

# Experimentation and Innovation in Hybrid Work

November 21, 2023

Office of the Chief Human Resources Officer (OCHRO)  
Research and Experimentation Team

# OCHRO's Research and Experimentation Team



RET is composed of a mix of **researchers** including behavioural scientists, human-centred designers, policy experts, and HR professionals.



The team applies **interdisciplinary approaches** to generate and test holistic, measurable, and impactful solutions to people management challenges.



RET specializes in **people management** challenges across a variety of domains such as diversity and inclusion, the future of work, and health and wellness.

# Updating Our Model of Human Decision-Making

**Behavioural insights** aims to create solutions that “meet people where they are”, by applying a more accurate model of human decision-making.



People are not  
always rational



People make  
most decisions  
by “thinking fast”



People do not  
follow through  
on their  
intentions

# Optimizing Hybrid Work

## Summer 2022

The Chief Human Resources Officer requested all deputy heads complete a **Hybrid Profile exercise** outlining their progress to date on hybrid work implementation.

## Fall 2022

RET led a **Hybrid-in-a-Box experimentation initiative to evaluate trends over time** with 11 organizations as they transition to a hybrid work environment.

## December 2022

The *Direction on prescribed presence in the workplace* was announced to establish a **minimum requirement of 2-3 days per week** on-site for all public servants.

## Spring-Summer 2023

In a second **Hybrid Profile exercise**, **55% of organizations indicated facing challenges with change management** while transitioning to hybrid work.

RET led two projects aimed at:

1. Enhancing hybrid work efficiency through digital workplace behaviours.
2. Facilitating the transition to hybrid work through tools that increase team cohesion.

# Presentation Overview

1. Digital Workplace Behaviours
2. Team Charters as a Tool to Increase Team Cohesion
3. CBSA Culture Transformation and Insights on Team Charters



# Project 1 | Digital Workplace Behaviours

This project was a collaboration between the Research & Experimentation Team and the Employment and Social Development Canada (ESDC) Digital Workplace Taskforce.

As hybrid work has become increasingly more important over the past three years, we applied behavioural insights to increase digital workplace behaviours that support collaboration and increased efficiency in the context of hybrid work.

These behaviours included:

- Attending digital skills learning events
- Completing short digital skill-building exercises
- Using SharePoint to collaboratively develop documents
- Using the Harmon.ie Outlook add-on to support SharePoint collaboration

# Project 1: Phase 1 | Attending Digital Skills Learning

## Project Scope



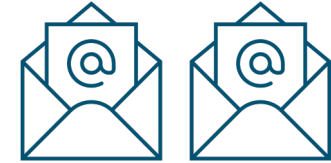
Short-term project to test ways to **encourage attendance** at the Digital Skills Booster in the fall of 2022

## Behavioural Insight



**Predictive analytics** to estimate if a person would attend the course based on similar past behaviours

## Approach



Created **employee profiles** based on region, classification, likelihood of attending event  
Constructed **two groups of mailing lists**

2,474 randomly selected employees who never attended a Booster Session before were assigned to either:

- **Targeted group:** Consisted only of employees with profiles with the highest likelihood of attending
- **Non-targeted group:** Consisted of employees from every profile

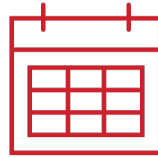
# Project 1: Phase 2 | Just-in-Time Tips to Spur Digital Behaviours

## Project Scope



Improve digital workplace best practices and tools (e.g., using SharePoint to co-author documents, installing Harmon.ie, time savings)

## Behavioural Insight



Default appointments to automatically block time in a person's calendar to help them follow through with plans

## Approach



Leaders Challenge participants were asked to **complete weekly digital skill-building exercises**  
Participants **randomly assigned** to one of two groups

The Leaders Challenge was open to all ESDC staff. About 80% of participants were employees, 17% were managers and 3% were executives. 1,388 Leaders Challenge participants were randomly assigned to either:

- **Weekly Emails:** Participants received 7 weekly emails with tips and short exercises to complete
- **Weekly Emails + Calendar Invites:** Participants also received weekly calendar invitations to complete the exercises

Both groups were sent a pre-trial and post-trial survey to measure changes in reported knowledge and usage.

Another 262 non-attendees were sent a pre-trial and post-trial survey, to create a passive control group



# Key Findings

- The targeted approach was >30% more effective at encouraging attendance at Digital Skills Booster events
- Calendar invitations with email reminders led to more exercises being completed and a greater increase in knowledge of digital collaboration tools and best practices
- Leader's Challenge increased knowledge and use of digital collaboration behaviours
- It is important to involve all team members, including managers and executives to effectively promote behaviours

# Areas for Future Research

- The effect of default appointments at boosting other behaviours, and their long-term effects.
- The role of individual characteristics (i.e., years working in government) in adopting skills or behaviours.
- The influence of team collaboration and upstream factors on adoption and promotion of skills or behaviours.

# Project 2 | Team Charters

This project was a collaboration between the Research & Experimentation Team and the Canada Border Services Agency (CBSA) Culture, Engagement, and Recognition Division.

To facilitate the transition of hybrid work we explored the benefits of team charters as a tool to increase team cohesion.

We used qualitative research to determine:

- The critical elements of the team charter process
- The elements of the charter that could be improved for different contexts

Using this design, we developed insights-driven recommendations to create better team charter tools that foster effective team dynamics.

# What is a Team Charter?

A document drafted collaboratively among members of a team that sets out norms and expectations for working together.

Establish the “unwritten” rules of a team, so everyone commits to a set of behaviours.

Can include statements about the mission and values of the team to help create a stronger sense of team identity.

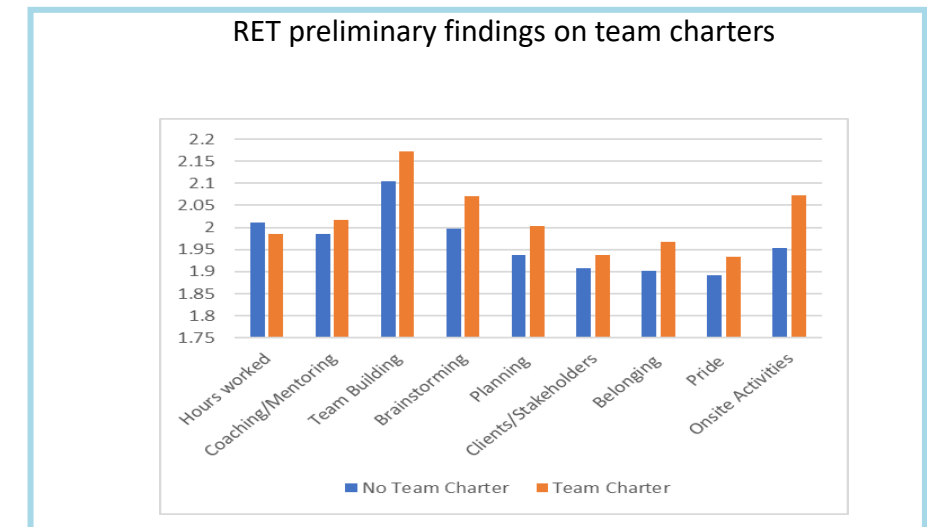
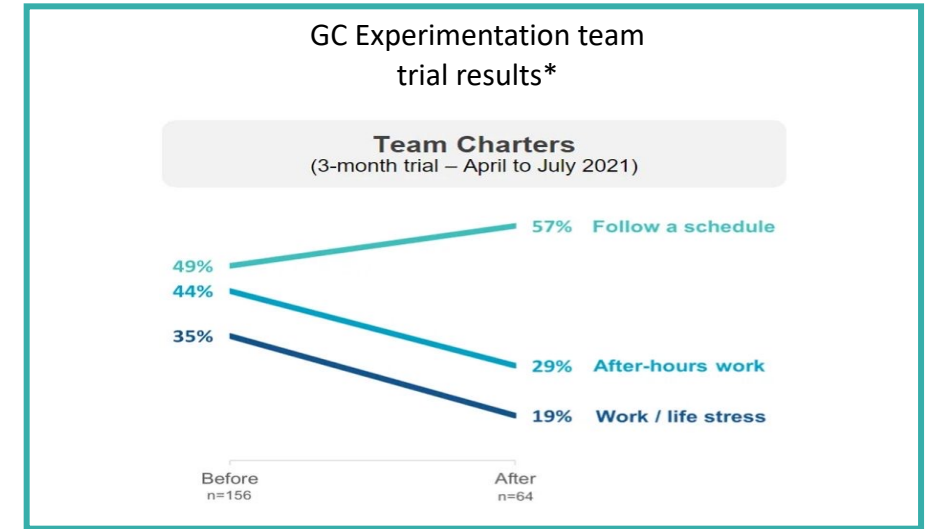
The diagram illustrates a 'Team Charter Template' with two main parts. The top part is a header section with a dark blue background and white text. It contains the title 'Team Charter Template' and the phrase 'As a team, we agree to the following:'. Below this header are two rows: 'Team mission' and 'Guiding values'. The bottom part of the diagram is a grid with five columns: 'Mission', 'Team values', 'Hybrid Work', 'Communication', and 'Collaboration'. The grid has three rows: 'Group 1' (blue cells), 'Group 2' (green cells), and 'Consolidate' (grey cells).

	Mission	Team values	Hybrid Work	Communication	Collaboration
Group 1					
Group 2					
Consolidate					

# Other Work

**Team charters decreased work/life stress and after-hours work** in an experiment ran by the Government of Canada Experimentation Team, where 11 teams from TBS tested out team charters.

**Team charters created more positive work experiences during the transition to hybrid work** in an experiment led by OCHRO RET



# Exploring Benefits and Challenges of a Team Charter

## Project Scope



Observe and understand the effects of team charters.

## Research Design



Qualitative research provides a deeper understanding of experiences, opinions, and perceptions.

## Approach



- 4 team charter exercises**
- 3 focus groups**
- 2 post-workshop surveys**

# Key Findings

- An informal facilitation style encouraged active participation.
- Team charter was perceived as a valuable opportunity for sharing personal perspectives.
- Had positive impacts on team cohesion and communication.
- Team charter was recommended as a tool for onboarding and change management.
- In a follow-up survey, 75-85% of the 14 respondents reported that their teams were following the charter agreements.

*“Team charter is a good way to ease into the work plan after a break or change management and it is a good tool for onboarding across the regions.”*

*(Manager’s focus groups, June 2023)*

*“The team charter will be used for onboarding and to test it as a measure of continuous improvement.”*

*(Manager’s focus groups, June 2023)*

# Best Practices

## Fostering Effective Team Dynamics



Select a modality for the exercise (in person/online, etc).

Use of digital collaboration tools

Use electronic devices to optimize the note-taking process.

Agree on the note taking roles in advance and use 2 note-takers.

Have a non-team member, facilitating the session.

## Emphasizing the Charter's Purpose



Team charters benefit different types of team members (e.g., new members, established team members, managers).

The “purpose” section of the charter should focus on ‘why’ the team exists rather than ‘what’ the team does.



# Key Takeaways

- Team charters are an effective tool for onboarding new members, measuring continuous improvements, and adapting to changes in team dynamics, management, or other structural changes.
- Team charters can be adapted to the needs of each team, and you can have a specific section on hybrid work.

# Areas for Future Research

- Alternative tools for those teams where team charters are not recommended.
- Team charters as a tool to encourage psychological safety
- Longer-term benefits of team charters.

# Background on the CBSA Culture Transformation

## CBSA Modernization

CBSA Modernization is an agency-wide initiative to build the border of the future. Our goal is to create modern tools and processes and make sure our people are supported to do the important work that they do.

## What is Culture?

Culture, put simply, is “how we do things.” It is a collection of patterns of behaviour shaped by different internal and external forces.

Culture is created and changes over time whether you are deliberately tending to it or not.

## Culture Transformation at CBSA

### Phase 1: Diagnosing our culture (2019-2020)

We identified three core issues around:

- Having a shared and meaningful identity
- effective and authentic communication
- courage and empathy

### Phase 2: Defining our vision (2020-2021)

Our ultimate goal is to work to build an organizational culture founded on trust.

There are three long-term outcomes that we are striving for:

- having a shared sense of purpose
- valuing and caring for each other
- fostering a psychologically safe workplace

### Phase 3: Staying focused to achieve a healthy workplace culture (2022-present)

The objectives of this phase are to:

- take actions to achieve the vision for our culture
- reinforce new behaviours and ways of thinking so that we don't slip back
- focus on specific groups, areas or key projects that need support

# Culture Insights on Team Charters

- **Team Charters**

- Are an intentional and tangible way to influence the culture of a team
- Are meant to be a living document – you can use adaptive action<sup>1</sup> cycles to keep it up to date and relevant
- Involves everyone on a team which helps people feel heard, seen, and part of something

- **Key Takeaways from our Experience at CBSA**

- Not everyone will understand the purpose of a team charter in the same way, take time to explain the potential benefits and get people involved to keep it alive
- A healthy team can benefit from reinforcing the good things it already does and it opens a door for a struggling team to speak up and find ways to work better
- If you have a team in a bad place with lots of conflict, this might not be your first (or only) step – it is important to assess where your team might be before jumping in



**Adaptive action:** Adaptive Action is an iterative, deceptively simple planning process that allows you to move forward in uncertainty. When you feel like you cannot move forward because you don't know what to do, you can always use Adaptive Action to identify your next wise action.

(Source: [Adaptive Action \(hsdinstitute.org\)](https://hsdinstitute.org/))



# Contact Us



## **Elizabeth Hardy**

Senior Director, Research Experimentation, Office of the Chief Human Resources Officer, Government of Canada

[Elizabeth.Hardy@tbs-sct.gc.ca](mailto:Elizabeth.Hardy@tbs-sct.gc.ca)

## **Dr. Renante Rondina**

Behavioural Scientist, Research and Experimentation, Office of the Chief Human Resources Officer, Government of Canada

[Renante.Rondina@tbs-sct.gc.ca](mailto:Renante.Rondina@tbs-sct.gc.ca)

## **Dr. Gloria Castaneda**

Behavioural Scientist, Research and Experimentation, Office of the Chief Human Resources Officer, Government of Canada

[Gloria.castaneda@tbs-sct.gc.ca](mailto:Gloria.castaneda@tbs-sct.gc.ca)

## **Richard Coelho**

Senior Culture Advisor, Culture, Engagement, and Recognition, Canada Border Services Agency, Government of Canada

[Richard.Coelho@cbsa-asfc.gc.ca](mailto:Richard.Coelho@cbsa-asfc.gc.ca)