GOOD PRACTICE BRIEF

MARCH 2021

STRENGTHENING ORGANIZATIONAL EFFECTIVENESS

KEY TAKEAWAYS

Staff and organizations need the time, space, and support to get away from the busy-ness, the day to day pressures, and to pause and reflect, do some deeper work, and discuss and find solutions to problems and issues they face—technical or organizational, immediate and strategic.

Creating enough time and inclusive spaces for thoughtful, constructive conversations, collective discussion, and an informed contextual analysis enables organizations to identify and build on what works, make better decisions, build ownership, and continuously improve in a challenging world.

Addressing pain points as well as appreciating what works, when we are at our best, and why all help to improve organizational systems and processes.

Change is complex, can come in noticeable and not-easily noticeable ways, and will not always be linear or accumulative.

BACKGROUND

One of the action items following the Center for Education's (DDI/EDU) 2017 annual Off-Site meeting was creating Strategic Office Priorities. To make progress on each, working groups formed and advanced the priorities, and office teams reflected them in annual work plans.

FIGURE 1. 2017 STRATEGIC OFFICE PRIORITIES

USG Education Sector Strategy	Office-Wide Learning Agenda	Mission and Field Support	Leadership/ Partnerships/ Influence and Engagement	Office Culture and Organizational Effectiveness
Develop and launch USG/USAID Education Strategy (per READ Act requirements) that is supported by relevant tools, resources, guidance and a communications plan	Develop and implement an office-level learning agenda through a consultative and iterative process that aligns with education strategy and goal areas, and delivers tangible public products and learning events	Develop and implement, with regional bureaus, a strategic approach to mission technical assistance based on standards of practice that yields coordinated, consistent support	Engage with key internal and external stakeholders to influence policy and leverage resources to advance education strategy goals and office priorities	Improve office effectiveness and organizational health through streamlined processes and systems for accountability, coordination, and staff development

EPIC supported Priority Five by facilitating team and office planning and decision-making, and making space to collectively discuss challenges and create effective solutions. Both DDI/EDU and EPIC believed that improving organizational effectiveness and health would allow the organization to achieve Strategic Office Priorities One through Four.

While systems and processes are important, it is worth noting that organizational wellness is the greater determinant of success. Recent McKinsey research of 1,000 organizations shows that 70 percent of transformations fail, and 70 percent of those failures are due to culture-related issues. Organizational cultures that ranked in the higher quartile posted a return to stockholders 60 percent higher than median companies, and 200 percent higher than the bottom quartile. Healthy cultures enable organizations to adapt in a changing, challenging world.

GOOD PRACTICE

COLLECTIVE DISCUSSION AND PROBLEM-SOLVING

Through EPIC support, DDI/EDU transformed annual All-Staff Retreats, quarterly Town Hall Meetings, and monthly All-Hands Meetings into spaces that brought individuals and teams together to collectively discuss changes and challenges, and collectively problem solve and co-create the culture that is needed.

All-Hands Meetings were created in response to staff wanting a space for deeper technical and operational discussions that were not being addressed in either the Town Hall Meetings or in the weekly staff meetings because of time limitations. These meetings were designed to discuss technical, agency, and office-wide concerns. Topics often included:

- USAID's transformation
- Technical interests and highlights
- Co-creation
- Matrix management

In times of change and increased workloads, spaces like All-Hands and Annual Off-Site Meetings can foster cordial discussion and forward movement on the big issues facing an organization. The necessity for these regular meetings was reflected in the meeting evaluations, where participants—on the whole—appreciated being given a voice and space in crucial conversations.

ADDRESSING PAIN POINTS

During initial consultations with DDI/EDU leadership, staff, and stakeholders in 2016, three priorities emerged:

- A better system, process, and materials for onboarding new staff
- More clarity on travel authorizations
- A defined clearance process

Working groups were then assigned to each priority, who met with other staff, offices, and sectors to find good practices and crucial documents on those topics. Then, EPIC worked with staff to pilot and produce these new guidance documents. Identifying key pain points and empowering a group to create or adapt existing systems and processes helped make incremental progress in day-to-day issues that were affecting performance.

INDIVIDUAL AND TEAM DEVELOPMENT

In 2016, EPIC administered 360-degree reviews for the Executive Management Team (EMT) members and Team Leads using the Integrated Reflection Exercise (IRE). The results helped DDI/EDU in the following ways:

- Enabled leadership to identify personal blind spots in their behavior and the impact it can have.
- Provided a starting point for EMT and Team Leads to begin working with a coach.
- Informed the development of the Leadership Development Program topics.

Building off of results from 360-degree reviews, the Leadership Development Program and new Coaching Program helped staff identify their growth areas, and provide support and accountability needed to enhance competencies, confidence, awareness of self and others, and performance. This then helped individuals and teams shift thinking in the right direction on inter-office relationships and communication by focusing on conversational, emotional, and social intelligence and skills. This included a series of sessions on Meyer Briggs for all staff.

OUTCOMES

CREATING SPACES

Annual Off-Site retreats became a tradition during EPIC's first year. EPIC co-designed and co-facilitated these gatherings with the participation of leadership and staff. Each year's retreat included themes that reflected the priorities and concerns at the time:

- The meeting in 2016 generated guidance on roles and responsibilities of Team Leads and the EMT, and what each needed from the other. Team Leads and teams had been recently formed, and there was new leadership on the EMT.
- The 2017 meeting revealed the need for shared Office Priorities and more specific work on organizational climate and culture, which resulted in a wellness survey, dashboard, and feedback mechanisms.
- The 2018 meeting took place at a time when the USAID transformation process had begun, as well as the roll out of the new policy and strategy. Regional Bureaus and other operating units were invited to talk about what this might mean, and staff spent time talking about what the new center should look like and be.
- The 2019 meeting analyzed external partnerships (alliances and networks) and how there might be greater synergies and sharing across them. The Agency guidance regarding the transformation in the new center was that there were many things we could not yet talk about or prepare for.
- There was no "off-site" two-day retreat in 2020 because of COVID-19, but All-Hands Meetings took place nearly every month to prepare for and operationalize the launch of the new center, and provide a venue to collectively reflect and plan.

ANNUAL WORK PLANNING IMPROVEMENTS

At the beginning of EPIC's support, not all teams created annual work plans, and those that did used different templates. With input and support from office leadership and technical teams, the following progress was made:

- In the first year (2016), EPIC piloted a model based on those inputs. Eventually, teams leveraged the created model—with varying degrees of enthusiasm and interest, and with little or no interaction with other teams.

- In the second year (2017), the template and process were improved upon through consultations with the teams. By then, teams had started to invite members from other teams to participate in certain moments of their planning (especially QUEST, a multivariate team with specialists in gender, inclusive education, technology, finance, and private sector engagement).
- By the third year (2018), nearly all teams dedicated a time and space for intersection with others in their annual work planning process. Work plans were shared across the office in a common effort to learn from each other, and enrich each other's approach.
- By the fourth year (2019), key staff picked up on the work planning process to create the space for collective analysis of team work plans and technical exchange.

LESSONS LEARNED

CONTINUE TO CREATE A SHARED FUTURE STATE AND THE DEEPER WHY OF THE NEW CENTER

Consulting with leadership, teams, and individuals at the beginning stages of the organizational effectiveness initiative has helped DDI/EDU build trust, rapport, and a shared vision, and determine how to best leverage its resources. DDI/EDU should continue and build upon established priorities, norms, and streamlined processes. A few examples of this include:

- Co-creating and co-facilitating meetings
- Using, endorsing, and adapting model systems and processes
- Creating more routine opportunities for feedback from individuals, teams, and stakeholders

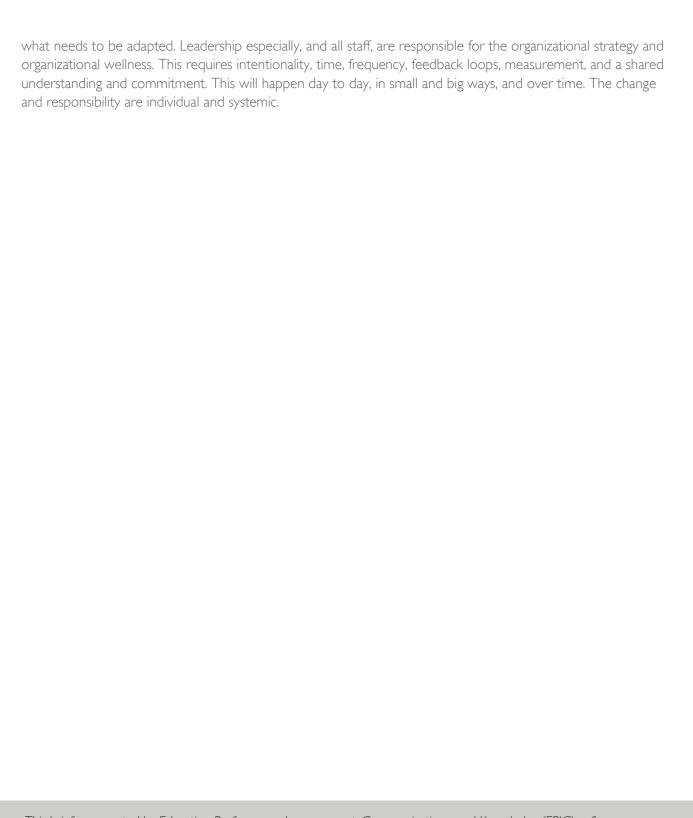### PROVIDE DIFFERENT WAYS FOR STAFF TO GIVE FEEDBACK

DDI/EDU should consider institutionalizing a process for receiving and giving feedback for different engagements. While meetings give an opportunity for staff to raise emerging issues and concerns, and to give acknowledgements and appreciation, not all staff will provide verbal or written feedback during meetings. To accommodate those who are less vocal in plenary settings and those who do not want to be identified, written or online surveys/questionnaires should also be periodically administered. The decision-makers should then consider feedback and implement it accordingly.

LEVERAGE WORK PLANNING TO ALIGN, COLLABORATE, AND COORDINATE

As a new Center for Education, priorities have been established after a deep analysis across different data points, including a survey of USAID Missions. Work planning will now cascade down and align the USG Strategy and USAID Education Policy principles and priorities, DDI/EDU priorities, Function Areas work plans, Matrix Working Groups work plans, Working Group work plans, and individual staff work plans.

In an iterative process, the questions in the templates of these work plans should connect operating units, provide a basis for supervisor-supervisee conversations, guide professional development opportunities, balance portfolios, and facilitate work-life balance. The work plan and work planning process can become the new guiding force with which everyone can identify, contribute to decision-making and resource allocation, and track individual and collective time and effort.

Going forward through the COVID-19 pandemic and beyond, DDI/EDU will need to maintain or create spaces—virtual and otherwise—for the deeper work and deeper thinking needed to be effective. Time, preparation, and thought need to be given to not just the day-to-day demands that fall on individuals and groups. The organization will need to collectively pause and reflect on priorities, emerging challenges, new directions of the administration, how we are doing in organizational norms/values, what we are learning, and

what needs to be adapted. Leadership especially, and all staff, are responsible for the organizational strategy and organizational wellness. This requires intentionality, time, frequency, feedback loops, measurement, and a shared understanding and commitment. This will happen day to day, in small and big ways, and over time. The change and responsibility are individual and systemic.