

TABLE OF CONTENTS

1.0 The Transformation Challenge	3
2.0 The Ministry Context.....	3
2.1 People and Culture Strategy.....	3
3.0 The Land Title Branch Context.....	4
3.1 Background	4
3.2 Current Environment	5
4.0 Our Approach	5
4.1 Basic Principles	5
4.2 What Is A Learning Organization?	5
4.3 Business Transformation Dialogue Process	7
4.4 Performance Management Dialogue Process	9
4.4.1. <i>Performance Management Definition</i>	9
4.4.2. <i>Performance Measure Definition</i>	10
4.4.3. <i>Accountability Definition</i>	10
4.4.4 <i>Performance Management Model</i>	11
4.4.4.1 Collaborative Planning.....	11
4.4.4.2 Communication	11
4.4.4.3 Monitoring	12
4.4.4.4 Two-way Assessing.....	12
4.4.4.5 Validating.....	12
4.4.5 <i>Performance Management In A Learning Organization</i>	13
5.0 LTB Approach To Performance Management.....	13
5.1 Historical Approach	13
5.2 Current Approach	13
5.3 Employee Views on Performance Management	14
5.3.1. <i>What Works</i>	14
5.3.2 <i>What Doesn't Work</i>	14
6.0 Our Recommendations	16
6.1 Performance Management	16
6.2 Organizational Development	17
6.2.1 <i>Matching Resources With Demand For Services</i>	17
6.2.2 <i>Ongoing Organizational Development Dialogue</i>	17
6.2.3 <i>Dialogue Leaders</i>	17
6.2.4 <i>Structural Changes</i>	17
6.2.5 <i>Employee Performance and Development Plan (EPDP)</i>	18
6.2.6 <i>Maintaining the Momentum in the Collaborative Strategic Planning Process</i>	18
6.2.7 <i>Internal Facilitation Team</i>	18
6.2.8 <i>Team Development</i>	18
6.2.9 <i>Coordinated Customer Relationship Approach</i>	18
7.0 Considerations For The Future	18
7.1 Organizational Trust.....	18
7.2 Lessons Learned	20
7.3 Setbacks Are Opportunities.....	21

1.0 THE TRANSFORMATION CHALLENGE

In May 2003, the British Columbia Ministry of Sustainable Resource Management (MSRM) embarked on a bold initiative to transform the Land Title Branch (LTB), an organization that historically operated according to a production-focused industrial model, into a learning organization with a business orientation. This document provides details of how IC Possibilities, working collaboratively with MSRM's Registries Department and the LTB, designed and delivered a four phase organizational change process over several months.

In laying the foundation for this initiative, the Land Title Branch, which registers ownership of land in British Columbia and is responsible for the accuracy and security of title for all privately held land parcels, established several key goals:

- Develop measurements and measure the organizational climate within each Land Title Office (Victoria, New Westminster and Kamloops);
- Evaluate and recommend opportunities for empowering employees for decision making;
- Involve employees in the development of organizational/business process solutions to enhance land title program delivery to clients;
- Develop with employees, performance and accountability measures for the new organization; and,
- Recommend how a client focus, a learning organization and continuous improvement will become a foundation for the new organization, develop measures to demonstrate how the organization climate has changed and, as a component of that assessment, demonstrate client satisfaction improvements.

2.0 MINISTRY CONTEXT

2.1 People and Culture Strategy

Acknowledging that organizational change and cultural transformation take time, the Ministry of Sustainable Resource Management has developed a long-term strategy “to create a service culture that promotes mutual respect, teamwork, collaboration, innovation and support.”

MSRM's draft People and Culture Strategy (2003) states a clear vision: “A high-performing, motivated workforce that delivers quality client service in an environment of teamwork and appreciation, where learning and leadership are respected and encouraged.” To support that vision, the Strategy outlines a number of objectives in the areas of performance, supporting staff through workforce adjustment, developing an environment of teamwork, creating a culture of appreciation, developing a learning organization, and fostering leadership throughout the organization. Detailed actions, timelines and responsibilities have been articulated in each of the key areas.

1.0 The Transformation Challenge

2.0 Ministry Context

The Strategy proposes that focusing on people and culture is the only way the Ministry's land information system can meet its business goals and it proposes a fundamental culture shift to help meet current and future challenges:

We believe that the public service needs to move away from traditional hierarchical management of staff, which stifles creativity and innovation, compartmentalizes information, and creates a disincentive to collaboration. We need to move towards learning organizations, which offer staff the chance to share and augment knowledge in an environment of teamwork where achievement is celebrated and failure learned from. We believe that we need to respect the value of public servants as knowledge workers, and develop systems which show that respect.

The initiative started by the Land Title Branch in 2003 is tangible evidence that the cultural shift outlined in the People and Culture Strategy has already begun.

3.0 LAND TITLE BRANCH CONTEXT

3.1 Background

The Land Title Branch has, to a large extent, operated according to an industrial model that emphasizes production. In terms of what the Branch does, production essentially means the timely registration of land title. As a consequence of that focus, there has been little in the way of organizational development over the years, aside from training for specific job functions. Within the Branch's traditional command and control structure, innovation, empowerment and risk-taking have not been encouraged.

Historically, Land Title Branch employees have not had to deal with a great deal of change. Many, if not most, have been in their current positions for more than 20 years. Job functions have been confined to three key areas: management, examiners and support staff. Opportunities to move within the organization have been limited.

Like other areas of government, the Branch and its employees have enjoyed an implicit "social contract" for many years that has revolved around the concept of job security for work performed. Godfrey Archbold, the Executive Director of the Registries Department, points out the government's core services review and workforce adjustment have changed the terms of that "contract." As he puts it, "If I just stay here and do a good job, I've got something that'll carry me through to retirement. Well, that implicit contract has been (changed) and employees need to understand that that's no longer the case. They now need to develop a wider range of skills."

3.2 Current Environment

Like other areas within government, the Land Title Branch has been told that the mantra for the new millennium is "do less with less." As desirable as that may be,

3.0 Land Title Branch Context

it simply hasn't happened. In fact, surges in the real estate market coupled with workforce adjustment have forced the Branch to "do more with less." Management's continued focus on production issues is being reinforced by an organizational structure and financial resources that are out of balance with the demand for services.

Despite the current production bottleneck, Archbold believes developing the Land Title Branch into more of a learning organization will produce benefits for staff that, over the long-term, will support the production process. He envisions a workplace in the future that will encourage curiosity among management and staff, what he calls "why" conversations, leading to organizational change. Engaging employees in the planning process and building greater accountability and empowerment, supported by training and tools, will, in his view, produce "flywheel" momentum within the organization. In his words, "That flywheel momentum starts to gain speed and you start to see the organization itself asking 'why' in larger, more profound ways than you can do with a strict hierarchical organization."

4.0 OUR APPROACH

4.1 Basic Principles

Several basic principles guided IC Possibilities in helping management and staff of the LTB begin the transformation to a learning organization. In our view, organizational development initiatives must be:

- Grounded in a distinctive set of values and beliefs that guide behaviour and action;
- Dependent upon a systems approach, which recognizes that changes in one part of an organization impact other parts as well;
- Client-centred, ensuring the needs of the client are paramount throughout (In the context of a public service organization, this is linked to the public interest); and,
- Collaborative, using the fundamentals of participatory action research to engage employees in the process of change.

These principles are most obviously reflected in the degree to which we encouraged all members of the organization to participate in the initiative. Our belief is the more employees we engage, the more we can access an organization's potential and the wiser the organization can become. Additionally, we believe that people will support what they create and "the best way to build ownership is to give over the creation process to those charged with its implementation" (Wheatley, 1992). We believe people can only become more involved with planning the future of their organization by interacting with it and by creating different possibilities through their personal processes of observation and experience.

4.2 What Is A Learning Organization?

While there is no precise definition of the term "learning organization," the literature

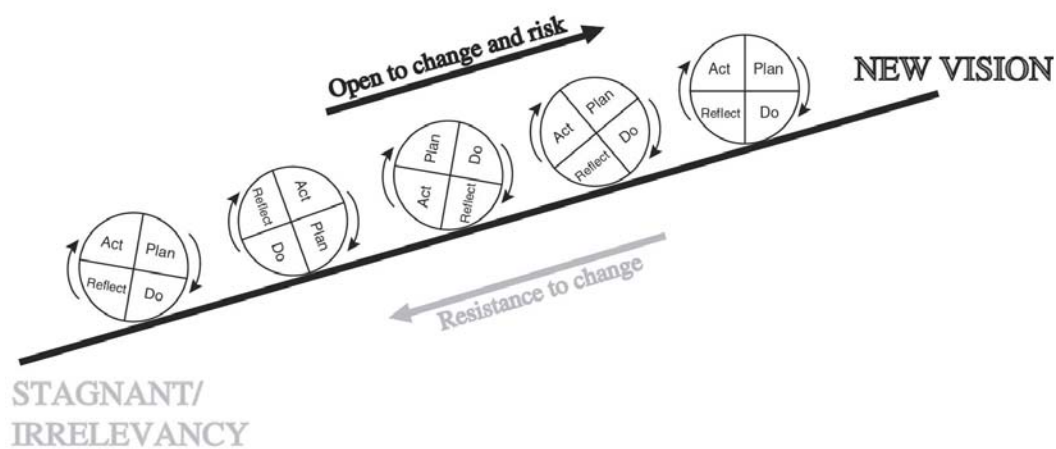
3.0 Land Title Branch Context (Continued)

4.0 Our Approach

points to a focus on helping organizations develop to their full potential, incorporating such things as vision, values, beliefs, empowerment, learning, systems, culture and behaviour. An organization that constantly develops in order to anticipate and respond to change is, in essence, a learning organization, characterized by Peter Senge (1990) as “a group of people continually enhancing their capacity to create what they want to create.” With this in mind, our focus was not on driving change, rather it was on *cultivating* change.

Cultivating change involves a fundamental mind shift within individuals and a culture shift within organizations. As our model below illustrates, being open to change and risk on the path to the organization’s vision involves engaging employees in an ongoing “plan, do, reflect, and act” cycle. We believe that practicing the four phases of the cycle consistently can help bring about sustained personal and organizational change.

Model For Learning Organization



The first part of the cycle – Plan – involves setting objectives (why), actions (what, who, when and where), and measures of success (how you know you’ve achieved your objectives). The second part – Do – is the execution of the plan, documenting problems and unexpected events. The third phase – Reflect – is an opportunity to make meaning of the experience, comparing what happened with what had been planned and summarizing the learning. The final piece in this iterative process – Act – involves the process of determining what changes can be implemented within the system, be they personal or organizational. This corrective phase, flowing from reflection, naturally feeds into the “Plan” part of the cycle, which spells out a new set of objectives and actions and so on.

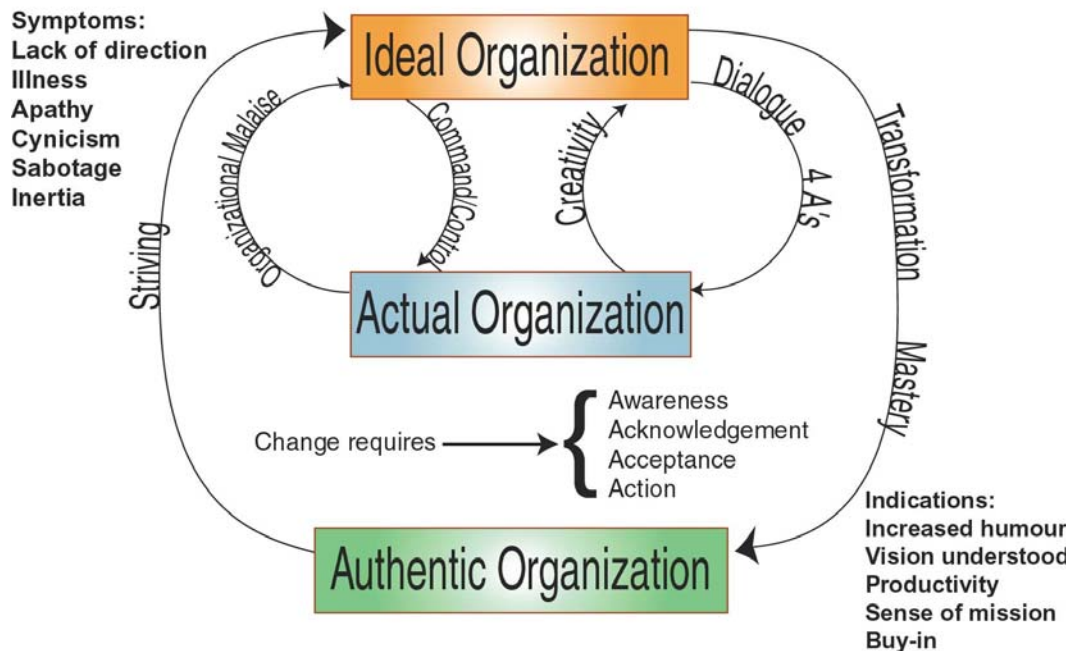
Organizationally, collaboration is key during each part of the action learning cycle. As Senge suggests, building a true learning organization is not about management driving the agenda. It’s about a shared vision and a shared responsibility among all employees, and dialogue is the key to the process. Through the use of Creative

4.0 Our Approach (Continued)

Planning Dialogues™, this initiative established a different kind of conversation between staff that began to broaden their perspective on the issues facing the organization away from a production focus to a more holistic business view. Staff began realizing that the current challenges facing the LTB cannot be met by relying on their historical context where a command and control approach to production was the norm.

4.0 Our Approach (Continued)

PATH OF ORGANIZATIONAL LEARNING



On the path towards organizational learning, we believe the only way out of organizational malaise is through the use of dialogue. Becoming aware and acknowledging the Actual Organization and developing understanding, and even humour, about how things really are can result in greater acceptance by everyone. These two steps also provide the foundation for continuously encouraging a compassionate culture, one that is interested in transformation and mastery. Members of the organization need to continue to develop their awareness and acknowledgement of the issues they face, accept the iterative nature of change, and take action on the possibilities they are willing to collaboratively implement. If collaboration is an organization value, then holding dialogues that share staff perspectives is the tool. By continuing the dialogue started during this initiative, the Branch can take advantage of what has begun as a result of what Godfrey Archbold calls “the watershed of conversations that needed to occur.”

Throughout this initiative, we encouraged each employee to identify some change, no matter how big or small, that they were prepared to take on. The challenge was to create forums where employees would feel safe enough to share their perspectives and open enough to hear other staff members’ experience and wisdom. These

two factors are necessary for members of the organization to have a real dialogue about their values and beliefs that ultimately will either help or hinder the organization in moving towards its vision.

4.0 Our Approach

(Continued)

4.3 Business Transformation Dialogue Process

Working closely with a Steering Committee established in July 2003, IC Possibilities designed a series of two-day Employee Forums in all three Land Title Office locations – Victoria, New Westminster, and Kamloops. Using the Creative Planning Dialogue™ process, the committee developed a Statement of Purpose (Appendix A), confirmed the forum design and identified four challenge/solution areas: business transformation; staff development; client access to services; and, communication (Appendix B).

The first forum, a pilot, was held in New Westminster in late August and the final session was held in Kamloops in early October. Following the pilot, the consultants met with the members of the Steering Committee (face-to-face and via teleconference) to de-brief the pilot and confirm the design for future forums. Throughout the process, volunteers from the Steering Committee helped organize participants and meeting space in each of the three locations and at least one member of the Steering Committee attended one or more of the forums in their areas.

At the beginning of each forum, the facilitators engaged participants in an experience that demonstrated the impact of “discounting” each other and themselves. “Discounting” is simply the notion that one can invalidate either one’s own or another person’s perspective, verbally or with body language. The point of the exercise was to demonstrate that when discounting is present in a meeting, participants are more likely to use their creative energy being defensive. Conversely, when participants engage in a respectful and curious manner, the dialogue can deepen in a way that the underlying values and beliefs of participants are more likely to be revealed. After this demonstration, participants were then asked to stand if they were willing to have the intention not to discount each other and themselves for the balance of the meeting. To further increase safety, members of the group were also asked to select the default form of decision making they wanted to employ during the meeting.

With these agreements in place, the meetings commenced using a variety of techniques (e.g. mind mapping, Creative Planning Dialogues™, etc.). From time to time during each forum, the session leader (consultant) met with the Steering Committee representatives to assess the session flow and timing and any other issues. Digital records of participants’ input, action plans and forum evaluations were then placed on a website so all employees could track the progress of the project.

In each organizational/business process area, participants identified short-term (Quick and Easy), medium-term (Some Time and Development) and long-term

(Long Term Development) solutions. In developing action plans for all Quick and Easy solutions (“What”), participants were asked to form working groups and identify a group lead (“Who”), and establish a date to begin the task (“When”). An example of these action plans is contained in Appendix C. (A complete record of the action plans are contained in the document *Employee Forum Action Plans*, Nov. 14, 2003). To help track the progress of the various action plans, one employee in each location volunteered to maintain an Activities Log.

4.0 Our Approach (Continued)

Solutions that were deemed to be “Some Time and Development” and “Long Term Development” were referred to the Steering Committee for action. On October 23 and 24, 2003, the Steering Committee set priorities and developed action plans for each of the solutions categories or referred them to the next annual LTB Plan Review in September, 2004. This essentially became the strategic planning document for the LTB. (This is documented in the *Challenges and Solutions Final Report*, Nov. 14, 2003)

In all, nine forums were held – five in New Westminster, two in Kamloops and two in Victoria. Nearly all (97 per cent) of the 122 employees who were invited took part. In short, the result of these forums represents the “voices” of staff throughout the Branch, their passion for the work they do and their commitment to action.

4.4 Performance Management Dialogue Process

Following the October 23rd and 24th, 2003 Steering Committee meeting in Victoria, IC Possibilities confirmed the design of a one-day Employee Forum on Performance Management. The design anticipated that participants would include examiner, support staff and management representatives from all three Land Title Office locations – Victoria, New Westminster, and Kamloops. Using the Creative Planning Dialogue™ process, the Employee Forum held in Victoria on December 2, 2003 focused on the following topics (See Appendix D for the Forum’s Agenda):

- Staff’s current understanding of performance management practices within the LTB (i.e. What’s working/what’s not working)
- Potential performance measures for the LTB
- Recommended means for communication accountabilities to staff
- Recommended means for assessing and validating staff accountabilities

Prior to the Employee Forum, interviews were held with the Executive Director of the Registries Department, MSRMC; the Registrar; and two Deputy Registrars of the Land Title Branch. They responded to a series of questions. In addition to the interviews and the employee forum, IC Possibilities conducted research into performance management, both in a general sense and specific to the Government of BC and the Ministry of Sustainable Resource Management. The research produced the following important definitions of performance management and accountability, which were shared with staff who took part in the employee forum.

4.0 Our Approach

(Continued)

4.4.1 Performance Management Definition

The concept of Performance Management reflects a change of emphasis in organizations from command and control to a facilitation model of leadership. This change has been accompanied by the recognition that an organization succeeds as a result of the interaction of its people and how they relate work performance to the strategic and long-term mission of the organization as a whole. Taking a systems view, the whole is not simply a sum of its parts; in a well managed workplace the parts interact to create a successful organization. In other words, organization success is based on synthesis.

Performance management is designed to enhance staff's sense of personal responsibility for being accountable for their work. A distinguishing characteristic of innovative organizations is that employees feel a strong responsibility for almost everything that goes on. They want to be involved, they contribute ideas, and they function in a team context because they see the achievement of overall organizational objectives as being equally important as the achievement of their own objectives. To quote author Peter Senge, "They see the forest AND the trees."

4.4.2 Performance Measure Definition

A measure, such as a standard or indicator, used to assess performance of a function or process performed by employees of an organization.

4.4.3 Accountability Definition

We believe accountability and empowerment are inseparable. As such, one does not define and decree accountability. It is fostered and encouraged within individuals. "Accountability: Getting A Grip on Results" (Klatt, Murphy, & Irvine, 2000), identifies six key principles that form the foundation for developing accountability:

1. Accountability is a statement of a personal promise
Accountability applies only to individuals, and is both a personal promise and obligation, to yourself and to others, to deliver specific defined results;
2. Accountability for results means activities aren't enough
It is important to understand "what" business results are expected, and to focus energy accordingly;
3. Accountability for results needs room for personal judgment and decision making
Within agreed accountabilities, individuals must be granted discretion to make decisions and exercise personal judgement;
4. Accountability is neither shared nor conditional
Accountabilities are not shared at the same level in an organization. That is, your leader assigns a specific part of his or her accountability only to you;



5. Accountability for the organization as a whole belongs to everyone
Every employee is accountable for thinking and acting on what is best for the organization as a whole; and,

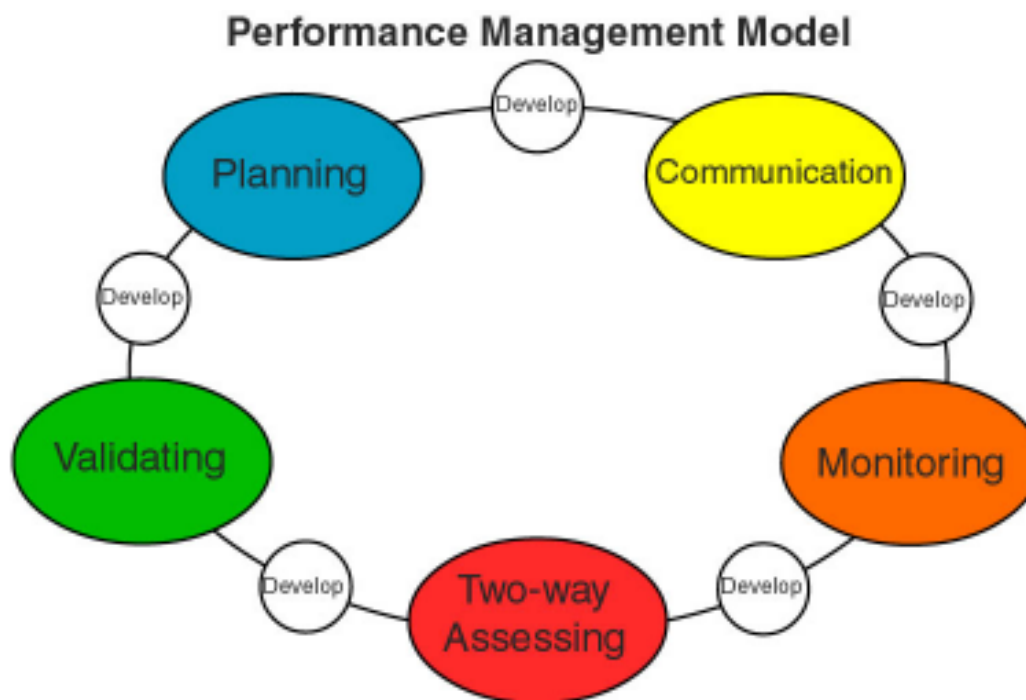
6. Accountability is meaningless without consequences
Positive consequences are earned based on results realized in an individual's area of accountability. Accountability is not about finding fault, assigning blame, or punishing. It is about rewarding success and learning from mistakes.

If all of the above are functioning in an organization, then **accountability will close the gap between intention and results.**

4.0 Our Approach (Continued)

4.4.4 Performance Management Model

Participants were introduced to the model we use for performance management that recognizes the iterative relationship between five active processes: collaborative planning, communication, monitoring, two-way assessing, and validating.



4.4.4.1 Collaborative Planning

In a learning organization, work is collaboratively planned out in advance within manageable timeframes. Planning includes setting performance expectations and goals for groups and individuals to channel their efforts toward achieving organizational objectives. Collaboration with employees in the planning process helps everyone understand the goals of the organization, what needs to be done, why it needs to be done, and how well it should be done. Performance standards need to be measurable, understandable, verifiable, equitable, and achievable. Employees are held accountable for specific work assignments or responsibilities that reflect these performance measures.

4.0 Our Approach

(Continued)

4.4.4.2 Communication

It is important that every employee clearly understand both the organization's overall performance management goals (i.e. performance measures and accountabilities) and the performance measures for which they are personally accountable. Employee Performance and Development Plans (EPDP) are one of the main ways in which these accountabilities can be communicated between a supervisor and an employee. EPDP's are designed to be specific, yet flexible, so that they can be adjusted for changing program objectives and work requirements. When used effectively, these plans can be beneficial working documents that are discussed regularly, and not merely paperwork that is filed in a drawer and seen only when ratings of record are required.

4.4.4.3 Monitoring

In a learning organization, assignments and projects are monitored continually. Monitoring well means consistently measuring performance and providing ongoing feedback to employees and work groups on their progress toward reaching their goals.

4.4.4.4 Two-Way Assessing

Ongoing assessment is the process that supervisors and employees engage in to initiate dialogues on progress each is making in meeting their accountabilities, and to make changes to unrealistic or problematic standards. By monitoring continually, unacceptable performance can be identified and assistance provided to address such performance. In a learning organization, employee developmental needs are evaluated and addressed. Developing in this instance means increasing the capacity to perform through training, giving assignments that introduce new skills or higher levels of responsibility, improving work processes, or other methods. Providing employees with training and developmental opportunities encourages good performance, strengthens job-related skills and competencies, and helps employees keep up with changes in the workplace, such as the introduction of new technology.

4.4.4.5 Validating

The definition of validate is to "prove valid; show or confirm the validity of something." In the case of performance management, the validating process is to confirm for each employee whether their efforts are paying off in terms of meeting the organization's goals and their own individual work related development goals. This validation consists of recognition, reward, or consequences on an ongoing basis.

4.4.5 Performance Management In A Learning Organization

In a true learning organization, good performance is recognized informally and spontaneously. It is an ongoing, natural part of day-to-day work experiences. Actions can be recognized by supervisors and peers saying "thank you" or "well done" and intrinsically by an employee acknowledging their own good work. Formal

recognition can also provide a broad range of rewards such as plaques, certificates, and many nonmonetary items. Conversely, poor performance considered unacceptable by the organization should be dealt with by enforcing consistent, appropriate and progressively negative consequences that either lead to improvement or termination of the working relationship.

Using this performance management model, goals are set and work is planned routinely. Progress toward those goals is measured and employees get feedback. High standards are set, but care is taken to develop the skills needed to reach them. Formal and informal recognition, rewards and consequences are used to reinforce the behaviors that will help accomplish the organization's purpose and the employee's work related aspirations. All five component processes work together to achieve effective performance management.

5.0 LTB APPROACH TO PERFORMANCE MANAGEMENT

5.1 Historical Approach

Over the years, the LTB has paid close attention to the quantitative side of performance management by focusing on measures like turnaround time, as a way of gauging customer satisfaction. Management recognized that the legal/notary communities and property owners are looking for reasonably quick service for registering their property transactions. Historically, the organization operated in a context where command and control techniques on production were emphasized. Accountability for production was left to local Registrars. They were responsible for assuring the office met the turn-around time. How they achieved this was left to each office to figure out. There was no comprehensive agreement on how the Branch would define its success.

5.2 Current Approach

Currently within the Land Title Branch, performance management is described as: "...a way of ensuring the organization is meeting its objectives for service delivery, both in a quantitative and qualitative sense." The Land Title Branch is managed comprehensively in a quantitative manner through the number of applications, turnaround statistics and document quality as reflected in the number of errors. The Branch is also informally monitored for its ability to deliver client satisfaction (i.e. Is the service being delivered in a meaningful and relevant manner that supports what the client requires from the system?).

Performance management within the Branch considers output measurements from those two perspectives when making decisions to ensure the right number of resources are in place to meet the demand. This includes both financial and human elements to make sure the Branch has the right kind of people, proper training and the necessary funds to pay the support and system costs. Management is attempting to develop a performance management program that takes a holistic view of

4.0 Our Approach (Continued)

5.0 LTB Approach To Performance Management

the organization so that the Branch has a way by which it can monitor whether the organization is meeting its strategic objectives. This initiative is one of the foundations of this new approach.

The context within which the organization operates is heavily focused on continuing to utilize computer technology and the additional opportunities it offers for automation. Consequently, the organization's focus on production continues to intensify. There are fewer people trying to meet rising production expectations. Staff feel pressure to work longer and harder in an attempt to meet the perception that they should be able to turn the work around more quickly and more accurately.

While the organization's emphasis remains on production goals, the focus of management is beginning to change. There is greater awareness of the importance of the qualitative aspects of job performance, particularly those related to the individual employee. There is recognition that the production focus doesn't address questions such as, "Is the approach of the LTB relevant to the needs of a customer?" The organization has been very well-managed on the quantitative side and less so on the qualitative side from a customer, organizational and employee perspective. A lack of emphasis on these areas has resulted in challenges that still need to be addressed in the areas of client satisfaction, succession planning, staff development and empowerment, morale, and collaborative planning processes.

5.3 Employee Views On Performance Management

5.3.1 *What Works*

The Land Title Branch's operational accountability to the Ministry's Service Plan is expressed through the specific performance measures stated in the Service Plan. A formal process is currently in place to ensure adherence to the production measure. It is a process consisting of letters and telephone calls from the Executive to the Branch management. This communication focuses on ensuring there are plans in place to meet the stated measure. The organization has achieved a level of quantification of the performance standard so that it is capable of measuring at any moment in time how well it is doing in achieving the Ministry's performance measure.

Within the Branch, staff have indicated that the informal structure of performance management is working for "more than 90 percent" of employees. It appears most staff take ownership of their own performance. For example, counter staff are believed to be working well as a team. They see where work needs to be done and will fill in or bring it to the attention of management. Likewise, examiners will independently use flexible working hours so they can reap maximum productivity from "quiet" times to meet their production goals.

The Branch's monthly production statistical summaries are seen as useful in making year to year comparisons and giving staff a sense of their accomplishments.

5.0 LTB Approach To Performance Management (Continued)

Document error logs have also been used successfully to monitor quality. Additionally, there is general agreement that the current managers are respectful and are good at thanking staff for their hard work. They are seen as accessible and willing to listen to employees. The employee forums held during Phase Two of this initiative were cited as an example of management's willingness to support employee suggestions for change.

Management personnel said their meetings with clients throughout the year are a major source of useful feedback. These meetings solicit client feedback informally and issues raised are subsequently addressed where possible.

5.3.2 *What Doesn't Work*

When asked what isn't working in the Branch's performance management activities, staff focused on the estimated "10 percent" of employees who are not "pulling their weight". There is resentment among many staff that management appears to be too busy or unwilling to deal with this issue.

Currently, the Branch's document processing expectation is the only production standard that is formally communicated. The production standard is expressed as a single number in the newly revised job description for examiners. It represents a daily average over a period of time. This is informally used as the basis to assess those directly responsible for document processing. It helps define an examiner's worth within the organization. However, many individuals believe they are treated arbitrarily and that no corporate standard exists that the group is willing to espouse and hold themselves accountable to. In short, the present performance standard lacks credibility.

The Phase Three interviews and employee forum indicate there has been inadequate dialogue and consensual agreement among staff related to the beliefs and values that support the existing formal production performance measure (i.e. six day turnaround time). There has also been no formal dialogue and consensual agreement amongst staff on the document processing production measures that support the formal production measure. This has resulted in ad hoc informal production performance standards being applied among staff, giving rise to resentments based on differing opinions of what constitutes fair effort.

With the exception of carrying out EPDPs, no other formal conversations related to other performance measures take place on a regular basis. However, many ad hoc conversations take place with regard to job effort and attitude, particularly amongst support staff where specific performance measures are difficult to identify. The support functions vary from day to day and team work is perhaps the single most important aspect. The common denominator of support staff complaints centres around a lack of team effort by some staff.

A good example of management's lack of time for effective staff development was

5.0 LTB Approach To Performance Management (Continued)

reflected in the recent implementation of EPDPs. It was seen by staff as generally inadequate. Managers were responsible for too many employees to adequately understand their challenges and aspirations. Yet these are the basis for a constructive EPDP dialogue.

In the area of customer satisfaction, while dialogues do take place with customers, no formal client satisfaction data is collected and no direct benchmarks exist for client satisfaction other than those that are implicit in turnaround statistics. While a process exists to respond to customer letters, these are seen as time-consuming since they often reflect a customer's lack of awareness of how the Land Title system operates. No statistics are kept regarding the content and frequency of complaints.

In the area of using technology to assist in monitoring performance, it was noted that ALTOS tools that track performance were either under-utilized or misunderstood.

Finally, many employees did not understand how the turnaround statistic was being managed. They generally believed there is a need to improve the early warning system for identifying systemic production problems, contributing to unacceptable delays in processing documents. Some employees believed management was not aware of the stress staff were feeling as a result of being "chronically" behind on turnaround times with "no hope of catching up". They said this was having a negative impact on staff performance. Other stress factors such as uncertainty about office location were also cited as major impediments to good work performance.

6.0 OUR RECOMMENDATIONS

6.1 Performance Management Recommendations

Underlying our recommendations is the clear need for all members of the organization to engage in ongoing dialogue about performance management. As one manager put it, "We need to move the dialogue from a management issue, to an issue for the whole organization focusing on what's fair, equitable and meaningful."

Specifically, we recommended that the Land Title Branch:

- Establish a permanent Performance Management Committee, chaired by the Registrar, and made up of support staff, examiners, the deputy registrars from each of the three Land Title Offices and the Director of Operations;
- Have this committee recommend a more collaborative process for identifying performance measures in the Divisional Plan;
- Ensure this committee works toward identifying a credible formal production

5.0 LTB Approach To Performance Management (Continued)

6.0 Our Recommendations

performance measure - one that takes into account technological efficiencies and the core values and beliefs that relate to Branch's Statement of Purpose and supporting goals;

- Be encouraged to place more emphasis on the qualitative employee side of the organization. The quality of communications is the most obvious example of the need for this paradigm shift;
- Identify performance measures that encourage new opportunities in the areas of teamwork and job enhancement;
- Begin to look more closely at support functions such as staff development and planning skills, particularly once production goals are achieved, and develop appropriate measures;
- Conduct regular surveys to assess employee satisfaction, particularly as it relates to EPDP;
- Continue ensuring managers complete 360-degree feedback surveys;
- Measure client satisfaction regularly by taking a more formal, collaborative approach to assessing their needs and expectations;
- Use the Branch's strategic planning process to engage employees in dialogue to reach agreement on the organizational areas that should be developed and the measures that need to be in place to measure organizational development;
- Expand performance standards for managers to include a focus on qualitative measures that describe a range of management activities that is broader than simply production; and,
- Continue to use the EPDP process as a mechanism to clarify and communicate accountabilities for individual staff members.

6.0 Our Recommendations

(Continued)

6.2 Organizational Development Recommendations

Using current research and the information and experience gathered in the earlier phases of this initiative, IC Possibilities marked the formal conclusion of the project by bringing forward a number of organizational development recommendations. As consultants, we expressed the hope that the project would mark the beginning of a continuous process of organizational development within the Land Title Branch. To quote a member of the Steering Committee, "This project has been like a rehearsal for a play. The stage is set, costumes are ready and people know their roles."

As the "rehearsal" drew to a close, here is what we recommended:

6.2.1 Matching Resources With Demand For Services

If the Land Title Branch is to move from a production to a business orientation and truly develop as an organization, then it must develop a strategy to manage the



problem of matching resources with a fluctuating demand for services. We believe it is vital that the Branch develop contingency plans so that when the volume of property transactions begins to soar, additional resources kick in and casual workers are hired to help manage the increased workload.

6.0 Our Recommendations (Continued)

6.2.2 Ongoing Organizational Development Dialogue

This initiative has begun a different kind of conversation between staff that is beginning to broaden their perspective on the issues facing the organization away from a production focus to a more holistic business view. But it is only a beginning. We believe it is important to maintain an ongoing dialogue on how the Branch will develop. A number of possible forums are listed in Section 7.2.

6.2.3 Dialogue Leaders

To help encourage managers to move beyond a focus on production, we recommend that organizational development become a standing topic, on a regular basis, at Branch management meetings.

Acknowledging that managers must be role models within the organization, we recommend they participate as a group in a “values audit” at least once a year. This audit would involve identifying behaviours that support or are contrary to the stated team and organization values. We also recommend that a formal coaching program be initiated, including the continued use of 360 evaluations.

6.2.4 Structural Changes

Recognizing that the ratio of employees to managers is very high, we recommend that the organization consider the idea of formalizing the team leader roles that some employees already assume informally. Among other things, this re-structuring would give managers more time for organizational development.

While informal mentoring is currently being used, we suggest investigating a more formal approach to mentoring, particularly as it relates to advancement into Examiner positions.

6.2.5 Employee Performance and Development Plan (EPDP)

We recommend each leader be responsible for between 5 and 7 EPDPs. We also believe that EPDP needs to be used as a developmental tool more than once a year. At a minimum, quarterly check-ins are required to see how the plan is going. In order to avoid a yearly “bulge” in the EPDP workload, we recommend leaders establish a staggered schedule.

6.2.6 Maintaining the Momentum in the Collaborative Strategic Planning Process

To help maintain the momentum this project has started, we recommend the existing Steering Committee for this initiative be transformed into the Collaborative Planning Advisory Committee. At its first meeting, we recommend the Committee identify its terms of reference.

6.2.7 Internal Facilitation Team

In order to get the most out of LTB meetings, we recommend that, in addition to using outside facilitators when necessary, the Branch should consider training internal facilitators and that they be given specific tools such as Creative Planning Dialogues, meeting facilitation, etc.

6.2.8 Team Development

We recommend the Branch set up a team development program to provide ongoing life skills training to all staff. Given the resource requirement for such a recommendation, we suggest the program be phased over a number of years, identifying the teams that would benefit the most from this training.

6.2.9 Coordinated Customer Relationship Approach

We commend an approach that include initiatives that help to better define customer needs and expectations, track important client/customer information and provide customer service training for staff.

7.0 CONSIDERATIONS FOR THE FUTURE

7.1 Organizational Trust

In reviewing the work that has been accomplished during this initiative over the past several months, a member of the project Steering Committee used a familiar analogy: “This project has been like a rehearsal for a play. The stage is set, costumes are ready and people know their roles.” Indeed, as this “rehearsal” draws to a close, the curtain is about to rise on what we hope will become a bright future for the Land Title Branch.

While ongoing concerns about the turnaround time continue to overshadow recent organizational development efforts within the Branch, we believe that slowing down what Godfrey Archbold calls the “flywheel” of momentum has serious implications for the organization. In our interview with Archbold, he remarked that this organizational review initiative has created an appetite among employees to change the current culture, to move away from an industrial management paradigm and into a more collaborative business management model that develops and empowers employees. In essence, this broadly-based initiative can be viewed as a promise made by management that has inspired hope among employees. Any suggestion that this “promise” might not be honoured will erode trust within the Branch, with potentially severe and long-term consequences.

Galford and Drapeau (2003), writing in the Harvard Business Review, remind us of the importance of protecting trustworthiness in an organization, pointing out that years of earned trust can be seriously damaged in a moment. In the Land Title Branch, where trust has been shaken in the past by short-lived workplace improvement efforts, that moment is now.

6.0 Our Recommendations

(Continued)

7.0 Considerations For The Future

Building and maintaining trust within organizations is hard work, but Galford and Drapeau argue that it's critical. An established body of research, they contend, demonstrates the link between trust and corporate performance:

If people trust each other and their leaders, they'll be able to work through disagreements. They'll take smarter risks. They'll work harder, stay with the company longer, contribute better ideas, and dig deeper than anyone has a right to ask. If they don't trust the organization and its leaders though, they'll disengage from their work and focus instead on rumours, politics, and updating their resumes.

Organizational trust is particularly vulnerable during times of crisis. Galford and Drapeau say damage often occurs because management becomes preoccupied with the external elements of a crisis and fails to address the situation internally with care and attention. There is a tendency for employees to feel unsafe during a crisis. "They look for reasons to trust their leaders, but they are quick to find reasons why they *can't* trust them." Galford and Drapeau's advice for managers during times of crisis is to ask for help, remain open and accessible and, *most importantly, communicate with employees, keeping the information channels open.*

There will be no big event which heralds the success of the transformation of the Land Title Branch. However, there will be many little successes along this transformation journey. We have encouraged the Land Title Branch staff to continue their dialogue with the recognition that change is hard work, sometimes with setbacks, but with dedication and compassion, they can create the kind of work place they want to meet the external changes than will continue to challenge them.

7.2 Lessons Learned

In reviewing the design of this initiative, the early inclusion of a representative group of staff in the design and ongoing implementation was a key factor in helping to build trust, commitment and true engagement. Initially, the staff and management did not share "head office" management's concept of building a learning organization. Indeed, staff had not had an opportunity to collaboratively reflect on their current situation. Through creating their own statement of purpose for the initiative, and being able to "*interact with it and create different possibilities through their personal processes of observation and experience*", members of the Steering Committee quickly began owning the initiative. One of the indicators of the success of this approach is the desire and willingness of all Steering Committee members to evolve into a standing Strategic Planning Committee so that the initiative continues to have a broad range of sponsors.

This emphasis on involving staff early in the initiative continued into the employee forums. We believe it was important to invite staff into the initiative by making clear participation was voluntary. While this concept was agreed to by the Steering Committee, there were many instances where staff had the impression that

7.0 Considerations For The Future

(Continued)

participation was mandatory. Upon reflection, we would have spent more time with the Steering Committee having a dialogue on the principles reflected in this decision and exploring ideas on how to invite their colleagues into the initiative. The invitation is very important.

We think more care could also have been given to selecting the staff who attended the nine employee forums. The optimum configurations would ensure that employees who are most relational with each other attend similar forums. Essentially, the forums should reflect the social systems that have evolved within the organization so that the various sub-systems are in dialogue about desired changes that directly impact their environment. Additionally, care could also be given to avoid creating settings where unresolved personality conflicts counter-productive to the spirit of the forums might occur.

In future, we would take greater care to make sure employee forums in specific offices were scheduled contiguously so that staff would not feel left out of the new initiative. In one LTB office, the forums were scheduled four weeks apart. As staff from the first forum began their working groups, some of the remaining staff voiced concern about workplace changes taking place that they had no part in developing. This could have created unnecessary blocks if those “left out” staff decided to oppose the initiative shown by the first forum participants.

Choosing participants of the Steering Committee and the Performance Management employee forum could have been improved by further consultations on how the staff would like the selection process to take place. In some cases, it would have been beneficial to offer a competition styled selection process so that staff did not perceive any favouritism in the selection process. This selection method would avoid playing into any past history.

While time for management and staff was at a premium and will continue to be until additional resources can be acquired, a senior member of the organization should have been appointed whose accountability meant that the continuation of this work was a primary focus.

7.3 Setbacks Are Opportunities

This initiative is still in its infancy and there are many lessons to be garnered as it progresses. As with any kind of growth, be it personal or professional, our challenges most often lie in the setback periods. When we hit those spots, our choice is two fold ...whether to throw up our hands and give up or to choose to learn from these events and become curious about what happened and what could be done differently in the future. We believe the time spent creating a sense of team amongst the Steering Committee will prove to be of paramount importance since this group can support each other through these times. We also have emphasized the importance of regularly scheduled reflection times when the group can assess what has happened and what needs to happen. We are confident the members of the Land Title Office will continue in their initiative as we witnessed a level of goodwill that is more than enough to support the staff as they experience the challenge of change.

7.0 Considerations For The Future

(Continued)



APPENDIX A
PROJECT STATEMENT OF PURPOSE
CREATED BY THE LAND TITLE BRANCH
PROJECT STEERING COMMITTEE

(As amended on July 30, 2003)

Our project's purpose is:

- ☐ To change and improve the way the Land Title Branch does business.
- ☐ To strive to create a positive environment where staff are motivated, valued, trusted, and desire to be productive.
- ☐ To help build a vibrant economy, we will maintain high quality core services essential to our business and the fundamental values of the B.C. Torrens system.

Godfrey Archbold
Wallace Cheng
Mark Frantzen
Sharon Green
Sandi Howe
Ken Jacques
Cheryl Johnson

Susanna Lischka
Judy McKay
Alma Owen
Ann Parenteau
Edith Ramogida
Katie Salmoud
Ian Smith

APPENDIX B: Proposed Agenda: Employee Forum, Land Title Branch

Day 1

1. Introductions 8:30 A.M.
2. Expectations For Employee Forum
 - Synopsis/background/sanctioner statement
 - Invite participant expectations, debrief, and amend agenda as required
3. Safety Agreements
 - No discounting
 - Decision making
 - Confidentiality
4. What is your current work reality
 - Generate mind map
5. Break 10:15
6. Challenges in Organizational/Business Processes in the areas of..."
 - Area 1 (Business Transformation), prioritize challenges
 - Area 2 (Staff Development), prioritize challenges
 - Misc. Issues
7. LUNCH 12:30 P.M.
8. Challenges... (continued) 1:00
 - Area 3, (Client Access To Services) prioritize challenges
 - Area 4, (Communication) prioritize challenges
9. Break 3:00
10. Presentation on Learning Organization Model
11. Solutions and Action Plans
 - Review challenges of Area 1
 - Area 1, generate/prioritize solutions, develop action plans (what, who & when)
12. Review of Day 2 Agenda and Closure
13. End of session 4:00

Day 2

14. Check-ins and review of Day 1 8:30 A.M.
15. Solutions and Action Planning (continued) 9:00
 - Review challenges of Area 2
 - Area 2, generate/prioritize solutions, develop action plans (what, who & when)
16. Break 10:00
17. Solutions and Action Planning (continued)
 - Review challenges of Area 3
 - Area 3, generate/prioritize solutions, develop action plans (what, who & when)
18. Lunch..... 12:00
19. Action Planning (continued) 12:30
 - Review challenges of Area 4
 - Area 4, generate/prioritize solutions, develop action plans (what, who & when)
20. Break 2:45
21. Next Steps and Session Closure 3:30
22. End session 4:00



Appendix C: New Westminster LTO Action Plan – August 21, 2003

Business Transformation

Description	Who	When
<ul style="list-style-type: none"> · Let's revamp mark-up scanning with exp. people · Examiners to draft from orig. docs which are scanned after reg. · Just start putting documents in order for scanning · Survey keeps original documents with plans and does own mark-up 	Bonnie Bob Judy Janet	<ul style="list-style-type: none"> · First meeting Sept. 2 · ASAP to implement
<ul style="list-style-type: none"> · More examiners to have RA function · Examiners deal with defects from start to finish · Approach management to give RA to all Examiners · More staff responsibility on minor problems, less mgt. decisions 	Charlene Liz R. Sheila Evelyn	<ul style="list-style-type: none"> · 1st mtg. Aug. 22 · Discuss with both Deputies · Implement within 2 wks
<ul style="list-style-type: none"> · Flex days for all staff – Pat · Schedule meeting with management for flex time · Talk to Pat about making proposal to mgmt. · Have all staff to agree to no flex time so that more staff are available during peak times 	Pat James	<ul style="list-style-type: none"> · Aug. 22
<ul style="list-style-type: none"> · Start rotating staff on a regular basis · Examiners available for help on counter · Expectations – support staff · Could more people split up counter mark-up? · Redefine what counter people are doing and is it all necessary · Emphasis on job experience should be considered · Judy to schedule rotation all support staff · Get the people who are most familiar with the jobs to organize them · Committee to set out support staff jobs and rotation · More cashiers at peak periods · More front counter staff at peak periods 	James Gurmeet Sharie Judy Wallace	<ul style="list-style-type: none"> · First meeting Aug. 27 at 8:30
<ul style="list-style-type: none"> · Inform us of the “big changes” coming in March/04 	Ian Smith	<ul style="list-style-type: none"> · Aug. 26
<ul style="list-style-type: none"> · Meeting to inform us on examination changes on Mondays, meeting at 9:00 for a few minutes · Large projects to small groups, not all staff · Mgmt. to tell Examiners their job is to work – not stop at a count of 50 · More privacy screens · All staff to be trained on large projects by the people that know · Make proposal for looking at this · Discuss counts and what is expected · Have all staff pull their own weight · Let agents correct minor defects instead of notices · Look at how we hand C.P.L. · Deputy to see each team member daily on problems · Email for updating on progress · Limit comments to conversations you're not party to · Converse or gossip quietly · Identify contact person for Prince George 	Terry and Brian Judy Liz N. Ian S. Norma (check with her) Charlene	<ul style="list-style-type: none"> · First meeting Aug. 27 at 8:30

New Westminster LTO Action Plan – August 21, 2003

Staff Development

Description	Who	When
<ul style="list-style-type: none"> · Succession planning for taking on Victoria records 	Rosalie Sheila (will ask Rosalie) Judy to contact person in Victoria	

Communication

Description	Who	When
<ul style="list-style-type: none"> · Put a phone at counter for agents to call Examiners · Have a front information desk (but just a façade) and have sign telling people to go to front counter · Get paging system back · Have lawyers contact staff not agents · Have phone for counter staff to call Examiners · Give agents access to Examiners · Put signs back up for cashiers/counter 	Charlene James Ann (Charlene to ask her)	<ul style="list-style-type: none"> · First meeting Aug. 25
<ul style="list-style-type: none"> · Working group to compile all memos · Staff to take responsibility for their emails 	Evelyn Sheila	<ul style="list-style-type: none"> · First meeting Aug. 25

Client Access To Services

Description	Who	When
<ul style="list-style-type: none"> · Find available signs – use them or make them · Find available signs and use them · Due to extreme volumes of work and greater demands and fewer staff, please have patience · Queen's voice 	Shawn (will ask Chet) Chet	<ul style="list-style-type: none"> · First meeting Sep. 4
<ul style="list-style-type: none"> · Update existing pamphlets · 1 page handouts 	Janet Bonnie W.	<ul style="list-style-type: none"> · Sep 14 to complete
<ul style="list-style-type: none"> · Inform staff about client relations activities · And to invite input · Use and expand existing tours etc. 	Sharie Gurmeet James	<ul style="list-style-type: none"> · End of Sept. for proposal development

APPENDIX D

Proposed Agenda: Performance Management Employee Forum, LTB

1. Introductions 8:30 A.M.
2. Expectations For Employee Forum On Performance Measurement/Accountability
 - Synopsis/background/sanctioner statement
 - Invite participant expectations, debrief, and amend agenda as required
3. Safety Agreements
 - No discounting
 - Decision making
 - Confidentiality
4. What is your current understanding of performance measurement/accountability within your organization
 - Consultants provide a synopsis of findings from employee forums and interviews
 - Dialogue to gain common understanding on where we are now, storyboard what is working and what is not working in existing system
6. Storyboard potential performance measures in identified areas
 - Area 1 (Production) effectiveness and ease of implementation
 - Area 2 (Staff Development) effectiveness and ease of implementation
 - Misc. Issues
6. Break 10:15
7. Storyboard potential performance measures in identified areas (continued)
 - Area 3 (Client Satisfaction) effectiveness and ease of implementation
 - Area 4 (Organizational Development) effectiveness and ease of implementation
 - Misc. Issues
8. LUNCH 12:30 P.M.
9. Storyboard potential performance measures in identified areas (cont'd) 1:00
10. Break 3:00
11. Accountability, (Informal and formal)
 - Storyboard Communication of Accountabilities (Informal and formal)
 - Storyboard Assessing and Validation Processes (Informal and formal)
13. End of session 4:00

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