

Organizational Effectiveness 101
It's not rocket science, so why
don't all organizations do it?

WCMA Women's Leadership Seminar

December 5, 2024

Introductions

- Facilitators:
 - Todd Romenesko
 - Vicki Tylka
- Participants:
 - Getting to know you
 - You getting to know table partners

Today's Objectives

- Provide a high-level overview of key processes of Organizational Effectiveness (OE)
- Learn key concepts that can help in solving any problem
- Practice and apply OE concepts to real life scenarios

What is OE?

- American Public Human Service Association (APHSA) created
- Systematic and Systemic focused process
- Structured experience to achieve the optimal result (Area of Resolution)
- Learning by Doing

What happens if we don't use an effective process

- Shout out examples of what happens in typical meetings where best intentions are used to solve problems, BUT there is not an effective process used

Oh no!

- Loudest person or leader gets their way
 - Or the person who talks last
- Keep having the same conversations
- May create a solution that doesn't address the actual problem
- People may go off on their own to solve an issue
- Status quo wins the day
- People may feel:
 - Stuck, frustrated, worn out, defeated, hopeless, withdrawn

“Let’s have a staff meeting and discuss the things that must happen but will never actually end up happening.”

—Anonymous

“Sometimes, I spend whole meetings wondering how they got the big meeting table through the door.” —Anonymous

If you are not part of the solution, you are part of this meeting.” —Anonymous



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What does OE look like?

- Defining the problem and identifying the desired outcome
- Can include operationalizing new initiatives
- The length of time of the sessions is dependent on the scope of the issue to be addressed
- Results driven
 - Can include training internal facilitators
 - Can use a bridged process to achieve quicker results

Sponsor Group

Provide high level oversight; obtain resources; set expectations that align to strategy, clearly define the area of resolution, draft ideas for desired future state



OE Team

Group agreement for desired future state, engage in DAPIM, Initiate and manage continuous improvement effort; maintain hands-on responsibility during and after the facilitated process



Work Team I:

Implement plans that require complex and/or extended efforts (e.g., process design)

Work Team II

Work Team III



“Learning by Doing” Remedies to Barriers

- Team building experiences
- Safe, high-trust learning environments
- Encouraging experimentation and creativity; “big leaps” and “trusting the process”
- Peer groups and facilitators help learners
 - See problems in new ways
 - Discover root causes and novel solutions
- Learning is reinforced over time through continuous improvement and success

Two-minute reflection time

- Think of an issue to be resolved at your workplace and write it down, or keep it in mind as we work through the presentation
- It could be a new challenge on the horizon or an issue that keeps re-surfacing with no solution but plenty of wasted time

Let's talk OE



DAPIM™ Models, Tools, and Techniques

- Define priority improvements in operational terms
- Assess observable, measurable strengths and gaps. Identify root causes and general remedies for priority gap
- Plan quick wins, mid-term, and longer-term improvements
- Implement action plans while managing communication and capacity
- Monitor progress, impact, and lessons learned for accountability and ongoing adjustments

The DAPIM™ Model Work Products

Define

Work products – baseline surveys and measures, alignment notes, initial feelings, ground rules, defined areas for improvement

Monitor

Work products – monitoring quick wins, and other changes, evaluations and measures of progress and impact

Assess

Work products – findings: strengths and gaps, root causes and general remedies

Performance & Capacity

Implement

Work products – team activities, action plans, charters for working teams, communication efforts

Plan

Work products – quick wins, mid- and long-term improvement plans, communication and capacity plans



DAPIM™ - Define

- Area of Resolution
- Desired Future State
- Parameters for the Work
- Group Agreement

Area of Resolution Examples

- To fortify the functioning of the Department's Children Youth and Family division to enhance team collaboration in establishing and meeting performance outcomes to support children and families in our county. Focus will be on performance and connection to leaders and each other as team members. Areas for exploration and remedies are likely to include trust, communication, commitment, and building competencies and confidence in performance.
- The County's Management team leaders will position our county as the premium place to work. To achieve this, we will gain an understanding of the impact, value and interconnectedness of each departments' work to the organization. Through relationship building, we will enrich our workplace culture to achieve our goals.

Examples of Desired Future State

We have a highly coordinated system for services to children, youth, and families; and the community values what we provide. Stakeholders and partners work collaboratively with us, understand our contribution, and share in the mission to serve children and youth, and trust and value us. We engage in effective communication internally within the department and with the community at large.

North Central Health Care and Marathon, Lincoln, and Langlade County Departments of Social Services work seamlessly together in delivering human services to vulnerable individuals in our communities. Inpatient services deliver treatment and stabilization to support individuals with an organizational priority focus on providing care and services in our communities.

DAPIM™ - Assess

- Statements of observable or measurable experience
- Clear examples and descriptions
- Strengths and gaps analysis
- Not prescriptive

Building the Bridge to Planning

Assessment work involves group input, brainstorming and dialogue to determine:

- Findings: strengths and gaps
- Priority needs
- Root causes
- General remedies

Categories of Root Causes

More Task Oriented

- Organizational structure:
 - Tiers and functions
 - Roles and numbers
- Goals, standards and measures
- Policies and procedures
- Processes and methods
- Internal programs, services, and tools
- Staff capacity
 - Time management
 - Skill set (technical/general)

More Relational

- Culture and values
- Politics and power
- Communication
- Decision-making
- Teamwork and collaboration
- Trust
- Community partnerships
- Daily behaviors and motivations

Building the Bridge to Planning

Root Cause Analysis: Two Approaches

Keep asking “What isn’t working well, and why?”
until you discover something very tangible and actionable — a
general remedy

- or -

Test a priority need against a set of categories of
root causes and remedies until one or more “fit”

Example of a Root Cause

Gap: Lack of timely completion in performance appraisals

- No one wants to do them, Why?
- No time (If you had all the time in the world would they still be completed timely?)
- No, because people don't like them. Why?
- No value seen in them, not tied to professional development. Why?
- Template doesn't allow for a new goal to be entered, and we were told we can't use a new form. (Is this true and today's reality?)
- Root Cause: Our tool doesn't match our desired goal for completing performance appraisals

Volunteers Needed

- Now that we have learned about Root Cause, let's see what happens in a typical meeting when the structured process isn't in place

- Add scenario here

Let's Practice!



Scenario

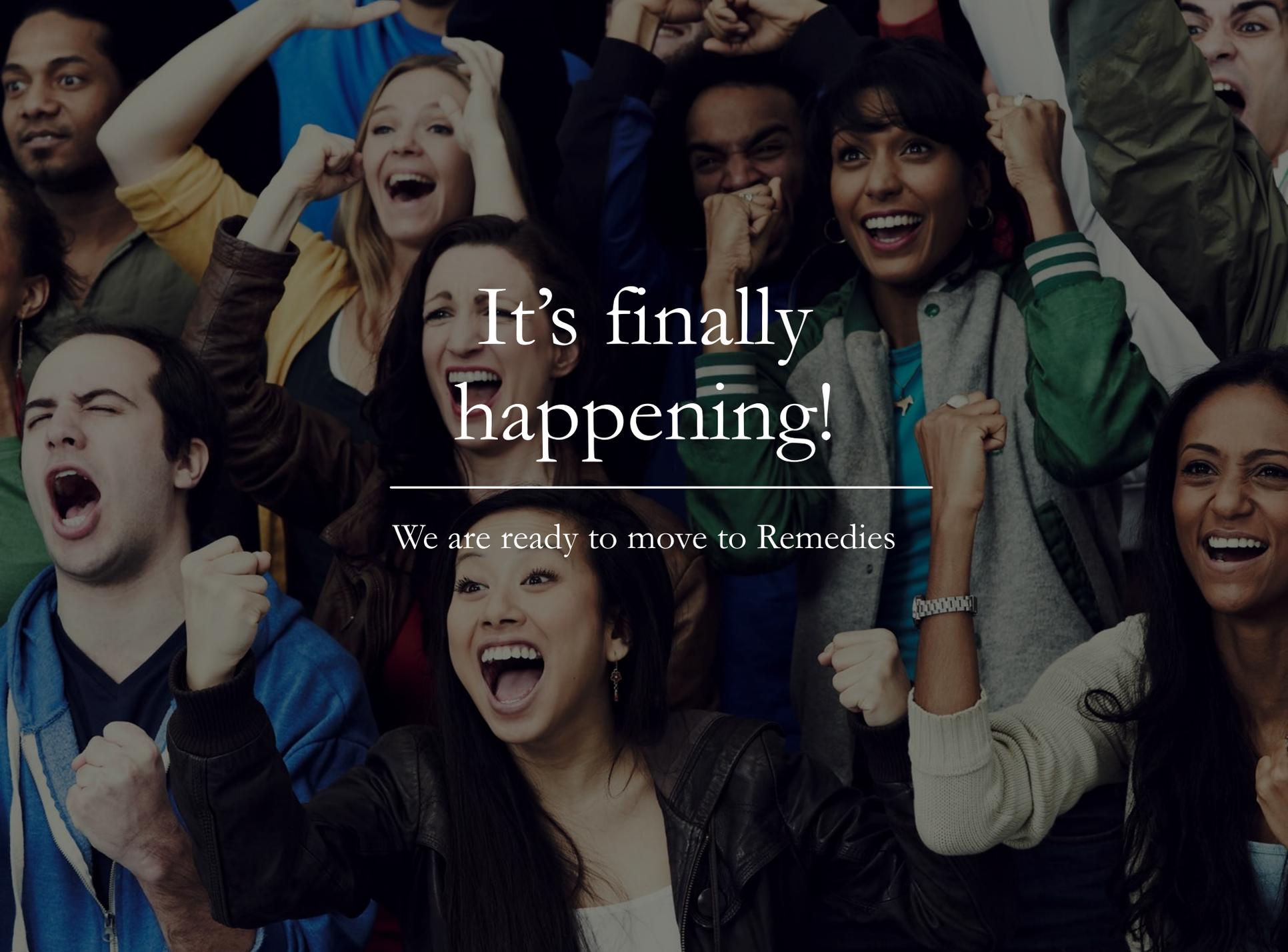
- The Emerald City Cashier's Office is interested in improving its efficiencies in collecting emeralds at tax time from the citizens of Oz.
- Strengths – willingness to change the system, unlimited funds
- Priority Gap – Excessive amount to time it takes to process payments (emeralds) for each transaction.

Define a root cause

- Be creative and use the “why” worksheet and determine a likely root cause for the priority gap
 - We are being fictional here, but your root cause should still make sense, and address the priority gap
 - Designate a note taker
 - Report out root cause

At your tables

- Review the issue you wrote down at the beginning of the session.
- One or more people share their example and brainstorm a root cause. Be ready to report out:
 - Why is this?
 - Has this happened before?
 - Don't rush to a remedy
 - Don't be a Solution Hopper!

A diverse group of young people, including men and women of various ethnicities, are shown in a state of intense excitement. They are cheering, shouting, and raising their fists in the air. The background is dark, making the people stand out. The overall mood is one of triumph and joy.

It's finally
happening!

We are ready to move to Remedies

DAPIM Plan

Three General Types of Remedies

- **Recommendations**
 - Remedies that are not in your control
- **Decisions / commitments**
 - Remedies are in your control and don't require development of new tools / processes
- **Team activities**
 - Remedies are in your control and require development of new tools / processes
 - Teams can be chartered to perform work to support change

DAPIM™ Plan

Three equally important types of improvements or action plans:

- “Quick wins”
- Mid-term improvements
- Long-term improvements

Quick Wins and Mid-term Improvements

Pursue quick wins and mid-term improvement in areas that:

- Enhance key initiatives already underway
- Address needs that are obvious, big, and essential to operations and relationships
- Build the involvement and the confidence of clients and staff – “visible wins”
- Stretch current resources to an untried level
- Eliminate or curtail lower-priority “capacity eaters”
- Enable deeper future assessments and planning
- Are symbolically powerful

Let's Practice!



Remedies

- Using your root cause for Emerald City, identify one or more remedies
 - Clarify if they are quick, medium- or long-term strategies
 - Be detailed, and include resources needed:
 - Workgroups
 - Technology
 - Buy in from leaders
 - Other

At your tables

- Review the issue you wrote down at the beginning of the session with the root cause you identified.
- One or more people share their example and brainstorm a remedy.
 - Quick, medium, long term
 - Recommendations, decisions/commitments, or team activities

DAPIM Implementation

- Using remedies, create work plan
- Charter accountabilities
 - Who, what, when, how
 - Involve diverse teams for capacity support and buy in
- Communication Planning

Communication Planning and Developing an OE Plan

- Demonstrates a commitment to improving outcomes and services over time
- Builds credibility with stakeholders and staff
- Reminds the work team of commitments made
- Gets everyone on the same page about improvement work to be done, how it will be rolled out over time, how different initiatives are connected, and why they matter
- Tracks accountability and monitors progress while reinforcing a culture of accountability, data-driven assessment, follow-through, and ongoing adjustment

DAPIM™ Monitoring Techniques

- **Implementation reviews**
 - Measure accomplishments
- **Impact reviews**
 - Measure actual vs. expected impact on client outcomes
- **Lessons learned reviews**
 - Address new and emerging questions and findings; drive further innovations

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Closing

- The DAPIM method can be used for the most comprehensive and simple issues to be resolved.
- Discipline to the structure is key
- Keep in mind systemic connections
- Consider using an external facilitator for high stakes issues and to learn the process

Questions?

- Contact us at toddvickiconsulting@gmail.com



Todd and Vicki