INTRODUCTION

This Organization Redesign overview is intended for use by School/Unit leaders across Harvard. In light of the many changes and uncertainties departments face due to COVID-19, this toolkit will help leaders identify and execute a plan to address any changes to the design of their organization that are needed to be successful in this new environment. It is intended to be used in partnership with their Human Resources Office, in consultation with CWD Executive & Organization Effectiveness as needed. It is recommended that leaders focus on completing one step at a time. Depending on the time allotted to complete the organization redesign plan, ideally complete 1 to 2 steps per week (there are 9 steps, therefore it will take a little over a month if two steps are completed per week; a little over two months if one step per week is completed). If helpful, please use the attached template.

STEP 1: IDENTIFY DRivers OF AND DESIRED OUTCOMES FOR A REDesign

Even when external circumstances are driving an organizational design process, it’s important to clarify, articulate and own the need for change, be explicit about intended outcomes and commit to drive the process forward.

- What is driving the need to redesign the organization?
- What do you wish to achieve from a redesign process?
- What values and criteria will drive your decision-making?
- How will you define and measure success?

STEP 2: CREATE (OR UPDATE) THE ORGANIZATION’S STRATEGIC PLAN*

Strategy is the first component of an organization design/re-design effort as it clarifies key criteria for choosing among alternative organizational design. Each organizational design enables some activities while hindering others. The choices the leader(s) makes in redesigning the organization should enable those activities most critical to supporting the current or revised strategy in this moment of crisis and beyond.

- What is the purpose of your organization? Has this changed at all due to COVID-19?
- What are the methods that your organization uses to accomplish its purpose? What are your primary services or programs?
- What are the core priorities of your department? Have they shifted in this new reality?
• What is the work that needs to be done to meet these core priorities? (what are the “must haves” versus “nice to haves”?)
• Who are your key constituents? How does the critical work impact them?
• What should be started, continued or accelerated to meet the current priorities better?
• What should be paused, discontinued or done differently?
• What are your initial thoughts on what success will look like in the next 1 to 3 years?
• What are your initial measures of success?

*See CWD’s Strategic Planning Toolkit for more information on this step.

STEP 3: ALIGN ORGANIZATIONAL CULTURE*

Leaders cannot overestimate the extent to which the effectiveness of strategy depends on cultural alignment. As the leader(s) of this effort, you need to closely align your culture to the strategic objectives you adopt.

• How would you describe the culture of the organization (its values, norms, stories, rituals, and ceremonies that give meaning to the activities and events of the organization)?
• How are the realities of the current environment impacting the culture?
• What aspects of the culture are working to support your organization and its ability to execute the updated strategy, and therefore should be preserved?
• What aspects of the culture no longer support your organization and its ability to execute the updated strategy, and therefore need to shift or end?
• How can your culture accelerate best practices around collaboration, learning, flexibility, diversity, inclusion, and accountability?

* See CWD’s Culture Change Toolkit for more in-depth information on this step.

STEP 4: DETERMINE STRUCTURE AND ROLES NEEDED TO SUPPORT THE STRATEGY

Consider how the organization should be designed to support the updated strategy you have outlined in the previous steps. As the leader(s), you will identify and implement any adjustments that need to be made between the structures and roles that worked before and those required for success in the times ahead.

• What is the existing structure?
• Does the organizational structure in place enable execution of the updated strategy?
• Which functions and roles* within your organization are aligned with the updated strategic priorities? *Note: At this stage, you are focused on the roles themselves, not the people who are currently in those roles.

• Which functions and roles within your organization don’t align with the organization’s updated strategic priorities or seem redundant?

• Which new functions or roles will your organization need to create to support the updated strategic priorities?

• Overlap or Gaps: Are two or more individuals doing the same thing (often without even realizing it)? Are important tasks or responsibilities not assigned to any particular person or area resulting in things falling through the cracks?

• Overload or Underuse: Are some individuals or areas so overloaded it’s impossible for them to get their work done? Do some individuals or areas have too little work?

• How should you configure roles to get the critical work done? Determine the positioning of roles to maximize effectiveness—should the roles be positioned according to function, program/service, audience served?

STEP 5: DETERMINE EFFECTIVE PROCESSES NEEDED TO SUPPORT THE STRATEGY

In shifting your organization’s structure, your processes will need to shift as well. Think about the role of processes in creating impact and efficiency.

• Which processes in place best support the realization of the updated strategy?
• Which processes don’t support the strategy?
• Which functions in your area will need to collaborate more closely to support the strategy?
• Which processes do you consider overly cumbersome or difficult to execute? Which processes are the most time consuming?
• Are there current processes that can be redesigned, streamlined, make better use of technology to make them more effective?

STEP 6: DETERMINE CAPABILITIES NEEDED TO SUPPORT THE STRATEGY

An organizational redesign provides an opportunity to assess current skills and abilities to ensure that they are aligned with the work ahead. This moment of change can be leveraged to foster professional development on your team.

• What capabilities does the organization need to execute the updated strategy?
• Do the current capabilities of the organization support the realization of the strategy?
• What are the skills and experience required to perform each role?
• What capabilities (that were not critical to success in the past) do you need to build to be successful now?
• What capabilities does the organization need to reduce, eliminate, or change substantially to succeed now?

**STEP 7: DETERMINE SELECTION**

The goal of this phase is to determine who from the current organization is needed for which roles to implement the updated strategy. This can be the most difficult step for leaders, as your decisions will have implications for the people in your organization.

• For each current employee, look at the following:
  o Skills, Abilities, Experience/Knowledge
  o Competencies and/or Mindsets in key areas (e.g. adaptable, solution oriented, team player, etc.)
  o Current and past performance

• For each employee, document who is selected for which role based upon how their skills, abilities, experience/knowledge, competencies/mindsets and performance align with those needed in each role. *Assessing your employees this way may seem overwhelming. Consider creating a chart that lists the organizational capabilities and role requirements needed to be successful (which you identified in previous steps) and, using a simple rubric, evaluate each employee against each element on the list.*

• Clearly spell out changes to current position responsibilities.
• Create a development plan to addresses any skills gaps.
• Identify which roles you cannot fill with existing employees and a plan to fill those roles (talent redeployment from another department, an exception to the hiring freeze, etc.).
• Identify if there are current employees who will not be selected for positions in the new structure.

**STEP 8: DETERMINE IMPLEMENTATION PLAN**

In this phase, the leader(s) create the plan to execute the new design. Your plan should be clear and carried out with respect and compassion. While you must be decisive and take action, you must also maintain agility, as organizational needs will shift as our response to the crisis evolves.
**STEP 9: DETERMINE HOW TO COMMUNICATE CHANGES**

Leaders need to communicate clearly, simply and frequently. A crisis limits people’s capacity to absorb information. Share information as soon as you reasonably can, and then repeat, repeat, repeat. Trust is never more important than in a crisis, be honest about where things stand.

- What are your plans for communicating any changes? (various channels, forums, frequency)
- How will you sequence and assign communication of specific job impacts?
- If you want help in creating your communication plan, what resources are available? (HR, CWD OD consultant, Communications, etc.)
- Consider using William Bridges 4P’s Framework:
  - **Purpose**: Why are we doing this? Why did we have to leave the old ways behind? What is the problem? What are we trying to accomplish with all this? If people have a clear sense of purpose, they can endure far more confusion than they could otherwise.
  - **Picture**: What is the outcome going to be like? How is it going to work and what is it going to feel like? Giving people a picture of what you are trying to create is the vision needed to keep them going. Without it, they are not sure that there is any clear destination. If there is no clear picture, now is the time to create one.
  - **Plan**: But the destination alone is not enough. Unless people can see a path that leads there, they are not going to have much confidence that they (or the organization) are going to make it. If, however, people have a step by step plan, their confidence returns. The plan holds out the promise not only of an end but the means to reach that end.
  - **Part**: Confidence is essential, but to get people started you must give them a role to play. Their commitment to making this change work will depend on their making it their change; it will depend on their getting involved; it will depend on whether they have a meaningful part to play in the plan.
INITIAL NEXT STEPS

- Complete Step 1 through 9 (again, use the attached template if helpful).
- Create new organization chart.
- Human Resources and leaders will work together to finalize the plan.
- Plans reviewed by the senior leadership of the School/Unit, OGC, OLER, and/or HHR, as appropriate.
- Update job descriptions for new or changed roles.
- Begin to execute communication and implementation plans.

Measure and monitor progress

The effectiveness of the organization’s new design, as well as the implementation of the changes needed to execute, should be measured to gauge progress and surface any additional adjustments needed.
- Review the desired outcomes and success measures identified at the beginning of the process.
- What were the key learnings from this initiative?
- Is there alignment between the organization’s updated strategy and its design?
- Has the new design improved performance?
- Are there any adjustments that need to be made?

Additional resources

5 Ways COVID-19 Will Impact Organization Design (Gartner)

Frameworks for Organization Design (Gartner)

Reimaging the Post-Pandemic Organization (McKinsey)

Capitalizing on Capabilities (Harvard Business Review)