

USP Staff Retreat 2010 – Evaluation Summary

A total of 43 staff responded to the survey (out of 57)

Key things that you took away from the retreat; conversations or exercises that you found most useful (respondents gave, on average, 2-4 answers)

The vast majority of responses identified 2 conversations as being most useful and/or critical:

- Internal / inter-personal communication
- Creating an elevator speech

These two were followed by:

- Alignment presentation
- Ann's "not enough" framework
- Ann's vision presentation and surfacing issues we need to address

Additionally, a number of respondents commented on the value of being in the same room with colleagues, of reconnecting, and on the quality of the facilitation (with a few cautionary notes).

Elements of the retreat that were not particularly useful (respondents gave, on average, 2-4 answers)

Overwhelmingly, responses highlighted that the retreat **felt rushed and did not provide enough time to engage in substantive discussions:**

- The agenda did not allow time for open discussion and more interaction with colleagues
- Most of it was useful, none of it was in-depth enough. We tried to cover too much territory in a few hours – this worked for some people while others felt we rushed through too many things.
- The facilitator delivered some sessions as lectures, leaving little time for interaction and for putting concepts into practice
- Some respondents wondered if retreats should even include a skills-building component, arguing that it can be a distraction from deeper and more pressing needs we need to face collectively.

Additionally, several responses questioned the value of the interpersonal communications session and the elevator speech exercise:

- On the elevator speech exercise: some funds have already developed or are developing them; there was not enough time to practice; the presentation ignored some critical issues that have an impact on communication, such as gender or race; non-verbal communication was not addressed; not enough discussion or practice on how to link an elevator speech back to the USP vision.

- On interpersonal communication: conversation scenarios were too contrived; exercise was too late in the day and people were tired; too little time – session felt rushed and provided no opportunity to reflect on how we can communicate within USP and what it is that we need to improve.

Overall, how valuable was the retreat?

82% of respondents found it valuable and very valuable.

Effectiveness of morning session #1, “Context set, introductions, working agreements”, in helping us to achieve retreat purposes

94.8% of respondents agreed on the effectiveness of this session.

Effectiveness of morning session #2, “Alignment”, in helping us to achieve retreat purposes

79% of respondents agreed on the effectiveness of this session.

How could we have made it better?

Longer session, more practical, using actual examples of USP to walk through the concept of alignment.

Effectiveness of morning session #3, “Discussion with Ann about USP vision”, in helping us to achieve retreat purposes

70.2% of respondents agreed on the effectiveness of the session.

How could we have made it better?

Longer session, allowing time to engage in deeper discussion, make sure there is a process to address issues raised and places in “parking lot”.

Effectiveness of afternoon session #1, “Spitfire and working on our elevator speech”, in helping us to achieve retreat purposes

79% of respondents agreed on the effectiveness of this session

How could we have made it better?

Have it be stand alone session, allow more time for deeper discussion and practice, have facilitators work in-depth with each group, pre-retreat introduction or preparation.

Effectiveness of afternoon session #2, “Conversational competence”, in helping us to achieve retreat purposes

81.6% of respondents agreed on the effectiveness of the session.

How could we have made it better?

Longer session, allow time to reflect on how we communicate within USP and OSI, establish a better balance between time allotted to facilitator and staff interaction.

Facilitator Jose Acevedo

(a) Delivered content in a clear an engaging way

94.7% of respondents agreed / strongly agreed.

Although....

At times, he took too much air time.

(b) Created trust and built rapport

86.4% of respondents agreed / strongly agreed.

Although...

Jose's mention of salary freezes was deemed unprofessional and unrelated to the retreat.

Facilitator Ed Walz (Spitfire)

(a) Delivered content in a clear an engaging way

89.1% of respondents agreed / strongly agreed.

Although....

There was some disconnect with Jose's facilitation style; he did not address some critical issues that have an impact on communication, such as gender, race, accent or body language.

(b) Created trust and built rapport

89.5% of respondents agreed / strongly agreed.

Suggestions

- Very positive comments about the role the Staff Advisory Group played in shaping the agenda and requesting input from staff. Suggestions made to keep this as a model for planning future retreats.
- Next year, plan a 2-day staff retreat or consider having two 1-day retreats. Respondents highlighted their desire for a longer retreat that leaves more time for interaction with colleagues.
- Share retreat goals and objectives earlier.
- Include more opportunities for small group work and interaction.
- Ask staff to do "homework" to get them to start thinking about some of the issues in advance (although others favored NOT having to do any preparation).
- Do a better job at balancing "air time" of the facilitator.
- Start planning the retreat more in advance.
- Incorporate dinner and fun together as precursor to retreat.

Follow up

1. USP internal communication vehicles and mechanisms

The evaluations highlighted the need for channels/spaces/mechanisms for raising and addressing issues (such as work from home policy, workload management, growing budgets and static program staffing, communication between SMT and the rest of USP, amongst others).

Action proposed:

- Eric Ferrero will act as point person.
- Building from retreat feedback, Eric will conduct an audit of USP internal communications.
- This audit will be conducted during the summer through an inclusive, participatory process so as to ensure feedback from everyone in USP. May include individual and small group discussion, and a large group conversation.
- Eric will then work with Staff Advisory Group and Senior Management team to develop strengthened communication mechanisms.

2. Interpersonal communication skills

Evaluations emphasized the need to continue working to improve interpersonal communication skills.

Action proposed:

Grantmaking Operations will propose a series of training sessions. These sessions should also seek to further conversations about how we communicate in USP and how to incorporate lessons into work culture.

3. External communications & elevator speech exercise:

Evaluations highlighted the hope for more intense skill building in this area.

Action proposed:

- Eric Ferrero and Debra Rubino will lead follow up and explore organizing two or more follow up sessions to continue with this exercise, help staff hone skills and make a clear link between their jobs and USP broader goals and vision.
- Eric will consult with Senior Management Team and Staff Advisory Group who, in turn, will reach out to colleagues to request input.

4. Alignment framework:

Evaluations showed the interest of many staff to take the alignment conversation one step further and explore how we can put the framework into practice.

Action proposed:

- Grantmaking Operations will re-circulate Jose's alignment framework.
- Senior Managers commit to try to incorporate it into their work.
- Grantmaking Operations will explore bringing back Jose to lead us in a conversation about how to operationalize the alignment framework and dig down into practical examples of what this means for USP.