

# Case Studies

**Name:**

Dennis Benson

**Title:**

Introducing the Basics of Teamwork and Communication

**The Client:**

I was called in to help a community action agency that was in danger of losing its funding. The agency's funding source had threatened to pull support unless the agency staff could solve its internal problems and become productive. Problems were documented through a combination of state audits, customer complaints, staff complaints, vendor complaints, monitoring, and compliance reviews. The new president of the agency was at odds with much of the staff, and trust levels within the organization were at an all-time low. The agency had been founded and directed by one person who died several years ago, so the issues within this agency are not uncommon among other community action agencies. When you've had one boss for 20 to 30 years, it is often difficult to adjust to a new personality and a new way of doing things.

**The Business Need:**

The agency staff had developed an 'us versus them' mentality with regard to the senior management team and the president. The agency was no longer productive — the staff wasn't organized appropriately and they didn't have any accountability mechanisms in place. As a result, the agency had been audited due to its lack of productivity; the organization constantly missed deadlines. Reports were late and often incomplete or inaccurate, payments were not being made in a timely fashion, allocation of personnel to tasks was often inefficient, and rules were not being followed. The staff needed to learn to work as a unit to increase productivity. The organization needed overall professional development at all levels and had no mechanism to link employee evaluation to continuous improvement planning.

**The Solutions:**

The theme of my solution was 'Paradigm Shift.' The agency's staff sensed they weren't working as a team, but they had no idea why. The agency thrived on having meetings but had no clue as to what the meetings even cost the agency to assess against measureable impacts, which too often were defined as writing up the minutes in a timely fashion. I introduced the *Team Dimensions Profile* to introduce the idea of team roles and a process for project development. We also used DiSC to sensitize them to communication issues; I wanted to help the employees understand their own communication styles. Once they had achieved self-understanding, they could begin to understand the communication styles of others, particularly how their co-workers received information based on their behavioral styles. By understanding self and others, we could work to identify and resolve potential areas of conflict.

**The Delivery:**

Our goal was to introduce a new philosophy into the agency: integrated human services. Human services delivery is most often done in "silos." There is a silo for energy assistance, another for food assistance, another for employment assistance, one for housing assistance, and so on. An integrated human services case management system links those silos together and provides more effective solutions to customers' needs. As an example, it does little good to train a person for a job when they lack transportation, adequate clothing, day care and dental care.

I designed the sessions around four of five videotapes on change and paradigm shifts by Joel Barker (available several places but check [www.starthrower.com](http://www.starthrower.com)). That led to natural discussions about the agency's situation. Each of the tapes was intended to be a set introduction to a module

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of lecture, discussion, and activity, with the intention of increasing perspective and holism and building toward the workshop's main goal – launching a quality process for the agency.

I began by talking about changes in the human services system and the philosophy of human service shifting from entitlement to personal responsibility and how that provided new challenges for the profession along with the increased expectations for performance accountability. We then segued to our first paradigm shift tape: *Change and Leadership*. This led to a discussion on the human services/community services paradigm and its impact on this agency, and on the formation of new partnerships in service delivery.

The second tape, *The Paradigm Effect*, led to a discussion of rules and the limiting and enabling effects of paradigms. Then I had everyone in the room complete the *Team Dimensions Profile*, which led to a discussion of the Z-process and the importance of balance on teams, among other topics. All this in the first half-day session!

The second day began with another video, *The Paradigm Curve*. (All of these videos are about 30 minutes in length.) By now, we've watched three videos and had a lot of discussion. At this point, I gave everybody in the room a box of four light bulbs. Light bulbs? As we had been working through the tapes, materials, and discussions, lights were coming on for people regarding their ability to impact the future. I handed out "paradigm shift" light bulbs. People were instructed to pick a lamp at home or at the office and to use these light bulbs to remind themselves of their paradigm shift each time they turned on the lamp. (When I did my exit interview with the president and his cabinet a year later, I gave them three-way light bulbs to reinforce the lesson, explaining that they had choice about how bright they wanted the future to be.)

From this, we proceeded into a presentation of *DiSC® Classic*. All attendees took the assessment and scored it. The amount of mis-scoring was appalling. One cannot emphasize too strongly the necessity of reading and understanding the instructions before beginning. Everyone also received the cards covering DiSC Talk!, the People Reading Guide, and DiSC Interaction Strategies and I explained the uses of these tools. DiSC PPSS was also provided to the agency's MIS director for installation, and I told the HR director that I recommended that software reports be generated for all key staff. The morning session ended with viewing the fourth tape, *Paradigm Partners*.

After lunch, we went into an orientation to ISO 9001:2000, Baldrige, and ROMA. (ROMA is the U.S. Department of Health and Human Services/Office of Community Services response to the requirements of the Government Performance and Results Act, which requires all federal agencies to develop a performance measurement system and a continuous improvement plan. ROMA stands for Results-Oriented Management and Accountability, the performance system which applies to all community action agencies in the country. ISO 9001:2000 is the world's most recognized quality management system.)

Following this orientation, the participants worked as a group to design a Quality Policy for the agency. The room was organized in rounds with four to eight people at each table. Each table first designed their own policy, which they shared with the large group. From this, we developed a consensus policy, and then a team of about seven volunteers was dispatched to another part of the building to work on refining the policy. The Quality Policy in ISO really states what your organization is in business for.

We followed this with our final video, *Paradigm Hunting*. The rest of the workshop was devoted to



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beginning the process of developing an agency quality plan and identifying potential barriers to success. Throughout the entire workshop, a stack of red 3x5 cards were on each of the tables. At any time during the discussions and viewing, participants were encouraged to write down any potential problem, barrier, or challenge – only one idea per card. I collected the cards at the end of each video, and the participants got a break while I reviewed them to identify common themes.

Of the several hundred cards, many were duplicates representing shared concerns. Five basic themes emerged – computer and MIS, staff recruitment and retention, staff attitude and morale, communications, and operations efficiency. People then self-selected one of those topics to cluster around, forming groups to work on a prioritized list of issues. These clusters formed the basis of innovation teams back at the agency, for continued development (the groups included any staff members who weren't at the retreat).

In addition to the profiles, I tried to get the participants to put the ideas of team roles and style interaction into a personal perspective — at home, in religious or neighborhood groups, etc. — in order to expand their horizons about how these ideas of interpersonal skills can positively affect all aspects of their lives, not just work. One individual reported he planned to use the profiles with his church committees. Another took an extra copy of the *Team Dimensions Profile* home to use with his college-bound daughter to help her with career planning.

I knew that I could not accomplish anything substantive in a day and a half workshop, which is why I agreed to the assignment only if I could stay involved for a year as a continuing resource (and cattle prod) for change. The real strategic planning took place when I worked with individual teams after our first session. The purpose of the retreats was to give them a common foundation of understanding so they could commit to working together as a team.

## **The Results:**

When we started the process, many of the participants were hostile toward me; they thought they knew everything they needed to know to perform their jobs. Slowly, they began to understand that they could learn valuable communication skills and teamwork strategies from me. Their hostility decreased during the course of the initial training and had pretty much evaporated after six months. The innovation teams provided the foundation for the agency's future success. The agency subsequently won an award for sustained strategic planning from the John Glenn Institute for Public Service & Public Policy at The Ohio State University.

Even with a year-long commitment, there wasn't enough follow-up — there never is! I keep in regular contact with the agency, but I don't think they've capitalized on the power of the instruments and team process. They have the basics, but I'd like to go back and spend a couple more days reviewing what we did to take them to a higher level of application. Through the course of the training, I did find an internal champion. I was impressed with him, and he is working now on my current project with another community action agency (a total nightmare). We plan to use the *Team Dimensions Profile* and *DiSC Classic* with that agency as well.