



SUCCESS FACTOR BRIEF

MARCH 2021

The Education Performance Improvement, Communications, and Knowledge (EPIC) contract was a five-year activity of support services implemented by Training Resources Group, along with subcontractors Forum One, Social Solutions International, and Making Cents International. EPIC supported USAID's Center for Education (DDI/EDU) through implementation of four mutually reinforcing workstreams, including organizational effectiveness (OE), knowledge management (KM), professional development (PD), and engagement, communications, and partnerships (ECP). Together these workstreams were intended to improve education sector programming, measurement, and management support for DDI/EDU. Between October 2015 and March 2021, EPIC implemented an average of 25 activities per year. The project also responded to buy-in requests from 11 USAID Operating Units. This brief summarizes the key success factors that enabled the project to provide flexible, adaptive, and contextually relevant support across its four main workstreams.

STAFFING AND TEAM STRUCTURE

EPIC's staffing approach was to organically augment the team in response to specific project needs. This yielded significant gains in terms of providing the right people at the right time, but it also proved to be cost-effective. Another outcome of this approach was the development of deep pools of functional and technical expertise that the project could access across workstreams. Each individual worked well on a team and had the right skills and knowledge for their role. While the team structure was created around four main workstreams, each team member recognized the synergistic and interconnected value of collaborating and coordinating across workstreams. This staffing approach allowed the team to quickly respond to emergent needs and changing contexts, and utilize surge capacity as needed.

On the USAID side, the Contracting Officer's Representative (COR) and workstream Activity Managers were central to EPIC's success, working in close partnership with and providing overall vision, direction, and monitoring for workstreams. Project successes often stemmed from a clear and strategic vision from the COR and Activity Managers. Then, together with EPIC workstream leads, a vision was articulated, the right people engaged and consulted, and clear processes, expectations, and accountability were established.

MECHANISM FLEXIBILITY

The flexibility and adaptability of the EPIC contract mechanism and its management operations enabled the project team to accommodate emerging priorities and rapidly shifting contextual factors, such as the 2018-2019 government shutdown and the COVID-19 pandemic. The ability to iterate was built into both budgeting and work planning processes. Furthermore, contract finances were managed so that funding could be moved between activities, as needed. Yearly budgets were designed to capture and report budget utilization across the entire project, at the workstream level and at the activity level, to ensure financial data was readily available to

support decision-making. The patience and flexibility of both the project as a whole and the USAID COR and Activity Managers allowed placement of some activities on hold, while prioritizing and moving others forward across the project.

SUPPORTIVE CLIENT RELATIONSHIP

Throughout the life of the project, there was strong partnership with DDI/EDU and a willingness to support and value EPIC team members' expertise, skills, and knowledge. The EPIC team was viewed as an extension of DDI/EDU. The relationships forged between EPIC and USAID enabled teams to work closely together, and pivot and adapt when change occurred. EPIC often approached a challenge or task with a co-creation mind-set, knowing this would ultimately achieve better results. The partnership between EPIC and DDI/EDU enabled a trusting relationship, allowing the project to support, or when appropriate, lead initiatives.

Early in the project, EPIC and USAID worked together to clarify the project's purpose, objectives, and implementation (the why, what, and how, respectively), and provided staff with the bigger picture and rationale for how activities would be designed and implemented. This enabled USAID and EPIC staff to see collective progress toward established goals.

BUILDING PARTNERSHIPS

All workstreams sought to build trust and relationships with DDI/EDU, USAID Missions, country programs, and other support mechanisms through transparent actions and communication. EPIC strived to convene the right people for the right purpose at the right time and prompt the right questions.

The following approaches helped design support that built trust between EPIC, USAID, and partnership networks and other DDI/EDU mechanisms:

Consultative: EPIC used interviews, surveys, and dialogue to gather feedback in order to tailor processes and activities. Intention and planning sought to be inclusive on whom feedback was gathered from.

Pivoting: When a large shift or change occurred, EPIC was quick to alter existing plans or ways of working to incorporate feedback or otherwise adapt.

Creating shifts: EPIC sought to change group relationships and DDI/EDU dynamics by enhancing transparency, providing space for the exchange of information and ideas, and creating collaborative processes.

Building soft and emotional skills: EPIC supported the advancement of individual competency to encourage better interactions between colleagues, problem solving, and internal communications and collaboration.

Promoting evidence-based decision-making: EPIC helped DDI/EDU leverage information gathering through a global dialogue and feedback loops to inform decision-making.

SYSTEMATIC AND HOLISTIC

The EPIC Team believed that organizational improvement needs to be approached systemically and holistically, respecting and strengthening individuals, teams, and their relationships. EPIC sought a paradigm shift in how DDI/EDU functioned and performed internally, in the USAID education sector and in the global field of education. To offer support across OE, PD, KM, and ECP functions, the EPIC Team first sought to engage and learn from DDI/EDU individuals, teams, and leadership, along with their partners, USAID Missions, and country programs. Examples of this included:

- Co-designing and co-facilitating annual DDI/EDU retreats as participatory and reflective spaces for all staff to contribute to actionable priorities.
- Conducting a USAID Education Sector Professional Development Needs: Meta-Analysis, which synthesized information collected from USAID Education sector staff, both in the field and in USAID/Washington, and was used to identify PD topics that respond to the expressed needs of learners.
- Surveying DDI/EDU audiences with the intention of using the results to determine and prioritize new EducationLinks outreach channels.
- Supporting a Mission Advisory Group, which provided input and feedback during the creation of the USAID Education Policy and served as a sounding board on guidance documents and points of debate before communication was circulated to the broader USAID education staff.

REFLECTIVE PRACTICES

Taking the time for the USAID COR, Activity Managers, and EPIC team members to jointly reflect promoted collaboration and learning led to informed decision-making. This practice, which began in project Year Two, provided opportunities to capture lessons learned, adjust activity implementation, and take stock of what was working. This allowed some activities to start small, which ultimately yielded more focused products and provided greater opportunities to engage and co-create with stakeholders.

PROCESS DEVELOPMENT

Each workstream created and adapted processes to promote efficiencies and achieve better outcomes for DDI/EDU. Some of these included clarifying decision-making processes, which helped leaders be perceived as more open and transparent; creating process maps for knowledge products, newsletters, and professional development; and introducing co-creation to course and training development. These processes helped define the standards, people, and tools needed to conceive, develop, disseminate, and measure content creation or decision-making.

This brief was created by Education Performance Improvement, Communications, and Knowledge (EPIC), a five-year activity (2015-2021) of support services to the Center of Education (DDI/EDU). EPIC consisted of activities in four key areas that were implemented simultaneously: performance improvement through organizational effectiveness; professional development, training, and learning for all staff; knowledge management, generation, brokering, uptake, and use; and internal and external communications, engagement, and partnerships.