Leading organisational change through a shared values culture <mark><ch hdg></mark>

Oliver Pritchard
Assistant Director
Student & Learning Support
University of Sunderland

oliver.pritchard@sunderland.ac.uk

This article describes the development of shared service values at the University of Sunderland to drive and shape a service convergence, and reflects on challenges, successes and key learning for the future.

Student and Learning Support (SLS) is a department of some 180 staff and includes the University Library Service, Web & Learning Technologies, Student Services and Institute of Sport. The department was formed in a major university restructure in 2005–6 and at that time it included IT Services (later replaced by Institute of Sport). Convergence on this scale was new to the university. The Directorate team (3FTE) of the new department was given the challenge of making sense of it and, more importantly, making it work. One obvious approach would have been to restructure the service itself.

'Values... I get that... but when ARE you going to restructure?'

The breadth of the service portfolio and the complexity of varied specialisms militated against restructuring as an immediate or meaningful solution. We wanted something deeper and more organic, and found this via a SCONUL Deputies Group and early work at Sheffield Hallam University. Values as a vehicle for organisational change came to the forefront of our thinking.

The concept was that a set of service values could shape an organisation and its culture and drive change in the service operation. Many organisations embrace and align themselves with 'values'. However, these may not always be widely owned or embedded.

Our research told us that values-led change was no quick-fix and would be a longer-term 'project' – and so it has proved.

'*Values are the beginning, the means and the end.'*

We wanted our values to capture the attributes that were most important to all the new staff team. This process, of finding and creating a common platform where a service including both chaplaincy and software developers could find a common space and experience, was part of the convergence strategy.

We developed and delivered a staff-wide, facilitated values development framework using 'Appreciative inquiry': 'the cooperative search for the *best* in people, their organisations and the world around them'.[i]

This included values and culture assessment questionnaires, review of results in management and staff groups, management team workshops and whole system / all staff events focusing on themes, challenges and improvement.

From this came our five service values:

- customer focus
- customer satisfaction
- team working
- information sharing
- continuous improvement

This was also the opportunity for staff to identify problems and solutions, which gave rise to seven new project groups. These were important in themselves, but were also key to our new way of working – bringing people together in cross-service groups to solve commonly identified problems. All the groups discovered new ways of thinking and work, which has provided the foundation for the SLS that exists today. For example, this work delivered a new process for staff induction, a staff development framework, a staff recognition scheme and a marketing strategy and plan, which now directly inform our service delivery.

The values were articulated through a new service vision – again with staff input. In 2011 we undertook a major all-staff review of the vision using a World Café format. This highlighted our shared achievements in building our new culture and identified positive progress overall. Team working, vibrancy / creativity and staff empowerment showed particular improvement.

The first stage of values development was challenging but instrumental in both bringing staff around a common agenda by involving them in the selection of values, and in beginning the process of convergence by offering both commonality and a genuine fresh start.

The next steps in the values journey provided further challenge. We began to embed our values through our senior managers, through all-staff events, and by making our values a public and customer-facing part of our service, thus creating both visibility and accountability.

Not all staff were enthusiastic advocates but pragmatism ('Take the wins where you can'[ii]) was important in maintaining motivation and momentum. One of the key challenges in all our work on values and cultural change has been putting them into context for all staff, particularly those in non-managerial or supervisory roles.

We related our values to management and staff behaviours. This simplified and clarified language and connected the values to everyday practice. To begin with, the senior management team developed a set of agreed behaviours, drawn from our values, in order to establish clear expectations that all managers should seek to demonstrate and advocate in our daily work. These public documents are displayed around our services and are a common point of reference.

Front-line staff are, of course, core to high quality customer services. Our service values recognise the focus on the customer; ensuring that all staff embrace this is paramount. Yet sometimes our front-line staff can be the most distanced from these messages or may see them as centrally-driven, management-sponsored corporatism. Language, communication and application of values to the local context have been important to success.

This prompted the building of a set of staff behaviours relating to the values. Developed with the wider staff team, they seek to identify which behaviours characterise each of the values and then, critically, give simple examples of what that means in a particular service setting. This may seem over-kill but has proved worthwhile. One of our learning points as a

directorate team has been not to underestimate the value of simplicity, particularly when faced with what can sometimes be perceived as abstract management approaches.

Progress with the embedding of our values has been long-term and at times both frustrating and slow. We have likened the process to pushing the proverbial boulder up the hill, but with the summit never quite reached; and any loss of momentum in the early stages inevitably means only backward movement.

Promoting and advocating our values is a constant. Over time, embedding can be achieved – even if that summit remains only in tempting view, the steepness of the gradient does lessen. Our values have become our service 'mood music' and a touchstone for how we do things, deliver our services and work with each other.

Recruiting to values <mark>*<subhdg A>*</mark>

Our values are the first line in our job descriptions and are now embedded in staff performance review. This is key to recruiting and then supporting staff who can deliver on our values and who will fit in with our organisational culture. Through values we can be very clear about who we are as a service, what matters to us, and, crucially, how we do things.

Although in the early stages of convergence we resisted restructure, later structural changes have drawn on the values set and ways of working. This included both major changes to Library senior management team[iii] and our Web and Learning Technology Services.

A recent test of the strength of our culture was a university restructuring in which IT services left SLS and the Institute of Sport took its place. This was a major change, but our values gave us a common platform that has allowed a relatively seamless integration, early identification of synergies and a renewed, common service identity.

Other university services have adopted the values concept, and we have seen the adoption of some of our values at institutional level; currently these are being reviewed at a deeper level, staff-wide. Our approach has also found recognition in our Investors in People assessments by way of best practice.

Cultural change using a values-based approach is no quick-fix, as it requires both commitment and energy. However, it can be successful, galvanising the service and giving it identity and presence internally and externally. It has energised staff, releasing creativity and enterprise that we could not have imagined or hoped for; our all staff service events remain a high point of the development calendar.

Looking ahead, we plan to develop further the language of values and behaviours in order to synthesise the essence of the culture we have created, and promote collaboration, creativity, atmosphere and enjoyment.

In 2006, in a staff briefing, we wrote:

'How will we know when we have reached our goals and created the SLS we would all like to see? The journey has no end of course... However, we will see improvements in the way we work together and how we present ourselves to each other and the wider university. The next steps we take now will lay the foundation for the future for an integrated, visible and successful SLS.'

Despite the wide-ranging nature of a large service provider, our values and culture have wide resonance. Ten years on we have delivered improvements founded on direct staff involvement, embedded and shared service values and a strong SLS culture of authentic collaboration and customer-centred service delivery.

[i] D. L. Cooperrider & D. Whitney. 1999. *'Appreciative inquiry: a positive revolution in change'*. In P. Holman & T. Devane (eds.). *The change handbook*. San Francisco. Berrett-Koehler Publishers), pp. 245–63 (102). Available from: https://appreciativeinquiry.case.edu/intro/definition.cfm

[ii] O. Pritchard & K. Black. *Service convergence at Sunderland*. Available from: http://www.slideshare.net/sconul/k-black-and-o-pritchard-service-convergence-at-sunderland-23571615. [Accessed June 2013]

[iii] O. Pritchard. 2013. *Reshaping library management in changing times.* SCONUL *Focus* 58