

Motivating Your Team

Right Time, Right Information

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What We'll Cover

- Brief recap of “Recruiting with Confidence: Strategies for Hiring”
- Job Descriptions vs. Volunteer Summaries
- The Importance of Onboarding
- Goal Setting / Performance Management
- Recognition / Appreciation
- Giving tough feedback and parting ways with employees and volunteers

Recap from “Recruiting with Confidence: Strategies for Hiring”

- **The decision to bring others to your organization should start long before you feel like you’re drowning at work. The best organizations:**
 - Complete a strategic plan (and revisit it often).
 - Develop a staffing plan that is aligned to the strategic plan.
 - Attempt to find qualified people to fill roles defined in the staffing plan through the development of thoughtful job descriptions, volunteer summaries, and targeted recruiting techniques.
 - Have a baseline understanding of best practices for conducting interviews that help get the best hire while fairly representing the organization.
 - Onboard (orient) employees and volunteers continually in the first 90 days and listen to the feedback they provide about the process.

Recap on the Definition of a Volunteer (as opposed to paid employee)

“The FLSA recognizes the generosity and public benefits of volunteering and allows individuals to freely volunteer in many circumstances for charitable and public purposes.

Individuals may volunteer time to religious, charitable, civic, humanitarian, or similar non-profit organizations as a public service and not be covered by the FLSA. Individuals generally may not, however, volunteer in commercial activities run by a non-profit organization such as a gift shop.

A volunteer generally will not be considered an employee for FLSA purposes if the individual volunteers freely for public service, religious or humanitarian objectives, and without contemplation or receipt of compensation. Typically, such volunteers serve on a part-time basis and do not displace regular employed workers or perform work that would otherwise be performed by regular employees. In addition, paid employees of a non-profit organization cannot volunteer to provide the same type of services to their non-profit organization that they are employed to provide.”

Job Descriptions differ from Volunteer Summaries

Job Descriptions

- Position title and summary
- Essential duties, including supervisory responsibilities and/or reporting structure
- Competencies
- Qualifications and experience level:
- Part-time, full-time or temporary
- Hours of work: rigid schedule or flexible?
- Classification by FLSA: exempt or non-exempt
- Location of work: on site, from home, multiple locations
- Physical demands
- Rate of pay / salary range

Volunteer Summaries

- Volunteer title and summary of role / need for role
- Special skills or traits of successful volunteers
- Any training required
- Volunteer Code of Conduct
 - Including what happens if conduct is breached (i.e. a person might be asked not to return to his volunteer assignment)
- Time commitment
- Location of assignment
- Physical demands

The Importance of Orientation and Onboarding

Orientation for New Hires, Volunteers, and Interns

Provides the following:

- History of an organization
- Policies and procedures (e.g. handbook, emergency procedures, code of conduct)
- Benefits
- Context for how one's position fits with the rest of the organization

Can be most memorable and meaningful when:

- Requiring active participation from your new members
- Is given in smaller segments over a period of time for better retention

Checklist for volunteer orientation:

<https://www.wildapricot.com/articles/new-volunteer-checklist>

Onboarding

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Noun

the action or process of integrating a new employee, volunteer or intern into an organization and the foundation for managing future expectations

Onboarding New Hires, Volunteers, and Interns

Provides the following:

- Introduction to organizational culture
- Organizational mission, vision, goals
- Organizational structure
- Job expectations
- Work resources
- An opportunity to be paired with a mentor (board member, a veteran volunteer, etc.)

Onboarding New Hires, Volunteers, and Interns

- Onboarding is not the first week on the job, it is the first 90 days up to a year.
 - Check in with new hires at 30, 60 and 90 days with open-ended questions.
 - Check in with new interns and volunteers after their first few assignments or regular and established intervals with questions appropriate to their roles.
- Some statistics:
 - 69% of employees are more likely to stay with a company for 3 years if they experienced great onboarding.
 - Up to 20% of employee turnover happens in the first 45 days.
 - New employees who went through a structured onboarding program were 58% more likely to be with the organization after 3 years.
 - Organizations with a standard onboarding process experience 50% greater new hire retention.

Sample Onboarding Questionnaire

1. How is your job going?
2. Is it what you expected when you were hired?
3. Any surprises? If yes, what are they?
4. Has training been helpful? Adequate? Lacking?
5. What training would you add for new employees?
6. Do you know where you stand in terms of your progress since you started working?
7. How are your relationships within your department/and in the office?
8. Do you have suggestions on how we could improve our communication across the department and/or company?
9. Are there any questions you still have/is anything unclear?
10. Is there something that we should be providing to new employees that we have missed?
11. Do you feel out of the loop about anything?
12. Do you have any general suggestions?
13. Do you have any general work needs that haven't been met?
14. Is there anything would like to ask that we have not addressed?

Name:

Hire Date:

Manager:

Date Meeting Conducted:

Performance Management

Performance Management



“An effective performance management system starts with a thorough goal-setting process, followed by regular feedback and reviews/appraisals. It also identifies employees' developmental needs and includes robust reward and recognition practices. The system also should encourage collaboration, teamwork, and communication.

Fundamentally, a performance management system is composed of **process** and **people** elements. The process element includes items such as job descriptions, rating criteria, the time period of performance appraisal discussions, and reward and recognition systems. **The key component of the people element is the manager**, who drives the system by setting expectations, communicating plans, encouraging development, and giving and receiving feedback.”

- Oberoi and Rajgarhia gallup.com

Goal Setting

Goals come from a combination of the following sources:

- Strategic plans
- Organizational objectives
- Individual job descriptions
- Employee interests/passions

SMART Goals

- Specific
- Measurable
- Action-oriented
- Realistic
- Time-bound

Performance Reviews

Performance Reviews can be used for:

- Compensation/promotion rationale
- Dismissal/demotion rationale
- ID'ing strengths and areas for improvement
- Career planning
- Mentoring
- A historical record of accomplishments

Main ways to evaluate performance:

- Checklist of attributes
- Rating (e.g. 1 to 5: outstanding → needs improvement)
- Comparison to others
- Narrative

** Nothing in a performance review should be a surprise to an employee if you've been actively managing your relationship and providing routine feedback.*

Motivation through Leadership

The Carrot Principle -- Basic Four

Good managers are seen as great leaders when they excel in four areas of leadership:

- Goal setting
- Trust
- Communication
- Accountability

Communication and Trust Pitfalls

- **Communication happens every day in every organization. But is it good communication?**
 - Most employees cite lack of communication (i.e. being left out of the loop) as a main reason for job dissatisfaction.
 - Employers often make decisions that do not get transferred in a meaningful way to staff (i.e this is a missed opportunity to convey broader company goals to your teams and to set individual employee goals).
 - When information does not get spread to all levels of the organization, employees are left to their own devices to fill in the blanks, resulting in a culture that breaks away from the influence of the leader.
- **Trust is damaged when:**
 - One's word isn't kept, ethics are viewed questionable
 - Blame is placed arbitrarily on others, mistakes are not acknowledged

Communication and Trust Corrections

- **Open communication means:**
 - Modeling organizational values and setting goals
 - Addressing rumors through open dialogue
 - Promptly answer requests for more information
 - Having an open-door policy
- **Trust happens when:**
 - Behavior is consistent (i.e. people are not afraid to approach and talk)
 - Integrity and ethics are present
 - Mistakes are addressed

Accountability

- Hold yourself and others accountable for working toward goals
- Identify mistakes
 - Mistakes can be a sign of innovation and should not automatically be a source for discipline
- Identify successes
- Show **APPRECIATION** when staff take initiative and take a risk, while keeping the end goal in sight

Appreciation

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Noun

the RECOGNITION and enjoyment of the good qualities of someone or something.

Recognition

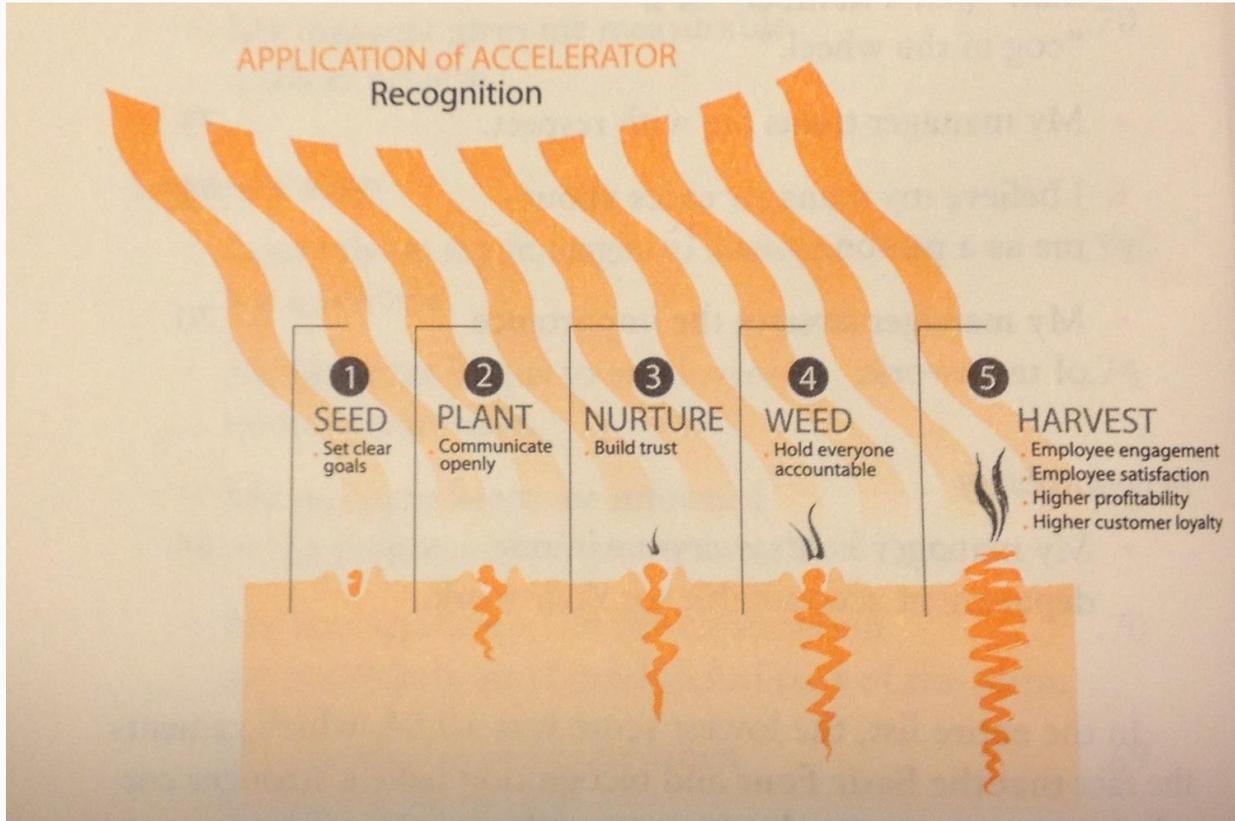
“the accelerator”

,rekəg'niʃ(ə)n

Noun

appreciation or acclaim for an achievement, service, or ability

The Carrot Principle -- Recognition Accelerator



Source: Gostick & Elton, *The Carrot Principle*

The Carrot Principle seems so simple, right?!

Gostick and Elton assert that managers are usually effective in a couple of the Basic Four and the few that are effective at all four still often fall down on the accelerant: RECOGNITION.

“Throughout conducting our research, when we have found leaders strategically using praise and recognition in concert with all of leadership’s Basic Four, employees are dramatically more engaged in their work and more satisfied with their jobs and with their leaders and their companies. The result is that team and company profitability is substantially higher.”

Source: *The Carrot Principle*

Main types of Recognition

- **Day-to-Day**
 - Handwritten notes
 - Small tokens of appreciation (branded gifts) or gift certificates
 - Snacks in the breakroom
 - Low-cost, high-touch
- **Above-and-Beyond**
 - Monetary reward, recognition ceremony at staff meeting
- **Career Recognition**
 - Milestone service recognition (not just at retirement) highlighting major career contributions (often underutilized)
- **Celebration Events**
 - Thank a team or an entire organization for achievements, completion of projects

Three Hallmarks of Strong Day-to-Day Recognition

1. Frequent

Research from Gallup shows that employees feel valued and committed to a workplace when they receive some form (even a quick verbal thanks) of recognition every 7 days.

That's about 35x per year if you count full-time working days!

2. Specific

A general “thanks for what you’re doing” to an entire team or one person lacks impact.

Instead, praise a person or team for a great idea, above-and-beyond customer service, or putting in some extra hours to get a job done.

3. Timely

“Don’t put off until tomorrow what you can do today.”

Managers will forget what they put off until the next day, week, etc. and employees will feel overlooked.

Why is recognition so important? Why isn't it second nature?

Benefits of recognition:

- Shows employees, volunteers, donors, etc. that their contributions make a difference in your organization.
- Can increase engagement and job satisfaction among staff and volunteers.
- It's contagious! You'll build a future generation of leaders.

It's very natural to say thanks for a job well done, but recognizing people frequently, in a specific manner and in a timely manner can prove to be challenging -- it takes some practice.

- Think about a time when you received a meaningful, non form-letter thank you.
- Conversely, when's the last time you wrote a thank you note for a staffer or volunteer for a job well done?

Activity: Sample Thank You

Giving Tough Feedback and Parting Ways

If you have created a culture of trust and accountability, then giving tough feedback can be as easy as giving appreciation.

- If not, the task of giving feedback when someone has not performed to expectations or trying to work with them to raise the level of performance becomes practically impossible.
- Much like appreciation, tough feedback for performance improvement should also be *timely* and *specific* as well as *fair*.
- The intent of feedback is to improve the individual's behaviors through coaching, not punishing.
- Corrective actions can be anything from a verbal warning to a written warning or suspension all the way up to dismissal.
- Policies and past practice most often dictate how future corrective events will occur.

Corrective actions should always be documented, even if the corrective action is verbal.

Practical example: An employee shows up late to work his/her shift by 30 minutes with no call or supervisor communication.

First thought: Do you have a policy or have you laid the foundation (through orientation or a code of conduct) that says that this is unacceptable behavior?

If yes, inform the employee that you would like to speak to him/her about the shift arrival and tardiness.

If no, inform the employee that you would like to speak to him/her about the shift arrival and tardiness and lay out your expectations. Consider adopting a policy to help you out should the situation arise again in the future.

Corrective actions should always be documented, even if the corrective action is verbal.

Practical example continued: An employee shows up late to work his/her shift by 30 minutes with no call or supervisor communication.

Listen to what the employee has to say regarding the event. Speak about **accountability** being a two-way street and how the action puts the organization or co-workers or yourself in a tough spot. Listen for cues that the employee recognizes that this action was inappropriate or apologizes or says nothing at all.

Corrective actions should always be documented, even if the corrective action is verbal.

Practical example continued: An employee shows up late to work his/her shift by 30 minutes with no call or supervisor communication.

Documentation (the missing step):

- Document (even in a management note to yourself, which is not part of an official personnel file) the specifics of the incident (date time), your actions, and the outcome.
 - Should you have the same conversation again, you can use this documentation as a reminder to your employee or yourself
- Send a follow-up email or memo to the employee
 - Thank you for speaking with me today regarding x. While I recognize emergencies arise, it is my reasonable expectation that you contact the office should you be more than x minutes late. Please see the attached policy for reference.
- Should you have to have the same conversation again, you will have history and can decide how to handle the next step.

Sometimes it becomes necessary to part ways with your staff (and even your volunteers).

The more clearly you communicate the mission of the organization, define your code of conduct, elaborate on the expectations for successful volunteerism, provide training, and give room for timely feedback, the chances of having to let volunteers and staffers go will be diminished.

Usually, the decision to part ways with a team member is not made overnight (unless a serious breach of conduct has occurred, in which case you need to be prepared to send someone home immediately and communicate that he/she should await further instruction/next steps).

Let's talk through some examples from the audience!

Let's Wrap it Up

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Q & A

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