

**Organization and Team Dynamics
&
OD Interventions**

Class #5

CPY 560 Consultation / Dr. Burt Bertram

Community Counseling & Consultation

Conflict Resolution Mediation	Consultation: What Is It?	Community Service Delivery Organizations
Process Consultation & Organization Change	Social Justice Change Agent	Personal / Professional Mission Statement
Organizations & OD Interventions	Mental Health Consultation	Community Change Consultation & Advocacy

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HIERARCHY
Organization / Team Functioning

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Organization / Team Dynamics

BELONGING

Formal membership is not enough. Belonging means identifying with the organization/team and "feeling" like a member. Each member is responsible to belong and to include.

PURPOSE

Members need to know the "big picture" so they can understand how their role serves the goals of the organization. Additionally, members should participate in setting team goals, performance expectations and success criteria.

COMMUNICATION

Information is power! All members have a right and a need to "know." Secrets are a cancer to effective team functioning. Communication up, down, and lateral should be clear and open.

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PRODUCTIVITY

Being productive -- accomplishing the goals and purpose of the organization/team is a source of individual and team pride and satisfaction. Members must experience their role as significant and meaningful.

REWARDS & SACRIFICES

Everyone "keeps score." Everyone knows who is receiving the most rewards and who is making the most sacrifices. There should be valued and equitable rewards for all. Sacrifices should be visibly shared by all.

DIFFICULTIES EXPECTED - RESOLUTION REQUIRED

Differences, conflicts and problems are inevitable facts of life in every human endeavor. Ignoring these realities is a prescription for team and organizational disaster. Organization/team success is based upon an "even when it hurts" commitment to the effective resolution of interpersonal tensions and business problems.

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INTEGRITY

Team leaders and team members who desire to achieve great things have absolute trust in each other. At all times, they behave with integrity. They are believable and respectable. Without these essential values, teamwork can never move beyond "guarded cooperation."

PERSONAL RESPONSIBILITY /ACCOUNTABILITY

Team members take personal responsibility for the success outcome of the team. They think, act with initiative and take responsibility for their attitude and behavior. Everyone is accountable to everyone. Accomplishing the mission of team is everyone's "personal responsibility."

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OD Organizational Development Consulting

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<p style="text-align: center;">Consultee-Centered Administrative Consultation <i>(OD Consultant)</i></p> <p>Goal is to improve the professional functioning of one or more members of an administrative or leadership staff/team. Consultant moves freely throughout the organization – takes active role in identifying organizational problems and recommending and/or initiating activities to address the problems.</p> <ul style="list-style-type: none"> • Consultee: Senior Leadership / Organization • Target: Efforts are directed at improved organizational functioning through leadership competence improvements 	<p style="text-align: center;">Client-Centered Case Consultation <i>(Expert / Specialist Consultation)</i></p> <p>Consultant functions as a specialist who assesses the client, arrives at a diagnosis, and makes recommendations concerning how the consultee might modify his or her dealing with the client.</p> <ul style="list-style-type: none"> • Consultee: Mental Health Professional, Teacher, Medical, Clergy, Parent, Adult Child • Target: Efforts are directed to the "Case" (client, student, child, parent, employee, etc.) <p style="text-align: center;">CONSULTATION</p> <p style="text-align: center;">Consultee-Centered Case Consultation <i>(Mental Health / Human Service Consultation)</i></p> <p>Consultation is concerned with difficulties a consultee encounters with a particular client for whom he or she has responsibility – the difficulties spring from shortcomings in the consultee's professional functioning.</p> <ul style="list-style-type: none"> • Consultee: Mental Health Professional, Teacher, Medical, Clergy, Parent, Adult Child • Target: Efforts are directed to the consultee to address <ul style="list-style-type: none"> ○ Lack of Knowledge ○ Lack of Skill ○ Lack of Confidence ○ Lack of Objectivity • Theme Interference 	<p style="text-align: center;">Program-Centered Administrative Consultation <i>(Experts/Specialists)</i></p> <p>Consultant is called in to study a problem and provide a set of recommendations for dealing with the problem.</p> <ul style="list-style-type: none"> • Consultee: CEO, Administrator, Manager, Supervisor, Team Leader, Etc. • Target: Efforts are directed to the Admin functioning or to a larger system context (community consultation)
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Organization Development Consulting

OD Consulting is concerned with the performance, development, and effectiveness of human organizations. (www.free-definition.com/)

OD Consulting is the process of improving organizations. The process is carefully planned and implemented to benefit the organization, its employees and its stakeholders. The client organization may be an entire company, public agency, non-profit organization, volunteer group - or a smaller part of a larger organization. The change process supports improvement of the organization or group as a whole. The client and consultant work together to gather data, define issues and determine a suitable course of action. The organization is assessed to create an understanding of the current situation and to identify opportunities for change that will meet business objectives. (www.odnetwork.org/odnc/whatis.htm)

OD Consulting is a large area of expertise, encompassing the ability to conduct overviews, interviews, analyses and any other assessments required to determine the overall structure and function of an organization, including all the inter-dependent parts and how they function together. The purpose of this review is generally to determine where problem areas may exist and then to suggest changes and/or improvements. (www.interlinkt.com/definitions.html)

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Organization Consulting

Action Research - An assessment and problem solving process aimed at improved effectiveness for the entire organization or specific work units. The consultant helps the client organization identify the strengths and weaknesses of organization and management issues and works with the client in addressing problem opportunities. (www.odnetwork.org/odnc/whatis.htm)

Action Research can be described as a family of research methodologies which pursue action (or change) and research (or understanding) at the same time. In most of its forms it does this by using a cyclic or spiral process which alternates between action and critical reflection and in the later cycles, continuously refining methods, data and interpretation in the light of the understanding developed in the earlier cycles. It is thus an **emergent** process which takes shape as understanding increases; it is an **iterative** process which converges towards a better understanding of what happens. In most of its forms it is also participative (among other reasons, change is usually easier to achieve when those affected by the change are involved) and qualitative. (www.scu.edu.au/schools/gcm/ar/arhome.html)

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“The Firm”
OD Consulting
Case Study

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Stage One	<p>1) Initial Contact/Meeting Contacted by Firm Administrator Arranged a 90 minute meeting to determine fit Overview of the problem / her take on the problem Agreed to initiate a consultation relationship (4 hours)</p> <p>2) Define Desired Outcome Coaching: Continued exploration of problem and how things would look/feel if the problem was solved Crisis: Partners met – decided (without talking with consultant) that the Administrator needed to resign. Decision: Introduce consultant to partners – possibly expand the scope of the relationship</p> <p>3) Contract Meeting with Partners Presented Scope of Services Proposal - Accepted Discussed Ground Rules / Consulting Process & Timetable</p> <p>4) Physical/Psychological Entry Introduced consultant to staff Tour facility / Informal meeting of staff Invest in establishing relationship and building trust</p> <p style="text-align: center;"><small>CPY 560 Consultation / Dr. Burt Bertram</small></p>
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Stage Two P R O M E L E M I D	<p>5) Gather Information Confidential Partner Interviews Staff Questionnaire Selected Staff Interviews (Representative)</p> <p style="text-align: right; font-size: small;"><i>CPY 560 Consultation / Dr. Burt Bertram</i></p>
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Client – Who is it?
<ol style="list-style-type: none"> 1. Contact Client: the individual who first contacted the consultant with the request or issue 2. Intermediate Client: the individuals or groups that participate in interviews, meetings, and other activities as the project evolves 3. Primary Clients: those individuals who ultimately “own” the problem (an pay the consulting fees) 4. Unwitting Clients: the people who work with the primary client, are impacted by the interventions but don’t realize it 5. Indirect Clients: organization members who know they’ll be affected but are yet unknown by the consultant 6. Ultimate Clients: total organization, community, or groups whose welfare will be affected by the consultant <p style="font-size: x-small; margin-top: 10px;">Schein, Edgar H. (1997). The concept of “client” from a process consultation perspective: A guide for change agents. <i>Journal of Organizational Change</i>, 10(3), 202-214.</p> <p style="text-align: right; font-size: x-small;"><i>CPY 560 Consultation / Dr. Burt Bertram</i></p>

Case Study... Who is the Client?
<ol style="list-style-type: none"> 1. Contact Client: Firm Administrator 2. Intermediate Client: Staff members surveyed / staff members interviewed 3. Primary Clients: Partners & Administrator 4. Unwitting Clients: Everyone in the firm – even those who did not believe there was a problem or those who don’t care if the problem gets fixed 5. Indirect Clients: None in this case 6. Ultimate Clients: Clients/Customers of the Firm <p style="text-align: right; font-size: x-small;"><i>CPY 560 Consultation / Dr. Burt Bertram</i></p>

Organizational Systems Questionnaire (OSQ)

Strongly Disagree Strongly Agree

1 2 3 4 5 6

- 1) I am given clear guidelines for my job.
- 2) People are given the respect they deserve.
- 3) When at work, I feel like I am part of the team.
- 4) I know who I should go to when I have a problem or need something.
- 5) I am not kept informed about important issues.
- 6) Good planning is a priority here.
- 7) The path for organization success is clearly outlined.
- 8) I am not given the information I need to carry out my job.
- 9) Information flows effectively in this organization.
- 10) In time of need, coworkers support one another.
- 11) Leaders seem to have a vision for the future.
- 12) Decisions are based on appropriate policies and procedures.
- 13) I receive constructive feedback regarding my work performance.
- 14) People are held accountable for their work performance and conduct.

15) On a scale from 1 to 10, circle the number that indicates the level of functioning of the organization.

LOW 1 2 3 4 5 6 7 8 9 10 HIGH

16) In what direction do you feel the organization is moving (circle one):

- a) Moving toward the LOW side of the continuum
- b) Moving toward the HIGH side of the continuum.

Organizational Systems Questionnaire (OSQ) Validity Study, Billings, J
Journal of Marital & Family Therapy, Vol 22, Number 2, April 2007, p.164
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Confidential Interviews

Explained: The purpose of the interview
 The overall assessment process

Reviewed: Confidentiality

Assurances: How information learned would be used

Interviews: Firm Administrator
 Partners
 (2) Supervisors (Admin & Operations)
 (8) Staff members
 4 Admin
 4 Operations

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Stage
Two

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5) Gather Information
 Confidential Partner Interviews
 Staff Questionnaire
 Selected Staff Interviews (Representative)

6) Define the Problem
 Analyze & Synthesize Data
 Define Themes / Trends (Systemic Thinking)

7) Set Goals
 Present to Partners / Administrator
 Present to Staff
 Together set Goals

8) Generate Possible Interventions
 Present list of possible interventions to Partners,
 Administrator, and Staff - solicit
 Feedback/Suggestions

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Results

1. Morale within the Firm has never been higher.

	TRUE		UNDECIDED		UNTRUE		(TOTAL)
	Very	Somewhat	Somewhat	Very	Somewhat	Very	
Administration	1	0	4	1	4		10
Operations	0	1	2	3	3		9
Unknown	0	0	1	1	1		3
Total	1	1	7	5	8		22

11. Communication within the Firm is effective.

	TRUE		UNDECIDED		UNTRUE		(TOTAL)
	Very	Somewhat	Somewhat	Very	Somewhat	Very	
Administration	2	3	3	1	3		12
Operations	0	2	1	6	0		9
Unknown	0	0	1	1	1		3
Total	2	5	5	8	4		24

22. I know people within the Firm who are considering leaving.

	TRUE		UNDECIDED		UNTRUE		(TOTAL)
	Very	Somewhat	Somewhat	Very	Somewhat	Very	
Administration	5	5	1	0	1		12
Operations	6	0	3	0	0		9
Unknown	0	1	2	0	1		4
Total	11	6	6	0	2		25

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- 23) What are the Most Important Job Satisfaction variables for you at the Firm?
- Rank-order the following variables from 1 (Most Important) to 12 (Least Important)
- Opportunity for Advancement/Career Growth
 - Feeling of Being Appreciated
 - Quality of Supervision
 - Financial Rewards
 - Employee Benefits
 - Friendships
 - Positive Work Environment
 - Sense of Accomplishment
 - Flexible Work Schedule
 - Secure/Stable Employment
 - Location of job near residence
 - Other _____
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23. What are the Most Important Job Satisfaction variables for you at the Firm?

Rank Order	Variable	Points
1.	Positive Work Environment	214 pts
2.	Secure/Stable Employment	187 pts
3.	Financial Rewards	179 pts
4.	Feeling of Being Appreciated	176 pts
5.	Sense of Accomplishment	175 pts
6.	Flexible Work Schedule	158 pts
7.	Employee Benefits	153 pts
8.	Opportunities for Advancement	136 pts
9.	Quality of Supervision	107 pts
10	Job Near Residence	96 pts
11	Friendships	88 pts
12	Other	20 pts

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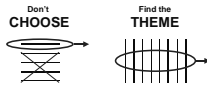
Systemic Thinking: an approach to thinking that makes the assumption that everything is connected – everything interacts with (affects and is affected by) the things around it.

»Bartlett, G. (2001) *Systemic Thinking*
(http://www.probsolv.com/systemic_thinking/home.htm)

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Systemic Change

- 1) Identify the elements of a situation
- 2) Identify the theme that connects the elements
- 3) Develop interventions that target the theme for change...rather than attempting to change individual elements or symptoms.



There is **ALWAYS** a theme....
..... **ALWAYS!**

Bartlett, G. (2001) *Systemic Thinking*
(http://www.probsolv.com/systemic_thinking/home.htm)

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Elements

STRENGTHS

Technical/Financial Systems: It is widely acknowledged and appreciated by partners and staff alike that the upgrades of technical and financial systems have been a plus for the Firm. The need for upgrading was evident to all. The Firm Administrator is credited by all for these advances.

Billing/Cash Flow Management: Financially the Firm is perceived to be functioning at a high level. Securing timely payment from customers has significantly improved. The Firm Administrator is credited by all for these advances.

Customer Service: Partners and staff believe the Firm is providing high quality service at a competitive price.

Operations Team: Generally the Operations staff believe they are working well together.

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Elements

WEAKNESSES

Interpersonal Behavior of Firm Administrator

Disrespectful Behavior: It was reported by numerous staff that the Firm Administrator has on many occasions engaged in behavior that is perceived by staff as disrespectful and demeaning. Behaviors include; laughing at staff members' mistakes, making threatening statements, cursing, and with obvious intense anger, verbally attacking staff members.

Favoritism/Double Standard: It is the perception that the Administrator plays favorites among the staff and applies a double standard regarding both discipline and compensation; favoring employees she likes and/or those she hired.

Unresponsive/Unavailable: The Firm Administrator does not communicate enough. When asked a question she often brushes aside the person with a comment such as; "Yea, yea...we'll do that." Many staff members describe a "black hole" - information to the Administrator goes in...but nothing ever comes out. The Administrator is often not in the office and no one knows where she is or when she will return.

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Elements

WEAKNESSES

Organizational Communication: There is a consistent perception throughout the staff that they are in the dark. They are not consulted about changes that affect their area of responsibility and often do not know about changes until they are scolded for doing something incorrectly.

Role Confusion: Staff is uncertain about who is responsible for what. Clarity of the role and responsibilities of Partners, the Administrator and the two supervisors is needed.

Departmental Tension: There is chronic tension between the Billing Department and Operations.

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Themes to Target for Intervention

Family Systems Perspective

Executive Subsystem (Partners) had not given full authority to the new Administrator (even in the beginning). Partners could not decide if they had confidence in the Administrator. Partners permitted (in some cases encouraged) staff to come directly to them with problems, rather than going through the Administrator. The Administrator saw the Partners as meddling; Staff saw the Administrator as weak.

Change Management Perspective

The old Administrator was one of them, she was very social, didn't demand much, and was not a professional administrator by training. Staff was comfortable with her and resented the change. Some believed they could bring back the old Administrator if the new Administrator were to leave.

Professional Self Esteem of Administrator

The esteem of the Administrator was badly shaken. As a result she said things and did things that only made things worse. She just could not pull out of the nose dive.

Cliques - Triangles - Frozen Communication

Partners and Staff had broken into cliques and triangles; resulting in frozen communication and rampant rumors.

Role Confusion

Two supervisors, responsibilities were not clear, added to confusion, reduced accountability

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Stage
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9) Choose an Intervention
Agree on Interventions

10) Formulate a Plan

- Firm Administrator: Apology / Commitment to Improve
- Partner: Endorsement of Administrator
- Monthly Staff Meeting
 - Process to bring issue for discussion
 - Feedback loop to ensure action/outcome
- Management Team Building / Role Clarification
- Coaching for Administrator (on-going)
- Facilitated meeting between Partners and Administrator
- Periodic feedback to/from Partners
- Re-survey staff in 6 months

11) Implement the Plan

12) Modify/Customize the Plan (as needed)
Consistent with Action Research model

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Stage
Four

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13) Evaluate the Impact of the Interventions

14) Additional Interventions (as needed)
Consistent with Action Research model

15) Reduce Involvement & Follow Up

16) Terminate
Communication from Firm Administrator received 6 months later:
"Things at the firm are going very well. The Partners and myself seem to be trusting each other more, and the staff seems genuinely happy (as work goes). I even rehired Xyyyy Yxxxx, but on my terms and Joe [Sr. Partner] even said that the reason I rehired her was because I know I'm in charge of the office, and that I had matured and am now the bigger person. Probably best of all...at least for me is that two weeks ago during my annual review I asked for and received a 25% salary increase. All and all, things worked out really well. Thank you!"

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Questions & Implications

- What counseling skills/theories were utilized?
- What are the implications for clinical or community counseling/consultation practice?

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