RESEARCH SHORT

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A Practical Guide to Implementing Organization-Wide Change in the IC

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A continually shifting landscape of new challenges, technologies, and adversaries complicates the IC's core mission of protecting national security. To adapt effectively to disruption, IC agencies must often initiate change on an organization-wide scale. Yet, implementing large-scale internal change can seem daunting, especially to those charged with leading that change. A dedicated, methodical effort to create tangible outcomes and constructively engage the IC workforce can shape and embed the needed change—like a greenhouse growing the seedlings of new policies and programs until they are ready to take root and flourish in their IC organizational home. This guide draws largely on three key experiences leading to organization-wide change, offered as helpful examples to others leading change within the IC.

Embracing Organizational Change

Your Intelligence Community (IC) agency conducts a study from which a set of recommendations emerge. You have the mandate to make them a reality. Knowing that studies show most organizations fail at implementing a big change strategy,[1] how do you go about making change that sticks? How do you get started? How will you know if you succeeded?

The world we live in is dynamic. Rapid developments in artificial intelligence technologies alone are transforming the way we think about and interact with information, the way we learn, the way we live, and—as it pertains to the IC—the way we go about the daily business of intelligence.

Embracing change is an important part of organizational life. While an abundance of studies on change management exists,[2] this *Research Short* is meant to offer a practical how-to guide, based on personal experience in the IC, to inspire your own foray into implementing lasting change.

About Change

Change is the opposite of stasis. At its fundamental level, change is about doing or experiencing something differently, ranging from a small modification to a dramatic transformation. We tend to think of change as hard at the individual level, let alone at the group or organizational level. Think about those New Year's resolutions you make that are abandoned within a few weeks or months, at best. How daunting then is a resolution that applies not just to you but is one you have to make a reality for hundreds of others?

Change can be fragile. Although excitement often accompanies change, so does wariness, confusion, and resistance. Those being encouraged to embrace change may ask, "What are we changing and why? Things were good as they were." People need to understand change in a way that reaches them at a deeper level. As the author and speaker Simon Sinek noted in a TED talk, civil rights leader Dr. Martin Luther King, Jr., did not say "I have a plan" in his famous "I have a dream" speech.[3] As Dr. King rightly perceived, the reasons for change should touch minds *and hearts.*

Change is influenced by precedent. When we think about organizational change in the IC, we need to consider whether the organization is jaded because change may have been tried without success many times before. What is different now? How can necessary change be framed and instituted in a way the organization—its people—can embrace and absorb?

Change Challenges

On three occasions during my career at the Central Intelligence Agency, I led an organization-wide change management effort. The first was to improve foreign language capability by "doubling the number of collectors and analysts with foreign

> "Short-term fixes did not solve the underlying need to build and sustain a broad, crisis-ready multilingual capability in the ranks of intelligence and national security personnel. ... The catalyst for real change that sticks is to better position ourselves to act—by committing to and executing an intentional, comprehensive strategy—and not to react to needs as they occur."
>
> – Lorie Roule
> *Research Short,* "Foreign Language for National Security: Let's Act, Not React," July 27, 2023.

language skills and increasing by 50 percent the number of officers with the right language skills serving in jobs that require foreign language."[4] The second resulted from a study by the Director's Advisory Group on Women in Leadership (DAGWIL) that examined the question of "why more women—at the GS-13 level and above—were not achieving promotions and positions of greater responsibility?"[5] The third, which evolved from a CIA study on optimizing the organization to meet future challenges, called for standing up a new corporate Talent Center to consolidate and improve the recruitment, management, training, and leadership development of the CIA workforce as part of a "modernization" plan launched in 2015.[6] The first two efforts involved five-year implementation plans; the third was a half-year effort to set up a new talent management structure and approach.

Although the topics and the amount of time given to implement the findings differed, the fundamental challenge was the same—an organization-wide change management effort to fully implement study recommendations designed to achieve specific goals. From the ups and downs of each effort, I gleaned common principles that may be helpful to others tasked with leading change for building a plan of action, gaining buy-in, and ultimately engineering change that sticks within the IC.

Three Stages of Implementing Change

The three primary stages to implement change at an IC agency are as follows: designing the change, executing the change, and embedding the change. The length of each stage depends on how much time you have available to implement the change.

Stage 1: Designing the Change

The first step by the IC organization is to select an implementation lead—ideally someone who communicates effectively and is adept at putting ideas into action, skilled at motivating a team, and experienced in leading by influence. More important, the lead should be *solely dedicated* to leading implementation. The task to lead an organization-wide change effort cannot be a part-time gig, or the press of other business will inevitably get in the way despite the best of intentions.

For a large change effort, the lead will need a core team, ideally staff who are also assigned full time to the effort. The team's size will be determined by the nature of the change effort. In my experience, the core team varied from 6 to 12 people. Team members should bring a diversity of experiences and backgrounds, such as different occupations, lengths of service, and areas of expertise. Because organization-wide change impacts everyone, a team reflecting the IC agency's diversity promotes greater connection to the workforce.

Before determining how to effect an organizational change, the now-identified lead and core team members should take the time to fully understand and embrace the change by doing the following:

- *Thoroughly read and confer on the study.* Understanding the study's purpose and its findings or recommendations facilitates structuring core team functions—who does what—by considering

> When you lack money and personnel:
> - Leverage the talent inherent within the workforce.
> - Encourage other offices to fund specific initiatives by highlighting how they benefit as well.
> - Aim for no- to low-cost actions, such as learning events, which can have a big impact.

which part of the effort excites individual team members the most and where each one thinks they can make the best contribution. In designing a new Talent Center at CIA, members of the core team—ranging from junior to senior officers—related to the need to enhance talent and leadership development at all professional levels. Similarly, the DAGWIL core team personally related to many of that report's findings—having experienced situations such as undervaluation of part-time work and the challenges of childcare to one's career.

- *Create a change tagline.* How would you summarize the change, so others can understand what is being changed and why? Not only does this mental exercise solidify the change for the lead and core team, but it also serves as a useful tool in communicating the change as the team engages with stakeholders and the workforce.

- *Envision the end state.* Even as you think about how to get started, have a vision of the ideal outcome. The MD Anderson Cancer Center presents one of my favorite examples of a successful end state, playing on the meaning inherent in its tagline: "Making Cancer History."[7]

- *Check in with leadership to verify that your thinking aligns with expectations.* Securing leadership's support and, ideally, its participation at appropriate touch points can smooth the implementation process.

Next, determine the implementation approach. The methodology presented in this *Research Short* consists of a three-pronged approach, specifically: 1) establishing change groups to create the needed change and measure progress in achieving the desired outcomes, 2) hosting learning events to raise awareness of specific issues and gain workforce buy-in; and 3) engaging in strategic outreach to the workforce that communicates what is changing and why.

Establish Change Groups: *To actively involve stakeholders and members of the workforce.*

Change groups create the actual outcomes—new programs, policies, activities, training, and management models—that will implement the goals of the change effort. Including representatives from each element within the organization builds trust. The size and composition of the groups might vary from many part-time volunteers to a few employees assigned to a full-time effort or a combination of both, but, ideally, each group will have a dedicated "change group" lead. The core implementation team lead should be explicit about expectations and commitments and aim for a start and end date—spanning one year, for example—for the change group members. An organized kickoff helps ensure all participants understand their roles in the effort, what is in scope, and what is out of scope. (See Appendices A-D for sample tools that support a change group's work.)

Hold Learning Events: *To build the IC agency's workforce concurrence with the proposed change.*

Holding periodic events that focus on some aspect of the change effort, which are open to the workforce at large, can raise collective awareness on a specific topic. Aim for a variety of formats; some real-life examples from my experience include: a town hall to debunk myths about how foreign language proficiency is tested, a panel of employees to highlight workplace flexibility stories, and a workshop on how to write more inclusive job qualifications. Even if people are familiar with associated

concepts, such as the importance of learning and maintaining a foreign language, they may be less familiar with new programs in place or new ways of learning that improve (as pertains to this example) language retention. Stories of how others in the workforce navigate career and intelligence challenges relevant to the change effort are particularly powerful as colleagues sometimes learn best from each other. Another advantage of learning events is they can be quickly launched to sustain momentum of the change effort, giving the lead and core team time to organize the change groups.

Engage in Strategic Outreach: *To secure and reinforce buy-in at all levels of the IC agency.*

Create an outreach plan that calls for the implementation lead and core team to communicate often and at all levels to keep the workforce and stakeholders apprised of developments. In each of the change efforts in which I was involved, our core team met with hundreds of groups, large and small, about what we were changing throughout the implementation process and why. These interactions served as an instant feedback loop for our implementation team. Based on participants' questions and reactions, we learned where we needed to make course corrections—be those in better understanding how foreign language proficiency is measured or how changes to promotion panels were designed—in our implementation and messaging efforts and we gained ideas we later adopted. This opportunity to ask questions and provide input—involving the workforce in the creation process—got people excited and often eager to volunteer their time or, at least, advocacy for the change. It also helped us identify future volunteers as initial change group team members moved on.

Stage 2: Executing the Change

Creating outputs that meet the change mandate falls to the change groups. The implementation lead and core team orchestrate their work to ensure such products remain in scope and in sync, provide support to overcome obstacles, and acquire the resources the change groups need. In each of my efforts, our core team met with the change groups regularly to coordinate their progress and provide guidance, as needed.

The change groups should strive for tangible outcomes. In standing up a new Talent Center at CIA, one of our objectives was to create a new model for professional development that could be applied to any intelligence professional regardless of their specific occupation. The change group drew representatives from each of CIA's five directorates to create this model, which in turn formed the basis for new policies and training. In another example, the DAGWIL study mandated the recommendation to "promote sponsorship,"[8] a concept that focuses on how talent in an organization—particularly its hidden talent—can be discovered. The sponsorship change group created as its first deliverable a definition of sponsorship tailored to our organization, which was critical to promoting the concept and practice.

Change groups should proceed in an integrated way, which the core implementation team can help ensure. Other initiatives may be underway across the organization, and the implementation effort should not work at cross purposes with those. Rather, determine where your initiative creates new change or where your efforts become a positive force multiplier for other programs, practices, and policies that support the change you are seeking to implement.

While change groups are focused on creating the needed change, the implementation lead and core team also take on the role of organizing learning events and conducting strategic outreach, in addition to guiding and supporting the change groups. Learning events keep the workforce engaged and the change effort top of mind. Outreach also makes the change transparent. It shows that progress is possible and happening. It reinforces the change message and updates leadership and the workforce on progress. The outreach messaging should be adjusted as progress is made. In the DAGWIL effort, one way we communicated progress was by summarizing accomplishments in each of the five years of the change effort through an annual report made available internally (as well as publicly).[9]

Stage 3: Embedding the Change

The final stage determines how to end a change effort, ensuring its achievements are embedded successfully into organizational systems and cultures. Think about these outcomes as akin to tiny greenhouse plants, nurtured until stable enough to be transplanted to a permanent location. One of our change outcomes in the DAGWIL effort involved creating "feedback advisers"—a cadre trained in how to effectively deliver and receive work performance feedback—in response to one of the study's recommendations to "provide actionable and timely feedback to all employees."[10] Having established the cadre and providing the initial training, we placed this adviser program permanently with the CIA's coaching team to manage.

As you wind down the change effort, communicating embedded change is another important element that can take place in a variety of formats, such as integrating content into existing or new training courses, incorporating new elements into policy, or introducing as a new practice. A formal end to the implementation effort is a good way to signal to the workforce that what started out as recommendations were realized by the organization.

Lessons Learned: Applicable Across the IC

The culmination of my change challenge experiences resulted in lessons learned that might be useful for future change initiatives across the IC:

1 Every IC change effort includes one key factor necessary for success: leadership support ideally from day one, in which organizational leaders message the change consistently and often and secure the resources necessary to achieve it. In my experience, supportive leaders also committed talented professionals from their own parts of the organization to help effect the change, and they broke through any barriers that arose. In addition, the core implementation teams in each of my change efforts did not hesitate to ask and suggest ways for leaders to get involved in championing, showcasing, and modeling the change.

Individuals benefit from getting involved by:

- Learning more about the organization.

- Developing new skills that can be applied to different projects.

- Broadening and diversifying their networks and interacting with others outside their normal course of business.

- Building a sense of pride through their accomplishments.

- Being open to implementing change in the future.

- Creating a safe space to empower conversations.

- Seeing that their participation in change increases their impact and relevance to mission.

2 Intentionally cultivating broad workforce involvement in and awareness of the change helps embed it successfully in the organizational culture. When addressing some of our foreign language challenges, input from our language-capable workforce was particularly useful in aligning the language testing experience to real-life scenarios.

3 Frequent communication and clear messaging—grounded in simplicity and common sense—ensure implementation goals, while challenging, are not overwhelming and help embed the change and move it forward. Even as the workforce is adjusting to change, the effort itself should be visible, known, understood, and seen as valuable.

4 Operating with the notion that the core implementation team is working within a defined timeline helps ensure a successful end to the implementation effort. A time-bound effort brings focus and attention in a way that a permanent unit may struggle to achieve.

5 When good things happen in the IC organization that support the change effort, partnering with the source of that support allows you to capitalize on win-win outcomes. We fostered this synergy in the talent management area by uncovering good practices in some offices that began communicating with greater transparency how promotions were decided, for example.

6 Engaging with the workforce empowers your colleagues and creates a safe space for conversations on hard issues that can determine their sense of belonging in the organization.

7 Finally, each of the three implementation stages described above has its own potential pitfalls. Based on my own experience, the most significant are underestimating how long it takes to create the architecture for getting started, allowing inertia to set in as the work of change gets underway, and failing to embed the change sufficiently and in a measurable way in the organization's structure before declaring success. Fortunately, you can anticipate solutions to each of these prospective problems. Learning events help maintain momentum while you get set up, and a strategic outreach plan ensures you are meeting frequently with all levels of the workforce to identify ahead of time offices that can adopt the change and help carry it forward into the fabric of the organization.

Let's become experts in driving lasting change by applying a strategic, methodical approach when faced with the ever-evolving external challenges and opportunities that call upon us to adapt to new ways of managing talent or operations. Failure to do so jeopardizes our skills and capabilities and, ultimately, our mission effectiveness.

Lorie Roule is an advocate for multilingual and multicultural competencies at the national level and in her home state of Virginia. During her 35-year career in the IC, Ms. Roule served at both NSA and CIA, where she honed leadership skills in such positions as CIA Chief Talent Development, CIA Senior Language Authority, and Director of CIA's Intelligence Language Institute. She was the recipient of a Presidential Rank Award in 2015 for leading change to promote gender equity. Ms. Roule dedicates this *Research Short* in memory of Sonya Holt, her Deputy Lead and partner in implementing the DAGWIL recommendations. After initially working together, Ms. Holt successfully led the last three years of the implementation effort, when Ms. Roule moved on to another (change) implementation assignment. Sonya passed away far too soon in July 2023.

Appendix A: How-to Guide

STAGE 1
Designing the Change

Appoint an implementation lead with the right skills and experience.

Create change groups with a diversity of talent and experience and host an organized implementation kickoff (see Appendices , , and).

Establish a methodology by tailoring the three-pronged approach to your needs:

- Ensure a means to develop and implement concrete outcomes,
- Raise awareness of the "what" and "why" of the issue along the way,
- Create a strategic communications and outreach plan to report progress and show value.

Establish an implementation timeline to organize the work and the commitment of change groups.

STAGE 2
Executing the Change

Ensure the change groups create tangible outcomes and support groups are working on plans for implementing them.

Host learning events, leveraging a variety of formats—such as workshops, panels, and guest speakers—to raise awareness of the issues and topics relevant to the change effort and its value.

Report progress to senior leadership on a regular basis and to the workforce in a variety of ways, such as town halls and end-of-year reports.

STAGE 3
Embedding the Change

Identify and work with offices that will manage the outcomes once they are ready to be embedded.

Be vocal with the workforce about handoffs of responsibility for sustaining the outcomes.

Communicate successes along the way, as the change effort winds down, and at its formal conclusion.

Endnotes

1   Lisa Bodell, "Most Change Initiatives Fail–Here's How To Beat the Odds," *Forbes,* April 14, 2022, https://www.forbes.com/sites/lisabodell/2022/03/28/most-change-initiatives-fail---heres-how-to-beat-the-odds/?sh=398eb54422ee; Mary Sharp Emerson, "7 Reasons Why Change Management Strategies Fail and How To Avoid Them," Harvard University Division of Continuing Education, Professional and Executive Development blog, November 18, 2022, https://professional.dce.harvard.edu/blog/7-reasons-why-change-management-strategies-fail-and-how-to-avoid-them/; among many studies on change and failed change management efforts.

2   John Kotter, *Leading Change* (Brighton, MA: Harvard Business Review Press, 2012); John Kotter, "The 8 Steps for Leading Change," Kotter website, accessed June 15, 2024, https://www.kotterinc.com/methodology/8-steps/; the reader of this *Research Short* may notice some similarities, albeit the three-prong methodology described was organically derived.

3   Simon Sinek, "How Great Leaders Inspire Action," TED Talk, September 2009, https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action?trigger=5s; Simon Sinek also famously said, "People don't buy what you do; they buy why you do it."

4   Lorie Roule, "Foreign Language for National Security: Let's Act, Not React," *Research Short,* National Intelligence Press, July 27, 2023, https://www.ni-u.edu/wp-content/uploads/2023/11/NIUShort_20230727_DNI_2023_02922-1.pdf.

5   CIA, *Women in Leadership: Unclassified Report,* CIA Director's Advisory Group, March 2013, https://www.cia.gov/static/825c79d82205d8b8e0045a8dd87fc614/CIA_Women_In_Leadership_March2013.pdf.

6   CIA, "CIA Achieves Key Milestone in Agency-Wide Modernization Initiative," Facebook post, October 1, 2015, https://www.facebook.com/Central.Intelligence.Agency/posts/cia-achieves-key-milestone-in-agency-wide-modernization-initiativethe-central-in/1153174768030861/?_rdr.

7   MD Anderson Cancer Center, "Vision," About MD Anderson website, accessed June 15, 2024, https://www.mdanderson.org/about-md-anderson.html#:~:text=We%20shall%20be%20the%20premier,are%20Making%20Cancer%20History%C2%AE.

8   Coqual, "Sponsorship," Coqual–Our Research website, accessed June 15, 2024, https://coqual.org/; Coqual (formerly The Center for Talent Innovation, consulted during implementation of the DAGWIL report) is one among numerous sources on sponsorship.

9   CIA, *Implementation of Women in Leadership: Year Five Report to the Workforce,* CIA Director's Advisory Group, June 2018, https://www.cia.gov/static/1de6ae78027489183f365d934b5f5bdb/DAG-Implementation-Year-Five.pdf.

10 CIA, *Women in Leadership*.