



EDI routines rubric

INTRODUCTION

A delivery routine is different from most meetings because it is focused on monitoring progress and solving problems in a coordinated and structured way. In order to develop an effective delivery routine, you must look at the ways in which you are currently monitoring progress and determine how to build on that work.

EDI's routines rubric allows an organization to assess how well its meetings perform in four categories: regularity, strong execution, focus on performance and action on performance. For each category, the rubric asks questions about the meeting in question to focus the conversation. Then, in the middle two columns, the rubric gives descriptions of what weak (Red) and strong (Green) routines look like for each category. The group can give one of four ratings in each category: Red, Amber Red, Amber Green, or Green.



Category	What weak performance (Red) looks like	What strong performance (Green) looks like	Rating / Rationale
Regularity			
<ul style="list-style-type: none"> ■ Does the routine happen regularly enough to drive performance? ■ Are the right people present? Including: <ul style="list-style-type: none"> – the “leader” holding the actors accountable, – the “actors” driving the work and reporting on progress, and – the “broker” facilitating the discussion 	<ul style="list-style-type: none"> ■ Takes place sporadically and is often cancelled or rescheduled ■ So frequent that changes in performance are not observable, or so infrequent that performance “drifts” in between ■ Key players are rarely present 	<ul style="list-style-type: none"> ■ Provides a stable rhythm for the work; participants plan around the schedule of routines ■ Discussions are timely (not too early / too late) ■ Key players – including the leader – attend; relevant actors are senior/informed enough to account for performance commit to necessary actions 	
Strong execution			
<ul style="list-style-type: none"> ■ Do participants buy in to the purpose of the routine and come prepared for a productive discussion? ■ Are roles and responsibilities clear? ■ Are the supporting materials high-quality? ■ Is the meeting well facilitated? ■ Are clear next steps defined? 	<ul style="list-style-type: none"> ■ Participants are confused about the routine’s purpose/objectives or do not believe in them ■ Important participants are not sufficiently well-prepared to contribute ■ Participants are unclear about their roles ■ Supporting materials are confusing, too detailed or missing important information ■ Starts late; runs out of time; departs from agenda ■ Next steps are not identified 	<ul style="list-style-type: none"> ■ All participants can articulate the routine’s objectives and want to play their role in achieving them ■ Key participants are well-prepared (briefed in advance by the broker if necessary) ■ Agenda and supporting materials are clear, concise, relevant, and prepared in advance ■ Runs to time; changes to agenda are deliberate ■ Leader/broker ensure that objectives are met and clear next steps are identified 	



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Focus on performance			
<ul style="list-style-type: none"> ■ Is the area of focus for the routine clear – do we know what we are assessing progress on? ■ Does the routine allow participants to quickly form a <i>shared view of performance</i> and progress, based on strong, well-synthesized evidence? ■ Does the agenda/specific objectives of the routine allow for a focus on the most important issues impacting performance? 	<ul style="list-style-type: none"> ■ Routine is merely a check-in during which participants give updates ■ Evidence is sporadic/inconsistent; discussion is mostly based in anecdote/opinion; data are disputed or not recognized by participants ■ Data are presented in raw format with little or no attempt to discern patterns or implications ■ All items get equal weight, with no attempt to make meaningful comparisons or focus on key issues 	<ul style="list-style-type: none"> ■ Performance on specific goals, strategies or entities is selected as the focus of the discussion ■ A wide range of evidence is presented in a way that is clear, sharp, and consistent, including outcome data, leading indicator data, and evidence on quality of implementation ■ Data is synthesized to identify key patterns and comparisons ■ Debate is vigorous but an overall picture of performance emerges quickly; the majority of discussion is on the biggest areas of challenge 	
Action on performance			
<ul style="list-style-type: none"> ■ Does the routine help participants to identify and agree on the most critical barriers to progress? ■ Are the tough questions asked? ■ Does the routine result in creative problem-solving that empowers participants to address the challenges and holds them accountable for doing so? ■ Does the routine encourage participants to continuously learn and improve? 	<ul style="list-style-type: none"> ■ Problems may be identified but are too vague to be actionable; their root causes are poorly understood, if at all ■ Data is discussed to no practical end; discussion tends to dwell on problems, with little attempt to seek solutions; key issues are left unresolved ■ Actions and next steps are superficial, with no real expectation that they will “move the needle” ■ There is no follow-up on actions between routines ■ Participants are reluctant to engage in open dialogue about their own/colleagues’ performance; challenging conversations are either avoided or couched as a “gotcha” ■ Wider learning points are not identified 	<ul style="list-style-type: none"> ■ Discussion allows participants to identify specific barriers to success, with a focus on root causes that are actionable ■ Leader/broker ask the tough questions, and press for answers until adequate, realistic solutions have been identified ■ Between routines there is a shared expectation that actions will be followed-up ■ Participants are open to supporting, challenging and learning from each other ■ Cross-project comparisons create a spirit of friendly competition and professional learning across teams ■ Learning points are captured and shared 	