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Strengthening Self-sufficiency Pathways

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CHANGE READINESS PODCAST TRANSCRIPTION
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Bright: Hello and welcome to the “Peer TA podcast.” I'm Bright Sarfo, a researcher and member of the Peer TA team and MEF Associates. And I'll be your host today. In this episode, we'll be talking about a concept called Change Readiness, or how TANF and other human service agencies can make themselves ready to take on big changes to improve their work. While change can be unexpected, as we all know from the changes many agencies have had to make in light of COVID-19, this episode will encourage you to think about fostering change readiness proactively and equip you with strategies to do just that. I have three guests with me today.

Fannie Ashley is a TANF administrator from Alabama, Maria Wortman-Meshberger is a TANF administrator in Nevada, and Mishon Hicks is an expert on a process called Strategic Doing, a conceptual framework for piloting new practices and strengthening partnerships. All three of my guests have experiences leading and preparing staff to participate in big changes in TANF offices. I'll be asking each of our guests to share a bit about a recent change they led, spanning from implementing a new coaching model, to transitioning to telework before COVID, to rethinking the way human service agencies do strategic planning in a more active, inclusive doing, oriented way. We'll be highlighting concrete strategies that you can borrow to jumpstart readiness for change back at your own office or wherever you're working these days.

My first guest is Fannie Ashley. She's a program manager for the state of Alabama at the Department of Human Resources. She manages what's known as the Jobs program in Alabama, which is part of the TANF program there. Alabama was part of a project that the Federal Office of Family Assistance funded to test out a new coaching model to case management. This model would be tested in a ton of agencies throughout the country. While the overall project was federally funded, each state had discretion in how they selected offices and staff to implement and manage the change necessary for these pilots. Fannie and her team wanted to take the staff perspective into account, so they developed an anonymous survey to explore concerns from the staff about participating in a pilot ahead of any formal training in the new coaching model. Fannie is going speak with us today about our first concrete tactic for change readiness, using assessment tools to gauge staff's readiness for change, and using the results to tailor training and support for that change. All right. Okay, so I'm just going jump in here. Well, to start off, tell us about the survey you sent out to staff in advance of the pilot.

Fannie: Well, of course, initially, when we decided we were going to do it, there was a memo that was sent to all of the counties, and so, as information to let them know that Alabama had been chosen to participate. However, we knew immediately at the point that...after the directors all agreed... The county directors is who we sent the memo to, asking if they would be interested in having their staff participate. But that wasn't...to me, that wasn't the stopping point. That was actually just the beginning because county directors, certainly, are important in the process, but we knew the important people in the process were frontline staff and their managers. And so, we really wanted to know how they felt about this. And so we decided that what we would do, we would develop a survey. We had seven questions, I believe, that we surveyed the counties on. And it was done anonymous. We sent a letter to the counties and said, "We want your input. We want your real concerns. We want to know what issues you have here. The things that worry you most about the fact that you're going to be a part of a pilot." Those are the, kinds of, things. And, "We want you to know that this is going to be done anonymously, so, no one will know what your answers are."

Bright: What did you ask?

Fannie: Our first question was, "Which of the following represents your greatest concern about implementing new approaches to conducting your work?" And 29 out of the 56 said, their greatest concern was receiving clear guidance on how to get the work done. Nineteen of them...I mean, 19% said that they were worried about increased workloads. The next question that we asked was, "Have you personally participated in a county-level pilot in the past?" And 48% said that they had not. The real answer came when we asked what their experiences were with those pilots. They were not good. We knew we had lots of work to do.

Bright: So how did the information that you received actually shape the way you prepared staff for this big shift to coaching?

Fannie: Well, normally when we're going to make a change, we write a memo, send it out, and say, "Here's what we're going to do, and how we're going to do it and when we're going to do it." In this particular case, we wanted to do something different. So, basically, we decided that our first step was building trust. And that was our responsibility. And we needed to do it face to face. Basically, we set up a meeting with each one of the four pilot counties. We spent a day and a half with the Mobile staff, which was the really large county. We spent a day in Dallas County, and a day combined because the small counties were so small. We did those two counties together. And the good news is they were right next door to each other, so, that worked out really well. But basically, we went in, and we talked about why we felt like the pilot that we were about to institute was important. And finally, we talked about it from the perspective of who we were, of who we had signed on to be, and how we could make a difference in the kinds of statistics, if we invested, the poverty rate, the participation rate, the denial rate, all those things.

Bright: So, if you had to tell other organizations to do just one thing to prepare for a big change, what would you tell them?

Fannie: Assess, assess, assess, all the time, continually, never stop. Assessment is crucial in figuring out where you need to go. If you don't assess, know where the issues are, know what people are feeling, know what their struggles are, know where the potential and the land mines are... I believe going face to face, doing the survey, and getting it done anonymously was the best thing to do because people were honest in what they had to say. They shared concerns that I don't think they would have shared if we had sent a survey to the county and say, "Complete this and turn it in to your supervisor." So that, I think, was the right thing to do. Taking those surveys, looking at them, hearing their voices, giving empathy to what their concerns were, letting them know that their concerns were important, and then helping them to take ownership for all of this, as we went out to the counties, and said, "Here's this new project that we're wanting to do, here's why we're wanting to do it." And in helping them to identify who they are, what their gifts are, and what they've chosen and selected to do.

Bright: Okay. So, ownership, making sure their voices are heard. I mean, what do you think the staff appreciated the most?

Fannie: Well, I think the staff most appreciated the fact that we didn't just send out a memo and say, "Here's what we're going to do." That we took the time to come to each county to say, "Here are the results of your survey." And we did it in a

PowerPoint, and we put it all up there so they could see. "We think these are legitimate concerns. We want you to know that we are going to keep these in our forefront as we move forward so we don't make the same mistake." We also then gave them specifics about how we were going to address that. Those are the comments I've heard from them, that they appreciated the fact that we heard them and that we listened and that we're accessible to them.

Bright: Fannie Ashley is a program manager for the state of Alabama at the Department of Human Resources. Fannie, thank you so much for your time today.

Fannie: Thank you for the opportunity.

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Bright: So that was our first strategy for change readiness, using assessment tools to gauge staffs' readiness for change, and using the results to tailor training and support for that change. Now we're going to hear from Maria Wortman-Meshberger. She is the chief of employment and support services at the Nevada Department of Health and Human Services. Interestingly enough, her agency had already been piloting telework, letting staff work from home before they knew that working remotely would become the reality for many human service agencies following the COVID-19 public health emergency. We wanted to ask Maria about how this planned pilot prepared her agency for the unplanned changes brought on by the pandemic. Maria and I sat down to chat about what led her agency to pilot teleworking in the first place.

As you'll hear next, really putting staff experience and well-being at the forefront of agency innovation efforts, not only led them to take on this incredibly proactive and lucky teleworking pilot prior to COVID, but it also helped them prepare staff to weather the post-pandemic changes. They did this by listening to staff, knowing what they needed, and helping them feel prepared and supported to take on shifting circumstances. Maria is here to present the second concrete tactic for change readiness, putting staff well-being at the forefront of agency innovation efforts. Well, we're glad to have you on. But just to get started, can you give us a quick overview of just the initial telework pilot, just pre COVID?

Maria: So prior to COVID, our agency was working on a telecommuting pilot. It happened...I can't say exactly. I'm going to say at least a year ago. And one of our staff members was involved in a certified public managers course, and his project was to do telecommuting and do that project. So they started the pilot with our quality control unit, where they selected members to work from home. There was a lot of development of forms and paperwork and getting that all approved, and then getting them to home. And we were coming towards the end of that pilot, they were asking that that could continue for those staff. And then COVID-19 hit, and the whole agency, kind of, went telework.

Bright: Right. And they certainly weren't alone, right?

Maria: Yeah.

Bright: So, I guess, I'm curious. Like, what was behind the initial effort to move to telework? Like what initiated the pilot? Why did you guys want to do that, kind of, work?

Maria: I think our agency just was ready to try something new, and this individual came up with a great pilot and put the work into it. And he was able to do that and show the success with it.

Bright: Right. Okay, so you talked about certain document approvals. Can you talk a little bit about some of the workarounds? Just go into that a little bit more.

Maria: So, we needed people to be able to sign off and say that they agreed. It's an agreement form that you agree to, you know, do your work at home and you agree confidentiality, ensuring that your computer and your work things are locked up in a safe, secure place.

Bright: Okay, great. Just bringing it back to the pilot and that work, would you say that there were some, sort of, feedback loop about...I mean, in this case, what works about teleworking, and feed that back into the agency? Is that, sort of, the process?

Maria: Yeah. I know when they were doing the pilot, they were definitely getting feedback from the staff that was participating, and finding out what was working. The staff loved it. They really enjoyed it, so much so that they did want to extend the pilot.

Bright: Okay.

Maria: When it was coming towards the end, I don't believe they wanted to come back into the office.

Bright: Yeah, I can imagine. So, in spite of all these preparations, I don't think anyone was quite prepared for the changes that COVID-19 brought on. So it would be helpful if you could just take us inside your agency when you received the news that folks would need to start working from home.

Maria: Well, that one really did happen fast and furious. We had a week, and they said, "You need to have your staff home. By the end of Friday, come up with a plan, and we're going to get this going. And make sure you fill out these forms. And find out this information from them. Do they have reliable internet access, do they have a computer at home, do they need to take our state equipment, you know, do they have a cell phone? How are they going to communicate back?" And it was like, "Okay, we're going to figure it out." Our IT staff, they did a phenomenal job. And it was, "Get them home, and come up with a plan for your specific unit." And that's what we did.

Bright: Okay. Okay, so this is interesting. So what's the extent to which you were prepared to deal with certain challenges, or just prepared to move on to this teleworking phase, given that pilot? So if you could just give us an idea of what were you prepared for? Let's start there.

Maria: Well, I think one of the big things we were prepared for were the forms. We had the forms. A few agencies actually reached out and said, "Do you guys have anything? What are we supposed to use?" And so we were able to provide those things to those other agencies so they could do it as well. And I think we, kind of, knew the IT requirements. What, kind of, system access? What do we need in certain areas to be able to do that?

Bright: All right. So there was a lot to think about. I mean, these days, just about everyone is working from home. And, you know, it sounds like you're working through the kinks. And so I'm wondering, like, beyond the new technology and the internet and the kids running around, you know, during calls, how else did you support your staff through all this?

Maria: One of the things our deputy did was put out a daily newsletter to help folks know what productivity looked like, things that were coming, just information about what was going on. And I really think that helped staff stay connected to everybody, and this really just gave everybody in our whole field operations and what would eventually become our whole agency, what was really going on with everybody. Like, "Hey, what's our productivity? How many tasks are we processing?" Which is important to our field staff. "Yeah, look, we're doing an amazing job and we're not even in the office."

Bright: Got it. So it basically sounds like you continued to put your staff at the center, just like you did during the telework pilot, even in the scenario that these changes were unexpected. So, do you think some of these changes will stick around once you return to the office?

Maria: I do. I know there's already been talks that some staff may get to permanently telecommute. We have to have in-person services. I mean, that's what we do, human services. So definitely, we'll always have people in our office, but I think there'll be definitely some more options for people to work from home.

Bright: This has been great. I appreciate it, Maria.

Maria: Thank you.

Bright: Maria Wortman-Meshberger is the chief of employment and support services at the Nevada Department of Health and Human Services.

So Maria just gave us insight into the second strategy for change readiness: putting staff well-being at the forefront of agency innovation efforts.

My next guest is Mishon Hicks, an expert in a process called Strategic Doing. Mishon is a teaching fellow at the Strategic Doing Institute, which is at the Agile strategy lab at the University of North Alabama. Mishon has implemented strategic doing to facilitate multiple change initiatives at the D.C. Department of Employment Services. This is included using strategic doing to coordinate WIOA integration across multiple agencies. Mishon is here to present the third and final concrete tactic for change readiness, using the step-by-step strategic doing process, and specifically, the upfront steps.

So Mishon, could you start by giving us a broad overview of strategic doing. What's your elevator pitch?

Mishon: I got it. So strategic doing is an approach that allows organization groups of any entity to be able to identify their assets very quickly, to formulate their future around an appreciative questioning, to link and leverage those assets to be able to come up with actionable items and develop an action plan, and then be able to actually do something, which results in a pathfinder project that that group can really look at over a period of 30, 60 or 90 days, and say, "We actually did something, and here's the results of what we did, and what did we learn from it? What did we gain from it? Where do we go from here?"

Bright: All right, thanks. That was a great overview. So I understand that there these, like, 10 skills of strategic doing. Can you just run us through those 10 skills? What are they basically about?

Mishon: Right. So they're 10 targeted skills that build on one another. So it's really based on four questions: what could we do together, what should we do together, what will we do together? And then in the next 30 days, we're going to check in on what we have done, right? So just think, you put yourself on a 30-30. And so those questions, kind of, guide the work that you're doing within this 30-day cycle, right? So the first skill, again, is coming up with your ability to have an invitation to an exciting, inspirational conversation, then you're going to create a psychological safe space to have that conversation. That is the difficulty because many people don't trust certain environments. So you got to create a psychological safe space. So that has to do with the location that you pick. Many times, we move conversations to universities or libraries or churches, because, guess what, people feel safe, and they feel trusted in those environments.

Bright: All right. So basically people have to feel comfortable first. That seems to be the first step. So what's the next step after that?

Mishon: The second skill is framing conversations with the right questions. So, really coming up with having a deep conversation about... So you're inviting people to a conversation. That's really what it's about. I'm not asking you to come to a meeting necessarily, I'm asking you or inviting you to a conversation about whatever it is. And once you invite people to come to the conversation, it should be something that's inspirational and exciting because those are the people that you want to be able to be a part of the coalition if they're willing. And this is what we find. If you're asking people to come to a conversation to say, "Hey, how can we lower crime rates? Or, "How can we fix a problem?" That's not inspirational to people. That sounds like tried, tested in the same old ideology that people have heard from years. If you invite people to a conversation that says, "This conversation," or, "This convening is going to be about making sure that every child in our community has access to digital resources in this entire county. That's what this conversation is about." Right? That's a very different conversation. I'm excited to go to that conversation. Right?

Bright: Right. Okay, so it sounds like these framing questions, they're designed to, sort of, build excitement and get people ready for change. So what's the next one?

Mishon: So the next skill will be moving into identifying those assets. Many of us have hidden assets. And, you know, if you and I were on a strategic doing team, hey, you know, I design great newsletters, and you might be a great guitarist. So if we're planning a community event, then those other skills and assets we have might come to bear, but we'll never know that unless we sit down and have a conversation about what assets we bring to the table, right? So identifying those assets. And then looking in those assets and linking and leveraging. How do you and I link and leverage those assets to create an opportunity? So we're not waiting on anybody else to grant us permission or to bless us with this overall edict. We're going to work our assets that we have within our collective group, and then we're going to create opportunity. So, in strategic doing you may have 50 post-it notes on the table, right? And then you start to link and leverage, "Okay, can we turn that into an opportunity?"

Bright: All right. So it sounds, like, at this point, we've done a lot of preparing for the change, as far as identifying the problem, identifying assets, and now we are at the stage where people are ready to identify which change they want to target. What exactly are they going to do? And so, I guess, at this point, if you could just walk us through the remaining steps or skills, that would be great.

Mishon: Skill number five is to look for the big easy. That's the opportunity that you and your group will do. Skill number six is coming up with success metrics and outcomes. How are you going to measure the characteristics? Skill number seven is start slow, but go fast. Launching and learning your opportunities. Skill number eight is drafting a short action plan. That's where your team is aware of what action items you will be taking. Skill number nine is setting your 30-30 and your meeting time. And skill number 10 is the gentle nudge and promoting and reinforcing your group.

Bright: Okay. All right. So I think I got it. So basically, it sounds like within this process, those first few steps, are about really getting people ready for change, or this idea of change readiness, getting them prepped. And then it also includes, just in those latter steps, actually undertaking the change itself, sort of, you know, holding people accountable and things like that. So, I guess, my question is, when does the light bulb go off for people in this process? You know, what really gets people excited, and what tends to be the most helpful?

Mishon: That's a great question. I think we see the light bulb go off in different... For some people, the light bulb goes off just at the convening, when the invitation is sent in a different way, right? Because it's the way they... They're not used to receiving information that way. So they're just curious because they've never had an invitation that has been built in such a way. So they're just curious, in and of itself, to see what it's about. And once they walk in the room, they're, kind of...and they're going through a session, you know, the light bulb for them is like, "Hey, this is something different, and I want to be a part of it."

But I think the crux of it is when people start to see the linking and leveraging of opportunities. Is when the lightbulb goes off. Because you can do that in relatively 30 to 60 minutes in that time slot. And people are amazed at the number of opportunities that they have created at the end of an hour, right? I mean, they might have walk away with... I've seen engineers walk away with 200 opportunities because they were just that energized with the people who were around the table. With your asset, with your 3D printing, this is what we could do. Yeah, so I think that's when a lightbulb goes off, in the linking and leveraging. Assets is a revealing stage, but the linking and leveraging, really, really, is when people are...they have a aha moment.

Bright: I see. All right, so to wrap up, where can people go to find out more about strategic doing?

Mishon: You know, definitely get the book, reach out to the strategy lab. I think getting somebody trained, it will go... You take that one person that goes back into your organization as trained in strategic doing, and they can change the entire organization just by training other people and doing it. So I think that's a great opportunity as well.

Bright: Okay. Mishon, this was great. We cannot thank you enough. Thank you so much. We appreciate it.

Mishon: You're quite welcome.

Bright: Mishon Hicks is a teaching fellow at the Strategic Doing Institute at the University of North Alabama.

Okay, so that was the third and final Change Readiness Strategy, implementing a step by step process to engage staff, develop ideas, and implement a plan for change, using Strategic Doing. As a recap, the first strategy we heard, is using surveys and assessments to understand staff feelings and emotions about change, and the second was putting staff well-being at the forefront of agency innovation efforts. Overall, these strategies really underscore the importance of building trust with staff and getting their buy in to approach change within your agencies. I hope these strategies have given you an idea of how you can be prepared for big changes as you consider ways to strengthen the work you do. A special thanks, again, to our guests, Fannie Ashley, Maria Wortman-Meshberger, Mishon Hicks, who all took time out of their busy schedules to hop on yet another Zoom call and share their experiences.

Our episode today was produced by Angie Gaffney at MEF Associates, with support from Sarah Bradach and Liza Rodler on the MEF Peer TA team. The Peer TA team is led in partnership between MEF Associates and Manhattan Strategy Group. Peer TA facilitates the sharing of information across state and local agencies implementing TANF and other programs serving low-income families, to provide technical assistance, facilitate dialogue, and help programs learn about effective strategies to support families.

You can learn more about Peer TA on our website at peerta.acf.hhs.gov, or you can also submit a request for peer-based technical assistance related to any of the topics discussed on this podcast.

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