

## ORGANIZATIONAL CHANGE FROM AN OD AND PR PERSPECTIVE

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### EXECUTIVE SUMMARY

This paper explores the connection between Organizational Development (OD) and Public Relations (PR). The two functions meet where they support the agency in developing and carrying out its long-range vision in the increasingly politicized world of welfare reform. While OD looks at the development of internal structure and systems (strategic planning, staff development, human resources, etc.), PR supports OD through the effective communication of the Agency vision internally and externally.

The recommendations set forth in this paper are based on a study of San Mateo County. Contra Costa County was used as a comparative model. The human services agencies in both counties have taken the innovative step of hiring specialized staff for the OD and PR functions. Brief references in the recommendation section are also made to Monterey County, where I visited for one day to observe specific training to facilitate organizational development through team facilitation.

This paper compares the use of the OD and PR functions in each of the two counties and draws concrete examples of what has worked well or not so well in their use. In San Mateo County the PR function focuses on legislative issues. Reporting directly to the Agency Director allows the position access to information and political ties necessary to make the creation of a politicized focus viable. The OD specialist, on the other hand, advises the executive committee but occupies a staff position under a department head. She also has the added chal-

lenge of overseeing staff development, training and planning functions. The danger of this arrangement is the potential for OD recommendations to be seen as biased towards the needs of her Department head verses coming from a desire to what will benefit the agency as a whole. On the other hand, the OD specialist has the potential to shape the human resources and staff development functions to support organizational changes through OD.

In Contra Costa County, the PR function is used primarily for media relations and the production of campaigns and materials to promote the agency's image in the community. The ability to influence politicians through a clear, compelling message about the clients serviced is also masterfully fulfilled through these functions. The PR specialist sits on the executive committee and reports directly to the Agency Director. She is a valuable source in advising him in dealing with communication issues that arise. The OD specialist also reports directly to the Agency Director and sits on the executive team. As a Department head in her own right, the OD specialist potentially wields more power and influence than does the OD specialist in San Mateo County. The OD specialist in Contra Costa County has the added duties of overseeing staff development, training and planning functions. An effective plan has been developed to use the two functions to fine tune training to meet the Agency's objectives as laid out in performance based measures for each agency department. Because the staff development, training and planning functions work so tightly together to meet a common objective, bundling

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them together under the OD specialist is seen as an asset in Contra Costa County.

Based on this study the following key actions are recommended to generate effective organizational change from an OD and PR perspective in the Alameda County Social Services Agency (SSA).

- **Revise the Strategic Planning Process** SSA should consider adopting an all staff strategic planning and review process similar to that used by Contra Costa County. There each department has performance-based measures that are used to develop long-range plans and department special training needs. The staff review goals and objectives on a regular basis to determine progress towards meeting them.
- **Hire an OD Specialist** Recruitment is currently underway for an Agency Planner and such a position is important. However, the agency also needs an OD Specialist who can focus on the comprehensive development of staff and processes in tandem to meet Agency goals. In addition, an OD specialist with the necessary training to perform analysis and staff interventions as needed goes beyond the scope of a traditional Human Resources Director function.
- **Emphasize inter- and intra- departmental team building and team facilitation** Lack of communication and shared vision facilitates poor services. Team building can effectively foster ownership and common goals that supersede individual departments. Team building also facilitates cooperation and communication between departments and improves customer service.
- **Review and revise current communication practices** Clear, consistent communication is a challenge for an agency the size of SSA, however it is critical that more be done to improve internal and external communication. Staff needs to be as

informed about the issues that the Agency cares about (as are outsiders).

- **Hire a fulltime PR Specialist** CCCHSA's success in developing a premier public relations bureau lies in dedicating Lynn Yaney to focus on the agency's media relations and public information campaigns. As a larger agency with much to win or lose in the political arena, SSA must do the same. Agency needs must constantly and consistently be communicated to politicians and community leaders with a solid understanding of the legislation and issues affecting the political climate.

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### INTRODUCTION

A child welfare worker in County B was arrested for embezzling more than \$1 million using phony child and foster parent names, the B Times Reported. Staff was angered, shocked and amazed by the crime. They wondered what would make anyone hurt the clients they dedicated themselves to helping.

Immediate co-workers learned about the crime when a manager gathered them together to break the news before the story appeared in the B Times. This was a new experience for this group. No manager had taken time to gather them for this type of quick, news breaking meeting before.

Other County B staff were angry because they were not briefed in advance. They learned about the incident when news reporters came to their office asking questions. Director B handled media calls, talked to executive staff about the embezzlement and gave them the responsibility of informing staff.

Two eligibility workers in County A were arrested on embezzlement charges similar to those leveled against the worker in County B. The story appeared in the A Times. Workers were angered by their co-workers' behavior, accusing them of stealing from the clients. They felt the embezzlers' unscrupulous behavior reflected negatively on all agency workers to the outside world.

Director A was sensitive to the workers' feelings. He drafted a letter to the staff expressing appreciation for their dedication to serving clients. An editorial to the media and numerous interviews by

Director A drove home the point that County A workers were not like the embezzlers and that workers were outraged by the crime.

The preceding scenarios represent the interplay of OD (Organizational Development) and PR (Public Relations). From an external PR perspective, the agencies' interactions with the press were handled well. They were as open as the sensitivity of legal matters allowed them to be. They did not increase suspicion of the respective agencies by hiding behind a wall of silence.

From an internal PR and OD perspective, however, County B failed to meet the needs of its staff, causing hard feelings because not all staff were properly informed. No attempts were made to build morale after the breach of trust caused by dishonest coworkers. This lack of sensitivity to staffs' need for encouragement and appropriate information about their work place bred lack of trust. As a result, future attempts by the agency to gain support for organizational change were hindered if not sabotaged. Staff lacked enthusiasm because they felt they were not part of the "team."

There is a natural connection between the public OD and PR functions of a Social Services Agency. The two must work in tandem with other forces in the agency's environment to:

- Shape the agency's long-term direction through strategic and succession planning
- Motivate the staff to support the many changes mandated by welfare reform that will lead to achieving the agency's long-term goals

- Create a shared agency vision
- Inform the outside world of agency goals and strategies using staff as key sales people
- Inform staff of the agency's plans and direction and gain their support to ensure successful implementation
- Build up the agency's most important asset—its people

The OD function supports the development of the staff needed to carry out the agency's mission. The PR function communicates that mission internally to staff and externally to clients, advocates and supporters. Together the functions are powerful tools for preparing and motivating the staff to embrace the organizational changes needed to meet the demands of welfare reform. Unfortunately, too few agencies recognize the potential of this combination. Most agencies fail to take full advantage of the PR function, and few work with an OD specialist.

The purpose of this paper is to make recommendations for how the Alameda County Social Services Agency (SSA) can make full use of OD and PR for organizational change over the long run and in the immediate future.

### **What is OD?**

This paper is written from the perspective that the agency is a living organism composed of a diverse workforce that forms one body with many functions. OD then is how an agency cares for itself by:

- Developing long range plans for its future by formulating a clear, brief agency vision. To execute this vision, OD builds up the skeleton or framework of the organization by developing an effective strategic planning process that holds it responsible for meeting specific vision-related goals over time.

- Creating an organizational structure that positions the agency to achieve its goals by putting into place the most effective processes, departmental configurations and partnerships to make optimum use of staff and resources.
- Nurturing and grooming the staff to make the most of the agency's human potential by giving staff the tools they need to be successful in executing existing and future goals. This occurs through staff development, training, and the human resource functions of recruitment and retention, team building and staff motivation.
- Assuring healthy inter- and intra-unit communications by helping groups initiate and manage change through primary emphasis on relationships.

All this occurs in an environment of politics, legislation and public opinion.

### **What is PR?**

In the public sector the person who speaks to the media on behalf of the agency is called a public information officer (PIO). This role is too limiting for the service agencies need today. Now agencies need a public relations officer to be effective in carrying out their mission in the era of welfare reform. The difference between the two functions is critical.

- PR draws attention to the agency for the purpose of making its vision, accomplishments, services and needs known to the outside world and gaining support at the grassroots, state and/or national level. Public information (PI) gives information often as the media request it.
- PR creates events for the purpose of attracting attention, while PI responds to events usually not of the Agency's choosing and usually perceived as negative by the agency.

- Because PR is proactive, it helps the agency control its image, secure support and win allies. PR assists in influencing legislation and controlling relationships with community-based organizations. By responding to events, PI is defensive in nature, working in the realm of “damage control.”
- PR leverages the agency’s assets by encouraging the world at large to get involved in its programs and agenda before the “powers that be” force an agenda on it.
- PR occurs when the agency realizes it has a valuable, viable product to sell in its ability to provide social services. PI is steeped in status quo.

### **PROJECT DESCRIPTION**

I was assigned to the San Mateo County Human Services Agency (HSA) for 15 days. The primary research method used was reviewing the use of OD and PR at HSA and conducting interviews with staff at multiple levels of the organization. The use of OD and PR in San Mateo County was compared to the use of these functions in Contra Costa County (CCHSA), which also has in-house OD and PR functions. The comparison allows a wider perspective from which to draw an understanding of the OD and PR functions and how SSA might best use them. Other research activities included:

- Attending meetings on collaborative marketing efforts occurring in the HSA environment
- Interviewing a representative from The Public Media Center to discuss technical issues involved with marketing a public agency
- Attending an offsite meeting for the formation of a new team to work under the HSA OD Specialist
- Visiting the CCHSA staff development center

and discussing the staff development strategies unfolding there with the manager and the OD Specialist

- Interviewing CCHSA staff at various levels

### **BACKGROUND**

San Mateo County is in many respects one of the strongest counties in California. It is a leader in caseload reduction (69% between 1994 and 1999), income (an average of \$10 per hour for a recipient leaving aid) and economic growth (2.1% in 1999) (FY 1998-1999 Annual Report). In 1992 HSA experienced the first of three major organizational changes when it merged with the Housing Department and a new Director, Maureen Borland, was hired.

Borland came with a penchant for change. A student of private industry and highly experience in the public sector, she was well suited for the major overhaul the agency required. In spite of its strengths, HSA also shared the weaknesses of many other social services/human services agencies.

“There were a lot of negative perceptions about what the agency is,” Borland said, explaining that the community perceived and often experienced a lack of responsiveness and partnering from HSA. “The community had no idea of what the agency was doing. There was a lot of distrust.”

In 1992 HSA developed its first five-year strategic plan, gathering input from residents. The plan focused on achieving measurable outcomes in the areas of individual self-sufficiency, family strength and community health. To meet the objectives of the plan, staff was drawn into closer partnerships with the community and a team-based approach among HSA staff.

More intense change was eminent. Two years before the enactment of CalWORKs (California Work Opportunities to Responsibilities to Kids), Borland began preparing San Mateo for welfare reform. In 1996 she made the almost unprecedented move of hiring an internal OD specialist, Donna Woche. Woche's primary background is providing team building and organizational assessment services in a university setting. She holds a master's degree in counseling and in organizational development. Woche's charge at HSA: navigate HSA staff through the rapid whirlwind of change Borland initiated. Woche was brought in as planning department staff but reported directly to Borland and served as a consultant to the executive team. Her first tasks involved working with the Executive Team to help the group become more effective in its own meeting and planning processes. From there, she quickly moved to assisting in the design and implementation of other processes at HSA. Changes that occurred in the agency included:

- **Matrix Management** A matrix management system is one in which managers from different areas (children and family services, employment, eligibility, adult and aging, etc. work together as a regional team. HSA consists of three regions. Each of the three Regional Directors reports directly to Borland. Each manager is now required to be a generalist with a broad array of services under his belt.
- **Integrated Services** Line staff were transformed from paper pushing workers into service providers who work in teams to meet customer needs at a single point of entry. In the old "silo" system, workers were categorized into a narrowly defined benefits program or "silo." They worked under a manager who specialized in one program. Now a worker's closest associates may come from a variety of programs.

- **Policy Teams** The matrix system is supported by a series of policy teams. The teams consist of managers and some line staff from various work groups. They are drawn together to work on tasks, issues and policies affecting a given area such as Family Self Sufficiency, Children and Family Services, Medical & Nutrition Access or Human Resources. The result is a team approach to problem solving and planning that involves multiple levels of staff and a cross-disciplinary approach.
- **Internal Planning System** In 1992 HSA created its first five-year strategic plan. In addition, individual departments and regions developed internal strategic plans to accomplish their respective missions. Each quarter staff meet to review the Agency's accomplishments and gauge progress. Unmet objectives are scrutinized and plans are made to complete them.
- **Regional All Staff Forums** The OD Specialist facilitated a series of All Staff Forums conducted in each of the three service regions. These Forums provided an opportunity for managers and staff to share information on the changes taking place in HSA. Managers could quickly get feedback on what was going well, and staff became part of the information loop. Some concern has been expressed that the Forums digressed from their original purpose and became one-way communication vehicles for management rather than opportunities for two-way sharing that they were envisioned to be.

In March 2000, the Agency went through another restructuring. This time, the changes occurred primarily in the management ranks.

- **Regional Directors** Two new Regional Directors were brought on board and another retired.

- **“General” Program Managers (PMs)** PMs were swapped between regions to complement each Regional Director’s area of expertise. For instance a director strong in child welfare was assigned PMs from employment.
- **Institutionalized OD** Woche reports directly to the Planning Director and now heads staff development, training and human resource functions. She remains on the Executive Team. Borland referred to this shift in Woche’s position as “institutionalizing” the role. She believes it is a natural progression now that OD is well established in the agency and much of the initial organizational change she hoped to implement has been accomplished.
- **Politicized PR** The PR specialist remains in a staff position but now reports directly to Borland. Her focus is legislative analysis and increasing the HSA’s visibility in the political arena.

## AN OVERVIEW OF THE CCHSA MODEL

HSA’s structure represents only one of the many ways in which an agency could organize itself.

At CCHS, OD and PR are prized assets that receive executive level attention. Both the OD and PR functions report to the Agency Director, John Cullen. The OD and PR specialists sit on the executive team and provide valuable input to Cullen’s decision-making process.

### The OD Function at CCHSA

The OD specialist is Kerri Ray Chaudhuri. Chaudhuri brings a background in industrial and organizational psychology and human relations to her work. Like Woche, Chaudhuri oversees staff development and training functions for her agency.

However Chaudhuri holds an additional tool that is key for organizational development: the planning function. As a result of this unique combination, there is tight control over the use of objective measures to optimize organizational development efforts.

Prior to taking on the OD role, Chaudhuri served as CCHSA director of Planning and Development. In that role she assisted CCHSA in becoming an outcome measures-based agency. Each CCHSA department operates based on clearly defined measures. The goals are reviewed on a regular basis and have become a pivotal tool in determining future training needs for CCHSA staff.

Planning staff performs research and evaluation functions to support staff training and development efforts based on each departments’ performance measures. Once training is complete, Planning provides the follow-up evaluation to determine if staff is more effective in using trained skills three and six months down the line. If managers are still not seeing the necessary results, an analysis of skill gaps assists in pinpointing areas for change based on objective data. As program trends and changes are observed by planning, recommendations for future staff development needs are developed. The result: more effective long-term planning for the effective use of staff.

All staff is kept aware of the department’s progress in meeting its performance objectives. Using careful analysis and tracking of worker numbers, planning staff are able to track performance down to the worker. Chaudhuri said these tools are a tremendous help to front line supervisors and managers.

“They aren’t leading in the blind as much as they used to,” she said.

A Staff Development Director has been hired to work under Chaudhuri and focus on the development of training needs. Al Qatsha said his goal for SD will be to make CCHSA training more proactive. To do this, he will focus on assessments of client needs and how well CCC is meeting those needs. From there, decisions will be made about what types of training can be offered to CCHSA staff and managers to make them more effective.

### **The PR Function at CCHS**

The PR function focuses primarily on image control to the outside world with less attention to matters of internal communication. Cullen has taken a visionary approach to presenting CCHSA and its message.

“We as human services directors need a more sophisticated way of educating the public and gathering public input from the community,” Cullen said. “We already are spending a good deal of public money. The public needs to know what we’re doing. All our Departments do a lot more than give out welfare checks.”

Cullen’s motivation for changing the way CCHSA communicates is simple. He was tired of seeing the “junk” often used to promote the valuable work of social services agencies. The junk included information printed on dull, unattractive goldenrod paper and dog-eared photocopied materials written in governmentese. On the other extreme were failures of agencies to make any efforts to promote their services to the general public providing the tax dollars for programs.

Cullen enlisted Lynn Yaney, a savvy advertising specialist, to take control of CCHSA publicity and fulfill that vision. A member of the executive com-

mittee, she is a key advisor in assisting Cullen in dealing with the media and with certain internal issues that require communicating to all staff.

One of Yaney’s major undertakings was creating an image for CCHS by taking control of promotions. An example of her success in this area is the Foster Care Adoption Program promotion. Yaney took the complicated world of Children and Family Services and reduced it to two sentences that drew hundreds of inquiries: “Kids like these need families like ours. Adopt a child or be a foster parent.” The campaign included bookmarks, bus stop posters, pamphlets and brochures. Compelling visuals and a simple, powerful message drew countywide attention to the need for adoption homes and won CCHSA an award for its campaign.

Yaney’s talents bend to the simplest elements of CCHSA presentation as well. Using photos that are representative of the types of clients served by CCHSA, she created letterhead for each Department in the agency (Children and Family, Workforce Services, Adult and Aging, Administration). Although each letterhead has unique photos, taken together they have a common theme: “We are an agency that cares for the needs of people like you.” The images of children, families, senior citizens and single adults refute the negative stereotype the outside world usually associates with social services agencies and the people they serve. This deliberate approach to creating an image has paid off for CCHSA in increased support from specific politicians and the general public. CCHSA’s strategy is to target specific groups: Clients; community based organizations and churches; politicians; city counsels, chambers of commerce; and fairs. In addition, county staff attend six festivals a year to provide general information, answer questions about services and recruit



potential foster parents and staff. The reaction of the general public to the agency tends to be very positive.

*“CalWORKs has been a nice opportunity for departments to market themselves,” Cullen said. “How do we measure the impact of community support? People in the community say things. We get commendations from public officials. Some politicians are associating more with the departments. I’ve seen our materials in the offices of politicians. Ten years ago they wouldn’t have put out the goldenrod.”*

Yaney has also proved masterful in wooing the media even when there is no emergency demanding attention. She develops feature ideas for them and enlists their support in providing services to the community such as public service announcements on children waiting for adoptive parents. The following chart provides a brief comparison of the OD and PR at HSA and CCHS.

THE OD FUNCTION: A COMPARATIVE LOOK	
SAN MATEO COUNTY	CONTRA COSTA COUNTY
• Reports to Planning Director	• Reports to agency Director
• Controls Staff Development, Human Resources and training functions	• Controls Staff Development and planning functions
• Sits on the Executive Committee but a staff level position	• Executive level position

THE PR FUNCTION: A COMPARATIVE LOOK	
SAN MATEO COUNTY	CONTRA COSTA COUNTY
• Reports to agency Director	• Reports to Agency Director
• Staff level Position	• Executive level position
• Focuses on legislative issues but gives oversight to production of printed materials	• Focuses on media and printed materials
• Plan for agency image evolving	• Controls agency image

### **OD COMES TO SAN MATEO: PROBLEMS AMID THE PROMISES**

Staff are the vital organs of any organization. No strategic plan or lofty goal succeeds without them, and yet staff needs are often the last consideration in the planning process. “The program” or “state

regulations” come first. An OD focus gives an agency the opportunity to put people where they belong—at the forefront of planning.

CCHSA and HSA have wisely chosen to closely link the OD function with human resource issues in some form. At CCHSA, the OD specialist supervises the Staff Development and Planning functions. At HSA, the OD specialist now supervises Staff Development and Human Resources.

HSA’s response to OD has been mixed. Overall, staff see the change as too much too fast. Because Wocher was brought in as an advisor to the Executive Team, there has been a lingering sense that she is an “agent” of the administration. There is an us v. them dynamic at work. One HSA manager said his staff does not want to work with the OD specialist. If differences can be worked out between the OD specialist and staff, the manager said he wants Wocher to do management team development with his staff.

Another manager lamented that although Wocher remained on the executive team, she is essentially buried in the organization now that she reports to the Planning Director and oversees various HR functions. The heavy demands of HR and training could cause her to lose focus, the manager said. If this happens, Wocher will be unavailable to managers needing to resolve OD issues.

In contrast, CCHSA’s OD specialist remains at the executive level and reports directly to the Agency Director. Chaudhuri agrees there are pitfalls to having too many functions under the OD specialist.

“One thing counties have to be careful of is that they allow us to do OD work,” Chaudhuri said. “They tend to stack a lot of stuff on (the position).

We probably have enough OD to keep me busy 200% of the time.”

Unlike Woher, Chaudhuri has the luxury of a Staff Development Director and a Planning Team to assist her in implementing organizational change. The Staff Development Director will focus on training and development issues. The Planning Team will focus on big picture issues affecting the agency. This frees Chaudhuri to work on OD issues.

Reporting to the right supervisor is also a major concern for legitimacy, Chaudhuri said. Who the OD specialist reports to will affect how important people think the position is and whether they see a bias in the recommendations made. To optimize Woher’s position under Madelyn Martin, the HSA Planning Director, Martin and Borland would have to be on the same page about the importance and directives of Woher’s role. Martin must also maintain good standing with other Executive Team members and key managers in the agency to lend clout to Woher’s work.

Woher sees her position in the Planning Department as an opportunity to resolve OD issues at a finer level of the agency’s structure and to learn more about the agency. In contrast, her initial work at HSA during the major organizational changes focused on big picture items. The following are a few of the issues that will comprise her focus in her new position:

- **HR** The Human Resources functions need development. Trainers still tend to be specialized in one area. The goal is to have trainers who take lead responsibility for one area (such as CalWORKs) but are able to train in other areas. Most of the staff is not trained in OD principles. If a manager requests training, SD

staff provide it without evaluating the underlying issues. Often a unit experiences problems that are not training issues. Staff Development must be trained to perform assessments to see if training is beneficial. Where other issues are at work, SD staff must become adept at coaching managers in problem resolution skills.

- **Training** Woher has her staff working on the development of a comprehensive training program for agency staff based on an assessment comprised by an outside consulting firm.
- **Team Building** Woher’s staff is a newly formed team of people who initially worked separately in training, staff development and HR functions. Some of them have never worked together before. The group must work on OD needs for the agency around training and staff development issues while building themselves into an effective team.
- **Succession Planning** Borland and Woher are sensitive to the fact that a number of key staff will retire in the near future. OD will play a part in assessing the types of skills needed to fill those positions and a strategy for developing the right staff to move into leadership.
- **Recruitment and Retention** Like other counties, HSA is struggling with recruitment and retention, particularly for child welfare workers. In addition, there is the need to hire the right staff for ongoing planning, research and direct service delivery to clients. OD will play a part in developing the strategies to make sure these key functions are filled.

## PR’S EMERGING EMINENCE

Public relations is emerging as one of the most important tools a social services agency can have in its arsenal. From a skillful lobbyist at the state and federal level to a charismatic agency director to

handle board questions to an effective agency newsletter, welfare reform is creating the need for agencies to be more savvy about the images and messages they portray. As Yaney of CCHSA states, "The better your materials, the more people will read them." And if no one reads the materials and identifies with the programs, they won't support the agency's efforts. In an age where public sector services are being privatized and patience with government supported programs is quickly thinning, social services agencies need all the support they can muster.

PR is a double mirror that must reflect in two directions: externally and internally. From the external perspective, PR reflects the agency's vision, goals and mission to the outside world. This is done in several ways:

- **Aggressively lobbying** politicians, advocates and potential voters in the community to influence legislation and social policy.
- **Partnering** with the community to bring attention to social issues influencing or influenced by the agency, highlight joint efforts with community based organizations or make potential clients aware of services.
- **Inviting** the media to provide news coverage of accomplishments, pressing issues or changes in social services that affect the community. These activities increase awareness of social services needs among the general public resulting in increased support for an agency.
- **Creating** a seamless, consistent image to the outside world by 1) skillfully developing print material for distribution to the general public and key community players and 2) advising managers on how to work with the press to present issues clearly and accurately.

From an internal perspective, PR has an equally important partnership with OD efforts to:

- **Assist** in the coaching and development of managers who can then become good agency spokespersons when needed for explaining technical or difficult issues to the media, politicians or staff. Well-trained managers aware of the agency vision, goals and needs are also the best sales people for the agency through their daily contacts with the public.
- **Assist** in the development of strategies to communicate with staff when an emergency occurs that directly affects the agency or involves agency staff.
- **Generate** methods of informing the staff of changes taking place or progress made in specific efforts such as newsletters, banners, report cards, speakers' bureaus on public and agency policy and relevant current events.

The challenges of developing an effective PR function at HSA are more subtle than the OD issues, but no less important. Jenny Loft is the Public Information Officer (PIO) at HSA. She is classified as a Management Analyst and originally was assigned to the budget team in the Planning Department before becoming the PIO. The role of PIO was not highly utilized under her predecessor, Loft said. That may be due in part to the positioning of the function as part of the Planning Department Staff. In the May 2000 reorganization, the PIO function became a more visible role that reports directly to the agency director. Although she does not have an executive level position, she has a greater flow of information that is helpful to her position, Loft said.

While CCHSA focuses primarily on media relations, PR at HSA focuses primarily on legislative

issues. The need to focus on legislation is key to Borland's decision to move Loft to her personal staff. In this more visible role, Loft networks heavily with San Francisco and Santa Clara County to generate support for legislation that will benefit the three counties. Without a concise message from the director, staff seem slow to recognize the agency's increasing focus on influencing policy, however. Loft has also worked on some partnership efforts with the community such as Peninsula Works. The collaboration teams HSA with community based organizations to promote One Stop Centers in San Mateo County. An outside media consultant from the Public Media Center also assist with the project.

Loft does not see her role as being a direct player in influencing internal communication. Her primary internal role is supervising the production of materials for distribution by the Agency's various Regional Teams and function groups. Her goal is that the pieces be people friendly and show that the agency care's about people.

Woche, on the other hand, is particularly sensitive to the need for OD and PR to work together. In the future, she would like to use Loft's skills to communicate more effectively with the staff. Consistent communication of the agency vision is key to laying a solid groundwork for OD to take place.

Developing a powerful image for HSA based on strong external and internal communications will require a concentrated focus that is not yet been evident. The quality of printed materials such as annual reports and strategic plans is excellent. There is no focused public relations campaign to keep the agency and its mission in the media. Internal communication remains a top down approach. Members of the executive team pass

information to immediate subordinates to communicate to staff. The results are mixed. What a staff person knows is highly dependent on the individual personality of the manager he works for.

### **WHERE OD AND PR MEET: SETTING THE FUTURE COURSE**

HSA's long-term goal is to foster an appreciative learning culture. Barrett defines such a culture as one that

*Emphasizes continuous experimentation, systemic rather than fragmented thinking, and a willingness to think outside the accepted limitations of a problem. It goes beyond the framework that created current conditions...*

*Appreciative comes from the word appreciate—to value what is best about a human system. In this sense it refers to a system's capacity to deliberately notice, anticipate, and heighten positive potential. Appreciation is the ability to both see beyond obstacles, problems and limitations and to generate hope in the human capacity to achieve potential.*

The appreciative organization is one that makes the best and highest use of OD by fostering the most effective use of PR to support internal and external communications. Barrett contrasts the appreciative organization with the traditional problem solving organization in which "heroes" emerge for their problem solving. Problem solving creates a competitive environment hostile to information sharing, collaboration and risk taking. The appreciative organization creates an atmosphere of anticipation based on strengths and past successes. PR fuels momentum by highlighting those successes to the outside world and to staff. In spite of current abuses

of PR to promote self-serving motives in pop culture, PR need not be a negative. PR can also become an occasion for a public sector agency to do what private industry has done for years—celebrate the best and genuinely valuable within itself.

An appreciative atmosphere challenges people to go beyond what is considered feasible or reasonable to solve a problem and create success. Creating success can be as simple as sending an all staff letter that says, “I know you care about the work we do. You’re nothing like the worker who embezzled money from our clients,” as Director B did in the opening scenario. The anticipation among staff might then be “We are better. We can and will show we are better.” Sending the all staff letter becomes a masterful stroke of internal PR that preserves the opportunity for future OD by motivating the staff and letting them know they are valued. Sending that same message the external public through news articles and editorials further encourages the staff while communicating the agency’s values to the outside world. Too often agency managers worry about the media and neglect to consider the demoralizing affect negative media accounts may have on the staff sitting outside their offices.

Another aspect of an appreciative learning culture is generative competence. Barrett describes generative competence as “integrative systems” are created to help staff see that their contributions make a difference in reaching a shared goal. Translation: the hierarchy of information sharing that traditionally occurs in bureaucracies must be discarded. In order for staff to work as a team, all levels of employees must receive information about agency goals and visions and the progress being made toward reaching them. Strong internal PR needs to be a part of that integrative system. An example is having a quarterly review of the Strategic Plan by

staff at all levels similar to the CCHSA model. If the goal isn’t met, why not? What needs to be done to meet the goal? PR can be used to share the results agencywide, celebrate the accomplishments and provide encouragement in the areas of short-coming. As staff recognize their need and ability to work as a team toward a common, specific goal, OD takes place. Staff have a big picture view of how and why their work matters. Staff become motivated to work toward a specific target and have a clear deadline for meeting it. Staff tend to be more motivated to meet that goal and provide better service. That results in a better image in the community at large.

Providing accurate, adequate and timely communication to all staff is a challenge for most agencies. CCHSA is no exception. The agency relies on the OD specialist and her staff to assist in providing vital communication to agency employees through newsletters, training sessions and advising Cullen on the best way to present issues to staff. Cullen does a monthly update for all staff. Some of the promotional pieces produced for the community are also distributed to staff with a memo from Cullen. One need that has been identified is a technical newsletter with a fact box that would keep staff up to date on program changes and emerging trends. In addition, Program Directors are encouraged to send all staff memos and conduct regular staff meetings at their respective buildings to review progress and answer questions. Even with this, communication is not perfect, Cullen admits. There are times when the issues of concern to the public are not of equal interest to staff.

## CONCLUSION AND RECOMMENDATIONS

*“People internally are occupied with what they do,” Cullen explained.*

That is the challenge that OD and PR must overcome to create useful, effective and sustainable organizational change in social services agencies. “People” must be moved away from being occupied with the “do” and become motivated to achieve the social services agency’s responsibility to the people it is mandated to serve. What agencies do is good in and of itself. Viewed comprehensively, too much of what agencies do is at cross-purposes and harms clients. While OD and PR cannot change an agency overnight, strategic use of these functions in a well-developed plan can lay the groundwork for much needed change over time. This occurs as clear vision is laid and adhered to, information is shared internally and externally and staff are developed and allowed to participate in the creation of the Agency’s future.

SSA is becoming more and more recognized as an Agency that is capable of providing leadership and innovation in the social services arena. It truly has some of the best and brightest minds in the field beneath its roof. As welfare reform progresses, the potential for SSA to emerge as a leader is tremendous and exciting. However, to reach that goal, there are many changes that need to take place. The following are recommendations for organizational change from an OD and PR perspective that can facilitate the ascent to leadership. Although many worthwhile endeavors are not undertaken because there is a sense that funding does not exist, SSA cannot afford not to make the most of any tool that will enable it to make the most viable changes for its future.

- **Cultural Change** Commit to moving away from the current problem solving culture to an appreciative learning culture. As Barrett described, the problem solving culture tends to generate more barriers by creating “heroes” and “us v. them” competitive structures. This mentality is detrimental to working as a team to meet the Agency’s goal and visions.
- **Image assessment** SSA could benefit from a comprehensive image assessment that considers how internal and external perceptions affect its ability to garner support for programs, recruit quality staff, provide effective service to clients and achieve political objectives. Participants in the research portion of the study should include political and community representatives as well as clients and frontline staff.
- **Agency Vision** Develop a clear, long-term Agency Vision that is specific and functional in nature. This lays the groundwork for a comprehensive strategic plan with measurable objectives, goals and outcomes. Although an Agency Strategic Plan exists, there remains considerable fragmentation among the departments and vagueness in the ability to measure progress in fulfilling its objectives as an Agency. Further, staff from all levels of the Agency should have equal access to give input to strategy development.
- **Review and rethink current training** Agency training should be based on meeting specific performance measures that reflect the Agency’s overall vision. Much of current training is skill based. Issues of attitude and vision sharing are not addressed. Any training that does not support the Agency’s organizational changes should be revised or discarded.
- **Become Political** In keeping with the previous recommendation, SSA needs to develop political strategies based on its mission for the local state and national levels. SSA must become a

proactive player in shaping the legislation and political climate that affects social services.

- **Develop an aggressive internal communication plan** The rubber hits the road where community-based partners, politicians and the general public meet Agency staff. As a result, the community feels it gets one message from Agency leaders and another from Agency staff. The message: "Alameda County isn't serious about what they promise. If they were, everyone would know what to do."

### RESOURCES

Barrett, F. *Creating Appreciative Learning Cultures. Organizational Dynamics.*

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McLagan, P. (1989). *Models for HRD Practice. Alexandria, VA: American Society for Training and Development.*

Woche, D. and Gonzalez, L. (1999). *Evaluation and Impact of Success: Final Report. San Mateo County Human Resources Agency. Belmont, CA.*

County of San Mateo Human Services Agency FY 1998-1999 Annual Report (1999). San Mateo County Human Resources Agency. Belmont, CA.

### ACKNOWLEDGEMENTS

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Legislative Analyst  
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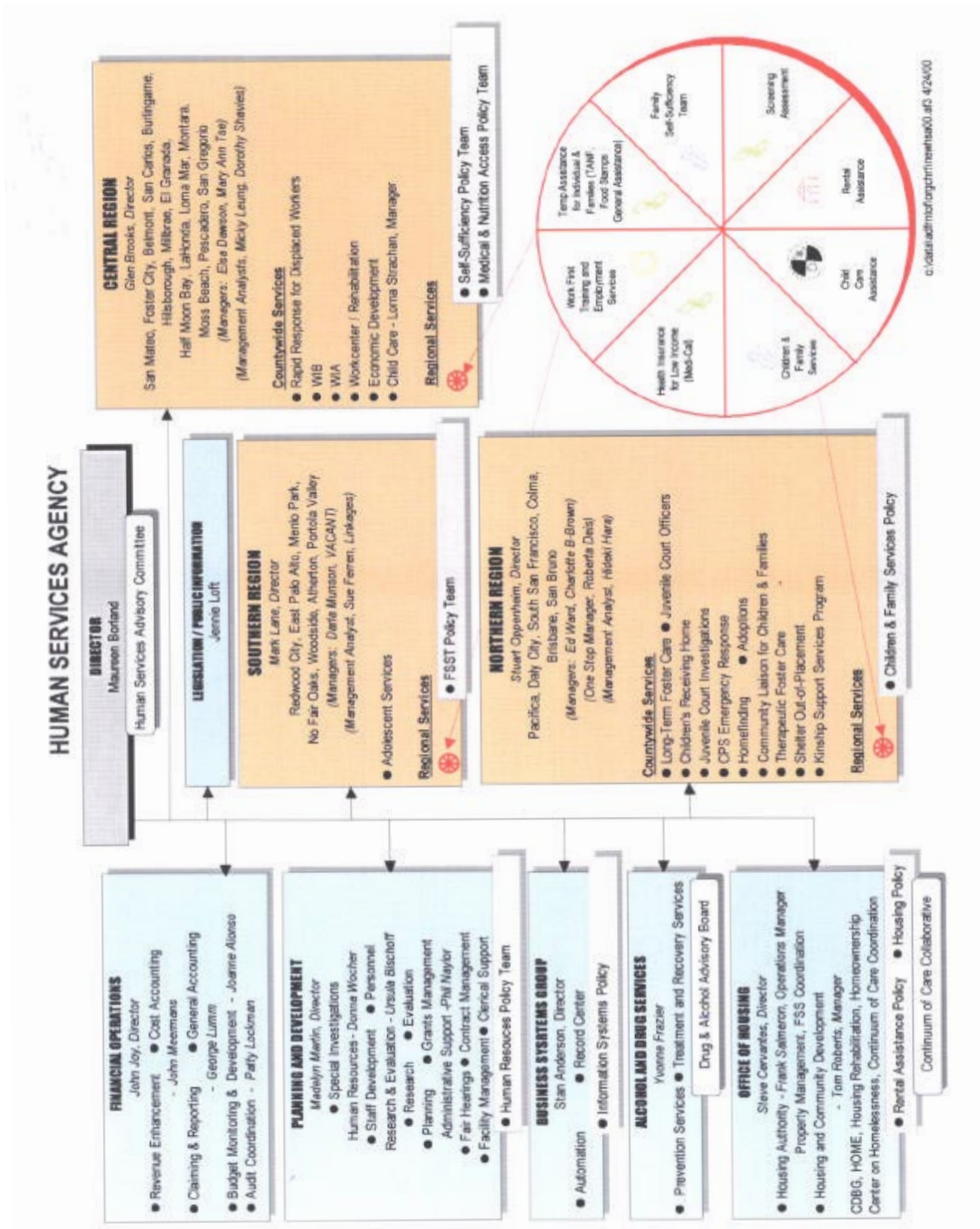
#### County of Contra Costa Human Services Agency

John Cullen, Director  
Lynn Yaney, Public Information Officer  
Kerry Ray Chaudhuri, Division Manager,  
Organizational Development  
Al Qatsha, Staff Development Director  
Paul Ward, Associate Planner

#### Public Media Center

Timothy Feder

Appendix I  
HSA Organizational Structure: May 2000





## Appendix II CCC PR/Informational Pieces Samples

Contra Costa County

# Employment & Human Services

Workforce Services • Children & Family Services • Aging & Adult Services

## Community Information Report





**OUR MISSION** *In partnership with the community, we provide services that support and protect adults, children, families and the elderly, and promote personal responsibility, independence and self-sufficiency.*

**We serve** *a diverse county.*

- We have over 800,700 residents living within 800 square miles, the sixth largest county in the state.
- There are 10 cities and 11 unincorporated areas located within three geographically distinct regions.
- Our diverse population is 70% Caucasian, 11% Hispanic, 9% African American, 9% Asian/Pacific Islander and 1% American Indian.
- Median household income exceeds \$20,000. Our unemployment averages 9%, and 7.3% of our population has income below the poverty level.
- Over 1,300 Employment & Human Services staff are located in 30 facilities throughout the County near the people we serve.
- Ten percent of all county residents were directly served in the fiscal year 1995-1999 by the Employment & Human Services Department. ■

**We protect** *abused and neglected children.*

- Children & Family Services staff work to ensure the safety of children and to assist families in making their full potential. When children cannot be cared for by their birth families, we place them with families that will make a lifelong commitment to them.
- In fiscal year 1995-1999, we facilitated the adoption of over 300 abused or neglected children into loving homes.
- Last year, we received over 21,000 calls reporting the suspected mistreatment of children in our county. Approximately 24% reported alleged physical abuse, 10% sexual abuse, 30% general neglect, 36% severe neglect, 0% abandonment and 0% emotional abuse.

Continued on page 2.



# MISSION

In partnership with the community, we provide services that support and protect adults, children, families and the elderly, and promote personal responsibility, independence and self-sufficiency.





Contra Costa County

## Employment & Human Services

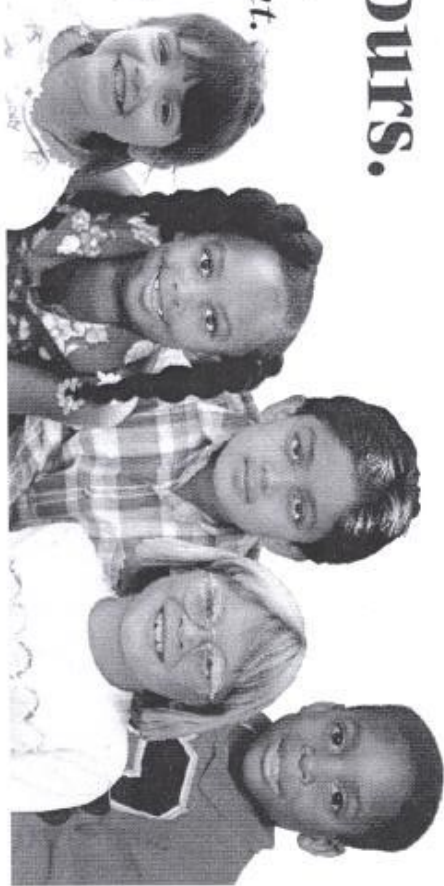
Workforce Services • Children & Family Services • Aging & Adult Services  
Administration: 40 Donaghy Drive • Martinez, CA 94501 • (925) 833-9000 • Fax (925) 833-3325

# Kids like these need families like yours.

*Adopt a child or  
be a foster parent.*

Call  
**313-7788**

CONTRA COSTA COUNTY  
Social Service Department



### Appendix III CCC Letterhead and Business Cards





Central Contra Costa County  
**Children & Family Services**  
A Division of the Employment and Housing Services Department



**Children & Family Services**  
Division of Employment and Housing Services  
400 Franklin Street - Berkeley, CA 94702  
925.862.8200 • Fax: 925.862.8200

400 Franklin Street • Berkeley, CA 94702 • 925.862.8200 • Fax: 925.862.8200



Central Contra Costa County  
**Workforce Services**  
A Division of the Employment and Housing Services Department



**Workforce Services**  
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## Appendix IV

### Overview Memo of Monterey County Staff and Management Training Program

Alameda County Social Services Agency  
DEPARTMENT OF WELFARE TO WORK

#### MEMORANDUM

TO: Rodger Lum, Agency Director  
FROM: Tamarra L. Brown, Administrative Specialist II  
DATE: January 26, 2000  
SUBJ: **BASSC One-Day Project**

#### Summary

I spent one day at the Monterey County Department of Social Services (DSS) to observe Team Enhancement Training. The focus of the training is to provide participants with facilitation skills that can be used to increase the effectiveness of team building. Monterey County first contracted with the consulting firm Impaq in 1997 to provide training. Once trained, this initial group was commissioned to begin using the skills to work with the teams they lead and to become trainers for other staff members. Participants in the initial training group included Program Managers, Analysts and first line supervisors.

Impaq training represents one of several tools DSS is using to implement organizational/cultural change. The Monterey County DSS Model for organizational/cultural change represents a comprehensive approach based on staff development at all levels. I recommend that the Alameda County Social Services Agency (SSA) consider adapting tools from this model to achieve sustainable change at SSA. Such tools include: an image assessment of the Agency by an outside firm to develop a single vision for organizational/cultural change; team building and management training at all supervisory levels; and, a review of current training for alignment with the Agency's vision of organizational change.

#### Project Description

The one-day Team Enhancement training was designed to provide a refresher for managers who had previously attended Impaq training. The group facilitators included a Staff Development Specialist, a Clerical Supervisor and an acting Supervising Eligibility Technician. The three had recently completed training to become facilitators. By using Impaq's models to address issues surrounding change, a team can overcome barriers to achieving change. The group worked through the following facilitation exercises during Team Enhancement Training.

**Personal Accountability Model** This is a model that allows individual workers to take charge of issues in their work environment by choosing to view the issue in one of two ways: 1) Victim; 2) Accountable Worker. The Victim loop follows the pattern of behavior that leads to an ongoing problem in the work place such as denial, blame, rationalization and resistance. The Accountability loop introduces types of behavior that can be used to effectively solve problems such as ownership, forgiveness, self-examination and learning. Working through these proactive behaviors, the individual worker or unit can accomplish effective problem solving.

**Zones of Change** This model allows staff to look at possible reactions to change and how they can more effectively support and facilitate positive change. There are three zones of change: 1) Punishment Zone; 2) Comfort Zone; 3) Safety Zone. The

Punishment Zone represents refusal to change because of fear of negative outcomes. The Comfort Zone represents what staff is used to. Staff does not feel a need to change in the Comfort Zone because the environment is familiar. The goal is to move staff to the Safety Zone where change is not comfortable, but strategies are devised to make changes/risks safer for the individual or group.

**Wall of Fear** This model helps staff to chart their progress in achieving a goal and pinpointing obstacles that hinder success. Staff use the image of a brick wall to see that until they do the thing they fear, they will continue to bounce off the wall of fear and experience defeat. Team members can plan little steps to penetrate the wall of fear and reach their goal.

**Team Agreements** Team Agreements are used to help the individual or team put into writing a plan for overcoming a challenge and be held accountable for taking action. The team responds to questions such as What is one behavior the team needs to do differently to demonstrate more effective ---? or What will you need from others to make it safe/possible to keep the agreement?

### **Benefits**

Team Enhancement Training offers the following benefits:

- It can be used to train staff at all levels to work effectively to solve problems and meet challenges faced by a work group or individual.
- The methods promote positive communication by acknowledging the difficulties of change while encouraging forward momentum. Changing the way staff interacts with one another is crucial to sustainable organizational/cultural change.
- The concepts are easy to grasp and can be used in one on one coaching and development, a peer group setting, a unit meeting, or a client/worker interaction.
- The training provides people skills that can be used to develop staff at all levels for promotion.

### **Background and Culture for Change at Monterey County DSS**

Team Enhancement Training is part of an in-depth, comprehensive organizational/cultural change at DSS. Managers and staff are being challenged not only to interact and to work differently but also to change the way they think about themselves. The following factors contributed to DSS need for organizational change:

**Department Audit** In 1997 Monterey County conducted an audit of DSS that focused primarily on the Foster Care/ Adoptive Program. Recommendations for organizational change throughout DSS followed.

**New DSS Management** Marie Glavin was named Director of DSS following the Agency Audit. During that same time period, several new managers were hired at DSS. Because of welfare reform, the positions into which these new managers moved changed dramatically from the duties expected of their predecessors.

**New County Management** A new County Administrator was hired about the same time as Glavin. The two shared a vision for bringing organizational change to DSS culture and agreed that a combination of organization and staff development measures would be the most effective means. Thus DSS has strong support from its County supervisors to take aggressive measures to affect change.

**Welfare Reform** The work-based CalWORKs program demands that Social Services Agencies/Departments do business differently to meet the needs of their customers.

**Automation** Prior to the introduction of ISAWS two years ago, DSS's 650 eligibility workers performed all tasks by hand.

In addition to the Team Enhancement Training, other components of change implementation at DSS include:

**Management Training** Senior Managers at DSS are enrolled in an extensive course at the Pacific Institute called Investment in Excellence for the 90s. The training focuses on the individual as the source of organizational change vs. assuming it is enough to change the organizational structure. In addition to a three-day course that discusses issues such as How Your Mind Works and Habits and Attitudes, Phase One includes a four-week Audio Assimilation course for individual use. Phase Two of the training features a two-day video course on topics such as Living a Purposeful Life, Building a Co-Responsible Team and Guides to Goal-Setting. Phase Two concludes with a two-week audio course for individual use. Participants continue to meet with members of their group as needed for support and accountability.

Monterey County also offers all managers Zinger Miller Training through its Leadership Academy. The Zinger Miller training is designed to teach executives how to coach, facilitate and mentor their staff.

**Department Image Assessment** Armanasco Public Relations, Inc. (APR) was retained in 1999 to do a three-month research project assessing DSS's image. The purpose of the research was to examine three areas identified by DSS as trouble spots within the overall organization that needed change. These areas were 1) Internal and External Image; 2) Staff Recruitment; 3) Foster/Adoptive Parent Program. For the purpose of the APR study, DSS staff, other County employees and members from a wide spectrum of the community were interviewed. Armanasco's proposal for the assessment is attached to this document. Results of the research will be shared with staff and used to further guide change.

#### **Recommendations for Alameda County Social Services Agency**

I recommend that Alameda County explore the possibility of adopting aspects of the DSS Model for organizational change and development. These include:

**Image assessment** The Agency could benefit from a comprehensive image assessment that considers how internal and external perceptions affect its ability to garner support for programs, recruit quality staff, provide effective service to clients and achieve political objectives. Participants in the research portion of the study should include political and community representatives as well as clients and frontline staff. Based on this study, the Agency could best gauge the areas where change is most necessary.

**Team Enhancement Training** Explore piloting the Impaq training or similar team building training that allows front line supervisors to become adept group facilitators and work team managers. The pilot group could consist of a department, a division or a few units of staff.

**A Comprehensive Review of Existing Training** Staff training offered through the Agency and other sources should be reviewed in light of a single vision for organizational/cultural change. Any training that does not support the Agency in making the needed changes should be revised or discarded.

I will explore cultural/organizational change as part of my ongoing BASSC project and anticipate refinements and additions to these recommendations as the level of research broadens. Should you have any questions regarding the material in this document or possible areas for further research, please contact me at 267-(2)9433.

**Conclusion**

The Monterey County DSS Model represents a well-thought out, comprehensive model for organizational change that recognizes staff development is crucial for sustained results. The extensive training that focuses on individual behavior represents a commitment to making change from the very core of the organization — its people. The inclusion of front line supervisors in receiving and facilitating training represents a unique approach that helps to ensure significant ownership and acceptance of change.

**Attachments**

C: Jill L Esperance, Deputy Director  
Kathy Archuleta, Director of Welfare to Work  
Barbara Weiss, BASSC