing a shared vision for the agency. One director described a process in which internal planning groups that included staff from all levels of the organization "came together to help define the challenges and what we're going to do about them . . . . to get common understandings of where we're going." Some agencies went beyond the boundaries of the organization to include the community in developing a shared vision through collaborative community planning processes. However, it is also clear that the directors brought a clearly articulated set of personal values to the process of vision development. Without interviewing staff, it is difficult to determine the extent to which the perspectives of staff were integrated into the agency's vision.

Personal Mastery: A number of directors described the increased demands placed on staff by the shift from eligibility to employability services. Personal mastery on the part of workers directly responsible for interacting with agency clients takes on added meaning. The goals of welfare reform related to employment and self-sufficiency are dependent upon the ability of line staff to master the new job functions of providing effective services. It was clear to the directors that achieving such personal mastery would take time and require special training supports. As a result, staff development and human resource managers began to recognize the need to help staff develop personal goals for career development as well as education pathways involving training resources outside the agency including community colleges. It remains to be seen whether the demand for the personal mastery of new skills and knowledge will translate into more effective services for those served by the agency.

Team Learning: As part of the organizational restructuring process, many of the agencies developed service delivery models that included multi-disciplinary teams at the managerial, supervisory and line staff levels. These teams offer an opportunity for team learning that generalizes learning across agency boundaries. However, teamwork also presents challenges, as senior members are called upon to listen to new perspectives, and line staff assume new responsibilities for generating ideas rather than simply relying upon directives from above.

CONCLUSION:
PRACTICE AND RESEARCH DIRECTIONS

The directors participating in the study identified a number of lessons learned about guiding organizational change processes. First, fundamental organizational change often requires a change in the organization's culture. The directors noted the importance of identifying and addressing resistance to these changes through extensive training, mentoring and role modeling. Second, traditional managerial command and control processes need to be examined and changed through the use of participatory management, delegation, and teamwork. Third, without the use of current data in the planning process, new programs and services are likely to be based upon ideology and stereotypes about clients and communities. Finally, the ability to tolerate chaos is essential to helping staff function in an environment of uncertainty. They described two simultaneous processes operating in their organizations: searching

for accurate data and articulating values and vision, while at the same time implementing changes without sufficient data and using an evolving vision.

Further reflection on the change processes described by the directors revealed that they were striving to transform their agencies into a learning organization as defined by Senge (1990). The directors described their ongoing efforts to uncover and change mental models about clients, organizations, and communities. Many have engaged in developing a shared organizational vision for the agency. In using data to identify the actual characteristics of the clients and communities they serve, directors and their staff members were using systems thinking to identify complex factors and relationships underlying service outcomes. All these initiatives reflect learning organization principles which are related to implementing the significant organizational changes stimulated by welfare reform.

However, welfare reform is neither the first nor the last major policy initiative requiring significant change on the part of public social service agencies. As public agencies, these organizations are subject to an ongoing stream of reforms generated by policy makers that may require changes in organizational goals, structures and operations. It remains to be seen if the learning organization framework offers a sufficiently robust model that can assist agencies in addressing mandates for continuing change. The directors in this study identified the need to become "more adaptable and flexible to handle the current wave and future waves of reform." The learning organization principles involve a constant reflection and learning which may prove to be the key ingredient in helping agencies develop flexibility and organizational adaptability to changing environments.

A number of questions remain, however, regarding the value of the learning organization model for public agencies. First, while this study begins to identify some examples of initiatives implemented by public agencies that exemplify learning organization principles, more work is needed to develop and implement the learning organization framework in these settings. Additionally, specific avenues for inquiry can be identified with respect to each of the learning organization principles. Second, while many agencies have created team-based structures to deliver services, it remains to be seen if these teams are able to coordinate services based upon trust, dialogue, and discussion. Third, while agencies have begun to identify the complex range of variables relevant to assessing client outcomes, more work is needed to determine whether underlying systems or patterns of causation exist. Fourth, with regard to

personal mastery, it remains to be seen if the challenges associated with the assessment of individual ability and achievement can be addressed by a continuum of educational opportunities ranging from in-service training, certificate programs, and college degree programs. Finally, as organizational goals and operations are subject to repeated external reform pressures, there is continuing demand for public agencies to develop new shared visions using new mental models. It is now clear how much time is needed to stabilize the focus on new visions before being challenged to come up with another set of new directions.

It is clear that the benefits of learning organization initiatives for public agencies need to be evaluated over time in terms of their impact on client and staff satisfaction, staff recruitment and retention, and relationships with community stakeholders. Finally, the ultimate test of the implementation of learning organization principles is on the service outcomes for the individuals, families, and communities served by public social service agencies.

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