

# **Successfully Changing Workplace Culture with the Boundary Theory**

## **A Team's Journey to Manage Culture More Effectively in a Unionized Environment**

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Organizational culture isn't like a sports car. It cannot instantly change directions and make a hairpin turn. Instead, it's more like a tanker ship that takes time and planning to put on the right course. If you think about how your organization or team arrived at the culture it currently has, it's unlikely you can point to a single event, or even a few moments, that explain your current culture. Instead, it is the slow changes that happen, unnoticed at the time, which better explain how most organizational cultures develop. Not actively managing your culture doesn't cause it to quickly turn off course, but instead allows it to drift slowly astray until one day you wonder how you got to Baffin Island when you thought you were headed for Halifax.

This reality came into clear focus about two years ago within the Social Assistance and Employment Opportunities (SAEO) division at the Niagara Region. At that time, I was the Human Resources Consultant (HRC) supporting the Community Service Department (which includes the SAEO Division) of the Niagara Region. As an HRC, I acted as the lead contact and strategic resource for the management team of my client group. Since that time, we have been on an exciting and interesting path characterized by thinking differently about what boundaries mean and how to use them to keep culture on course.

SAEO, one of three operating divisions within the Community Services Department of the Regional Municipality of Niagara, administers the Ontario Works program to approximately 10,500 households within the Niagara region who are experiencing significant financial hardship (Niagara Region, 2014). The SAEO team includes over 220 employees comprised mainly of unionized (CUPE) staff.

## **Our Situation**

In 2005, senior management began examining the work culture and responded by implementing tools and training that would align the day to day operations with a culture that reflected the corporate values of respect, honesty, partnership, choice and service. About two years ago, the SAEO management team assessed their progress, taking a frank look at the operations and came away with some key realizations. First, they determined their structure and activities were not as customer centric and customer service oriented as they wanted them to be; the work they had already done had taken them some of the way, but more work was needed. They also agreed that the current culture of SAEO was not what they wanted it to be. The workforce is unionized and a pattern of division between management and staff had developed where staff would regularly become the "squeaky wheel" whenever they disagreed with management decisions. Finally, management wanted to increase their knowledge about how to effectively manage sensitive employee issues.

As the Director and I explored root causes of these issues, it was determined that SAEO needed further shifts to manage culture more effectively. As part of the diagnosis phase, we asked the management team a series of questions to understand the underlying issues, and several key findings emerged:

1. At times, managers and supervisors were avoiding conversations with staff about issues/concerns. Inconsistent tolerances for these kinds of infractions among managers put them at risk of bullying allegations. (“Why are you talking to me when I see people in the other team doing this all the time?”)
2. Management needed help to deal with staff who provided significant emotional responses to performance discussions. (“You’re harassing me! I’m filing a complaint!”)
3. Managing the emotional responses required a lot of time and energy from management who were also dealing with other day to day pressures.
4. Management was taking on staff accountabilities due to continuing staff resistance.

## Our Approach

One evening, as I was proctoring a final exam at the local university where I teach part-time, I was thinking about how all this fit together and what would help the team move forward. Then came a “Eureka” moment as I shouted out “Boundary Theory!” to a gym full of students writing various finals.

Boundary theory is a concept I first came across at university. In its purest form, it’s a perspective for explaining and managing interpersonal conflict (Furlong, 2010). Several authors have written about the concept and application of boundary theory.<sup>1</sup> My favourite author on the subject is Gary Furlong (2010). My idea during that evening exam was to apply the principles of boundary theory more broadly than a single point of interpersonal conflict. Broadening the principles would enable the management team to better manage themselves and their division’s culture.

At its root, boundary theory applies behavioural principles to understand how social rules (including work cultures) are initially formed, how they can be effectively managed (either adjusted or maintained over time) (Cloud, 2013). When people think of the word boundary, many get the connotation of restrictive and/or punitive styles. While this tool can be used as a means to compliance, it can also be used as a method of proactively engaging staff. The boundary framework leads to specific recommendations for what management needs to focus on, but is not prescriptive on the exact methods of implementation.

Boundary theory explains that people push boundaries (rules or group norms) when there is a personal benefit to doing so and the risk of negative consequences is low. A good analogy relates to driving behaviour. People speed for two connected reasons: to get where they are going as fast as possible, and they are relatively sure they won’t be pulled over by the police as long as they aren’t speeding excessively. If organizations don’t actively maintain their organizational boundaries, they create real expectations that are different from their stated expectations. Over time, such lack of boundary maintenance will result in slipping of standards as the actual expectations drift further away from the stated ones.

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<sup>1</sup> Some authors include: Gary Furlong (2010), Anne Katherine (2000), Henry Cloud (2013), Sherry Boland Ahrentzen (1990), and Syed Arshad Raza & Craig Standing (2011).

Maintaining boundaries can be done harshly through disciplinary measures or can be done supportively through coaching conversations and/or instructional discussions. What is core, however, is that for an organization to maintain its boundaries, management (and other staff if you can create advocates) must demonstrate a consistent and persistent intolerance to behaviour falling outside of accepted norms and boundaries (Cloud, 2013). Doing this requires a shift in thought, away from seeing events as single occurrences and understanding them to be part of a larger pattern where what you do today will impact every day going forward (Kahneman, 2011). As well, boundary theory leads to two other requirements. Management must clearly define expectations (boundaries) and management must continually communicate the boundaries to ensure a consistent understanding among staff (Cloud, 2013). We call these focuses the Three C's: Clarity; Communication; and Consistency (across people and over time). We have found that when you apply these three principles in a supportive and disciplined way, staff respond positively.

The first real step in implementing a boundary approach is to determine which cultural and behavioural boundaries are important and then clearly define what the boundaries actually need to be. To do this, the SAEO management team worked hard to assess and define the key issues. This work resulted in a set of expectations that the entire team is now managing towards. Next, we needed to help managers further develop their skills in having positive and corrective conversations with staff. We partnered with Vital Smarts and delivered Crucial Conversation (Patterson, Grenny, McMillan, & Switzler, 2012) and Crucial Accountability (Patterson, Grenny, Maxfield, McMillan, & Switzler, 2013) training which offers a supportive approach to holding people accountable. Finally, time came to communicate the agreed upon boundaries to staff and build tools to help leaders manage staff towards these new expectations.

## **Our Progress to Date**

There has been some significant work done to date on the boundary framework and this work has yielded some promising initial results.

The hard work (over several days) of identifying which boundaries are crucial and needing definition was a beneficial exercise. The result was that supervisors and managers, who had different levels of tolerance for various issues, were able to work through their different perspectives and land on an agreed upon interpretation of key expectations. Supervisors and managers have anecdotally noted a marked decrease in "answer shopping" behaviour by staff who are now getting more consistent answers to their questions.

With new clarity about key expectations, we focused our efforts on developing tools to aid in managing staff toward achieving these new expectations. A new Customer Service Expectation Discussion Tool was developed and rolled out to all staff, outlining the keys to positive client interaction. The tool requires staff to self-assess and enter into a discussion with their supervisors about maintaining good performance and/or improving performance that is falling below expectations. Since the implementation of this new tool, customer complaints are down 50% year over year, with complaints alleging poor staff behaviour dropping by 37% in the same period.

Another tool that we created is a manager resource guide. This document is a repository of the agreed upon key boundaries, contains strategies for managing a variety of employee issues, and houses various tools and templates. Supervisors and managers are regularly using the resources available to guide their conversations with staff. The boundary definitions are organized around the three areas on which employees are assessed, namely:

- Attendance: expectations about attending work regularly as scheduled;
- Performance: expectations about the quality and timeliness of work; and
- Conduct: expectations concerning workplace relationships (clients, fellow employees and management)

This toolkit has helped management increase their consistency for dealing with all kinds of performance issues. An example of the results of this newly found rigour includes the fact that in the past six months, five staff have failed to pass their probationary or trial periods and none of those decisions were grieved by the union. In general, staff and management are clear on the expectations, discussions are more concrete when staff are not meeting expectations, staff agree that proper supports were put in place to help them succeed and are therefore not surprised by the outcome. As well, since the adoption of these practices we have not had a single instance of a staff member claiming harassment or bullying when they are held accountable by a member of the management team.

Finally, this work has led to the management team having more confidence in managing differently. We are now discussing how to create differential employment experiences for staff based on their performance. We are selecting high performing staff to sit on important committees as a reward for strong performance and to develop them for future leadership roles. It's important to remember that we are making these improvements within a unionized workforce.

Even though we are still near the beginning of our cultural journey with boundaries, we have already seen significant cultural changes and returns. Managers are realizing that a seemingly small issue, effectively dealt with today, prevents it from becoming a huge issue later and may also prevent two or three other issues from developing. They have learned that being proactive today saves time in the long run and management is starting to reap the benefits of this work by being able to focus on other priorities and opportunities.

## About the Author



Neil Culp is currently a Business Consultant with the Organizational Performance department at the Niagara Region. Holding his MBA with a specialization in HR Management and his Certified Human Resources Leader (CHRL) designation, Neil has worked in progressively more senior HR roles within multiple industries, including post-secondary education, commercial real estate, and gaming, before joining the Region as a Human Resources Consultant in 2010. Outside of his current role, Neil has been teaching HR courses in the business program within the Goodman School of Business at Brock University for seven years, and is currently the Vice President of the Niagara Chapter for the Human Resources Professionals Association (HRPA).

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