

# Personnel in Advancement

*Presenter:*

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## Topics

- Understanding Who We Are
- Avoiding Crisis, Conflict and Confusion
- Communication is the Key!
- Management
- Performance Evaluation
- Instilling Ownership
- Problem Employees
- What Causes Turnover (so that we can know what NOT to do!)
- Keep Employees Motivated

**As “middle managers,”  
the key to *our* success  
will ultimately depend on  
how well we have  
managed our staff – and  
dealt with “difficult”  
employees.**

### **What Does Advancement (what IS advancement anyway?) Look Like?**

- We don't stick around long: 80% *leave the profession* by the 15<sup>th</sup> year (advancement officers leave by year 10)
- Hop-scotch: 58% stay in one place less than 5 years – only 11% will stay 15+ (76% of advancement officers will leave by their 5<sup>th</sup> year)

## What's Going On?

- We'll discuss causes of turnover later. But what is it about the Advancement *profession* that keeps us moving around and ultimately out?
- What can we do to motivate good players to stay and play?

## Instilling the Proper Values & Behaviors – It's NOT Just About Getting the Work Done!

- Results driven
- Customer/Quality focus
- Innovation & Creativity
- Competency
- Leadership
- Fast/Action-oriented/Initiative
- Simplicity

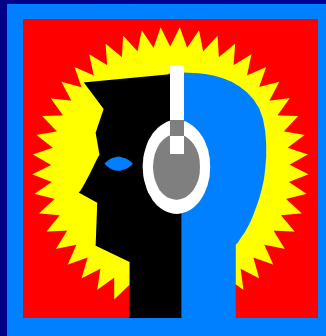
Too often this is ALL we care about

## Instilling the Proper Values & Behaviors – It's NOT Just About Getting the Work Done!

- Empowerment/Accountability
- Commitment/Self-discipline
- Mutual Respect/Candor/Trust/Integrity/Loyalty
- Open/Effective Communication/Collaboration/Compassion

## Avoiding Crisis, Conflict, and Confusion

- What you say isn't always what is heard!
  - Verbal vs. Non-verbal
    - Open & closed arms
  - Communication Consistency
    - Same message – different people
  - 'Word-speak'
    - Use your own words, not someone else's
  - Information Overload
    - Bite-sized chunks



## Communication Principles

- Direct, honest communication at all times
- Listen; communication is a two-way street
- Concrete, specific, detailed information
- Focus on outcome you want
- Documentation, documentation, documentation

## Management Principles

- Clearly understand expectations
- Proper training and guidance
- Recognize good work
- Constructively criticize poor work
- Opportunities to grow
- Encourage self-improvement
- Safety and healthy environments
- Beware the "manipulator"
  - Wants to be your "buddy"
  - Talks behind your back

## The Role of an *Effective* Manager

- You will be respected by your subordinates – and appreciated by your superiors – by:
- Ensuring individual goals and objectives are aligned to Advancement goals
  - Setting SMART objectives (defined in a few minutes)
  - Encouraging and supporting stretched performance
  - Engaging the commitment of all associates

## The Role of an *Effective* Manager

- You will be respected by your subordinates – and appreciated by your superiors – by:
- Conducting regular dialogue with the associate
  - Demonstrating fairness and consistency in performance evaluation and compensation management
  - Communicating rating to associate after it has been fully agreed upon by all stakeholders
  - Ensuring the performance management process is fully implemented in your *entire* area of responsibility

## **Your manager holds the key to *your* success by:**

- Developing an organizational strategy ensuring that the strategy is aligned with the overall institutional goals
- Holding *you* accountable and responsible for the achievement of the established goals
- Holding *you* accountable for the performance and development of your direct reports

## **Your manager holds the key to *your* success by:**

- Ensuring proper calibration of year-end performance ratings across the organization
- Approving final performance ratings of your associates
- Ensuring the performance management process is fully implemented in their *entire* area of responsibility

# Performance Evaluations

## A Few Issues:

- Numerical
  - Only?
- Self Evaluations
  - More later
- Manager Only?
  - No!
- 360 Degree Evaluations
  - Huh?



# Proper Administration of Evaluation Process\*

- Managers and associates meet to jointly distill 3-5 major objectives from job description. Each objective should be SMART:
  - *Specific* – clearly stated
  - *Measurable* – measurable outputs defined according to criteria (quantity, quality, time..)
  - *Attainable* – achievable with stretch but still realistic
  - *Relevant* – relevant to the business needs and goals of department/organization
  - *Time-bound* – within a clear time-frame

\*Certainly do what your HR office requires - but these PROVEN measures may help!



## Proper Administration of Evaluation Process

- Objectives should include:
  - Targets to support short-term development and performance improvement needs
  - Stretched targets to support longer-term *professional/career growth and development*
- Weigh objectives in beginning
- Track changes in objectives or weights during year:

## Proper Administration of Evaluation Process

- After half a year, both associate and manager reflect on the associate's performance and objectives
- The associate provides specific examples of progress and notes if previously established objectives remain realistic and achievable
- The manager reviews the associate's comments and feedback
- No Written Rating is provided at mid-year review:

## Proper Administration of Evaluation Process

- Have a face-to-face dialogue ensuring no interruptions or time-constraints. The conversation should include:
  - The associate's progress to-date
  - A review of objectives to ensure alignment with organizational needs
  - A re-alignment of objectives if necessary, to ensure objectives remain relevant, realistic and achievable

## The Year-End Review

- Have the associate conduct a self-assessment:
  - Self-ratings for each objective
  - Specific examples of performance per objective
  - Specific examples of values & behaviors used to achieve the objectives
  - An overall performance rating

## The Year-End Review

- 360 review process – peers review associates and provide performance feedback to the manager
- Based on the calibration, the manager makes a final decision on the rating of the associate
- The approval of the manager's manager should be required for all associate's year-end reviews & ratings BEFORE it is communicated to the associate

## The Year-End Review

- Face-to-face meeting to discuss:
  - The self-assessment and differences in ratings
  - What went well
  - What should improve next year
  - Performance improvement plan (if necessary)
  - Strengths/Development needs (performance & behavioral)
  - Discussion of the final rating

## Confidential Feedback for Managers

- Part of the 360 degree process
- Communications/Management/Personnel
- Open-ended; suggestions given
- Confidential/anonymous – provide feedback as part of an overall discussion

## Instilling Ownership

- Create an environment that allows and cultivates the achievement of the vision/mission and desired outcomes and results:
  - Share information
  - Teach associates new habits
  - Ask associates their opinion
  - Listen to associate answers
  - Learn from associates and others

## **Dealing w/Marginal Performance**

- Tell the employee
- Discuss methods of improving performance
- "Coach employee"
- Write memo to employee detailing conversation, no cc:HR
- No improvement, write memo to employee, cc: HR

## **Unsatisfactory Performance - Written**

- Communication
- Contact Director of Human Resources
- Inform divisional Vice President
- Notify employee performance is below standards
- If unsatisfactory, could result in termination

## Completion of Performance Improvement Plan

- Written review of the whole time frame
- If unsatisfactory, termination
- If satisfactory,
  - Evaluations for the total job
  - Employee remains satisfactory 12 months
- If employee unsatisfactory within 12 months, terminate without another chance to improve – but it doesn't have to be scary!

## Turnover Stats (Thank you Jennifer Warwick)

- 75% of American workers are disengaged
- 42% are suffering from burnout
- 33% believe they've reached a dead-end in their jobs
- 21% are eager to change jobs

## Turnover Stats

- 89% of managers believe most employees are pulled away by better pay
- Yet in 88% of voluntary turnovers, something other than money is the cause
- ***95% of voluntary turnover is avoidable***

## The Causes of Turnover

- Job or workplace was not as expected
  - About 35% of employees leave within the first six months
  - 60% of turnovers begin with some kind of “post-hire shock”

## The Causes of Turnover

- Mismatch between job and person
  - 60% of employees are not using their best talents in their jobs
  - Hiring too quickly
  - Looking at skills instead of talents
  - Disrespecting the excellence needed in low-level jobs
  - Relying too much on training

## The Causes of Turnover

- Too little coaching and feedback
  - More than 60% of employees – especially younger ones – say they don't get enough feedback
- Too few growth and advancement opportunities
  - While 85% of employees say that career growth is a key reward, only 49% say their organizations are providing it
  - Only 29% believe management cares about advancing employee skills
  - Recent survey asked employees to rate managers on 67 leadership competencies... "Developing direct reports" came in 67<sup>th</sup>



## The Causes of Turnover

- Devalued and unrecognized
  - 60% of employees say they feel ignored or taken for granted
    - Unequal pay for similar work
    - Not being acknowledged for a job well done
    - Being treated with disrespect
    - Having differences treated as negative, rather than prized
    - Not receiving the right resources
    - Having to work in an unacceptable work environment

## The Causes of Turnover

- Stress due to overwork/lack of balance
  - More than 40% of employees say their jobs are extremely stressful
  - 70% say they don't have a healthy balance between their work and personal lives
  - 60% would give up pay for more personal/family time

## The Causes of Turnover

- Loss of trust and confidence in leadership (full-circle back to the ethics discussion)
  - 36% of employees believe senior leadership acts with honesty and integrity
  - 40% believe their organizations are well-managed
  - 50% believe management is concerned with employee well-being

## Reminding *Ourselves* That Motivation is OUR Job\*

- What *specifically* have I done in the last 3 months to . . .
  - Help others learn, develop, and grow?
  - Support the people who work for, and with me?
  - Communicate, listen, and keep people informed?
  - Involve people in the processes, decisions, and changes that affect them?
  - Recognize performance and reward achievement?

\*180 Ways to Walk the Motivation Talk

## Reminding *Ourselves* That Motivation is OUR Job

- What *specifically* have I done in the last 3 months to . . .
  - Create and encourage fun and enjoyment?
  - Maintain high standards and expectations?
  - Exhibit contagious enthusiasm?
  - Demonstrate that I care – about work AND people?
  - Set the example for the behaviors I desire from others?

## Top Ten Motivators

- ❖ Select the right person for the job
- ❖ Keep jobs challenging and interesting
- ❖ Communicate your expectations
- ❖ Involve staff in decision-making
- ❖ Manage by exception
- ❖ Provide training opportunities
- ❖ Mentor staff
- ❖ Lead by example
- ❖ Treat staff well
- ❖ ***And practice the 3 R's of Management***

# Reward



# Recognition



# Respect

