

DRAFT Proposal:

GiveWell LifeCycle Feedback Program

Program Background

Operations Goals

GiveWell Operations has the following overarching goals and purpose.

To make GiveWell:

- A place where top talent wants to work
- A place where top talent can work effectively, and
- A sector-leading organization that can continue to exist sustainably.

Feedback purpose

GiveWell considers staff feedback a key (though incomplete) indicator of our success in achieving the top two above goals. GiveWell will solicit staff feedback on an ongoing basis in order to assess staff satisfaction and identify potential problems impacting effectiveness that require attention. We will use this information to identify trends over time and within various sub-groups of the organization (e.g. individual departments or managed teams)

Feedback Priorities

Our priorities in soliciting this information are to:

- Ensure staff have an opportunity to be heard throughout their entire tenure at GiveWell from onboarding through separation
- Provide a mixture of solicitation vehicles to suit various communication styles, comfort levels, and subject matter
- Capture both high level trends and actionable/specific feedback on specific issues
- Balance the need for actionable information with administrative burden on staff to administer or respond to solicitations
- Avoid “feedback fatigue” and/or data overload (resulting in non-implementation)

Feedback Structure

To meet these competing priorities, GiveWell intends to design a program that includes:

- Annual and more frequent components
- Routine and opportunistic components
- Confidential and attributed formats
- Comprehensive surveying and nuanced interviewing formats

We further expect that some of these components will evolve over time as we become more proficient in soliciting key information and in tracking this data to discover which methods and questions elicit the most useful information and are most appreciated by staff.

Program Design

All Staff

The following are components of the program that will be offered in an All-Staff setting or with the expectation that all staff are invited to participate in a joint event.

Annual Components

- **Annual Flex Survey**
What is it: Once-yearly, confidential survey inquiring into the full range of employee experiences, including satisfaction with various factors like role, compensation, work-life balance, work environment, manager, project opportunities, etc. This will be administered and analyzed by a professional survey company that provides many options for customization, multiple levels and forms of data analysis, including data coding, compartmentalization, and personalized debriefing for staff and management. Having a relatively consistent feedback form will also enable us to easily track trends over time.

How is it actioned: Management can access data responses and analysis at all staff, department, managed team, and other customized levels of compartmentalization. Senior managers will review the feedback as a group and managers may review department data as a team. A report-out will be presented to All Staff every year. Specific actions will be determined by management in response to the data.

- **Executive Director Office Hours**
What is it: The E.D. will host a series of open visitation periods for all staff. Staff may sign-up for a 1:1 or small group session. At present, these will likely be offered more than once a year given our small size but the E.D. will formally commit to an annual event.

How is it actioned: The executive director will note any actionable feedback in an “office hours” Asana project and discuss response actions with the Dir. Of Operations or specific managers as appropriate.

Quarterly Components

- **Quarterly Meetings**
What is it: All-hands meeting to update staff on GiveWell strategy and key initiatives and projects. We will be continuing to iterate these into more interactive formats and using

them as an opportunity to solicit feedback on ongoing initiatives (e.g. diversity) via more concrete inquiries such as straw polls or upvoting exercises.

How is it actioned: The Executive Director and Director of Operations will debrief after each meeting to discuss whether ongoing, new or corrective actions are required in response to the meeting feedback.

- Quarterly Reminders

What is it: Givewell sends out a standard document on a quarterly basis with key reminders to staff. Staff have to sign off each quarter that they have reviewed the reminders. In that document, we reinforce our desire to know about any incidents staff may experience and reiterate options for reporting issues, including reporting directly to a board member (Holden).

How is it actioned: The office manager is responsible for distributing and confirming all staff have signed off. He also solicits any edits to the document from select managers prior to distribution every quarter. The individuals receiving any complaints are responsible for responding to any grievances, including any that might rise to the level of triggering our incident response protocol.

Routine Ongoing Components

- After-Action Surveys/Polls

What is it: employees are asked via anonymous poll to rate all team meetings and various aspects of social cohesion events. Polls are the bluntest and least intensive form of feedback and are intended to provide a general barometer on the success of an event or the general health of standing meetings. Surveys are slightly more detailed and will be used less frequently for the purposes of assessing specific components of an event, the success of new or changed events, or to get immediate feedback while impressions are fresh in people's minds.

How is it actioned: Event owners will review the feedback and share with the Director of Operations, Executive Director, or other staff as appropriate. Combined annual results may be provided to staff when and if that seems usefully informative.

Opportunistic/Ad Hoc Components

- Round Tables

What is it: Round tables consist of opt-in group discussions focused on a specific topic of theme. We will be more intentionally utilizing this format to allow staff with an interest in particular initiatives to keep up to date on progress, provide perspectives and input during development stages, and to solicit staff feedback on critical questions or overall employee buy-in and satisfaction.

How is it actioned: Round table facilitators will determine the particular method of feedback for any given round table. This might entail anonymous or attributed polling,

facilitated discussion, coding comments from meeting minutes, etc. The facilitator will be the primary person responsible for interpreting and actioning the feedback but may also coordinate with other managers/directors as appropriate.

Employee LifeCycle

The following are components of the program that will be universally offered to all staff but would typically be offered in an individual setting, sometimes specific to their passing a particular employment milestone.

Onboarding Components

- Six Week HR Check-In

What is it: This is a dedicated 1:1 conversation between an experienced GiveWell staff person (intentionally not a senior manager; currently Erin Wolff) soliciting feedback on a comprehensive set of topics, including GiveWell as an organization, the onboarding process, the employee's manager, the employee's comfort level, GiveWell culture, etc. There are structured questions as well as organic conversation based on the flow of conversation. We plan to add new questions focused on key areas of current interest and will review these annually based on past feedback and the annual survey.

How is it actioned: The facilitator takes notes which are reviewed by the employee and approved for release to the Executive Director, Director of Operations, and the employee's manager. The employee can revise/redact any portion of their comments or choose to not release it to any/all of those individuals. Those that are approved for release are reviewed by the above individuals and action can be taken as appropriate in response to any specific areas of concern. The Director of Operations also plans to create a simplistic meta-file to collectivize responses and review for any trends that may require a more systemic change or correction.

- First Year Manager Check-Ins (approximately end of: 1 week, 2 week, 1 mo, 3 mo, 6 mo, 9 mo, 12 mo)

What is it: Our onboarding process includes a series of dedicated 1:1s intended to ensure new employees receive necessary support during their first year by carving out 1:1 time that is intentionally reflective rather than focused on day-to-day projects. While an important purpose of these meetings is to provide the employee with feedback on their performance, we plan to provide more specific guidance to managers on additional key objectives for these meetings and specific topics to check on, particularly regarding manager-report relations.

How is it actioned: Managers have the primary responsibility for acting on the feedback shared in these meetings though they may seek additional guidance from other managers or staff.

Tenure Components

(i.e. components offered routinely throughout an employee's tenure at GiveWell)

- **Bi-Annual Reviews**

What is it: GiveWell conducts performance reviews with all staff twice a year. These are handled as 1:1 meetings between the employee and his/her manager. Although the majority of this meeting is dedicated to employee performance, there is a dedicated question regarding things GiveWell, or GiveWell management, could do better. Once a year staff are also asked to provide feedback on their peers (any GiveWell staff person). We propose adding another dedicated question regarding improvements the employees manager could make to help the employee succeed or improve. We also propose collectivizing the staff responses regarding general GiveWell improvements in order for management to have a running, high level view of any trends, new issues, etc.

How is it actioned: Individual performance reviews and feedback are reviewed by a person's manager and the Executive Director. They mutually agree on any action plans that need to be implemented for the individual employees and/or manager. The Director of Operations would be responsible to updating and analyzing the meta-file on general feedback and proposing any actions to be taken at an organizational level.

- **Manager 360 Reviews (may be incorporated into the Annual Survey - TBD)**

What is it: Currently GiveWell does not have a systematic process for gathering feedback on managers. Certain managers have instituted informal procedures for gathering feedback from their direct reports, but this is not universal or routine. We propose to initiate some form of manager review which may be implemented via Flex's annual review or may be an independent process (tbd). In either case it will cover a broad range of manager strengths and weaknesses, employee comfort with their manager, and proposed improvements.

How is it actioned: Managers would be responsible for reviewing their results with the Director of Operations and the Executive Director and developing personal action plans as needed. They would also provide, at minimum, a high-level summary of the feedback to their reports as well as steps being taken to respond to the feedback.

- **Remote Worker Check-Ins**

What is it: The Director of Operations currently conducts periodic check-ins with remote staff. These are typically phone calls or video calls approximately every quarter (individual staff are contacted on a rotating basis). We plan to add a few dedicated questions to these check-ins, focused on issues specific to remote staff.

How is it actioned: The Director of Operations will be responsible for archiving and analyzing the feedback from these meetings and proposing any potential actions to employee managers or the Executive Director in response to individual circumstances or more general remote-staff issues.

- **Manager Handoff Check-Ins**

What is it: When employees change to a new manager, the former and new manager jointly administer a manager handoff process in Asana. One step in this process requires managers to check-in with their former reports several weeks after the handoff has been implemented. We propose to offer managers more specific guidance about key considerations to check in on during these meetings.

How is it actioned: Former and new managers would be jointly responsible for sharing information to facilitate a smooth handover and if there are any problems, the managers will be responsible for working collaboratively to develop next steps, involving other parties as appropriate if needed (e.g. Director of Operations or Executive Director). The Director of Operations is responsible for auditing Asana to ensure that the handoff project was completed.

- Weekly 1:1s

What is it: Managers host weekly 1:1s with their direct reports. These meetings vary by individual. Given the diversity and potential effort to apply any change across the board we are not recommending any specific change to these meetings. It is noted here for reference since many managers receive a significant number of insights through these discussions.

Separation Components

- Exit Interview

What is it: GiveWell requests all separating employees to participate in an exit interview prior to departing. This is a dedicated 1:1 conversation facilitated by a person of their choice (or the Director of Operations or Erin Wolff if the employee has no preference). The interviewer solicits feedback on a broad spectrum of questions about the employee's experience at GiveWell.

How is it actioned: Exit interviews are approved for distribution by the employee. They automatically are provided to the employee's manager, the Director of Operations, and the Executive Director. Similar to the 6-week HR talk, we propose to add the information from these interviews into a meta file to enable better analysis and tracking of the feedback from this tool.

Characteristic Matrix

	Component characteristics					
Component	Comprehensive	Focused	Nuanced or Detailed	Confidential	Attributed	Admin Burden
Annual Survey	Yes		Detailed	Yes		Medium
Quarterly Meetings		Yes	Nuanced		Yes	High
After Action Polls/Survey		Yes		Yes	(voluntary)	Low
Round Tables		Yes	Nuanced		Yes	(depends)
6 Week HR Talk	Yes		Nuanced		Yes	Low
Manager Series			Nuanced and detailed		Yes	Medium
Bi-annual Reviews		Yes	Nuanced		Yes	High
Manager 360	Yes (on topic)		Detailed	Yes		?
Weekly 1:1			Nuanced and detailed		Yes	Low-Medium
Exit Interviews	Yes		Nuanced		Yes	Low