Reflections and Lessons Learned From Two
Country Strategy and Implementation (CSI) Office Retreats

2018
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Background

From November 2017 through February 2018, KDAD supported the planning and delivery of two half-day staff retreats for USAID’s Office of Country Strategy and Implementation (CSI) team within the Bureau of Food Security (BFS). During this period, USAID was at the beginning of a reorganization process catalyzed by the new administration under the direction of the new USAID Administrator, Mark Green. Decisions had not yet been made about a new structure, although discussions among senior leadership were well underway.

BFS leadership identified the need for the retreats and proposed the shorter, half-day format, with the first retreat focusing on teambuilding to strengthen communication and the second retreat less defined so that they could respond to the evolving nature and needs of the reorganization process.

Leadership agreed to have a KDAD organizational development (OD) consultant conduct interviews with staff rather than do a survey to inform the objectives and design of the retreats.

For the first retreat, this methodology met with modest success, with five out of twelve staff nominated signing up for interviews, none of whom were BFS Division Chiefs. Likewise, in these interviews, interviewees made it clear that team building and a focus on communication approaches and protocol for the CSI team were not compelling objectives, given the dynamic shifts happening in the Agency and within BFS. Therefore, in consultation with BFS senior leadership, a decision was made to amend the objectives of the first retreat to align with and reflect what CSI team members hoped to discuss and explore.

The second CSI retreat benefitted from lessons learned in the initial retreat. The Director for the Country Strategy and Implementation Office decided to focus the second retreat on ensuring input was gathered to help operationalize the Washington Support Teams. Likewise, a BFS consultant had recently conducted interviews with CSI team members to draft guidance for Terms of Reference (TOR) for the Washington Support Teams. The data from these interviews were used to draft objectives and an agenda for the second retreat.

All CSI office staff were invited to participate in the two half-day retreats.

December 2017 Retreat

The objectives for the December retreat were to: 1) review and comment on proposed guiding principles for BFS and provide ideas on how to ensure coherent delivery of the results proposed under the Global Food Security Strategy (GFSS), including how to adopt a service-oriented approach and communicate effectively; and 2) identify what is working well in BFS and what could be improved.
The retreat opened with then Acting Senior Deputy Assistant Administrator (DAA) for BFS, Gary Linden, giving what information he could on the Agency reorganization at that point.

The first objective was met through small group work. The second objective was met within the context of the guiding principles.

According to participants' evaluations of the first retreat, the participants appreciated hearing an update from leadership about the state of the reorganization and having the opportunity to hear the diverse perspectives of others in the office and realizing that they were not alone in their concerns.

They particularly found useful the small group work, reports on guiding principles and what the office was doing well and could improve upon.

“The second session on guiding principles permitted deep reflection, with each group building on the thoughts of the preceding groups. Good end result that will help FTF improve and advance.”

“Opportunity to discuss what we do well and what could be improved as a team.”

“Convening around a specific set of questions and activities was very helpful and a great way to remain focused in a productive manner.”

“Great to hear what other CSI colleagues think about and prioritize in terms of redesign efforts.”

“Get to know the team better.”

“Chance to talk to other divisions.”

**February 2018 Retreat**

The objectives for the February retreat were to: 1) gain better understanding for the emerging vision of CSI; 2) clarify how Washington Support Teams (WSTs) are building on the work done in December 2017; and 3) offer input on how to make the WSTs operational and as effective as possible.

The agenda for this retreat began with a presentation by Sean Jones, Senior Deputy Assistant Administrator on “What we know, what we don’t know, and emerging vision for CSI,” which was followed by a Q&A period. Africa Division Chief, Christine Gottschalk, followed with “Picking up where we left off: outcomes from the December retreat” to remind staff about what they had done in the previous retreat and to update staff on progress since then, followed by Q&A. The rest of the half-day retreat was dedicated to gathering staff input on how to operationalize WSTs.

According to a retreat evaluation by participating CSI staff, the most useful aspects of this retreat were the group discussions about roles, structure and the purpose of the WSTs.
“Meeting as a group to discuss ideas and seeing the common themes that have emerged over the past several months. I think we may be getting to a meeting of the minds.”

“Uncorking a very rich array of good ideas.”

“A wealth of practical experiences in the room.”

Advice from staff for the next retreat focused on ensuring that the team revisit key agreements in light of the expected reorganization, including the proposed name change from WST to “Country Support Team” (CST).

One person commented:

“Let conversation flow, and let us go off script. It is good to have an agenda but it shouldn’t be at the expense of letting the team discuss, debate and flesh out issues. I am just now finally seeing the benefits of the many retreats that I have attended this past year.”

Given that the agenda and objectives were pre-determined by senior leadership, particularly in light of the previous retreat’s less-than-robust data gathering, one person commented:

“Consult widely on the agenda topic. The topic this time was driven by office leadership and doesn’t reflect the interests of the entire office.”

Follow Up

In August 2018, KDAD conducted nine interviews with CSI staff who had attended the retreats to understand better what impact, if any, the two retreats had and what could be learned from them. The reorganization process was still very much evolving with the new structure beginning to emerge, but details were not yet available as these interviews were conducted.

Team Building

When asked about how the retreats have influenced the way the CSI team works together and with others outside of CSI, if at all, four respondents replied that they hadn’t observed any changes, while the remaining five noticed positive effects:

“I think they do build a sense of team, but that needs to be regular, not ad hoc.”

“I think they have helped us work better as a team.”

“We all know each other better (including out of office interests). This familiarity speeds doing business among ourselves.”

“The retreat has helped in trying to create systems/processes that are more transparent. There is growing recognition that we need to have a better flow of information throughout the Bureau.”
Retreat Timing and Format: One Full Day or Two Half Day Retreats?

In theory, when a retreat happens and how much time is dedicated to a retreat should be designed based on the retreat objectives. In reality, there are other contextual and practical considerations that influence these design decisions. Limited budgets, organizational and staff schedules, the relative urgency of addressing particular issues and many other factors. In this instance, USAID, including this office, was in the midst of a reorganization process that involved many internal and external stakeholders. The decision to use resources that were earmarked for a one-day office retreat for two half-day retreats spaced a few months apart was well-founded. This approach facilitated more ongoing communication with staff to keep them apprised of what was known and not known about the reorganization during a time of uncertainty and provided a forum through which they could share their input to influence, to the extent possible, the emerging reorganized structure and vision.

One respondent did not think retreats, regardless of the format, would help the office, stating, “I don’t think the retreat will solve anything for us;” conversely, others liked the half-day format, while one thought they were too short, and two people thought the spacing between retreats should have been a lot closer:

“The two half-days were less disruptive to my work while creating enough concentrated time for useful discussions in the retreat.”

“They always seem a little too short!”

“A lot of water went over the dam between the two retreats. A half-day format is practical, allowing people to quickly catch up on missed work. I suggest putting these two half-day retreats one day apart, not 10 weeks apart.”

“Yes, perhaps a little less time between the two half days.”

“Both retreats may have been premature in that the Bureau had not come out with its reorganization plan. It was hard to respond to (or anticipate) a reorganization whose contours we did not know. However, one purpose may have given feedback to the organizers.”

Leadership’s Role in a Retreat in the Midst of a Change Process

In uncertain, changing times, it is particularly important for leaders to communicate honestly with staff about what is and is not yet known, what has or has not been decided, and to manage staff expectations in terms of timelines and how and when they can provide input into the process, if at all. This can be challenging when leadership is also subject to limited information, changing plans and timelines, diverse visions of change and other dynamics.

According to Planning and Implementing Retreats: A Leader’s Guide, “leader[s] must be very persistent in communicating about retreat goals, managing expectations and ensuring follow up

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with any key retreat action items. The most compelling reason for retreat failures is the lack of clarity about purpose and what the organization or team is really trying to accomplish by having a retreat.”

Given the timing of these retreats in the midst of the reorganization, we wanted to know to what extent these retreats provided staff with a better understanding of the reorganization process and to what extent the retreats may have provided a platform for staff to directly or indirectly influence this process. Responses to this question were mixed, which is not surprising due to the fact that many aspects of the reorganization were still uncertain during this period. Two people didn’t think they had better understanding or that the retreats had influenced the reorganization process, while four others had a more positive perspective:

“Yes (I have a better understanding), but there seems to be something of a lack of clarity about how the re-org is intended to shake down - without a clear vision, at least some options of how things will be operationalized in the new Bureau, there will remain uncertainty. That is not the fault of the retreat.”

“The retreat didn’t deal with the reorganization because there was little sharing of information by the Administration/Front Office on this process. The retreat has an influence because we discussed the WST which will be a platform to support the fundamental goal of the redesign which is to support Missions. This platform will coordinate the demand driven approach that BFS and other Pillars will take.”

“The retreat offered us a chance to revisit our functions and country support in general, certainly influenced the reorganization discussions by helping define the value added of CSI.”

“Yes, probably. It was helpful to hear in advance about the many considerations, opportunities and limitations influencing the reorganization.”

Nearly all respondents believed that these office retreats were a good platform to get CSI leadership to understand the needs of the CSI team. The one respondent who did not support this opinion believed that CSI leadership should talk to their staff one-on-one and at division levels.

“[The retreats] provide an opportunity to flatten a pretty hierarchical system which assumes that people lower down the tree don’t have experience to contribute to management issues.”

“Yes, if the retreats are touching on issues that interest the Front Office and are applicable to other offices. Sometimes retreats focus on team building and relate to the needs of the office.”

“Yes, getting everyone on the same page to discuss the reality of our work.”

“Yes, assuming that leadership participates for the full time – which they did.”
**Following Up After Retreats**

When asked whether the retreat conversations about the WSTs helped CSI to better integrate its support to missions, most respondents replied that this had not happened yet.

“Unfortunately, we haven’t been able to operationalize the information we got during the retreat on the Washington Support Teams. We have been focused on the redesign efforts for the Bureau. The WST is one piece in this complicated puzzle. But I am confident as we move forward with restructuring the Bureau that we will be able to use the discussions in the retreat to help us design a framework for field support.”

“No, it was another waste of time.”

“Discussions seem scattered due to uncertainty about Bureau structure and function. At the time we held the retreat, we did not know about upcoming RFS plans.”

“Yes, in theory. My target country missions had approved its Country Plan before both retreats. We have not used the WST since then, although we expect to use the WST when specific needs arise. CSI support to the Missions was already reasonably integrated between teams and divisions.”

When asked about what actions or changes, positive or negative, they have observed as a result of the retreats, six respondents stated that they hadn’t yet observed any actions or changes. Observations from the other three respondents follow:

“I’m not sure how directly related to the retreat the decision to have two managers for two teams under the Tech Division Chief was, but that came after. It has generally been a positive change in that there is someone closer and more available for support. I think it will be a positive change to have a structure that allows persons from the current MEL team to more regularly work with Country Support Officers.”

“The information from the retreat on the WST has informed the process guidance for the GFSS Regional Strategy. The WST will be the platform for bringing together the interagency, BFS, and Mission stakeholders.”

“For those who don’t have regular Front Office contact, it’s always beneficial to learn what’s going on and be brought into the picture. This is an intangible benefit. The specifics don’t matter as much as having an environment of cooperation.”

While one person stated that the retreats were “pitched and conducted well,” others offered some advice to make the retreats more effective. One respondent recommended that there be clear decisions made with demonstrated follow-up. Along these lines, another advised that people be tasked with follow-up and the development of an action plan. Another respondent stated that the timing was tricky due to the redesign, and a third respondent built on that thought offering that “it would have been helpful to have known more about how BFS would be structured/redesigned. Unfortunately, that information was on close hold.”