HUMAN CAPACITY
BEYOND SCALE:
How to make your digital development program sustainable

Module 6 of 7
A business plan is a piece of paper. A killer app is a few lines of code. No matter what an organization’s digital product or service is, people are its most important asset. Managing a team is more than just the administration of human resources. It’s about people: the set of talents, skills and experiences that any organization or program needs to deliver successfully, along with the processes that maintain and develop their people.

Human capacity needs change over time. Your NGO may have begun its digital development journey with just one or two technical staff, maybe a Head of ICT or a Director of Innovations. Alternatively, if you’re a social enterprise or start up, your company may have grown in the early years thanks to the efforts of a handful of dedicated staff and a passionate founder. But after several years of operation, your original human resource strategy may no longer fit the needs of your next phase and it may be time to reassess. You may also be facing significant personnel changes as your original funding lifecycle nears completion.

As you visualize your next phase, think about what it will take to get there and, more specifically, who it will take. A detailed staffing plan can help you determine the right number and mix of talented, experienced team members or external contractors and service providers for your operational budget. And the right job descriptions, titles and recruitment strategy will help ensure that you bring the right people on board. Establishing training, mentorship, and peer learning opportunities and adopting new tools to model
and reinforce desired behaviors can help set the stage for growth. These steps can help make your staff excited and engaged, rather than fearful or overworked, and solidify your work culture and quality standards across geographies.

As any organization that has operated consistently for many years will know, these steps are iterative and must be revisited regularly. Building them into your organization’s annual strategic planning activities will help ensure you have the skills needed to reach the next phase and beyond.

This module draws on interviews with the digital development leaders of organizations in Africa and Asia, including BBC Media Action, Esoko, Dimagi, mHealth Kenya, TaroWorks, MR. SOLAR, and Akros, about their experiences of building the right teams as they scaled. Although you may have already spent significant time and energy on your HR strategy, learning from the experiences of others could help you develop it further, while avoiding common pitfalls on your journey to scale.

This module will help you understand how to meet your needs for human resources and capacity, as your organization or digital program expands.

**It will help you:**

1. Reassess your human resource strategy
2. Build a detailed staffing plan
3. Bring the right people on board
4. Share knowledge to build skills
5. Express, model and reinforce desired behaviors
Key steps

1. REASSESS YOUR HUMAN RESOURCE STRATEGY
   • Identify the skills and experience needed for the next phase
   • Compare new requirements to your existing staff capacity
   • Restructure your org chart in consultation with your staff

2. BUILD A DETAILED STAFFING PLAN
   • Identify where you can source new skills and experience
   • Estimate headcounts based on your implementation plans
   • Consider your staffing model: permanent or contracted resources?

3. BRING THE RIGHT PEOPLE ON BOARD
   • Develop new job descriptions
   • Revisit and streamline recruitment processes
   • Assess the channels available for recruitment and hiring

4. SHARE KNOWLEDGE TO BUILD SKILLS
   • Document your team’s resident knowledge
   • Perform knowledge transfer and skills training (and re-training)
   • Create mentorship and peer learning opportunities

5. EXPRESS, MODEL AND REINFORCE DESIRED BEHAVIORS
   • Establish and track clear, concrete performance indicators
   • Integrate continuous feedback into daily work
   • Incentivize teams and create a culture of performance
   • Provide ongoing support to key program partners
STEP 1

REASSESS YOUR HUMAN RESOURCE STRATEGY

Identify the skills and experience needed for the next phase

You may need people with different skills and experience in the next phase of your digital development program. You may already have experienced staff capable of managing people in your organization effectively, but if you’re transitioning your program to government or entering into a new commercial partnership, you’ll need people who can manage external relationships and dependencies too.

When expanding your digital solution to new locations, your organization may need people with new business, sales and marketing capacity as well as product managers to help localize your solution. You may also need additional finance, human resource and operational staff to support the growth of your digital program. Your strategy and roll out plan will drive your human resource needs in the next phase. See the graphic at the end of this step to help identify the new roles you might need. Note that your organization’s staff may not necessarily be the right people to meet all your skill and capacity needs. Existing and new partners may be able to meet them more quickly and efficiently.

FOR MORE INFORMATION SEE:

➢ Strategy: STEP 2. ANSWER STRATEGIC QUESTIONS ABOUT YOUR DIGITAL PROGRAM
➢ Roll Out: STEP 1. BUILD PROJECT MANAGEMENT FOUNDATIONS FOR SCALE
➢ Partner Relationships: STEP 1. ASSESS YOUR EXISTING PARTNERSHIPS

Compare new requirements to your existing staff capacity and org chart

How do the skills and experience needed for your next phase compare with those you already have in-house? Conducting a gap analysis with key team members and HR staff can provide a qualitative and quantitative view of staffing, training and partnering needs. Some questions to ask in this analysis include: Could existing staff take on new responsibilities? Should we develop new skills in-house or outsource to a partner? (For example, should we increase staff to perform customer support for a larger user base or contract with a third-party customer support vendor?) Are these skills needed temporarily or permanently? Talk to your existing staff about their career interests in relation to your new requirements.
In practice | TaroWorks
Watch Brent Chism, CEO of TaroWorks, talk about how to assess what skills you need when revising your human resource strategy, and how they may change as your organization grows.

How to
- Learn how to manage the human side of change and transition here
- Learn how to assess current HR capacity against future needs here and how to close the gaps here
- View a tool for assessing organizational capacity here

Restructure your org chart in consultation with your staff
Once you’ve identified the new skills and experience that you’ll need, and determined whether existing staff could grow into some of these roles, you’ll need to restructure your organizational chart (as it relates to your digital program) in consultation with your staff. A clear, transparent and documented consultation process is key to successful restructuring and may be required by your HR policies. Although a new phase can be exciting, it can often be threatening to people too. A change in culture brought on by a transition can decrease your staff’s morale and cause people to wonder what will happen to their jobs — and may even prompt some people to leave.

Many digital programs in their fourth or fifth year are still being run by small teams of individuals, who wear many hats and possess institutional memory that may not have been documented. It can be a huge and necessary relief to them to bring in new and dedicated resources. But recognize that it can also be emotionally difficult for people to let go and entrust certain responsibilities and relationships to new hires. In some cases, bringing in experienced leaders to manage team members can be a good decision for the scale-up, but it can also be demotivating for individuals who had been working independently.

In addition, many digital development projects are started by passionate and invested entrepreneurs or program leads, and the next phase may involve a major shift towards more standardized processes and administration. A transition to government, in particular, means more bureaucratic processes that may be challenging for staff accustomed to a start-up culture. You may need to identify high-performing team members who might be thinking of leaving and incentivize them to stay, either with an improved compensation package or new career growth opportunities.
Skills you may need in the next phase

**Project Management**

Critically, you will need project managers with experience in overall project management as well as technical project management. Consider which project management methodology is appropriate for your project — Waterfall or Agile are two possibilities — and hire someone with the right experience and, ideally, certification. For example, if you’re making significant changes to your existing digital solution or planning a new service or product, those needs could be filled by a technical project manager with good communication skills who has experience with procurement, vendor selection, technical development and stakeholder management (sample job description [here](#)).

**Financial and Business Planning**

You will need people (who may be contracted or full-time) with financial planning and business management skills to help calculate the capital investment required to scale or transition a digital solution or program, as well as the operating costs required to run it. This applies to both the public and private sector, because donors, governments and for-profit investors want to know how much it costs to set something up and run it. You will also need these skills to forecast expenditure and track burn rates. If you are a for-profit or an NGO considering a commercial business model, you’ll also need someone to forecast revenue and calculate when you'll break even.

**Partnership Development and Management**

If you’re planning on building new partnerships, for example, with mobile network operators (MNOs), you’re likely to need someone in an account manager role — ideally someone from the commercial mobile industry who understands how MNOs work and can forge mutually beneficial relationships. On the other hand, if you’re trying to transition a digital product or service to government or you’re working on strengthening government ICT systems, you’ll need people with experience of navigating planning, budgeting, approval and procurement processes in that country.
Institutionalization or Marketing

If you’re trying to institutionalize a digital intervention by embedding it in government systems and processes, you’ll need to identify government staff willing to take responsibility for this work. Staff might also be needed to deliver training and provide ongoing monitoring and supervision. Additionally, you’ll need to think about the people required to support this process in your organization, who will both need to understand technology and have experience of working with local government in a development context. On the other hand, if you’ve developed a direct-to-consumer service that targets beneficiaries or customers directly and you want to grow your user base, you’ll need experienced marketing staff, ideally with above-the-line and below-the-line marketing expertise.

Sales or Business Development

If you’re planning on expanding to a new geography or market, you may need someone with experience in sales or business development in that market (sample job description here). But if you’re working to transition a service to government or strengthen existing government ICT systems, you may need people with business development experience to raise transition or technical assistance funding and manage partner relationships.

New Product or Services

If you’re planning to modify your existing digital service or product to make it easier to scale, transition or earn revenue, or if you’re planning to introduce a new product or service, you may need staff with experience of conceptualizing and specifying new digital services and products, often called a product manager in the private sector (sample job description here).
Replicating the success of an existing digital service in more geographies is likely to involve hiring more people with the same skills.

Increasing the user base within existing geographies may require:
- More trainers, and monitoring and supervision staff in the field
- More marketing and sales staff in the field
- Increased distribution capacity
- More technical support and customer care staff
- More data analysts for analyzing and reporting on uptake and usage of digital services

Expanding to new geographies may require:
- Expert advice on the regulatory, policy and legal environment in the new geography
- New channel partnerships
- New marketing, distribution and sales partnerships and staff
- New training, monitoring and supervision staff
- New creative staff to localize content in new languages
- New customer care staff who speak local languages

Some transitions have more complex HR implications than others.
Diversifying a digital portfolio by adding new products or services, or transitioning ownership to a 3rd party, could involve significant changes to human capacity throughout the organization; potentially even the appointment of a new CEO.

Transitioning program ownership may require:

- Deep, cross-functional engagement to build capacity of new partners
- New partner leadership and management
- New partnership managers and specialists, including IT, marketing, sales, and finance
Identify where you can source new skills and experience

Finding and keeping the right people to support your next phase will depend on local job market's norms and conditions and your financial and organizational constraints. In expansion countries, you may need to choose between hiring people and outsourcing to local companies, given that IT talent may be scarce and expensive relative to development pay scales.

Much of the experience, skill and market intelligence you need may only be available in the private sector, which may operate very differently than your organization. You may need to revise your compensation structures and develop non-financial incentives to motivate staff recruited from the private sector. You will also have to think about how you’ll meet goals for hiring women, which can be challenging in many countries. The quality and supply of local talent, average salary levels, typical compensation structures and perks, and laws and regulations related to hiring and contracting are all part of the landscape that your staffing plan will need to consider. Consider how your partners might be able to contribute additional skills to support your growth.

Estimate headcounts based on your roll out plans

Once the roles needed in your org chart are clear, you’ll need to estimate headcounts, which will largely depend on your roll out plans. Keep in mind where there may be efficiencies or economies of scale, which might allow you to handle more volume with smaller increases in staff.

For example, you may not need to triple the number of call center agents just because you plan to triple your users. Improving training and supervision so that each agent can handle a larger number of calls per shift might allow you to scale more efficiently with fewer new agents. It’s important to be realistic about how quickly you can increase your headcount in different areas, especially if financial or recruiting constraints slow the pace of hiring. Also, think about how your partners, such as outsourced technical support providers, may need to adjust their own staffing plans to support the next phase.
Don’t be afraid of change, even at the very top

In 2015, as we re-examined our vision for the company, we realized that a new set of skills was needed for growth. The Board of Directors, in consultation with the former CEO, decided a new CEO with new skills was needed. To ease the transition, staff were informed of the decision well in advance, and the search for new leadership was conducted in an open and transparent manner. In late 2015, a new CEO with a digital development and business background was hired.

Once on board, the new CEO quickly realized that developing and rolling out the new e-commerce product would require commercial investment and someone with a background in finance. A quick assessment revealed that this skill set was missing from Esoko’s team, and as a first order of business, the CEO hired a VP of Finance and Operations with experience in investment banking to fill that capacity gap.

While the changes to senior leadership have been critical, the business model shift has had far-reaching impacts on human resources. For example, the new m-commerce service, now called Tulaa, has required development of a cadre of call center agents. When we went to hire call center agents, we placed great emphasis on finding individuals with agricultural expertise that could engage with our customers in a respectful way.

Agents needed minimum one year of field experience, an agricultural-related degree and must speak at least three of the native languages spoken by our users. Agents also needed the right attitude, to show respect for the agricultural trade and not speak in a condescending tone to farmers. It took us three months to hire five agents, but has proven worth the wait.

Other examples

Zambian health technology provider Akros creates a large project plan at the start of every scale-up phase, which covers the districts slated for training, the timing of each training, and the number of supervision visits per district. Using this plan — which estimates the effort in person hours and days required to deliver each task — management is able to quantify human resource requirements in order to recruit or scale down the number of staff as needed.
Consider your staffing model: permanent or contracted resources?

NGOs and social enterprises entering a new phase of growth will have varied HR needs but may still have limited budgets. You don’t necessarily need new full-time employees for every new role, especially if the skills you need are expensive and are only required for a relatively short time. Using freelance contractors or management consultants or shifting responsibilities to partner organizations can be more cost effective and flexible.

For example, some digital development organizations hire data scientists or financial analysts for only two to eight weeks to establish key performance indicators (KPIs), define reporting requirements, or identify economic or operational efficiencies. Once a data model has been established, less-expensive analysts can populate it going forward. Secondments can also be used to provide direct technical assistance, especially when program ownership is being transferred to a government.
Other examples

- Watch Erik Luttjehuizen from **MR. SOLAR** talk about how his former company SolarNow hired the right people.

How to

- View a guide for hiring remotely based contractors [here](#)
- See other organizations that support knowledge sharing for scaling digital solutions [here](#), [here](#), and [here](#)
- Read an example of a tool for assessing needs and developing an HR plan [here](#)
## The right capacities across the board

### Do you have the right....?

#### Leadership

- To work with staff to create a vision for change
- To align staff with the new vision
- To motivate and inspire staff
- To make change happen

- Board of Directors
- Top Leadership (CEO, President, Organizational Director, Chief of Party or Country Director)
- Senior Management Teams (C-level, VPs, Directors and Heads of Departments)

#### Staff

- To design, develop, manage and support a new solution
- To create new content or localize existing content
- To research and user test new functionality or services with existing or new audiences
- To roll out the services – through training, marketing, distribution, sales etc.
- To hire and train new people

- Thematic experts (health, agriculture, finance, rights and gender, etc.)
- Technical architects, business analysts, developers, QA and test teams and support staff
- Content creators (producers, writers, graphic designers, editors, videographers, photographers and animators)
- Researchers (qualitative, quantitative, human-centered design, user testing, market research and impact evaluation experts)
- Financial analysts and accountants
- Marketing, sales, training, monitoring and outreach staff
### Management

- To bring in new funding or investment
- To develop and manage implementation plans
- To hire, train and manage staff
- To forecast, track and manage income and expenditure
- To identify and manage risks
- To report on outcomes
- To manage new relationships with governments, donors or other partners

- Project Directors, Program and Project Managers, and heads of ICT, finance, research, marketing, partner relationships and HR.

### Partners

- To offer new strategic insights
- To provide thematic expertise
- To develop or support new digital solutions
- To create new content
- To test and evaluate impact
- To provide connectivity and billing
- To train, monitor and supervise
- To distribute, market and sell
- To bring financing or other donors to the partnership

- Strategic partners with thematic expertise
- Technical development or support partners
- Channel, marketing and distribution partners, such as MNOs or device manufacturers and retailers
- Implementing partners to roll services out in the field
- Donors and investors
STEP 3

BRING THE RIGHT PEOPLE ON BOARD

Develop new job descriptions

Whether you’re hiring technical or operations staff, you’ll want to attract individuals who not only possess the required skills and experience but also connect with your mission and vision. Well-developed job descriptions capture both hard skills and intangible traits.

If you’re an NGO, it’s worth considering aligning your job descriptions and, critically, job titles with standard job descriptions and titles from the private sector. This will help potential job applicants recognize themselves in your job descriptions. A good place to look for the right language to use in job descriptions is on the corporate websites of private sector companies, such as those in the mobile industry.

If you’re an NGO, it’s worth considering aligning your job descriptions and, critically, job titles with standard job descriptions and titles from the private sector.

For example, if you need someone who has experience of developing mutually beneficial relationships with MNOs, you may need someone who has worked as a product or account manager for an MNO, aggregator or mobile solution provider. Consider using language that will bring more diversity to your organization. For instance, flexible work arrangements, mentorship opportunities and skills training can help attract female talent.
In practice | BBC Media Action

Why NGOs need people from the commercial mobile industry

One of the reasons our mobile health education services have achieved scale in India is because we have deliberately hired professionals from the domestic mobile industry, to industry-standard job titles and job descriptions.

Our digital staff, hired in India, have worked for MNOs such as Airtel, management consultancies such as PWC, tech multinationals such as IBM, as well as aggregators, mobile technology solution providers and digital publishing companies.

We’ve taken this approach because we’ve learned that domestic talent from the mobile industry has valuable intelligence about how the sector is structured, financed and managed, as well as experience of performing well-defined industry roles.

We may have found recruitment easier than other NGOs, because the ‘BBC’ in our name attracts private sector professionals, who otherwise might not want to work for an NGO. But we have had to pay Indian recruitment agencies that specialize in the domestic mobile industry to head hunt candidates for us, going through many unsuccessful rounds of interviews.

One of the key challenges is that most high performing people in the tech industry already have permanent contracts, while we’re only able to offer them fixed term contracts, linked to project funding. The instability of fixed term contracts can be a big deterrent. We have found it necessary to offer at least two-year fixed term contracts, with the possibility of renewal, to attract high caliber candidates.

Other examples

One of the biggest challenges faced by Dimagi in transitioning a national nutrition program over to the Government of India was hiring qualified Level 1 and Level 2 technical support staff. When transitioning the recruitment process to the government, Dimagi staff wrote job descriptions, designed practical tests for job candidates, and sat in on interviews with government hiring managers. Despite this, some of the newly hired government staff were assigned work unrelated to the program and did not provide the expected level of commitment. For this reason, Dimagi advises discussing time commitments with hiring managers to ensure program staff are dedicated to supporting the program.
Revisit and streamline recruitment processes

In a period of rapid growth, old processes for hiring and staffing might be too slow or cumbersome. For example, it may no longer be feasible for the executives of a growing social enterprise to review applications, short-list applicants and sit on first-round interview panels, so they must delegate these tasks to a dedicated HR manager or team. Though senior staff will need to be actively engaged in later interviews and hiring decisions, this person should be able to effectively drive the recruitment process — advertising jobs and briefing recruitment agencies, reviewing and short-listing applications, coordinating interview panels, making offers, and finalizing contracts.

It is also wise to test specific technical skills before making an offer. This is common practice in the private sector for a role such as software engineer, where applicants often complete coding tests. In some countries, private-sector companies might allow you to buy a departing employee’s notice period, enabling your new hire to begin work more quickly.

Assess the channels available for recruitment and hiring

Your own staff and networks might be a good place to start when recruiting for the next phase. Encouraging your staff to share job postings through their social media networks and offering recruitment incentives such as bonuses can be effective ways to engage your staff in the process.

But what if you need to look beyond your current channels and networks to let people know that you’re hiring? International development job boards might be good for finding people already working in the development sector, but job seekers may not have either the private-sector experience or local industry experience that you’re likely to need. Digital implementers note that effective recruitment channels tend to be very local. Each market may have different, specialized recruitment agencies, go-to forums, websites or email lists. When it comes to government-related work, recruitment may be highly regulated with requirements about where and how long job postings can or must be placed.

Many NGOs say they face recruitment challenges for digital staff because they advertise jobs via email lists or low-cost websites due to budget constraints. However, in many countries, people working in the private sector rarely seek employment through these channels. Instead they almost exclusively use recruitment agencies. Remember to budget for the fees that agencies charge, typically based on a percentage of the post’s salary. For international hires, factor in the time and cost of obtaining a visa for a new hire.
Other examples

When expanding into Tanzania, TaroWorks struggled to find the right people but learned that being slow to hire is important. While looking to hire three people, they screened 75 resumes and held 20 interviews. For job functions in areas like sales, managers bring people on for a trial period of about six months. The organization is transparent with candidates about this process and the criteria for evaluation. At the end of the probation period, there is a shared understanding of whether it was a successful term or not. The interview process and trial period help to reduce the risk that a hire will quit or be fired, forcing the company to go through the recruitment process again.

How to

- Learn more about how to develop good job descriptions [here](#) and [here](#)
- Read about steps that can increase gender-inclusive recruitment [here](#)

It is often worth investing in a recruitment agency with specific expertise for critical digital roles and senior management.
Document your team’s resident knowledge

Institutional memory might suffice in a small, centralized organization. It doesn’t work as well when you’re doubling your staff in six months or transitioning your program to the government. Standard operating procedures (SOPs) for addressing system issues, scoping new features in consultation with external partners, and communicating system updates and releases to users or partners are extremely helpful for new technical staff.

Digital programs at the four-to-five-year mark may have some formalized processes and guides, such as technical manuals, but these may lack the full detail needed to train new hires across management, operations, marketing and technical functions. Document this resident knowledge through manuals, SOPs and resource repositories, and store them in a location accessible to all new staff or consultants. Dedicated staff time should be budgeted and set aside for process documentation, including updates that will ensure these are living documents.

Perform knowledge transfer and skills training (and re-training)

The transfer of business, operational and technical knowledge from your core staff to new staff, contractors and partners is an important activity for most organizations that are expanding or transitioning their digital solutions. For instance, your existing teams will need to comprehensively transfer knowledge of your technical solution to government IT staff or empaneled government agencies to effectively complete a transition.

Furthermore, your program or organization may have changed a lot since it first started, and you may have some “old-timers” who are used to doing things a certain way. Effective training programs are designed to be iterative, continually refreshing old skills while adding new ones.

Frequent re-training is particularly important when delivering information or services digitally. Technology is constantly changing, as are the skills and knowledge of new staff who may be joining your organization. Re-training opportunities will help existing staff stay up-to-date and prepared to leverage new technologies. For example, paying for your...
In practice | mHealth Kenya
Watch Dr. Cathy Mwangi, CEO of mHealth Kenya, talk about how she identifies gaps in knowledge within the company and seeks advice from others to build her knowledge.

How to
- Learn how to write an SOP here and see guidance on creating a resource repository here
- Learn how to integrate peer learning into your organization here
- Connect with others in your field through peer learning forums here, here, and here
- See free or low-cost training and skill-building resources here, here, here, and here
- View an excellent resource for software developers to stay up-to-date here
developers or software engineers to take online courses in relevant areas could help your program evaluate new software options.

Train-the-trainer models are often used to quickly and cost-effectively build up training capacity in digital programs that are transitioning to government or other partners. Resist the urge to create training materials from scratch. Internal training resources likely exist already and can be used to equip staff with the skills they need.

FOR MORE INFORMATION SEE:

į Roll Out: STEP 3. ADAPT TRAINING, MONITORING AND SUPERVISION PROGRAMS FOR SCALE AND SUSTAINABILITY
į Partner Relationships: STEP 4. TRANSFER KNOWLEDGE TO YOUR PARTNERS

Create mentorship and peer learning opportunities

Building skills doesn’t happen only in the training room. Mentor programs that pair experienced staff and new hires open up informal opportunities for growth. Organization-wide networking sessions and lunchtime presentations are good opportunities for spreading knowledge and skills within and across different teams. Frequent peer-to-peer or mentor-to-mentee interactions in small groups or one-on-one can support continued learning outside of formal training sessions and help your team feel supported during rocky periods as you grow or transition. Mentorship and peer support can also be applied to cultivate female talent and leadership within your organization.
Mentor programs that pair experienced staff and new hires open up informal opportunities for growth.
Establish and track clear, concrete performance indicators

When expanding into new countries, you will likely encounter different norms and practices for motivating individuals and managing their performance. In the commercial mobile industry of most developing countries, performance is measured against financial targets often set during an annual appraisal process. In many companies, when staff hit their targets, they receive a variable portion of their salary which would otherwise be withheld. And when they exceed their targets, they get a bonus. But in the NGO sector, staff salaries rarely have variable components, and many NGOs have policies against paying bonuses.

As you expand the scale of your digital solution and take on more private-sector staff, it can be very challenging for digital professionals from the private sector to transition to NGOs because their new KPIs can be so intangible. It’s thus critical when agreeing on annual work plans with ex-private-sector staff to clearly define concrete KPIs — such as the number of new users to be acquired in a specific timeframe, or the launch of a new service within budget and to deadline, or transition of a specific contract to government by a specific date. It can be helpful to create success profiles that define what it means to be successful in each role. This is helpful for managers as they assess staff performance and for staff so they understand what is expected of them.

Integrate continuous feedback into daily work

Frequent communication using formal and informal feedback can help identify issues quickly and motivate teams with staff members who are new in their the jobs or have different responsibilities. In addition to annual appraisals, weekly documented one-on-one meetings between supervisor and employee — so often deprioritized in busy or challenging times — are useful to tackle real-time issues and sustain momentum. Regular team meetings and 360-degree feedback approaches — where people get feedback from those above, below and next to them on the org chart — can increase staff empowerment and provide people with a variety of perspectives. Digital programs striving for growth and sustainability should also get performance feedback from their key stakeholders and customers.
In practice | BBC Media Action

Managing performance without carrots and sticks

Hiring people from the commercial mobile industry has brought significant skill and experience to BBC Media Action, India. But senior management staff with development backgrounds have needed to introduce them to development objectives, policy constraints, and new KPIs — i.e. social impact as opposed to revenue targets.

It has also been tricky to motivate and retain some private sector staff, who are used to receiving a variable component of their salary every year based on performance. This means that if they do not perform against agreed targets, they do not get paid a percentage of their salaries. Many techies are also used to receiving substantial annual pay hikes based on performance. We’ve either lost or had to let go staff who were not motivated to perform without these carrots and sticks.

But we have also managed to retain dedicated people for many years. This loyalty seems due to a combination of factors, including the scale, impact and government adoption of our mHealth services, which has made the work rewarding. The opportunity to take on new responsibilities, which might not have been possible in a more structured, hierarchical commercial environment, has also proved compelling. And our more sympathetic and flexible attitude towards family life seems to be a key factor. Identifying and articulating these non-financial benefits to staff has been critical to retention.

Other examples

Leaders in Malaysia’s Ministry of Health developed a two-pronged approach to address challenges of user resistance, change management and training. They first created project committees that provided feedback on solution design. Committee members became “super users” who then trained others. Then they identified healthcare providers who were resisting change and engaged them to lead solution deployment efforts, which led to greater clinician uptake. Read more here.

Listen to Erik Luttjehuizen from MR. SOLAR talk about why he is a believer in 360-degree feedback and how it was conducted at his former company.
Incentivize teams and create a culture of performance

People are the most valuable resource for strengthening growing programs. Making the performance review process transparent and building in incentives, both financial and non-financial, will drive strong performance. While monetary rewards are critical, the importance of creating a culture in which people feel recognized for their efforts should not be underestimated. Some popular, non-monetary incentives include job title promotions, awards that highlight outstanding contributions, and sponsorships to attend professional conferences or training programs.

Provide ongoing support to key program partners

If you are transitioning entire digital programs or key responsibilities to a government or other partners, consider areas where your ongoing support may be required after the transition. There may be areas where your staff need to be engaged to support the partner over longer periods of time.

While monetary rewards are critical, the importance of creating a culture in which people feel recognized for their efforts should not be underestimated.

For example, if you are a social enterprise that has built a digital services platform and your pilot program is being adopted by a government, your lead developers may need to continue providing Level 3 technical support to users, even as you train government staff to provide Level 1 and Level 2 technical support. Ensure that the new owner of the program has budgeted for your staff time during the transition period.

FOR MORE INFORMATION SEE:

- Roll Out: STEP 2. PLAN FOR SUSTAINABLE SUPPORT AT SCALE
- Partner Relationships: STEP 4. TRANSFER KNOWLEDGE TO YOUR PARTNERS
How to

▶ Read more about success profiles [here](#)
▶ Learn about 360-degree feedback surveys [here](#)
▶ See sample questions for identifying gaps in performance and incentives [here](#)
RESOURCES ROLLUP

Who do you need?

Revising your HR strategy and plan, and revamping your tactics for recruitment, retention, training and performance management, will probably require some skill sets you don’t currently have on the pay roll. Fortunately, some of the people you’ll need to help with these activities don’t need to be permanent hires. Creatively engaging recruitment agencies, professional services firms and talented individual contractors can keep costs manageable.

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<th>Activity</th>
<th>Resource type</th>
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<tbody>
<tr>
<td>HR gap analysis</td>
<td>HR Manager, HR Operations Analyst (contracted)</td>
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<td>HR activity scoping</td>
<td>Head of Operations</td>
</tr>
<tr>
<td>Recruitment strategy development</td>
<td>Head of HR or Operations, recruitment agency (contracted)</td>
</tr>
<tr>
<td>Performance management program</td>
<td>HR Manager, performance management consultant (contracted)</td>
</tr>
</tbody>
</table>

Pro tips

- **Budget enough time to recruit for scale.** Finding qualified people, especially in low-resource environments, takes significant time and energy even with a sound recruitment strategy. When you set growth targets for your digital program, be realistic about how quickly you can hire people.

- **Engage resisters, don’t isolate them.** Some digital development practitioners report that people who resist change in an organization can be effective advocates for it later if they are engaged early. Soliciting their opinions and channeling them into active roles can win them over.

- **Get people excited.** The prospect of rapid growth or change can be genuinely frightening to some team members. Focusing on a message of positive impact and giving plenty of attention to accomplishments can help people move beyond fear.
## Key step

1. **REASSESS YOUR HUMAN RESOURCE STRATEGY**

   - Article: Managing Change and Transition
   - Toolkit: Workforce Planning Tool Kit: Gap Analysis
   - Toolkit: Workforce Planning Tool Kit: Gap-Closing Strategies
   - Toolkit: Institutional Development Framework
   - Example: Project Manager
   - Example: Business Development Lead
   - Example: Field Manager

2. **BUILD A DETAILED STAFFING PLAN**

   - Service: Upwork
   - Example: Enhancement of Capacity to Further Improve Health System in Nepal

3. **BRING THE RIGHT PEOPLE ON BOARD**

   - Article: Creating an Effective Job Description
   - Article: Writing Good Job Descriptions
   - Service: iHub job board
   - Network: Asian Disaster Reduction & Response Network (ADRRN)
   - Network: Asia eHealth Information Network (AeHIN)
   - Network: Alliance for Financial Inclusion (AFI)

4. **SHARE KNOWLEDGE TO BUILD SKILLS**

   - Guide: How to Write a Standard Operating Procedure
   - Guide: A Guide to Peer-to-Peer Learning
   - Network: ICT4D-Principles Working Group
   - Network: ICT4CHW
   - Network: Global Digital Health Network
   - Training: +Acumen
   - Training: Udemy
   - Training: Online Learning Center’s Africa Center for Project Management
   - Training: Tech Change (TC105: Mobiles for International Development)
   - Service: GitHub
<table>
<thead>
<tr>
<th>Key step</th>
<th>Referenced resources</th>
</tr>
</thead>
</table>
| 5. EXPRESS, MODEL AND REINFORCE DESIRED BEHAVIORS | • White Paper: *Success Profiles*  
• Guide: *How to Do 360 Feedback Surveys and Help Your Entire Team Develop*  
• Handbook: *Human and Institutional Capacity Development Handbook (Appendix 1.7 Sample Questions for Identifying Performance Gaps)* |
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Above-the-line marketing</strong></td>
<td>Mass media marketing, through television, radio and print media, which is not targeted at a particular customer but to a wide audience.</td>
</tr>
<tr>
<td><strong>Account manager</strong></td>
<td>An account manager is a person who works for a company and is responsible for the management of sales and relationships with particular customers.</td>
</tr>
<tr>
<td><strong>Aggregator</strong></td>
<td>An organization that acts as a middleman between application and content providers, and mobile carriers. Provides message traffic throughput to multiple wireless operators or other aggregators; provides mobile initiative campaign oversight, and administration, as well as billing services.</td>
</tr>
<tr>
<td><strong>Agile methodology</strong></td>
<td>An approach to project management utilized in software development. It uses incremental, iterative work sequences, commonly known as sprints.</td>
</tr>
<tr>
<td><strong>Below-the-line marketing</strong></td>
<td>One to one marketing through the distribution of pamphlets, handbills, stickers, promotions, brochures placed at point of sale or roadshows.</td>
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<tr>
<td><strong>Break even</strong></td>
<td>The point at which revenue received equals the costs associated with receiving the revenue.</td>
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<tr>
<td><strong>Burn rate</strong></td>
<td>The rate at which an organization is consuming or burning its financing or store of capital to support operations in excess of cash flow.</td>
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<tr>
<td><strong>Business development</strong></td>
<td>The activity of pursuing strategic opportunities for an organization, such as strategic partnerships, commercial relationships, and new markets for products or services.</td>
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<tr>
<td><strong>Business model</strong></td>
<td>A plan for the successful operation of a business, identifying products, revenue sources, customer bases and finance details.</td>
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<tr>
<td>Term</td>
<td>Definition</td>
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<tr>
<td>Capital investment</td>
<td>Funds used by a company to acquire or upgrade physical assets, such as property, industrial buildings or equipment.</td>
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<td>Direct-to-consumer</td>
<td>Marketing aimed at the customer who will buy the product rather than the shops where it will be sold.</td>
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<tr>
<td>Economies of scale</td>
<td>Cost savings realized on a per unit basis as production or activity increases.</td>
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<tr>
<td>Gap analysis</td>
<td>A process comparing an organization’s actual performance to its expected performance to determine whether it is meeting expectations and using its resources effectively.</td>
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<tr>
<td>Institutional memory</td>
<td>A collective set of facts, concepts, experiences and knowledge held by a group of people.</td>
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<tr>
<td>Key performance indicators (KPIs)</td>
<td>Measurable values used by managers to assess the effectiveness of processes and functions in meeting organizational goals.</td>
</tr>
<tr>
<td>Level 1 support</td>
<td>Basic help desk resolution with lower-level technical personnel trained to support simple customer issues, such as solving usage issues and fulfilling service desk requests that need IT involvement. Also called Tier 1 support.</td>
</tr>
<tr>
<td>Level 2 support</td>
<td>In-depth technical support from experienced and knowledgeable technicians, but not necessarily engineers or programmers, for problems that cannot be handed by Level 1 support. Also called Tier 2 support.</td>
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<tr>
<td>Level 3 support</td>
<td>Expert-level product and service support with access to the most skilled technical staff for problem resolution or new feature creation. Support is provided by chief architects, engineers, or product developers who attempt to duplicate problems and define root causes using product designs, code or specifications. Also called Tier 3 support.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
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<tr>
<td>Mentor-to-mentee</td>
<td>A relationship by which a person (the mentee) is advised, trained or counselled by another (the mentor).</td>
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<tr>
<td>Non-financial incentives</td>
<td>Compensation given that does not involve cash, such as job title promotions, awards, and sponsorships to conferences or training programs.</td>
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<td>Notice period</td>
<td>The time period between the receipt of the letter of dismissal or resignation and the end of the last working day.</td>
</tr>
<tr>
<td>Operating costs</td>
<td>The day-to-day expenses incurred in running a business, such as sales and administration, as opposed to the costs of production.</td>
</tr>
<tr>
<td>Peer-to-peer</td>
<td>A relationship between two or more people or groups, without any implied authority to any individual in the relationship.</td>
</tr>
<tr>
<td>Performance indicators</td>
<td>A measure to assess the performance of organizations or business units and their employees.</td>
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<tr>
<td>Product Manager</td>
<td>The role responsible for the strategy, road map and feature definition of a product.</td>
</tr>
<tr>
<td>Secondments</td>
<td>The temporary transfer of an official or worker to another position or employment.</td>
</tr>
<tr>
<td>Standard operating procedures (SOPs)</td>
<td>A set of step-by-step instructions compiled by an organization to help workers carry out routine operations. SOPs aim to achieve efficiency, quality output and uniformity of performance while reducing miscommunication.</td>
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<tr>
<td>Success profiles</td>
<td>A process that articulates the competencies and motivations needed for successful job performance</td>
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<tr>
<td>Train-the-trainer (TTT) or Training-of-trainers (TOT)</td>
<td>An education model whereby individuals identified to teach, mentor or train others attend training themselves.</td>
</tr>
<tr>
<td>Waterfall methodology</td>
<td>A sequential, non-iterative process used in software development in which progress is seen as flowing steadily downwards, like a waterfall, through the phases of conception, initiation, analysis, design, construction, testing, production/implementation and maintenance.</td>
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