Building & Empowering
Your Staff to Increase Your
Agency's Organizational Capacity

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Presented by:

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Polling Question

Which of the following best describes your position at your agency?

A. Executive Director

B. Program Director/Manager

C. Finance/Administrative Staff

D. Program Staff

E. Other --- please describe in chat box

Learning Goals

Participants will increase their knowledge about:

- how to assess their staff and personnel management needs
- how to develop staff workplans and succession planning processes for staff
- staff supervision, training, and performance reviews

The 3 P's of a Successful Organization

- <u>People</u> = the staff and leadership of your agency

- <u>Process</u> = how the organization functions and develops/provides their "product" (or services for nonprofits

- <u>Product</u> = the services that a nonprofit provides

<u>Source:</u>   Marcus Lemonis, *The Profit*, CNBC.

- *When organizations struggle, there is usually a challenge with one of the 3 P's.*

- *Successful nonprofits have strong and healthy people, process, and product (i.e., services).*

Our Staff is the <u>Most Valuable</u> Resource At Our Agency

Assessing Staff Needs

- "It's not a one size fits all approach."   We need to understand each individual staff person's needs, motivators, support, etc.

- How do you get staff input and feedback?   How do you respond to their feedback?

- What do staff need from their supervisors? (e.g., motivators, recognition, training, professional development goals, etc.)

- What type of communication works best with them?

- Do you meet with your staff on a regular basis?

How Do You Get Staff Feedback and Input?

- Hiring interviews and Staff Orientation Process: questions on what they need or look for from a supervisor, communication styles, motivators, etc.

- Supervision meetings: asking questions and getting feedback on their needs, review of project deadlines, and deliverables, staff workplans

- Performance Reviews/Evaluations: it should include questions of professional development goals, training needs, and feedback.

Other suggestions? What have you done to get staff feedback on their needs?

Employee Engagement

Does your staff know your agency's:

- Mission and vision
- History (how the agency was formed?)
- Philosophy and Core Values (e.g., anti-oppression, anti-racism, etc.)
- Organizational culture (including its commitment to leadership development and self-care)
- Grant info and deliverables

Employee Engagement = Investment

Staff Workplans

Every staff person should develop a staff workplan on an annual basis based on your agency's fiscal year.   Their individual workplans should include:

- Key deliverables (tasks, projects, or activities) that they are responsible for and timelines.   Staff should understand the grant deliverables they are responsible for.

- Program (and/or grant) reports and their respective deadlines (including any internal deadlines for agency review).

- Training and self-care activities and timelines.

Sample Staff Workplan Template

Goal/Objective #			
Key Activities	Anticipated Timeframe	Deliverables Produced	Completion Date

Professional Development/Training Goals			
Key Activities	Anticipated Timeframe	Deliverables Produced	Completion Date

Self-Care Goals			
Key Activities	Anticipated Timeframe	Deliverables Produced	Completion Date

Polling Question

Do you have your staff develop workplans every year?

A. Yes
B. No

Polling Question

Staff should develop their own workplans every year as it will increase their ownership for their job duties, tasks, and timelines as it relates to the organization's services and operations.

A. True

B. False

Employee Performance Reviews

- Completed annually

- Include opportunity to self-evaluation and feedback

- Problems or challenges should be addressed in regular supervision meetings so there are no surprises in the annual review.

- Professional development goals should be included for the coming year.

- Recognition should be given for good performance (e.g., salary increase, position upgrades or promotions when possible)

Succession Planning

- Succession planning should be addressed throughout the entire agency, not just focused on leadership transitions.   It should include transition plans for all Board and staff positions.

- Succession planning leads to overall organizational sustainability as the organization creates and institutionalizes systems and processes to solidify operations at all levels.

Source: NSTA Succession Planning Toolkit for Nonprofit SA and DV Organizations,

www.resourcesharingproject.org/nonprofit-sustainability

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Jumpstart Your Succession Planning Process

Strengthen (and document) your organizational systems and processes by including discussions of Succession Planning in:

- Board and staff meetings

- Individual supervision meetings, performance reviews, and staff trainings

- Anti-oppression and anti-racism trainings for your staff and Board

- Strategic planning and visioning meetings for your agency

Succession Planning

Document, institutionalize and review your existing processes and procedures for:

- Staff orientation (how to you train new staff)

- Ongoing training (including anti-oppression and anti-racism)

- Job descriptions (does it include what new staff need to know)

- Client-service procedures and processes (are there any gaps?)

- Staff procedures for workplans, grants, reports, computers, finance/administration, personnel, passwords, emergencies, etc.

- Master calendar of key due dates for grants, reports, Board, training, etc.

- Key administrative procedures, processes (banking, grants, etc.)

Any Questions?

Resources

- Engaging the Nonprofit Workforce: Mission, Management, and Emotion. OpportunityKnocks.org – The Georgia Center for Nonprofits: https://www.gcn.org/sites/default/files/ctools/OK_Engaging_the_Nonprofit_Workforce_Report.pdf

- Nonprofit Human Resources – Best Practices Toolkit, The Center for Nonprofit Management: https://cnmsocal.org/wp-content/uploads/2014/06/WB-Taproot-Pro-Bono-HR-Best-Practices-Toolkit-Guide-FINAL.pdf

- NSTA Succession Planning Toolkit for Nonprofit Sexual Assault and Domestic Violence Organizations, The National Sexual Assault Resource Sharing Project (RSP): http://www.resourcesharingproject.org/succession-planning-toolkit-nonprofit-sexual-assault-and-domestic-violence-organizations

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