Nonprofit**HR**

Building and Promoting Culture of Feedback

WEBINAR TRANSCRIPT

NonprofitHR

Building & Promoting a Culture of Feedback

Call it a Performance Management Revolution or the end to annual reviews, organizations are transforming their performance management programs to allow for increased opportunities for feedback. Feedback-driven models (often referred to as continuous feedback) encourage people managers and their teams to participate in ongoing conversations about both performance and growth opportunities. However, a continuous feedback model falls short without establishing and intentionally building a culture of trust.

Tune into this webinar to understand how to:
- develop a culture of feedback that increases your organizational capacity to deliver on your mission;
- provide increased opportunities for bi-directional feedback in support of employee engagement and development; and
- boost career development conversations as part of your workplace culture.

Alicia Schoshinski: Hello everyone, and welcome. Thank you for joining us today for Nonprofit HR's Virtual Learning Educational Event. Today's event is entitled Building and Promoting a Culture of Feedback. My name is Alicia Schoshinski and I'm the Managing Director of Talent & Development at Nonprofit HR. I'm going to be your moderator today and we have a lot of great content, so let's go ahead and get started. But before we do, I'd like to go over a few items so that you know how to best participate in today's event.

You've joined the presentation listing using your computer's speaker system by default. But, if you'd prefer to join over the telephone, just select telephone in the audio pane and the dial-in information will be displayed.

You'll have the opportunity to submit text questions today to your presenters by typing questions into the questions pane of the control panel. You can send your questions in at any time and the presenters will answer questions throughout, and then we will also have a Q&A session at the end of the session. Today's event is being recorded, and you'll receive a follow-up email within the next few days to view a link to the recording. Today's session is hosted by Lori Kipnis, Managing Director, Strategy & Advisory, and Laura Green, Team Leader and Senior Consultant. Now, a little bit about our presenters.

Lori Kipnis is Managing Director of the firm's Strategy & Advisory practice area. In her role, she partners with clients to lead projects related to HR effectiveness, assessments, performance management and talent management. Prior to joining Nonprofit HR, Lori served as the National Director of Human Capital for a nonprofit organization that partners with public school districts to improve student achievement within the nation's highest need schools. Lori brings more than 15 years of HR leadership experience within nonprofit, for-profit and public sectors.

And now about Laura Green. Laura Green is an accomplished HR professional who is passionate about partnering and collaborating with executives to strategically develop and execute organizational objectives. Laura brings thoughtful, intentional HR expertise to her clients in order to further the organization's mission and to support all facets of HR. She likes to collaborate to move the work forward and focus on client relationship management, stakeholder engagement, HRIS implementation, employee and labor relations, as well as supporting diversity, equity and inclusion objectives.

As mentioned, you will have an opportunity to ask questions throughout the webinar and at the formal Q&A session at the end of the webinar. So without further ado, I'll hand it over to Lori.

Lori Kipnis: Thanks, Alicia. As we begin, I just want to spotlight a little information about our Strategy & Advisory practice.

Under the Strategy & Advisory umbrella, we regularly partner with organizations to support more time-bound projects on topics like HR assessments, where we have an opportunity to gain stakeholder feedback and help understand how the HR function can be as effective and efficient as possible in line with your strategic priorities, both current and looking forward. We also support performance management and shaping and designing the performance management approach for all staff or working with the board of directors to shape performance management design for the CEO or executive director role.

We also provide support under that umbrella of learning and development, so through training and coaching programs, and regularly work with organizations to support workforce planning. We also provide HR thought partnership on an ongoing as needed basis. I'm happy to also turn it to Laura to share a little more about our Outsourcing practice.

Laura Green: Thank you, Lori.

Our HR Outsourcing practice is here to support organizations wherever they are with their HR support. Not only do we provide virtual support to clients as needed, everything from a CHRO to a generalist to an HR manager need, we also have services that can go on-site. We were able to partner with existing HR departments, or step in if you find yourself without one. So, we cover every aspect of talent management in the employee lifecycle, and we recommend you go to the website to learn more information.

Lori Kipnis: Thanks, Laura.

We want to start by highlighting our agenda items for our time together this afternoon. We'd like to review what is meant by the term "feedback culture." We also want to highlight why building and promoting a culture of feedback is important to your organization. We'll talk through some of the key essential elements to building a culture of feedback, and also leave time to walk through potential challenges that your organization may experience, either if you're preparing to launch a shift to more ongoing conversations, or perhaps if you've already implemented or in the first year of moving to more of a feedback-driven approach. And so, in walking through these challenges, we'll also talk through and suggest recommendations for preventing or overcoming them.

As we get started, we want to just spotlight what is intended by the term "feedback culture." And so, in its best form, a feedback culture is one where there's the opportunity for bidirectional feedback. The ability for managers and direct reports to offer and receive feedback on a frequent basis and for that feedback to have equal weight on discussions around both performance objectives as well as development goals.

It's also an environment that cultivates authentic, meaningful, ongoing coaching and development opportunities. It's one where it supports role clarity, so that ability for a direct report to have a crystal clear understanding of their key responsibilities to understand their piece to the whole. So, it is that cascading goal setting piece of how individual goals align with team-level goals and how those goals align to the organization priorities overall.

And also, it allows for ongoing conversations between a manager and a direct report that are agile and adaptable. So, as goal's shift, there's clarity around the real-time expectations, performance objectives and what might be shifting off an individual's plate to allow for new priorities.

A feedback culture is also one that allows for connection and calibration, and we know that both of those factors help build and support trust.

Laura Green: I was going to say, one thing I wanted to add to that was depending on who you ask, you'll get varying definitions of what a culture of feedback is. And so, we encourage those who are looking to develop this, to determine what that means. What does that look like at our organization?

As well, we want to reiterate that with bidirectional feedback, it goes both ways. It's very easy for organizations to think, "We're a culture of feedback, and it relies on management and leadership to consistently deliver feedback." But to truly have a culture of feedback, staff need to feel comfortable and know that they can also provide feedback to their managers and leadership.

Lori Kipnis: I think that's a great point, Laura. In seeing the four supports that we just talked through, they certainly can be anchors to your organization, but to Laura's point, and you'll hear throughout our presentation today, we'll be talking about the importance of providing training to managers that are providing feedback. And as part of that training, it's a great opportunity to norm and calibrate as a group how you are defining feedback culture within your organization to make sure any nuances tied to your organization are incorporated in some of these supports that we've just talked through tied to feedback culture. And as we move on, we want to go ahead and talk through the benefits, as well as what we know from best practice research are the why's around moving to providing more opportunities for ongoing feedback conversations.

So, over the last few years in the HR community, I'm sure many of you have seen some of the really great research that's come out from Gallup, from Harvard Business Review and from Deloitte. We wanted to spotlight the Gallup research from 2017 to really ground our discussion. So, as you'll see, Gallup put out Re-Engineering Performance Management, and it highlighted some emerging shifts at the time. A shift from traditional performance management to a focus on development. And so, even tactically reframing performance management from a verbiage standpoint, and that shift to

performance development or performance feedback process, has come out of the research. It also highlights the focus on individual talents, more forward-looking feedback, performance needs and integrating an overall sense of purpose. So, again, it's that piece to the whole: How does an individual role relate to the organization's priorities? How are organization's priorities in step with the overarching mission? And so, we see from the research, in the past, there was more of this historical view of my boss and my one-point-in-time annual review, where I'm going to receive, more than likely, a backwards-looking feedback of how I did over the last performance cycle.

What the research shows, and what we know in the HR community, as best practice tied to providing more opportunities for feedback, is the shift of the role of the boss to one of the coach; as well, allowing for more ongoing conversations, where you're tying in equal weight, again, not just on performance objectives, but on how that employee can develop, and the overall purpose and that piece to the whole with the role.

Laura Green: I was going to share that if you look at the comments around our future, purpose, development and ongoing conversations, these are comments and phrases we're used to hearing that are usually associated with millennials. Seeing how millennials were born between 1981 and 1996, so they fall between 25 and 40 now, and make up a large portion of the workforce, this makes sense. This is a group that started using cell phones to communicate with their parents in high school, or during the day about what they are having for dinner or what their schedule is.

Previous generations, we're used to, "This is the way it is," and it doesn't necessarily have a say in things that happened or affected their lives. And so, since this group is used to being engaged and having input and say around things that affect their lives, it shouldn't be a surprise that things, as it relates to feedback, are trending to a more regular, interactive process with more intrinsic motivations as opposed to being given, "Here's your goals. Here's their deliverables. Here's how you're doing."

Lori Kipnis: Very true.

And as we continue to just look at some of the key findings of the research, Gallup reflected on the key factors that the modern workforce seeks in a career. If we look at the column to the left and define employees' top needs from employers, we saw that the key factors included opportunities to learn and grow, so that development piece; a good manager or a high-quality management; interest in the type of work; and an opportunity for advancement. And so, we're seeing those themes around purpose, development, the coach.

When we look at an employee's top needs from a manager, it's interesting to see real job clarity spotlighted, as well as accountability and that opportunity to have ongoing feedback and communication.

Laura Green: Yeah, looking at this information, Lori, I would say, it's no longer enough for employees to show up, do their job and leave. It presents entirely differently now.

Lori Kipnis: Very important, very important to all of those listening is thinking about employee retention and supports that an ongoing feedback process can provide, as far as engaging, motivating and providing feedback to progress monitor goals to ultimately retain your high-quality employees.

And so, that's a nice transition into just walking through why a focus on building a culture of feedback is important. And so, if we start at that individual level, so the employee level, it really speaks to employees feeling valued. Again, that retention and engagement piece; that by having more opportunities for feedback conversations, employees feel recognized, they feel heard, they have an opportunity for voice and influence and it also speaks to development. By providing ongoing feedback, it's an opportunity to motivate, and to motivate based on real-time data. To celebrate accomplishments, to celebrate and recognize how an employee facilitated a particular section of a staff meeting or a presentation. Again, they're hearing that in real time, and they're aware that their manager or other levels of management or peers are seeing that, that it's visible. So from a development standpoint, for motivation, for support and overall, career development opportunity.

We've talked about and it's worth echoing and re-highlighting the importance of how it provides clarity of expectations so that an employee and their manager are in step with what is expected. And it builds productive relationships. I think Laura and I really want to highlight the fourth bullet out of everything on this chart. By starting to build that connection, that collaboration, through ongoing feedback meetings, you're building trust—that's the goal. So that when there are challenging moments, when there are moments of uncertainty or if something's escalated to the level of crisis in your organization, that employee and their manager, they already have that trust built. So, they can more swiftly pivot to being solutions oriented and problem solving. Rather than using that moment, that's a challenging moment, to start building that trust. So, it's just so key that by having more opportunities for feedback, it really helps to nurture and build connection between a manager and direct report. And, overall, this helps support fostering teamwork.

If we then look at why building and promoting the culture is important from a manager level, of course, as you're hearing, it helps with that role clarity. So, it ensures that a manager and their direct report or direct reports are in sync, have agreed upon expectations and are able to make those

changes to goals in real time, should there be shifting priorities which we know in these times, being so dynamic, is evermore important.

It also allows from a manager standpoint, the ability to reinforce or encourage an effective way of work. It's naturally building in that opportunity for ongoing coaching and development, and it allows for opportunities for bidirectional feedback, as Laura and I spoke about at the start.

So, by integrating discussion prompts—what can I, as your manager, or organization, do more of, less of or modify, to support you in meeting your objectives, to support you as an employee in our organization—it's allowing for that manager to receive and offer suggestions around supports on an ongoing basis. Again, all of this is to help support the accomplishment of performance objectives, to be able to co-advocate for your employees growth goals and to really help support delivering on the mission.

Finally, I just want to spotlight if we take it one step above and look at this from an organizational lens, ongoing feedback conversations work in support of employee development and growth. It helps to build stronger working relationships by having more opportunities for connection and collaboration. And, as I've mentioned, this is all working to have greater impact on your mission overall.

I also want to spotlight career development conversations. When we're talking about the term development, for those of you that are participating in the webinar today and work within smaller organizations or organizations that have experienced budget restrictions, there's often the question of managers: Should I hold off on discussing development goals or engaging in career development conversations because I'm not aware that our organization can provide opportunities for more of that traditional view of vertical promotion or vertical growth? And one of the key pieces that Laura and I want to emphasize is that now more than ever, in these dynamic times, you want to keep career development conversations alive and well. And, for an organization that may not have vertical opportunities, it's important to spotlight opportunities for adding depth and breadth within the role.

Start talking about what the skills are that can be developed over the next three or six or 12-month period, that will help the employee to think about next steps for when that opportunity arises. In the same way, what are opportunities to participate in leading projects, in mentorship, in shadowing, in ways to get exposed to different teams, different aspects of the organization? Again, that speaks to more of expanding depth and breadth.

It's also important to think about how an employee may be able to attend a meeting that they normally wouldn't attend to observe certain skillsets. If you know an employee is thinking about future leadership opportunities, how can they observe some of those core competencies tied to

leaders such as, communication, negotiation or budgeting? How can they sit in the right conversations, in the right meetings, that they may not normally be an attendee of to gain those skills?

Lastly, we just want to highlight that this is an opportunity for a manager to be really deliberate in the messaging of the opportunity. So, many of us can say, "Why don't you go ahead and sit in on that meeting next Tuesday?" But it really takes it to another level to be deliberate, and say, "I'd like you to sit in on that meeting because I know that you've identified a leadership opportunity tied to your future growth. You'll be able to observe X, Y and Z," or "I want you to observe X, Y and Z and then, in our next meeting, let's talk about what you observe." It has a whole different impact, and it helps to express the clarity of that leadership opportunity or that development opportunity.

Laura Green: Lori, thank you for sharing that example. I'd like to add onto that.

It's an opportunity for managers and supervisors to really think outside the box. What does development look like? And, as she shared, when you're intentional about sharing with your employee why you want them to do that or how this applies to their development as a professional, they really appreciate that. Also, again, that contributes to the building trust because now, you are showing an investment in their professional development and growth.

Lori Kipnis: Thanks, Laura.

As we wrap up talking about the benefits, we see, again, just some of the data. When managers provide more regular feedback, and this data speaks to touch points tied to daily feedback, their employees are six times more likely to strongly agree that they receive meaningful feedback and they're three times more likely to be engaged at work.

And so, I'll turn it to Laura to speak to what a culture of feedback looks like.

Laura Green: Thank you, Lori. So, we're going to talk through some of the key elements of what a culture of feedback looks like.

As we shared earlier, if it starts with leadership, it's based in trust, clear communication and expectations, transparency, accountability and collaboration. I'd like to re-iterate that a culture of feedback is one piece of trust, but it's not everything. And so, it's on leadership to truly evaluate the current state of the culture and trust levels within the organization before jumping into announcing, "We're a culture of feedback."

All right, so it starts with leadership. It is the responsibility of an organization's leadership to own and model the behavior they want to see in their organization. A culture of feedback isn't only in giving feedback, but also being prepared to receive feedback. We talked about this a bit earlier, but organizations have to be prepared to receive feedback. That's the only way that this will work.

Lori Kipnis: And I'll just add, from a leadership standpoint, we've talked earlier about how with role clarity, it's helpful to have cascading goals. It's suggested if you're a leader listening to this webinar, or if you are going back to discuss this approach to leadership, to do a pulse check to staff, to ask if they can articulate the strategic priorities of the organization because often, an organization's leader can assume that the strategic priorities for a given year, or tied to a multi-year plan, are clear to all staff. But that's not always the case, so rolling out a feedback process is helpful to make sure that staff are able to articulate your strategic priorities, your organizational values and if you have set core competencies. Then, as Laura said, echoing the importance of leadership and modeling the conversations, so if you are rolling out the expectation, for instance, that you're having no less than quarterly feedback conversations as members of leadership, that should be modeled in your one-on-ones as well.

Laura Green: Thank you, Lori. As we shared earlier, a culture of feedback is rooted in trust. The Merriam-Webster Dictionary defines trust as "an assured reliance on the character, ability, strength, or truth of someone or something; one in which confidence is placed."

A culture of feedback, again, is rooted in trust. This is trust that people can give feedback without repercussions, as well as trust that they can receive feedback with their professional development in mind. And what this is saying, essentially, is that individuals need to feel safe when providing feedback. If there is low trust, building a culture of feedback won't be developed in weeks, or even months. It may take longer, but it will be worth it. And, again, that starts with evaluating the current trust levels at the organization.

So, we'd like to ask you just to think about, when is the last time you engaged your staff around the topic of organizational trust? And, just to re-iterate, where there is low or no trust, it's almost impossible to develop a culture of feedback.

Lori Kipnis: As Laura said, that's where you may want to consider assessing your culture, conducting employee engagement surveys and working on the trust issues, as you're thinking about ways in which to provide training and the best way to pilot and perhaps stagger movement from if you're currently in a more traditional performance management model to one with more opportunities for feedback. But it is anticipated to have less effect if you are viewing your culture, leadership's viewing the culture, as low trust, and you roll out an ongoing conversation model without working on building trust first.

Laura Green: Thank you, Lori.

So, we have a quote from Radical Candor: "One of the reasons feedback fails occur is because people often forget they need to establish trust by soliciting feedback before giving it, especially if they're the boss."

One thing we'd like to add to this is that there are many avenues to solicit feedback, both publicly and anonymously. It's imperative that staff have options to share their feedback, especially if it is in an environment where there's low trust.

From Gallup, this quote reads that "...effective performance management requires managers and employees to take the time to review progress toward expectations, discuss lessons learned and plans for the future."

A culture of feedback is forward thinking, it's not just backwards. It's the evolving and dynamic nature of performance, and looking forward allows the room for agility and to look at what's coming down the pipeline. It helps make the term "learning culture" a reality and not just lip service. And this is where that coaching really comes into effect because while you can look at and provide feedback on previous actions, you can really plan for the future with your direct reports.

All right, again, what we discussed before, a culture of feedback encompasses clear communication and expectations, real-time data points and examples. Something that we often see at organizations, at many nonprofits in particular, is a culture of nice. While it may be pleasant, it unfortunately leads to toxic positivity.

There was a situation where an employee was leaving an organization, and so we were having an exit interview and feedback about their supervisor and their relationship. And they shared that while their supervisor was the most compassionate and kind individual, and always wanted to know how they were doing and had nothing but good things to say,
they would have given an arm and a leg for clear feedback on their performance, for clear feedback and clarity of expectations around their role. When they asked for it, they received, "Things are going well, you're doing fine." But they wanted to know, where can they dig in? How can they do better? So, again, providing, clear expectations and clear communication, that's not going against a culture of nice, but what it does is it really sets the employees up for success because it ensures that you're on the same page.

Another tenant is transparency. Again, the sharing of strategic priorities helps to support change management, and it also allows staff to feel like they know what's going on at the organization in real time.

Accountability, progress monitoring in accountability. The impacts of accountability cannot be overstated. From the Association of Talent Development, from that perspective, accountability allows individuals to consciously decide to achieve something. When you do that, it increases your chances of doing so from 10-25%. When you decide when and have a clear how, your chances of succeeding go up to 50%. And when you commit to someone that you will do it, your probability stretches to 65%. So, when you create a specific accountability appointment with the person you are committed to, the odds are in your favor—they go to 95%.

And then, the last one is collaboration. With this is goal setting and growth advocacy and the sharing of ideas. We recommend you allow for collaborative goal setting. Again, this is that interactive opportunity, that engagement. Don't have someone come in and tell someone what to do. It's saying, "Here's what we need. How do we partner on this?"

And it also, again, allows the opportunity to provide input, which leads to a sense of ownership over the established goals. And when individuals feel a sense of ownership, they're more likely to be excited about it and to see the work through.

Lori Kipnis: Laura, I just want to add, while we're still on this slide, to your point around providing examples, providing real-time data points. In rolling this out to people managers, this does not have to be heard as a large lift. Some tactical examples that we have seen as really effective, particularly in environments that can be defined as a culture of nice, is something such as really providing Track Changes back to an employee. So, if you have an employee that shared something with you, as a manager, and it was a writing sample, if you're making changes and finalizing that document, add on the ability to Track Changes. And, instead of keeping that within your own files, share that back and say, "Let's walk through this in our next meeting," and talk through the why, why something was reformatted or words were changed, so that it's a learning opportunity. And, so that direct report is getting more in step for the next assignment, to understand the intent, or the organizational or manager expectations with voice and tone in that writing example.

The other piece that I just want to emphasize is around transparency.

In dynamic times like we've been in, managers, leaders, are not expected to know all the answers, but it is important to keep the communication ongoing and being comfortable with saying, "This is what we know now, and this is when we'll come back and share more."

And also, in the one-on-one feedback conversations, for managers to be comfortable if, in the world of bidirectional feedback conversations, an employee asks a question perhaps around, "Can I attend this conference?" and it's X dollars and a manager is not crystal clear on if they can meet that request, it is certainly okay to remind managers that you can say, "Let me take that under review, and I'll be back in touch." And keeping to that timeline, and that follow-up promise. Being okay that you don't always have to have a ready answer is part of the ongoing feedback conversations.

Laura Green: Thank you, Lori, those are fantastic examples. Thinking about the Track Changes example you just shared, again, that's thinking outside of the box. All developmental opportunities aren't going to be highlighted as, "This is professional development," it's, "Here's how we do this and here's why." Every learning opportunity that you can provide, you should try and seize it.

Lori Kipnis: Bridgespan's research really speaks to that in such a wonderful way where they highlight, which many of you may know as more of that 70-20-10 model where, from a development perspective, 70% of an employee's development activities are being supported through on-the-job opportunities and being really effective in building, learning and employee growth. Then, that 20% being more through mentorship, either internal or external. Then, that 10% being more of the traditional forms that folks may think about for development around more of the webinars or the books. So, keep that in mind, particularly if you have restricted budgets, of just the value of on-the-job opportunities, with examples as quick as the use of Track Changes.

And lastly, as we begin to shift to challenges, for those listening that are a culture of nice and hearing that example about Track Changes, it really speaks to the employees that might be your emerging professionals. Those that may be receiving feedback similar to the example Laura had earlier shared, where they're hearing, "You're giving 100%. We just need to see you give 110%." What we are hearing as HR professionals, particularly from emerging professionals, is it's really hard to understand what a manager means by that 10% variance. What does that look like? By not being clear, by not providing real-time examples or data, it's doing a disservice because that employee may go and try to improve in three different ways that the manager never intended, or thought were strengths to begin with. So, again, that value of really emphasizing the use of data and examples as much as possible in providing feedback.

Laura Green: Yeah, great examples. Be as specific as possible. Always.

So, we're on to some of the challenges associated with building a culture of feedback. The number one challenge is the need for manager and leadership training. Here on this slide, you can see research revealed that eight in ten managers lack skills and providing feedback and coaching to employees. Research shows that managers tend not to be at their best in times of stress and pressure, and we want to re-iterate that, when it comes to manager training and leadership training,

it cannot be one and done. You have to be very intentional. How are you stepping into this? How are you going to continue to support and build your managerial skills? It is a lifelong endeavor. Your consistently learning, changing and building up that skillset. And it's important that your managers and leaders are committed to continuous training as it relates to providing feedback and coaching employees.

The second challenge we'd like to highlight is the need for development of manager and leadership principles. Again, it's important that you outline, whether it's in the job description and core competencies, and actively communicate the expectations for employees who have supervisory responsibilities; the role of the manager and leader as a coach; and the ability to offer and receive feedback, being flexible and having empathy. Again, we recommend having a goal to build their skillset around giving and receiving feedback. This should be one of their objectives.

Lori, was there anything you'd like to add to that?

Lori Kipnis: No, just as you said. If you're an organization that is about to shift to having more feedback opportunities, as Laura mentioned, how great to let folks know that if you manage one or more people, you want at least one of their development goals in this roll out to be focused on coaching their employees and taking part in regular feedback conversations. I just want to emphasize that it's a real opportunity, once you defined your manager and leadership principles, to integrate these across your talent management practices and to build behavioral-based interview questions for any roles that have supervisory experience, so you're able to assess for that cultural add piece. And then, as they're coming in, that they're hearing clearly, "This is what it means to be a people manager at our organization." And that's continued then through their performance management development goals. Keep that alignment as much as possible, so everybody has the same understanding, employee and manager alike, of what it is to be a manager and a leader at your organization.

Laura Green: Yeah. Unfortunately, something we see all too often is that the people management piece is missing for individuals who are hired into a management role or who are promoted into a management role. Often, we see individuals who are really great at the job who have those strong technical skills promoted into manager positions. Then, that people management piece is kind of brushed to the side because the assumption is, "Oh, if they do the job well, they're going to be great people managers," and that's not necessarily true. That's why it's important, that it's highlighted, that leadership is intentional about making sure that managers know what's expected of them and sets them up for success by providing training and resources to be able to perform that role successfully.

Lori Kipnis: I will just add, what we know at Nonprofit HR working exclusively with social impact organizations, that it's your people that deliver your mission. So, it is incumbent that managers make

time and, again, through continuous feedback models, that time is embedded in an ongoing standing meeting. It's not meant to be an additional lift of additional meetings, but make time to coach and develop your employees. That is how you retain your talent to, again, have impact on your mission.

Laura Green: One thing that I'd like to add to that, Lori, you just reminded me, is that the more regular these conversations become during your regular check-ins, the easier it will be to have those conversations when things may not be going so well. And it all gets back to that trust piece. So, yes, get in the habit of sharing feedback and requesting feedback. It doesn't have to be a formal 15-page lift of an annual performance review. Make it one of your topics for each of your conversations.

And then, some additional challenges in lower trust environments. We need to begin with connection and collaboration, engaging people. Again, this isn't something, a directive, that can be thrown at them. You want that buy-in, you want people to feel ownership, like they're a part of it.

Again, it needs to be championed and modeled by leadership. Leadership has got to support this 100% and set the example. They have to model the behavior that they expect to see in their employees.

The last one there is a non-retaliation policy. You should have one, and you need to make sure is it up to date. When is the last time it was reviewed? Also, how easy is it for staff to find? Do staff know where it's at? Do they know the policy? Are they comfortable with the policy? Do they know how to interpret it? It's important to make sure that they're familiar with that, and again, this goes back to building trust. Highlight to them, "This is the policy we have in place and we follow that, we take it seriously."

Then, inconsistent and/or unclear professional development policies. When is the last time that you evaluated your professional development policies? Do staff know what the policies are? Do they know how to access them, request resources or funds if they have them? It's on you as an employer to make sure that these items are fleshed out and communicated clearly to staff and that they know where to find these resources.

Lori Kipnis: I'll just add that, with an equity lens in mind, it's important to make sure you are proactively clarifying if you do offer a professional development budget, how that's distributed or, as Laura mentioned, who from an organizational point of contact standpoint employees can go to with any questions. You want to make sure that employees at all levels, with all comfort around voice and influence within the organization, can be making requests for equivalent development opportunities, and at least know what is within range for reimbursement.

So, one employee may feel more comfortable asking for a $1,500 conference, whereas another employee may not. And so, to be able to know what is reimbursed and what the policy guidelines are around professional development, that's important to help clarify and have accessible to all employees.

Laura Green: Thank you.

All right, next steps. First of all, status of goal setting. Again, clarify strategic priorities at the organizational, the team and the individual level.

Lori Kipnis: I'll just add here that we understand and we're actively partnering with organizations that have found the need to reshape strategic priorities in light of our multiple pandemics. And so, if your organization is shifting by needing to either refresh an existing strategic plan or feeling the need to move from more of that historic three or five-year strategic plan to a one-year strategic framework because of how dynamic the times are, that's okay.

What we want to make sure is that all staff are hearing what leadership is viewing and what is viewed organization-wide as your priorities for the year ahead. This doesn't mean it always has to be in that ideal state of the final written document, but that as an organization, you're clear and aligned, and everyone's able to articulate that these are current strategic priorities from an organization level. And then, empower your teams to be able to define team-level goals and as much as possible in your one-on-one conversations that you're helping to identify what and how those individual goals align with the team and organization-wide goals.

Laura Green: Yeah, thank you, Lori. The second one here is integrate discussion prompts into those standing meetings.

Again, this is not intended to be a huge lift. It's about clarity around what you can do more of, less of or modify in support of the established goals you've got as well as clarify those professional development policies. Make sure everybody's aware and that they know the correct avenues for requesting professional development resources.

The last one is to provide manager and leadership training and clarify expectations. Again, offering and receiving effective feedback across cultures and managing/leading through change. It is so vital that managers and supervisors are fully aware of the expectations on them in that role. What does feedback look like? How do you give that? How do you receive that? How do you encourage staff to provide feedback? It's our role to make sure that they are confident and have the resources to do that well.

Lori Kipnis: It's also based on available bandwidth and based on budget. If you're looking to move in this direction, but you're more limited on both, one of the ways that you can start to move forward is start to share a shortlist of bidirectional prompts, like the prompt that suggested asking, "What can we do more of, or less of or modify?" And ask managers to start to integrate that shortlist into their one-on-one meetings so that they're starting to get more comfortable with some consistent bidirectional feedback discussion prompts.

The other piece is, if you don't have the budget yet to support manager training or you need to plan for it a few months out, one of the things you can do is start to article share. Pulling some of the articles that we've mentioned, some of the research that we've found helpful and through the use of Nonprofit HR's blogs as well, start to share out some of these think pieces so that managers can start to understand the why behind having more frequent feedback conversations as you plan for larger initiatives tied to shifting to more ongoing conversations.

Laura Green: Thank you, Lori. I believe that takes us to the questions portion.

Alicia Schoshinski: Great, thank you Lori and Laura for all the great information you shared this afternoon, it's a timely discussion. We definitely have gotten a few questions in and if anybody has other questions, please type them in the questions box and the team will get to as many questions as we have in the remaining time.

So, let's see. One of the first questions we have is: How would you align pay for performance with the continuous feedback model?

Lori Kipnis: Sure, and Laura and I can speak to this high level.

One of the things that I think we want to clarify is that you can have, or move to, more of a merit-based or pay-for-performance model and have continuous feedback conversations or more qualitative approach to your performance development or performance feedback process. And so, what I think sometimes is misunderstood is that performance, as I just shared, can certainly be part of pay for performance. But what is suggested is that you are decoupling the conversation around compensation to your feedback conversations. So, feedback should be ongoing with that performance and development mindset that we've just talked about. When you're thinking about the structure of a pay-for-performance model, that is truly unique to your organization, but may take in, and often does, performance indicators. So, you at your organizational level may set specific KPI's, your key performance indicators. An example might be progress against established performance goals, and that may have a certain weight to your overall calculation of what goes into your pay-for-performance model.

So, again, it's unique to your organization, but performance can still have a place in it. It's just up to your organization to think about it in that regard. So, we want to just emphasize that we're not saying, and the greater HR community is not saying, decouple performance from pay for performance, it's just more of the timing so that employees are not thinking about are associating ongoing development and performance conversations with when they're receiving a salary increase. Laura, do you have other comments to share?

Laura Green: No. I think you captured that perfectly. And reiterating to staff to make sure they understand the process because they might be going into the conversation thinking, "Oh no, does this affect that?" Again, just making sure that, that goes back to transparency, they're aware of the process.

Lori Kipnis: Absolutely, and that should be underscored, particularly for all of us on the call applying that DEI lens, to have a clearly articulated compensation strategy so that folks understand the guidelines around your pay-for-performance model is key. And to Laura's point, the trust and the transparency are all certainly byproducts of staff that are understanding how compensation is shaped.

Alicia Schoshinski: Great. Thank you.

Another question is from somebody who says they have a team-based model in their organization, and they wanted to know how continuous feedback works under that type of model versus under a more traditionally supervisor-based one.

Lori Kipnis: Well, I think a team-based model is a great opportunity to be using prompts similar to what Laura shared with, "As a team, what can we do more of, or less of or modify to work effectively together to support one another?" So, introducing similar bidirectional feedback prompts is certainly a value. The other piece is when we talk about those cascading goals as a team to make sure that you're fully calibrated around what you're defining as your strategic priorities, both now and looking forward. Then, being able to take that on an individual level, to progress monitor and share out, so it's visible across the team where individual roles are contributing and their progress against what have been established as team-level goals. So, from a goal setting standpoint, and a support standpoint, those are two opportunities as far as feedback conversations.

And then lastly, I'll just add that it allows for team discussion around development goals. Based on what we're being expected to do and perform based on our team-level goals, in step with the organization-wide priorities, what competencies do we feel as a team we need to make sure overmastering and developing now to be where we know we're headed? So to discuss that collaboratively is a great opportunity for more team-based models.

Alicia Schoshinski: Right.

And then, another question is about how you build a culture of transparency and safe feedback when that is not something that's valued by the organization's leadership?

Laura Green: Well, I would say the first step, as we've discussed, is making the case to leadership for that because that's truly where it begins. As we shared, that's going to be one of the biggest hurdles is if leadership is not 100% behind developing and implementing a culture of feedback and leading by example.

Lori Kipnis: I think also, for participants joining, if you know your leader is more data driven, you saw us reference Gallup, so pull out some of the best practice research that can help ground your discussion of why you're suggesting moving towards providing more opportunities for feedback.

We've also seen from the research that if a leader starts asking for feedback, that ripple effect of then how that plays out to staff sharing out feedback, and in turn, asking for feedback. So, it goes back to that modeling and the importance of modeling, but they could even test it out. Spend a month asking for feedback, and see what potentially that domino effect has been on the culture. So, again, the use of data may be helpful depending on the approach of your leader.

Alicia Schoshinski: Great, and then in a similar vein, not necessarily related to the leader, somebody was asking about how to deal with resistance of the perceived labor-intensive aspect of a continuous feedback model versus it only being something they have to do once a year?

Lori Kipnis: Well, I'll start off and then, Laura, I'd love your input too.

I think that if you are shifting to this model, it does represent change. And so, like any change management process, I think it's incumbent of those leading this initiative, if that's HR or other roles, to be transparent that in the pilot year there is going to be the investment in some additional roll out, trainings, expectations that folks are taking part in that article share, the additional, as Laura mentioned, of what should be ongoing manager trainings. And so, to be transparent of some of the initiatives and supports that are going to help you implement this process with fidelity.

But, ultimately, as the culture of feedback is built and as managers and staff alike are more comfortable and are armed with some of those bidirectional feedback prompts, the model itself is meant to take away that feeling of lift and rather be more organic in your in your culture and be more collaborative. So, it is truly embedded in your one-on-one conversations, which may take the shape of virtual meetings, may take the shape when we more fully return to the workplace as walk-

and-talks. But it is meant to actually take away from what can be that heavier process of once a year, pulling together the backwards-looking feedback and setting aside time for a traditional annual review meeting.

So, having HR or the individual in your organization that's going to lead this charge really helps staff understand that kind of traditional S curve of walking through the start and stop this change process. It helps them understand, ultimately, how this actually can have a lighter lift with more impact.

Laura Green: Similar to what we actually discussed earlier with employees, they want to know the why. That's exactly what we need to do for our organizations when rolling this out. Ensure they understand the why. Change management, there's a reason it's entirely own discipline, it's not easy, but when you're transparent, as Lori said, set them up for success and make sure they understand the why. Once it becomes a part of their routine and they feel confident in doing it, it won't feel like such a huge lift. But yes, there will be growing pains during the first year. Managers will learn what works for them, they'll learn what perhaps doesn't work, what it should look like. But it is intended to remove that huge burden, it's just getting that buy-in, similar to what we talked about, with establishing the goals—getting the buy-in and making sure everybody has all the information they need to feel confident stepping down this new path and this new way of doing things.

Alicia Schoshinski: Great. Then, one final question is from somebody who says they, or their organization, has a goal to be a learning organization. How important is it to train, not only supervisors in giving feedback, but also employees in receiving feedback as part of that continuous feedback model?

Lori Kipnis: It's such a great point. That's such a great question. It's equally important. I think in rolling out the model, it's important that all staff understand the approach. So they are understanding what the expectations are for ongoing conversations. Are there certain guidelines around how often conversations should take place tied to goal setting specifically?

Are there opportunities to really anchor annual conversations around performance and development goal setting? All those what ifs that an employee may have come to mind in hearing about this new process.

And then, equally important, when we talked about that article share to managers, is there are great resources that can go out to all staff around the importance in everyone's role in building of performance and feedback culture. So, definitely keep employees in mind when you're developing your learning and development plans as well as when you're looking for resources that can complement more of an article library to support the implementation of a continuous feedback model.

Alicia Schoshinski: Great. That is all the time we have today for questions and answers. I do want to thank everyone who attended today's webinar. We hope you found it to be valuable, and I certainly thank Lori and Laura for leading today's dynamic discussion.

So, we have shared out a link to the new blog by today's presenters, and be sure to check it out. If your organization is a social enterprise, be sure to keep an eye out for additional webinars for that group of people. We have many more webinars coming your way in 2021, so be sure to check out our events calendar at nonprofithr.com/events.

Also be sure to complete the feedback survey that will pop up once the webcast has ended. Your comments help us with our planning and can inform the topics we cover as well.

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Thank you, everyone, and we hope you have a wonderful day.