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Case Study #16 The Case of the Angry Adoption Office

Ever been caught between a rock and a hard place? That is how Alex Morales, president and CEO of the Children's Bureau, felt in August 2007. After many years of planning and fundraising, his organization was about to move into a beautiful new HQ building. Alex had been looking forward to enabling increased inter-divisional cooperation by bringing all senior management and administrative functions under one roof. However, for seven months the Foster Care/Adoption Office (Office) had been in open rebellion, saying that if their Director, Lou Graham, was moved to HQ and they were forced to scatter to the various community centers, they would likely all quit, causing the program to fail. Such a loss would be catastrophic. The Office operated the Bureau's oldest program, constituted 25% of the Bureau's budget, and was vital to the Bureau's mission. However, if Alex didn't enforce the move, the efficiencies from centralization would not be realized, and an excuse for other departments not to move would be created. Alex thought, "This train wreck is going to happen and I don't see any way to avoid it."

Fast forward to February 2008. Graham is working in the new HQ building along with the other senior staff, and the Foster Care/Adoption program is more successful than ever, with no loss of staff. How did Morales pull off this miracle?

The Situation¹

For over 100 years the Children's Bureau of Southern California² has helped parents raise healthy children through an array of child-abuse prevention and treatment services aimed at strengthening families and communities. The Bureau's comprehensive programs focus on parents with kids (newborns through age 12) and include adoption and foster-care services; in-home and center-based counseling; child and parent development; health; child and parent education groups; tutoring and reading programs, and community-resource referrals. Twenty-two Children's Bureau offices are located in communities throughout Los Angeles and Orange Counties. The annual budget is slightly greater than \$28 million.

In 2002, the Bureau began a multi-year campaign to raise \$20 million to buy a headquarters building that would promote inter-divisional synergy by bringing together scattered senior program management and administrative functions.

By 2004 the Office had outgrown its space near downtown LA, and the lease was ending. As a temporary measure, the Office was moved to a converted home



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the Bureau owned in North Hollywood, in the San Fernando Valley. In general, the staff loved the new location: rent no longer had to be paid (which helped the Office's budget) and the home setting was appropriate to helping foster families. In addition, the staff tended to associate the move with a program turnaround that began around the same time. After struggling for a time, the program was beginning to experience significant success and growth, even with a "bare bones" staff.

In December 2006, the capital campaign was reaching its goal, a new headquarters building had been bought, and renovation had begun. Plans were made to move Director Graham to the new headquarters and to relocate the rest of the Office staff to existing community service offices. To help cover the financial shortfall in the cost of the new building, the plan also called for selling the North Hollywood building.

The Office staff pushed back against the move. Their stated concerns included fear that the program would suffer and not knowing who was going to move where. They thought the Office might even cease to exist as a separate division once the staff was spread among the branches, and some even thought this was the Bureau's intention. Emotionally, the staff expressed a strong connection to the North Hollywood building. They made statements such as, "They are selling our program out from under us; we're going to go under," "I don't want to move; I love this house," and "The Administration only cares about their new building, and not about how the move will affect our program." People feared that another site for the Office would not be found. Many felt they just had to stay in the North Hollywood house, period. Because no one wanted to think about having to move, they did not discuss how to implement a move. Thus many things were left unsettled.

In an attempt to stay in the North Hollywood office, the Adoption Office staff offered to raise the money to keep the house. Fearing that this would negatively impact the Bureau's capital campaign and would conflict with the Board's decision to use the money from selling the house to help finance the new HQ, and realizing that maintaining the house would undermine the goal of centralizing the Bureau leadership, CEO Morales declined the offer. The Office staff responded, "You won't even let us save ourselves."

For months, Graham experienced major stress. She could see no way to resolve the situation. Her fear was that she would move, the North Hollywood building would be sold, and the result would be "a train wreck." Not having a solution, she didn't know what to tell the staff, and therefore did not communicate anything to the staff about the move.

Morales and Graham shared the nightmare of an unavoidable train wreck. Even talking about the situation, Morales said, was "like touching the third rail."



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In summary, Bureau management wanted to implement its commitment to an integrated management team. The Office staff, however, felt that Bureau management was threatening a humming division for no reason other than money. Some even thought management's goal was to destroy their division.

The Goals

Morales wanted to

- Create an integrated management team, with all senior executives, including the director of the Foster Care/Adoption Office, located in the new Bureau central office building.
- Retain all Office staff.
- Preserve and if possible increase their morale and their already high productivity.

Given the views of the Office staff, these goals appeared incompatible, and therefore impossible to achieve.

What Happened

In mid-2007, Morales, wanting to take a good organization to great, arranged for the twelve senior executives of the organization to attend Frontier Associates' (FAI) Effective Leader Program (ELP).³ The planned moves were only months away, space planning had begun, and solving the Adoption Office problem had become critical. ELP promised to "provide a technology for producing breakthroughs." Morales and the other senior executives felt that they needed a breakthrough to solve the Adoption Office problem.

ELP suggests that participants investigate their "listening filters," the assumptions that shape what we see and feel, and therefore influence our actions. In looking at their listening filters, Bureau senior management for the first time thought, "Maybe we are all making assumptions that are not true. Maybe our assumption that all the Office staff cares about is their current quarters isn't true. It certainly is clear to us (Bureau management) that the Office staff's assumption that we don't care about their program is untrue."

The Breakthrough

Morales called a meeting of the relevant Bureau and Adoption Office managers to produce a breakthrough that would resolve the issue. Normally such a meeting would have immediately gotten into questions such as what were they going to do about the problem, the reasons the house needed to be sold, and reasons the Office didn't want to move, with each side trying to convince the other, including management trying to "fix" an unruly staff.



ELP, however, suggested that the first step for success in any project is to establish a sufficient “background of relatedness.” Before getting into the problem content, Morales planned to acknowledge a common context of commitment to the children, common goals for a successful program, and the value of the parties. Morales began the meeting by saying, “You have already proved to me that you all are totally here for the Children’s Bureau. I know that all of us are here to make a huge difference for the children.” This markedly reduced the defensiveness in the room.

Morales added, “While a goal is to get all the senior leadership in the same building, we also want what you in the Adoption Office already have—a successful program and a successful team. We want to learn from you and transfer the lessons learned to other Bureau programs.” For many this shifted the conversation from “us against them” to a common perception and possibilities. To put it another way, the Office staff’s listening filter changed from “You want to get rid of us” to “We are valued and needed.”

The conversation then shifted from being defensive to creating possible ways the two goals might be accomplished (ELP also taught how to have a group think from possibility rather than being limited by listening filters). The group brainstormed on the possible factors that contributed to the Office’s success. One factor mentioned was sufficient support staff. At one point someone said, “To maintain the critical mass of support people, everyone in the Office might move to the new Bureau building, not just the executive.” This was the breakthrough moment.⁴ The positive emotional and reaction confirmed that the staff issue wasn’t really staying in the North Hollywood house, but rather staying together. This realization was described by management as “an epiphany.” The desire to stay together grew not only from interpersonal attachments, but to have sufficient support staff in one place to be effective. The Office staff’s fear, previously unstated, was that breaking up the staff among the branches would result in insufficient support staff at every location, and that therefore the program would be likely to fail.

As the group continued to think from “how could we make this work,” they quickly determined that moving the entire Office staff to the Bureau HQ building was not only feasible, but could be a good thing.

Enrolling the Office Staff

The next step was for Graham to enroll⁵ the Adoption Office staff in this solution. Before participating in ELP, Graham had felt powerless, partly because she had been buying into the staff’s listening filters. In ELP she was able to see how she could help her Office through the change.



In the breakthrough meeting Graham got excited about a bigger opportunity—to serve as an example of how to be a successful program. There was a context (listening filter) shift from “They want to get rid of us” to “They want us.” She thought, “My program and the way we function—in a supportive interactive way with each other as a team—can be the good virus that is being brought into this new building. We’re no longer the bad guys—we’re the good guys.”

To enroll her staff, Graham realized that she had to be authentic. Again she used ELP technology, starting with creating a powerful background of relatedness. Here is an outline of the meeting she conducted:

- Address rumors (of which there were many, mostly negative from the Office staff’s perspective).
- Acknowledge that all staff were aligned with the Office mission: Taking care of the children.
- Acknowledge the fears: “It is true that the Bureau will sell the North Hollywood house. I know you love it because I love it too.” She talked about the history of the house—she authentically spoke the thoughts in the room, and shared that she had the same feelings.
- Share what Morales had said: “The Bureau wants the Adoption Office as an example of a successful program and team so everyone can learn from us. They want us.”
- Create possibility: Graham raised the possibility of moving the entire Office to the new Bureau HQ. She said, “What makes this house successful is who is in it. We could be successful in a tent. We are going to do the same thing in the new building.”
- Analyze feasibility: Graham also said, “There are issues (such as an alternative small meeting space that would remain in the North Hollywood area). I don’t have all the answers. Your help will be needed in figuring it out, but I know we can do it.”

No objections were raised because Graham had already said what they would have said, including authentically stating their objections. Staff response was “How can we help you?” They talked about how the new location might even be better, mentioning that it was closer to some people’s homes and that everyone would have their own desk. Soon thereafter Graham brought the entire staff to tour the new building, and the excitement grew further. Although some staff took longer than others to buy in, there were no negative comments or resistance.

Before the move, Graham thought about what problems might arise in the new building. One issue might be that the HQ refrigerator was too small. As a result she bought three small refrigerators to put near certain people’s desks. Little things like that made a big impression. Soon after the move Graham received a thank-you card from one of the supervisors that said, “Lou, thank you for your efforts to make our move more palatable. The fridges and efforts to make the staff feel welcome are appreciated. I know that this was not easy to impart to



those of us who are reluctant to change, but as usual you have done it with aplomb. Thanks.” A staff member who had expressed concerns about her longer drive to the new building said to a potential staff member who lived in the same city, “Oh, it’s not very far to drive here.”

The Results

In February 2008 the entire Adoption Office moved to the new Bureau HQ building. A great deal of thought had been applied to the move, using the lessons learned from the earlier move to North Hollywood, including figuring out a way to keep the same Office phone number (for clients’ ease), even though the old and new locations were in different area codes.

Not only was there no drop in business (as had been feared since business had dropped when they had moved to North Hollywood), but business increased. Additional support staff have been hired. The Adoption Office staff now say how much they like being in the Bureau building. They note that getting access to management and obtaining needed resources is easier. They are proud of the spaciousness and newness of the building, and there is even more cohesion among the Office staff.

Other Bureau staff, on their own volition, have looked for opportunities to socialize and work with Adoption Office staff. That has led to more collaboration within and between programs and is helping achieve one of Morales’ goals, that the Adoption Office “infect” other programs with its successful practices.

Analysis

People’s thoughts and actions were determined by a set of listening filters, such as “They don’t want us.” What people said did not necessarily reflect their major issue.

The breakthrough to success required

- questioning everyone’s listening filters (particularly management questioning its own filters about the Adoption office staff)
- alignment on a common commitment to serve the kids and have successful programs
- a time devoted to thinking from possibility

Morales said, “The relocation of the Foster Care/Adoption Office to the new Center involved a major cultural shift; we had anticipated this was going to split the organization from a morale standpoint and result in many disgruntled staff. This did not occur because of our ability to understand listening filters, build trust, declare that the Office staff and management had already proven that they are committed to the Children’s Bureau and the kids, focus on our end goal, and use the breakthrough process taught to us by Frontier Associates.”



Summary

The Children's Bureau of Southern California faced a major problem. The Foster Care/Adoption Office (Office) staff was strongly resisting relocation to a newly built central HQ. Bureau management planned to bring all senior management together in the new HQ to promote inter-divisional cooperation. Simultaneously the Office's building would be sold and the staff dispersed to various community service centers. The Office staff strongly opposed the move; it appeared that if they were forced to move they would all quit, including the director, destroying one of the biggest and oldest of the Bureau's programs. But, if the Bureau let the Office stay in its existing building the goal of inter-divisional cooperation would be compromised, other divisions might also resist moving, and the anticipated funds from selling the Adoption Office building would not be realized. The Bureau CEO said, "This train wreck is going to happen and I don't see any way to avoid it."

The Bureau senior management attended Frontier Associates' Effective Leader Program (ELP), where they learned about the concepts of "listening filters," empowerment, the power of declaring that the office and management had proven that they were there for the Children's Bureau and the kids, and a process for reliably producing breakthroughs and generating buy-in. Using ELP technology, a breakthrough was produced, resulting in the entire Adoption Office moving to the new HQ. Results have included higher morale and Office cohesion, a positive impact on other programs, and a significant increase in the Office's productivity.

¹ This case differs from others in this series in that the breakthrough was produced entirely by the Children's Bureau staff after having attended Frontier Associates' Effective Leader Program.

² Go to www.all4kids.org for more information about the Children's Bureau of Southern California.

³ For more information about the Effective Leader Program, go to www.frontier-assoc.com/Services/elp.htm.

⁴ The understanding (listening filter) of the Office staff was that a move of the entire staff to the Bureau HQ was not feasible. The understanding (listening filter) of management was that the Office staff wanted to stay in the North Hollywood building. Both understandings were erroneous

⁵ "Enrollment" means that others buy into what you are offering because they see the value of what you are offering to something of importance to them. Enrollment is also covered in the Effective Leader Program.