

# TEAM-DEFINED CULTURE DOS AND DON'TS

## Overview

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After two attempts to define and activate their desired culture, the Bill & Melinda Gates Foundation needed a different approach that would better engage the middle and the front line of the organization. In a CEO-driven effort to define new cultural pillars, feedback revealed that employees didn't understand their practical implications and needed more specificity on what to start and stop doing to live the culture.

## Solution Highlights

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Using a simple Dos and Don'ts tool, teams across the organization customize behavior expectations to guide employees during the high-stakes moments most likely to test their cultural alignment. This business-driven approach enables the Gates Foundation to promote firm-wide culture alignment while helping teams articulate the right behavioral expectations specific to their goals.

## Company Snapshot

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### Bill & Melinda Gates Foundation

BILL & MELINDA  
GATES foundation

Industry: Private  
Foundation

2016 Total Assets:  
\$41.3 Billion

2016 Employees:  
1,453

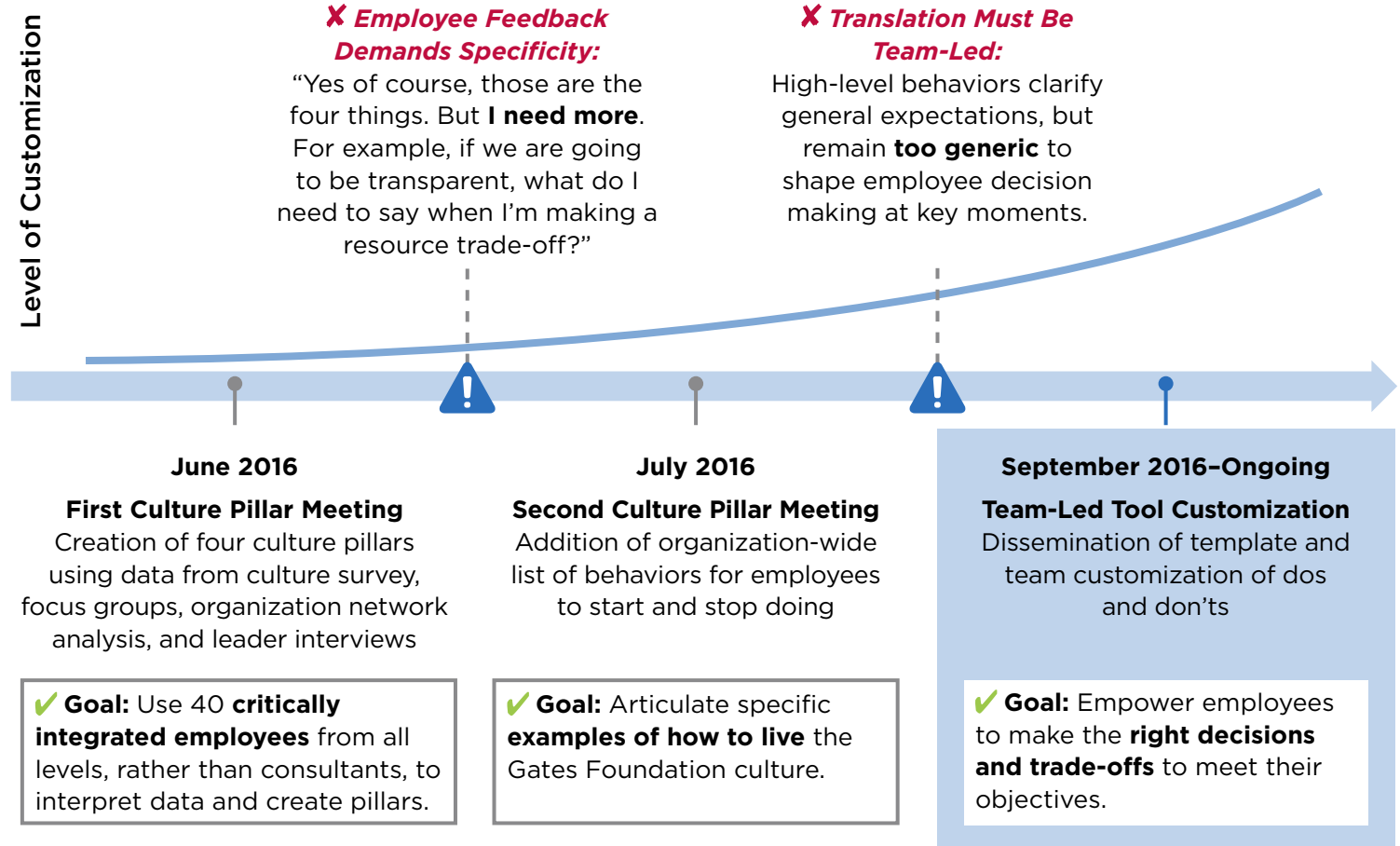
Headquarters:  
Seattle, WA

Guided by the belief that every life has equal value, the Bill & Melinda Gates Foundation works to help all people lead healthy, productive lives. As the largest private foundation, its primary focus is in developing countries, improving people's health and giving them the chance to lift themselves out of hunger and extreme poverty. In the United States, it seeks to ensure that all people—especially those with the fewest resources—have access to the opportunities they need to succeed in school and life. The foundation is led by CEO Dr. Susan Desmond-Hellmann and Cochair William H. Gates Sr., under the direction of Bill and Melinda Gates and Warren Buffett. The foundation supports grantees in all 50 states and the District of Columbia. Internationally, it supports work in more than 100 countries.

After the Gates Foundation used a middle-out approach to formulate its four culture pillars, feedback revealed employees didn't understand the implications on a practical level and wanted specific, actionable guidance.

- Following this feedback, the same 40 employees who developed the pillars reconvened to add specificity.
- However, feedback revealed the new list was still too generic to translate the new cultural expectations to employees' specific contexts.
- Given this demand from the business, HR helped teams customize this simple tool to equip employees to apply the culture in the high-stakes moments that matter most.

# EMPLOYEE DEMAND FOR BEHAVIOR SPECIFICITY



Source: Bill & Melinda Gates Foundation; CEB analysis.

To ensure relevancy, HR turned the central list into a scalable and customizable tool for teams to define behavior expectations in the high-stakes moments that matter.

- Teams throughout the foundation receive the original list and a template to customize it to their needs, focusing on the moments most likely to challenge the culture.
- The framework serves as a simple tool to make the culture actionable for employees, calling out legacy behaviors to stop doing and providing guidance in situations where the right decision and trade-off may not be apparent.

# TEAM-LED TOOL CUSTOMIZATION

Customizable Dos and Don'ts Template<sup>a</sup>

## HOW WE TREAT EACH OTHER

SHOW RESPECT	OFFER TRUST	BE TRANSPARENT	CREATE ENERGY
<p>We approach relationships with inclusion, kindness, curiosity and humility.</p> <p>DO give feedback with empathy and receive it with humility DO treat all staff ir respective of their level, equally DO listen well – others can have a better approach/idea/view point DO make diversity work for you by encouraging equal participation from all levels, backgrounds, locations and styles</p> <p>DON'T undermine smaller or less significant contributions DON'T be super sensitive DON'T undermine decisions after they are made</p> <p><i>Respect for differences leads to Innovation and Collaboration</i></p>	<p>We enable collaboration, risk-taking, empowerment, growth and accountability.</p> <p>DO assume positive intent (trust by default) DO walk the talk (do what you say and say what you do) DO provide genuine feedback and tell others that you are open to receiving it DO admit your mistakes or failures</p> <p>DON'T let misunderstandings fester DON'T talk about someone behind their back DON'T micromanage</p> <p><i>Offering trust leads to Collaboration and Optimism</i></p>	<p>We clarify roles &amp; expectations and communicate decisions.</p> <p>DO proactively communicate change in decisions or policies that impact people DO continually clarify expectations and opportunities for growth DO be open and honest in your communication</p> <p>DON'T wait for the other person to be transparent first DON'T allow rumors to fester DON'T hesitate in asking difficult or stupid question</p> <p><i>Transparent conduct leads to Collaboration and Rigor</i></p>	<p>We engage each other in the joyful, continuous pursuit of becoming our best, authentic selves.</p> <p>DO lighten up – make time to have fun DO celebrate each other's success DO show warmth to all and not just to your direct work associates DO interact with people more than devices</p> <p>DON'T over-react or be overly critical DON'T be bureaucratic or kill energy with barriers rather than solutions</p> <p><i>Energy in relationships leads to Collaboration and Optimism</i></p>

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- 1. Firm-Wide Goals**  
**Provide a Simple, Standard Framework**  
Each template contains the same firm-wide values and behaviors to ensure consistency.
- 2. Team-Defined**  
**Guardrails Aid High-Stakes Moments**
  - Teams customize dos and don'ts for scenarios specific to their critical experiences.
  - The framework serves as a decision-making tool during the high-stakes moments that are most likely to test cultural alignment.

Source: Bill & Melinda Gates Foundation; CEB analysis.

<sup>a</sup> See Appendix for Organization-Wide Do's and Don'ts.

SITUATION

SOLUTION

RESULTS

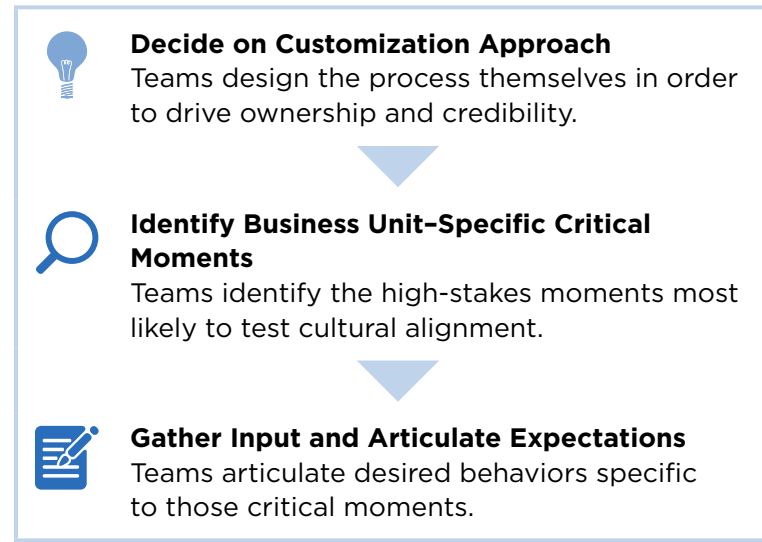
APPENDIX

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HR and the original 40 pillar creators are available to help create behavioral guardrails, but teams decide to what extent they seek support.

# TEAM-LED TOOL CUSTOMIZATION

## Create Behavioral Guardrails for High-Stakes Moments



### Tool Outcome

A simple way for employees to identify the right culturally aligned behaviors or decisions

Source: Bill & Melinda Gates Foundation; CEB analysis.

“When the India Country Office (ICO) came together to understand the Four Agreements, we felt the need to give it a local flavor to make it real for us. As a result, the customized Dos and Don’ts gained a huge level of acceptance and ownership from each of the ICO employees and gave us a common language for shared expectations and to hold each other accountable.”

Preeti Kalra  
India Country Office  
Bill & Melinda Gates Foundation

The tool has had a strong positive impact, providing employees a tangible way to live the culture and contributing to success achieved in broader culture efforts.

- Since implementation, surveys show statistically significant improvement of 80% of the cultural factors measured across the foundation's four pillars.
- The 40 pillar creators were inducted as Change Makers, a group of over 100 employees that meets every six weeks to report on what is or is not working.
- Pillar creators held workshops with both the executive leadership team and the top 90 senior leaders to teach the pillars and Dos and Don'ts framework.

# TOOL DRIVING PROGRESS AT ALL LEVELS

## Strong Movement of Culture Metrics

Show Respect	2017 % Favorable	Y2Y % Change
Our foundation is placing sufficient emphasis on building an inclusive environment.	70%	15%
Be Transparent		
I know how I am performing against expectations of me.	81%	6%
Offer Trust		
I feel empowered to get the work done for which I am responsible.	86%	5%
Create Energy		
People in my workgroup are encouraged to come up with innovative solutions to work-related problems.	86%	8%

Statistically significant improvement across **80%** of the cultural factors measured

Source: Bill & Melinda Gates Foundation; CEB analysis.  
 Note: 70% or above represents an emerging strength.

## Sustaining Progress for the Future



**1. Building change-makers network** committed to evolving the culture



**2. Driving leadership engagement** through interactive leader experiences

### Tool in Action Testimonial

“Bill and Melinda asked us for their own version, and we created a specific set of conversations in mind called Strategy Review. Those are really tough conversations: many of our directors go into this conversation thinking, this is all or nothing...and the high-stakes nature causes us to not always be on our best behavior. So the cochairs asking for their list of ‘dos and don’ts’ to guide them through these types of conversations was beautiful.”

Adrienne Van Strander  
 Deputy Director Organization Development  
 Bill & Melinda Gates Foundation

# ORGANIZATION-WIDE DOS AND DON'TS

HOW WE TREAT EACH OTHER			
<b>SHOW RESPECT</b>	<b>OFFER TRUST</b>	<b>BE TRANSPARENT</b>	<b>CREATE ENERGY</b>
<p><b>We approach relationships with inclusion, kindness, curiosity and humility.</b></p> <ul style="list-style-type: none"> <li>✓ DO value diversity and include viewpoints from all levels and locations in decision-making.</li> <li>✓ DO encourage rigorous debate and support resulting decisions.</li> <li>✓ DO treat feedback as a gift. Give it with empathy and receive it with humility.</li> <li>✗ DON'T dismiss ideas and opinions, contributions, expertise, either publicly or privately.</li> <li>✗ DON'T undermine decisions after they are made.</li> <li>✗ DON'T expect colleagues to be available 24/7.</li> </ul>	<p><b>We enable collaboration, risk-taking, empowerment, growth and accountability.</b></p> <ul style="list-style-type: none"> <li>✓ DO provide a clear vision and empower the team.</li> <li>✓ DO stay open to giving and receiving feedback through ongoing 4Cs.</li> <li>✓ DO make time for personal connections.</li> <li>✗ DON'T withhold feedback (positive or negative).</li> <li>✗ DON'T micromanage.</li> <li>✗ DON'T inflate your own ego. Your name is not on the building.</li> </ul>	<p><b>We clarify roles &amp; expectations and communicate decisions.</b></p> <ul style="list-style-type: none"> <li>✓ DO spot areas where confusion exists and become part of the solution to clarify.</li> <li>✓ DO use discipline in decision-making, clarify roles in the process and communicate outcomes in a timely manner.</li> <li>✓ DO continually clarify expectations and opportunities for growth.</li> <li>✗ DON'T rehash decisions, triangulate or exhibit passive-aggressive behaviors.</li> <li>✗ DON'T passively live in ambiguity.</li> <li>✗ DON'T allow rumors to fester.</li> </ul>	<p><b>We engage each other in the joyful, continuous pursuit of becoming our best, authentic selves.</b></p> <ul style="list-style-type: none"> <li>✓ DO interact with people more than devices.</li> <li>✓ DO show interest in others and their ideas.</li> <li>✓ DO invest in others' success.</li> <li>✗ DON'T disparage people or ideas to showcase your intellect.</li> <li>✗ DON'T be self-absorbed or leave messes for others to clean up.</li> <li>✗ DON'T glorify 24/7 busy-ness.</li> </ul>
<i>Respect for differences leads to Innovation and Collaboration</i>	<i>Offering trust leads to Collaboration and Optimism</i>	<i>Transparent conduct leads to Collaboration and Rigor</i>	<i>Energy in relationships leads to Collaboration and Optimism</i>

Source: Bill & Melinda Gates Foundation; CEB analysis.

SITUATION	SOLUTION	RESULTS	APPENDIX
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