



University of Southern California Finance Division Whole Systems Change to Co-Create a Healthy University Culture

SITUATION

The University of Southern California (USC) Finance Division¹ recognized that while their staff is highly skilled, many employees have felt disconnected and were merely going through the motions of their workday.

“The executive staff appeared very non-approachable...I was like a nobody, just a regular worker bee and had no significance.” -Finance Culture Champion

Under the leadership of Jim Staten, the Finance Division set out to recapture the hearts and minds of all employees, with the goal of creating an inclusive and supportive workplace culture.

To help do so, USC welcomed Charles Holmes and Annalise Jennings, consultants with decades of experience supporting organizations to create healthy, values-driven cultures using Barrett Analytics.

They implemented a Whole Systems Change approach to ensure everyone had a voice and the opportunity to shape the workplace culture. This process consists of four critical and interconnected stages:

- Align
- Engage
- Enable
- Measure

Industry:
Education

Country:
United States

Employees:
1,400

Consultants:
Charles Holmes
Annalise Jennings

¹ The Finance Division at USC comprises ITS (Information Technology Services), FMS (Facilities Management Services, and CCD (Capital Construction Development).

WHOLE SYSTEMS CHANGE APPROACH



ALIGN

Action: Culture Assessment

To get an accurate picture of what employees were thinking and feeling about their workplace, a Barrett Values Centre's Culture Assessment was conducted. People were asked what is important to them, how they experience the current culture, and how they would like to experience it in the future.

ENGAGE

Action: Values Summits

Charles and Annalise used the results of the Culture Assessment to identify opportunities for improvement and then carefully designed and delivered a series of Retreats and Values Summits. Participants began to engage in a shared understanding of the meaning of the values they said are most important. They explored what these values look and feel like for them, wrote actionable definitions of the values, and shared examples of the values in action.

Dr. Doug Shook explains during the sessions it was not **"uncommon for tears to flow, for people to be very revealing because Annalise and Charles are so authentic, open and vulnerable."** And yet, as Shook reminds us, **"for a leader to openly acknowledge we don't know what's going on, we have fears, we're undecided, in the US Western culture this is not traditional."**

These Retreats and Summits were guided by four key principles:

- Belonging
- Connectedness
- Caring for the well-being of the whole
- Shifting the focus from “problem” to “possibility”

“By the sheer nature of encouraging diversity of roles and experiences into every dialogue, hierarchy and silos dissolved. We created an environment and space for equality and encouraged all voices irrespective of title.” -Annalise Jennings

FINANCE DIVISION: CHOSEN FOCUS VALUES

ITS:

- Accountability
- Integrity
- Open Communication
- Opportunities for Growth & Professional Development
- Teamwork

FMS/CCD:

- Trust
- Respect
- Accountability
- Collaboration
- Employee Recognition

ENABLE

Actions: Culture Champions Program, Town Hall Sessions

The entire process was focused on ensuring the Finance Division would be capable of leading the culture change work themselves, independent of consultant support. To this end, a Culture Champions program was introduced to provide the resources and internal capacity to fully bring the values to life. There are now more than 100 “Culture Champions” within the Finance Division, including Jose Salazar who stepped up as a volunteer to run large Town Hall sessions. Salazar remarked that he usually passes on such opportunities but in this context “it was a great opportunity to make change within our group.”

“We are in this together. The Culture Champions have been key to helping build an engaged culture.” -Gus Anagnos

“People really value the development that has come from the Culture Champions program. It has given people a lot more confidence in engaging with colleagues and trying new things.” -Margaret Harrington



Some of the Finance Division's Culture Champions

BRINGING THE VALUES TO LIFE

Actions: Each Unit Creates their Own Approach, Values in Action Workshops

All employees recognized that it is through connection, conversation, and integrating values into the fabric of the organizational culture that true change occurs. As part of the transition process towards fully owning the culture change work, all units within the Finance Division created approaches for ensuring values are communicated to employees in an impactful manner. Values can be seen on posters hanging on doors and walls within the buildings as well as e-boards in different work areas and are used to call attention to individual behaviors.

“Just having the words on the wall is not enough. It’s not just words for us - we really wanted to operationalize, to truly ‘live’ our values.” -Lucy Avetisyan



One way this is happening is through the top-down engagement of the senior leadership team. As Margaret Harrington said, **“They don’t sit in the corner on their cell phones, they’re at the table, engaged with the exercises and they engage with people and share personal stories. Their involvement has been so valuable in helping shape the culture of the organization.”**

Values in Action (VIA) workshops have been another pivotal tool for both communicating values and bringing them to life. These “activation” sessions give people a chance to explore shared values and develop real life strategies. Questions explored in these VIA workshops include:

- What does that value mean?
- What would we do differently if we were really good at that?
- What would we stop doing?
- What do we as a group want to commit to? What do I as an individual stand for and commit to?

Integrating Values into Systems and Processes

Utilizing the Whole Systems Change approach, units worked with Annalise and Charles to develop ways to operationalize their values across many departments. Values have been incorporated into job descriptions and performance evaluations and added to online training modules. A new function was created which includes a Head of Engagement, Culture and Communication dedicated to nurturing culture work and spearheading activities to integrate core values.



Whole Systems Change Roll Out

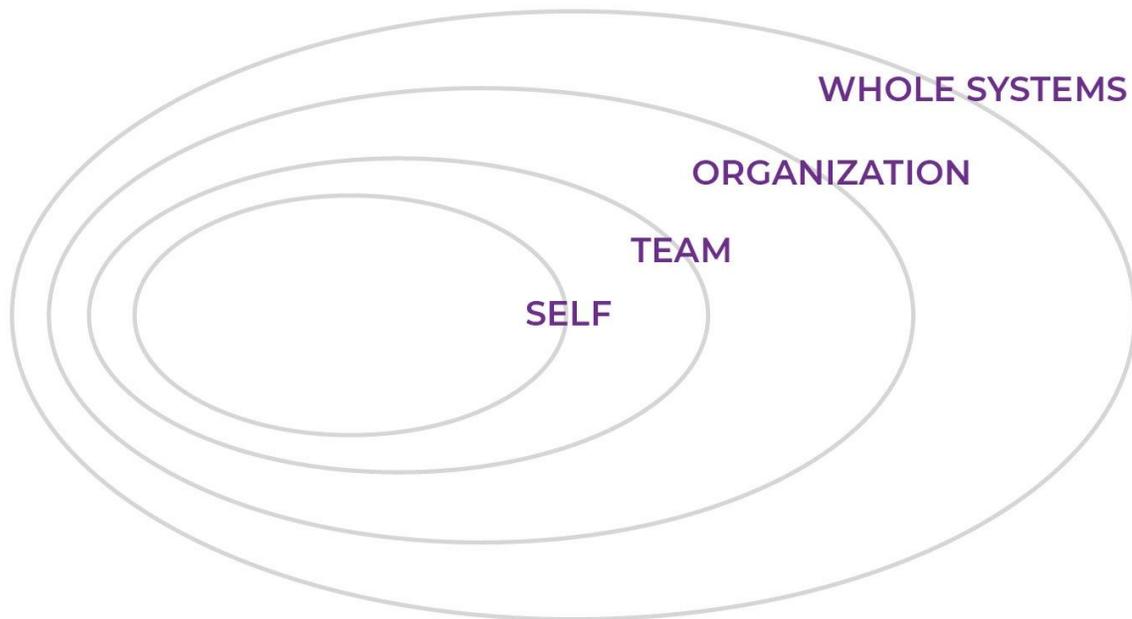
“That’s the thing, you can’t do all this - the Culture Assessments and Workshops - and then stop. It’s how you operationalize and how you all commit to nurturing this and demonstrating that it is making a difference. And it is clear that the work is making a significant difference in the Finance Division and proving extremely impactful.” - Lucy Avetisyan

MEASURE

Impacts of the Culture Change Work: It Starts with the Individual

The culture and values journey was guided by the fundamental belief that individual change is necessary to achieve organizational change. On a personal level, people have become more self-aware and more accepting of themselves and others. As they gain a deeper understanding of their own personal values and the alignment between these and the organization’s values, they become more confident to speak up and take a stand for the values.

Margaret Harrington commented that the process has taught participants that they can be **“really powerful, valuable actors in changing the organization’s culture because they are powerful, valuable people.”**



For some, this means they are working closely with senior executives, often sharing their thoughts for the first time. Others, like Crystal Ray, are noticing that leaders are more willing to take the time to get to know everyone on their team regardless of position or job title. The values work has effectively given everyone common ground to come together, share ideas, wisdom and expertise on a level playing field.

Increasingly, people are able to put faces to names and to recognize the gifts that others bring. They are also developing relationships with people they may never have spoken to previously.

Maryam Karimi shares that now **“There is more respect and purpose when people are communicating with each other. There are noticeable shifts in the language they are using as they are more aware of their alignment to values, purpose, and the impact of their words on others.”**

These changes have created a ripple effect of measurable impact within the entire Finance Division.

Impacts of the Culture Change Work at an Organizational Level

Over the course of two years:

- Cultural Entropy® decreased significantly.
- Higher match between Personal Values (PV) and the Current Culture (CC) values.
- Higher match between Current Culture (CC) and Desired Culture (DC) values
- Two of ITS's (Information Technology) Desired Culture values (accountability and teamwork) now appear in the Current Culture.

“The values work has made a positive impact at all levels of the organization. It encourages us to step outside of our comfort zone to grow, to listen, to trust. It gives junior staff the courage to respectfully call out leadership who aren't living the values in the moment. Most importantly, it is a perspective that most of

us seem to use when we look inward. And our introspection seems to be more frequent and effective as a result.” -Greg Condell

OUTCOMES

Whole of Systems Change is Rolled Out to the Entire University

The creation of a healthy organizational culture within the Finance Division has been so successful that it prompted a scaling up of the work to the whole university.

“I believe this is the most valuable thing you can do as an organization. If you can get people onboard and aligned with the values, and get processes and structures in place, everything else tends to take care of itself.” -Eric Johnson

Working in a Healthy Organizational Culture

Culture change work requires an investment in terms of time, resources, and energy from all involved. That investment, however, is yielding significant returns for employees at all levels of the organization. When asked how it feels to be living and working in this new values-driven space, Gus Anagnos remarked, “It feels natural and it feels like it should have been there all along.”

Jose Salazar is similarly enthused by the culture change and its effect on him and his work: “I really can’t thank Annalise and Charles enough for being there and supporting everything. It was an incredible experience and it’s really changed how I feel about myself.”

Crystal Ray is now excited by the sense of connection she feels, and the way in which she sees senior staff engaged with everyone in the workplace: **“[The culture and values work] was wonderful - I truly believe in the process. I feel more empowered now to empower my employees under me. We all have a role to play.”**

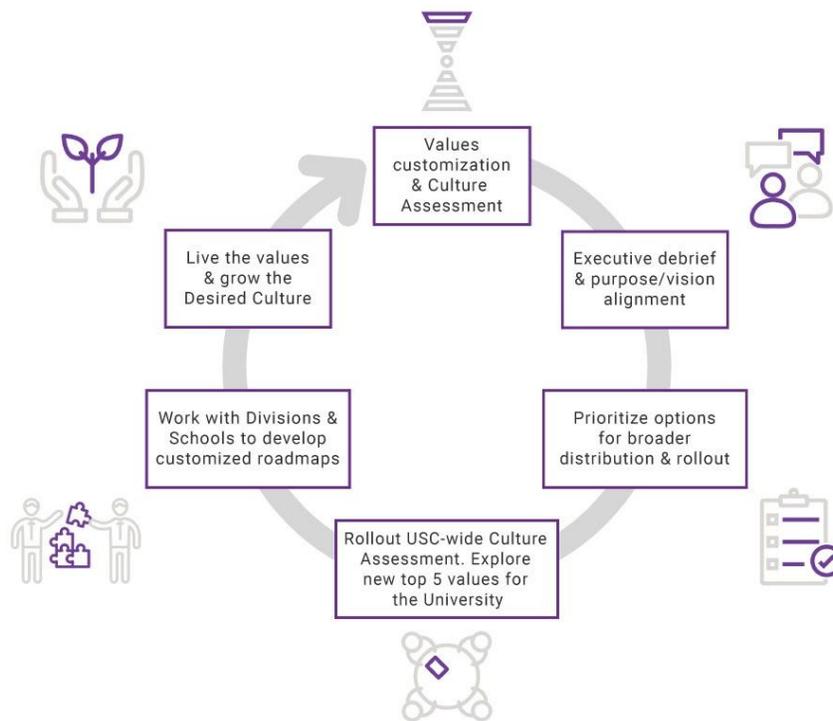
Best Practices & Learnings from the Finance Division

The Finance Division has been pioneering the culture change work and is learning valuable lessons along the way that will help other departments as they, in turn, embark upon this work. Some of their best practice suggestions include:

- **Personal connection:** Erik Brink suggests it’s important “to be open and be authentic – lean into the discomfort, don’t be afraid to share what you think and open up because sharing our stories is what connects us as human beings.”
- **Clarifying values & what they mean to you:** Lucy Avetisyan notes that often the [values] words selected don’t mean the same thing for every single person. It is therefore important to clarify the words and what they mean for the organization: “How, as leaders of this organization, are we committed to being the champions for those values? And how can we help everyone understand and live those values? How do we make that part of our everyday lives and not just a poster?”

- **Active involvement of the senior leadership:** Many in the Finance Division suggest it is imperative that the senior leadership embrace the process and align with and role model the values.
- **Trust your people:** Margaret Harrington advises that it is important for the leadership to trust their people: “[Leadership] can’t run it like a regular project or initiative – it needs their engagement and support and their resources but it also needs a grassroots component, everyone needs to work together on that. I would encourage leaders to trust [their] people: if you give them some latitude and say, you guys tell us, ‘What’s the next step? What should we do, how should we go about it?’ you’re going to unleash all sorts of incredible energy.”
- **Develop an internal group of early adopters:** The Culture Champions has been an essential part of the ownership process. This group is most effective when it represents the employee group as a whole in terms of levels, functional areas, diversity, and so on. The group can help bring the values to life and ensure they are integrated into people’s everyday work, rather than feeling like an “add-on” or separate entity.
- **Understand this takes time:** A change process like this takes time and experimentation. Building in time for dialogue, reflection as well as accepting that it is an ongoing process will help things go more smoothly. “This takes effort. It’s hard work. It’s worth it.” Margaret Harrington

Many areas of the Finance Division now have a prototype that is working well for them, after going through numerous iterations for elements like performance management and onboarding. Some of this information is already being shared with the rest of the university in various ways, including this case study.



Whole Systems Change Roll Out

Writer: Kim Bridgett, with the voices of:

- Gus Anagnos, Chief Information Security Office
- Lucy Avetisyan, Deputy Chief Information Officer, ITS
- Erik Brink, Associate Senior Vice President and University Comptroller
- Greg Condell, Vice President of Finance
- Margaret Harrington, Director, Organization Improvement Services
- Eric Johnson, Director of Operations, FMS
- Maryam Karimi, Accounting Systems Analyst/KBC Administrator
- Crystal Ray, Program Manager, University Payroll Service
- Jose Salazar, Edi Specialist, Disbursement Control, Financial and Business Services
- Dr. Douglas Shook, Chief Information Officer

And consultants:

- Annalise Jennings, Dynamic Exchange
- Charles Holmes, CE Holmes Consulting Inc

PERSONAL IMPACT STORIES

Crystal Ray, Program Manager, University Payroll Services

For most of her 15 years with USC, Crystal Ray felt largely ignored by the executive team and senior staff she worked with: "I was like a nobody, just a regular worker bee and had no significance." A positive person by nature, she made the most of her situation, but never felt like she could have frank conversations with senior staff or openly share how their behaviors made her feel.

That has changed. Today, she knows her manager will stop by to see how she's doing; she knows she can share what's on her mind with him and he'll listen, openly and with compassion. She now feels empowered to bring more of her full self to work and to help others do the same. Today, Crystal Ray works in what she describes as a healthy organizational culture where people are connected and eager to come to work, knowing that their voice is valued, no matter where they come from or what their job title is.

"I liked the fact that when [the consultants] were talking about survey results they tried to get us more engaged to force us to think about things rather than looking to them for answers: 'It's not about what we think – it's about what you think,' they'd say. You couldn't help be engaged if you wanted this thing to work! Often you want them to tell you, put the round peg in the round hole, etc. but they would say, what does it mean to you? You tell me.

Maryam Karimi, Accounting Systems Analyst/KBC Administrator

"I felt like I've been waiting for this for the longest time."

Maryam Karimi was excited to see change happening around her division, and inspired by the consultant's message that once you change yourself you can help inspire change in others: "If you want to see the change in the world, BE this change you want to see in this world." After experiencing the culture change work, she

decided to create a physical reminder of her values on her desk – “my values are hard rock, solid and I’m going to live them every day.”

Jose Salazar, Edi Specialist, Disbursement Control, Financial and Business Services

Jose Salazar does not usually volunteer for special roles at work, especially those involving presenting in front of large groups. Thanks to the culture change work, he felt able to step up and volunteer as a Culture Champion. On October 10th, 2018 the Culture Champions successfully delivered a Town Hall session by themselves, with the guidance of the consultants, and there are now 100+ Culture Champions within the Finance Division continuing the culture and values work. For Salazar, it was the one-on-one support, validation and encouragement he received that proved pivotal for him overcoming his initial resistance to presenting in front of a large room.

“I’ve worked here for a long time through different levels and nothing like this has ever been done before. On a personal level, I feel much more confident.”