



Nonprofit**HR**

WEBINAR TRANSCRIPT

# When & How to Shift Your Organization's Performance Management System

[NONPROFITHR.COM/EVENTS](https://nonprofithr.com/events)

# When & How to Shift Your Organization's Performance Management System

The world has significantly changed over the past two years, including a massive shift to flexible schedules and working remotely. Therefore, how we evaluate performance and support professional development must shift as well. When managers provide consistent feedback, research shows that employees are three times more likely to be engaged. Beyond using feedback for employee surveys, sharing challenges or documenting annual performance reviews, leaders can implement a continuous feedback process that uses that information to discover needs in real time and where to invest more. If put in a proper framework in any organization, continuous feedback will lead to optimized performance and more engaged employees, building a culture of high performance. Tune in now and learn how to support your leaders in becoming more effective when delivering and receiving feedback to support their people in an ever-evolving work environment.

## You will leave this webinar understanding how to:

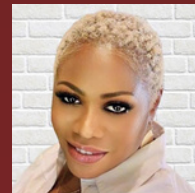
- Determine if your current feedback process is working
- Shift from a traditional, singular event-driven performance management process to a continuous feedback model using proven strategies
- Address the gap between the skills employees have and the skills employees need
- Strengthen your leaders' ability to give and receive feedback through effective training

## SPEAKER



Jennifer Morgan, SHRM-SCP, PHR  
Senior Consultant,  
Outsourcing\*

## MODERATOR



Atokatha Ashmond  
Brew, MBA  
Managing Director,  
Marketing & Strategic  
Communication

*\*formerly Consultant, Outsourcing*



[DOWNLOAD WEBINAR  
RECORDING](#)

## When & How to Shift Your Organization's Performance Management System

**Atokatha Ashmond Brew:** Hello everyone and welcome. Thank you for joining us this afternoon for a Nonprofit HR's Virtual Learning Education Event.

Today's session is entitled, When & How to Shift Your Organization's Performance Management System. My name is Atokatha Ashmond Brew. I am Managing Director of Marketing & Strategic Communication for Nonprofit HR. I will be supporting our presenter during today's session.

Before we get started, I would like to go over a few items, so you know how to participate in today's event. You have joined the presentation listening by using your computer's speaker system by default. If you would prefer to join over the telephone, just select telephone in the audio pane of the GoToWebinar control panel and the dial-in information will be displayed. You will have the opportunity to submit text questions and comments to today's presenter by typing your questions into the questions pane of the control panel. You may send in your questions at any time during the presentation. We will collect these and address them during the Q&A and throughout this session.

Today's event is being recorded, and you will receive a follow-up email within the next few days with a link to view the recording and to the presentation slides.

Just a brief note about Nonprofit HR. Since 2000, Nonprofit HR remains the country's leading and oldest firm focused exclusively on the talent management needs of the social sector, including nonprofits, associations, social enterprises and other mission-driven organizations. We focus our consulting efforts on the following practice areas: Strategy & Advisory, HR Outsourcing, Total Rewards, Diversity, Equity & Inclusion and Search. We were founded with one goal in mind: to strengthen the social impact sector's talent management capacity by strengthening its people.

Today's presentation will be led by Jennifer Morgan, Consultant for Nonprofit HR's Outsourcing practice. You will have an opportunity again to ask questions throughout the webinar and during our formal Q&A session at the end of the webinar.

And now a little about Jennifer Morgan. Jennifer is responsible for engaging with clients to support them in all aspects of the HR lifecycle. As an HR professional, Jennifer excels in the area of employee relations and has experience in both the oil and gas sector as well as social services. Jennifer prides herself as a committed leader who fosters a passion for strategic change and improvement.

## When & How to Shift Your Organization's Performance Management System

Prior to joining Nonprofit HR, Jennifer served as the HR Manager at a social services agency that supported individuals with developmental disabilities. During her time there, Jennifer created, implemented and facilitated a safety culture that led to a 62% decrease in workers' compensation costs for the organization.

And now, without further ado, Jennifer, I turn it over to you. Take it away.

**Jennifer Morgan:** Thank you so much, Atokatha, and welcome, everyone, to today's webinar. We are so excited to share information with you regarding performance management systems. As Atokatha said, I will be the presenter for today, but I'm also going to be utilizing the chat function so you can use the questions pane in the control panel when I open up questions periodically throughout the presentation. Let's go ahead and get started.

Really the focus that I love about today's topic is we look at not just when and how, but really the focus here is "shift." There's something I want to share with you that we'll refer back to throughout the presentation. So the definition of "shift" as a verb usually includes, "to cause a move from one place to another." Some definitions go a little bit further, and they state, "... to do so, especially over a small distance."

My clients will tell you that I commonly use the phrase, "This is a marathon, not a sprint." And I want you to remember that when we look at different topics related to the performance management system. Remember, it's a system of continuous improvement. So, what you may try first in your shift may have to be adjusted a bit and that's OK. So, please remember, over a small distance is perfectly fine. There's no need to implement everything all at once. Because we want to do it the right way, the first time.

Let's talk a little bit about the roles in performance management. Throughout our career, we have all played a different role in performance management. Some of us have been in a leadership role, where you've been a leader yourself, or a part of a team or you're responsible for deciding what the performance management system should be and implementing that. Others of us have taken more of a manager, supervisor or lead role, and we've really been the ones to carry out the performance management system. This means that you're executing the system that's in place, you're logistically facilitating the feedback with your staff.

Then, regardless of your position, at any organization, we have all been recipients of feedback. So, we know what it's like when you have a good experience, and we also know what it's like when that experience can be bad. We're going to go in a little bit to make sure we understand how to make the performance management system right for your organization and a good experience for all.

## When & How to Shift Your Organization's Performance Management System

There's a lot of different models of performance management, but today's focus is going to be on the continuous feedback model. We at Nonprofit HR believe that ... is the most strategic model that leads to the greatest benefit. What is that benefit you may be asking? That benefit is employee engagement. Employee engagement is just another way of saying employees feel progress. They feel progress within their organization, they feel progress within their department and they feel progress within themselves when it comes to performance management. And that's really why we chose the continuous feedback model as one of the most effective performance management systems out there. When you all registered for this webinar, your goal was to learn more about the recent trends and what that means to performance management systems. So, we're going to talk about that in detail.

Let's look at a few of the other areas we're going to focus on today. We're going to look at the analysis. What is your current feedback process, if you have one, and how do you know if it's working? We're going to go back to that main focus point, the shift itself. How do we shift from a traditional performance management system, which you're likely thinking of as an annual performance review, and how do we shift to that continuous feedback model? A lot of times after we do a shift like this within an organization, we highlight what we call the skills gap. So we're going to dive a little bit deep into there and talk about what a skills gap is in this term, and then also how we can overcome this very common barrier to the shift.

And then finally, one of the most important factors is the training component. So, we're making this shift, we've identified some skill gaps, but how do we make sure that it's implemented and carried out successfully? Well, this section is going to empower leaders to get in the practice of giving and receiving feedback effectively. Now, when I say leader, I don't necessarily mean you have to be in a leadership position in your organization. A leader simply means that you are a champion of different processes and programs within your organization. So, if you're not in a leadership role, another great factor of the continuous feedback model is you're still able to participate and champion this shift to be successful.

So, let's talk a little bit about the analysis. Remember, this webinar topic is about when and how. So first, let's answer the when, and we're going to do that through analysis. So, how do we know it's working? We need to know when we need to make the shift before we address how to make the shift.

So, I'm going to open it up for a question to the audience now. And I'm interested in knowing how your organization carries out performance management today. As a reminder, you can use the questions pane in the control panel to answer this, but I'm curious to see what you all are experiencing at your organization in terms of performance management. An example could be an annual review, a quarterly review, maybe even a mid-year review. There's a variety of answers, and none of them are wrong. So please feel free to share.

## When & How to Shift Your Organization's Performance Management System

Atokatha, are we seeing any responses to that question?

**Atokatha Ashmond Brew:** Not just yet, Jennifer.

**Jennifer Morgan:** OK. As a reminder, the questions [or answers] that you ... provide in the audience portion of the presentation, we may not get to them all. But that doesn't mean that we don't want to incorporate it, if anything it helps us understand how we can continue to support you all in the performance management arena. There's no wrong answers, I promise not to bite. What are you all doing in terms of performance management today?

**Atokatha Ashmond Brew:** OK, Jennifer, they're starting to come in, so just let me know when you're ready.

**Jennifer Morgan:** OK, I'm ready.

**Atokatha Ashmond Brew:** One person says, "We do an annual professional development plan."

Another person says, "Annual on the date of their hire."

Another person says, "It's informal, no appraisal."

Another person says, "Annual review with quarterly check-ins."

Another person says, "Annual review with quarterly check-ins and many managers do them more frequently." So many managers may do monthly check-ins is what they are sharing.

**Jennifer Morgan:** Great, great. These are all great answers and as you can see, a very traditional system is an annual quarterly or monthly review ... It can be at the date of hire, it could be within a fiscal or calendar year depending on your organization. That's what we determine and we consider the traditional model. We'll go into that a little bit later, but the most important thing to take away from these responses is, performance management is done in a variety of ways. And so, when we want to find out if this is working, we really want to find out — not is the system itself working, but specifically, is it working for your organization?

## When & How to Shift Your Organization's Performance Management System

There are four steps that we can do to analyze this [and understand]: Is it working? Step one. Let's learn about the best practices and common trends that are out in the world today. And so, just by attending this webinar, you've made a great first step in learning [about] the performance management shift. You want to find out what you can compare against the model that you have. There's also a variety of resources and training that you can learn more about. If you do already have an engagement with Nonprofit HR, and you want to see what else, what other options, are out there in terms of performance management systems, reach out to them as a resource so they can provide you that support. If you don't have a current engagement with Nonprofit HR, we would love to partner with you because we are definitely able to support you in making sure you're doing the best practice for your organization.

Step two is active listening. This one's pretty common if you've ever been a facilitator of a review process. Whether you're managing the system software, you're collecting the forms, you, the manager, are facilitating them yourself, you usually can hear a lot of verbal feedback. Sometimes [there are] a lot of barriers that we'll talk about a little bit later in this presentation. But most of the time you'll hear some gripes, maybe some positivity, but usually they're saying, "We don't have time for this." "This takes so long." "I am always confused by what the questions are asking me." Through this active listening, you're able to add this to your analysis about what's working and what's not. We'll revisit that one a little bit later in the presentation, as well.

So, you've learned what the best practices are out in your particular industry for your organization's size and culture. You've listened to verbal feedback [from] your staff about your current performance management system. But before you go forward, it's very important that you commit to the shift.

What we mean by that is, a performance management system shift is, or could be, a big undertaking. And so, you want those that are going to be facilitating the shift to commit to that. We're going to talk about the time consumption a little bit while we review some barriers, but when you have people [who] commit to the shift, they are committed to being one of those leaders who's going to champion this shift across your organization.

Now that you have the commitment set, you're ready to go forward and make the shift, right? You want to wait first and make sure you have the nuts and bolts of your current performance management system. So, you don't want to go in and start the shift without knowing exactly what the process currently is. Where is this performance management feedback captured? Is it through a system, or is it through hard copy notes? How is this performance management delivered? Is it virtually through a system or is it in one-on-one meetings?

## When & How to Shift Your Organization's Performance Management System

So, make sure before you go forward after that commitment to making this shift, that you really understand all of the who, what, where, when and why behind your current performance management system.

So, let's go a little bit now into the shift itself. So, when you all answered the last question, you all shared many examples that seem to be what we consider at Nonprofit HR the traditional performance management system: a review at some point, it may be annual, it may be mid-year, it may be cultural. So, let's talk a little bit about why we want to make that shift, and then go into some key framework that we need to do to make sure it's carried out successfully. So, what do you all, as an audience – I'll open this question back up to you all, please put your answer in the questions pane – believe is the greatest benefit to the continuous feedback model?

And it doesn't have to necessarily be a model that you're doing right now. This is why we're all here today. But what do you think the greatest benefit to your organization is? I'll give you some time to answer that.

**Atokatha Ashmond Brew:** OK, Jennifer, responses are coming in to your questions.

**Jennifer Morgan:** Wonderful, let's go over a few of those. Again, as a reminder, if we don't get to your response, we still appreciate your feedback that helps us capture and make our continuing education even better for you. So, what are some of those answers?

**Atokatha Ashmond Brew:** No surprises. "Employees know how they're doing, and we're able to learn from them what is and isn't working."

"Improved performance conversations and better understanding of expectations."

"Transparency."

**Jennifer Morgan:** Absolutely.

**Atokatha Ashmond Brew:** And a couple of others are ... Someone said, "All of these." And another person said, "Builds trust and creates a learning culture."

**Jennifer Morgan:** Wonderful, wonderful.



## When & How to Shift Your Organization's Performance Management System

So, yes, these are all great benefits to a continuous feedback model. And with all of these benefits, sometimes you do want to ask yourself, if there's such a great benefit, why aren't we dedicating more time and energy and commitment to this system? But that's OK. Like I said, it's a marathon, not a sprint. And the most important thing is [that] you're here today to learn best practices in making the shift and how to carry those out. Don't forget what's considered one of the greatest benefits of the continuous feedback model is the engaged employee: the employee that is committed to your organization, that feels valued and that puts in the hard work to drive our missions forward.

I'm going to share what SHRM says about the continuous feedback model. SHRM is the Society for HR Management, and they believe that continuous feedback is a system that allows for employees to exchange real-time feedback that is meaningful to all involved, can be delivered and received by anyone, is inherently less biased and ... allows for more versatile problem solving. Continuous feedback solutions improve collaboration, coaching, decision making, agility, skills acquisition, retention and most importantly, employee engagement. So, you all got a pass on that question because all of your feedback definitely aligns with what SHRM believes the benefits of a continuous feedback model are.

So, one of the reasons that the continuous feedback model leads to more employee engagement, among the other benefits, is that employees don't just want to know how they're doing periodically, and by periodically, I mean annually, mid-year, quarterly. That's not the only time that they want feedback. Now, they do want to know how they're performing. But also, we found that staff really want to learn how to develop and grow in their role. They want to be prepared for the next step when the next step makes itself available. And so, they want not just a company or organization to support them once a year or during this more formal review process, but instead the continuous feedback gives them what they want, which is making the employee feel valued, which leads to the employee being engaged.

So, now that we know why the continuous feedback model is so beneficial to your organization, let's talk about what we want to do in regard to preparing for the shift. What does our framework need to look like?

Well, before we get started with the next steps, you first want to make sure that your organizational goals for performance management align with what you determined to be your continuous feedback model. And what I mean by that is, you want to make sure whoever is at the top, maybe it's a board member, maybe it's you ... as the President and CEO, maybe you're a member of a committee ... but you want to make sure that whatever the organizational goals are currently, actively align with your continuous feedback model.

## When & How to Shift Your Organization's Performance Management System

After you've established and made sure you understand what your organizational goals are in regard to performance management, then we can go into the step-by-step shift.

The first thing to do, as with any project, is transparent communication. We need to answer the question of why we're making this change. It's so important. Sometimes we're so focused on creating this great framework for continuous feedback, we're so focused on training the leaders that are going to champion this shift, that we forget to communicate outside of those meetings: what it is we're doing and why. So you'll want to make sure that there's transparent communication that explains, "Yes, we will still do the annual performance review, but we'll also be including different feedback mechanisms." So transparent communication is key.

To have a variety of feedback mechanisms is also important in the continuous feedback model. So what I mean by that is, a lot of times, people are hesitant to shift to the continuous feedback model because they feel, "Well, we don't have a budget for a fancy, shiny system that's going to capture all of this continuous feedback." Or, "We don't have the people. We're a very small organization, and how does continuous feedback even work here? I feel like we'd all just be meeting each other one after another." But you want to look at your organization and how your organization typically communicates. And then, really push those communication styles to happen in a continuous feedback model. So let's go over some examples of some different feedback mechanisms, and in addition to receiving the slides for this presentation, we'll also include some assets for you that detail these different feedback mechanisms that we'll go over. But remember, it's a marathon, not a sprint, so you don't have to implement these all at once. And that's one of the biggest reasons people hesitate to move forward with this shift.

But let's talk about some that we can do. There's one that you are definitely familiar with, and that's the one-on-one performance check-in. So typically, this is probably happening already in your organization. But maybe you don't consider this a component of continuous feedback model. It absolutely is. When you have that one-on-one interaction to get a status update, whether it be performance based or development based, that's an example of continuous feedback.

Sometimes, people think that they have to wait until a certain point in time in an employee's career. A couple of questions you all submitted for this presentation were about the 30-60-90 model. That's an example of a type of one-on-one check in, but you don't necessarily have to stick to that model. You can check in, of course, beyond the 90 days, but you can even check in at a cadence that is a weekly, monthly or even biweekly. The one-on-one performance check-ins are really important and valuable. And we're going to go into a little bit of detail about how you can structure those a little bit later in the presentation.

## When & How to Shift Your Organization's Performance Management System

You can also do a goal-setting exercise, which is definitely another feedback mechanism for continuous feedback. So, in addition to your performance reviews, you can work with your staff to determine what their goals are, both short and long term. It really helps you highlight how you are going to create the journey for your staff, so they can achieve their goals and, again, feel empowered, which leads to them feeling engaged.

There are also development plans. So, when we talk a little bit more in detail about the skills gap, that's when we're going to talk a little bit more in detail about development of plans, but those are also a way of continuous feedback. A development plan, remember, of all of the feedback mechanisms may require a little bit more capacity for time. Because an ideal development plan means that your staff member does not currently have the skill, but they have the potential to be successful in the skill. So, you may have to do more one-on-one coaching involved in the development plan to make sure that they're set up for success, if you don't take that step, unfortunately a development plan can be inefficient and ineffective.

Another great mechanism is a pulse survey. If you haven't heard of these before, we use them within our own firm and it's more of a quantitative mechanism that you can use, but it's a rating scale based on one question. A perfect example of a pulse survey is, how happy are you with the recent change in how we capture our time? How happy are you with the recent change in how we submit expense reports? This gives you a pulse in the organization. As I said, it is a scaled survey. You don't have to have a system in your organization to carry out a pulse survey. This can be feedback collected at your annual meetings. It could be feedback collected in a newsletter. Any way that you can communicate through staff, through this mechanism, is going to give you a quantitative response.

Let's talk a little bit about what I mean by a quantitative mechanism. Well, pulse surveys are a rating scale. And so, you rate from one to 10 what someone's view of a particular question is. So, in this example, we use, how happy are you with the recent change in how we capture our time? So, people that are very happy, they are going to score high on that scale, within nine to 10, and we call them our promoters. They're, again, those leaders, those champions, within the organization that we know we can go to for immediate buy-in and will help us spread the message of how great the change actually is.

Then, we have people that will score from seven to eight. This usually means that they're passively satisfied. They aren't necessarily going to be damaging to your end goal, but they aren't at maximum engagement. They still need to know: What's in it for me? So when you see those passively satisfied staff members, you may want to take a little bit more time down one-on-one check ins with them to find out the reasons why.

## When & How to Shift Your Organization's Performance Management System

Then, anyone that scores between one and six or the lower part of the scale is a detractor. So, even if you've never heard of that formal term when we're talking about this feedback mechanism, I'm sure we have all interacted with a detractor at some point or another in our career. A detractor is the person that is just not going to accept the change. And what we want to make sure about those detractors is that we are listening – actively listening – to their feedback, and actively and timely responding to the reasons why the change is occurring. If we don't do that, they have the capability of spreading their dissatisfaction and their lack of support across the organization. And then, we take a step back with our continuous feedback shift.

So those are just a few of the mechanisms that you can use to obtain feedback. You can also have recognition programs. Don't forget, a recognition program doesn't have to mean everyone on your staff wins a new car. All a recognition program could be is a kudos board, a digital kudos board, within your team's chat. It could also be a monthly prize for greatest employee of the month. This is a type of continuous feedback that leads to employee engagement.

And finally, one thing that I just tried with a recent client is what we call the Teach Me Something approach. It's a great feedback mechanism because we all know what it's like when someone that we may report to or someone that we work with on a team asked how we complete a specific task or how we complete a specific responsibility, and we're able to teach them something. That gives us so much gratification. But it also helps the person that we're teaching see where [their] skill level is with that particular task. So, the "Teach Me Something" method would be you as a direct supervisor asking a member of your staff to show you how they complete a specific task. A lot of times, this is a great tool because it leads to different process improvements. It's a lot of eye opening. A lot of light bulbs go off [you] say, "Wow! I didn't know you were completing your test this way. Maybe we should try that way." So, it's just another great feedback mechanism to use.

So, just as a reminder, I know we went through a lot of different types of mechanisms here, but we will include some more details on those types when we follow up with the slides.

... along with the feedback mechanism and transparent communication, people over paperwork is something that [we need to consider] in a continuous feedback model. So, what do we mean by that? Well, a lot of times, people say that they don't have time for the continuous feedback model. They barely have time for the annual performance review.

## When & How to Shift Your Organization's Performance Management System

But if you're sure to prioritize people over paperwork, what that does is it doesn't stop you from having that one-on-one check-in. It doesn't stop you from doing the pulse survey just because you may not have time to document several pages about the outcome. When you put people over paperwork, a great example is this: I decided I want to have a one-on-one check-in with my staff member once a week, but I don't have time to write two pages to document all that [we] discussed.

Well instead, what I should be doing as an effective supervisor is sending that employee a follow-up email, just stating what we discussed and what the expectations are, or the priorities are, over the next coming weeks. That email in itself serves as your documentation, so please don't jump to the conclusion that you need a specific form or a specific calculation system in order to implement these different mechanisms. It can be kept very simple and very basic because remember, we want continuous feedback to happen. We want the people over the paperwork.

And then finally, the look back: When you're making the shift to a continuous feedback model, just as we continue to talk about, this is a marathon, not a sprint. So we'll try out some mechanisms, and we want to look back and see how they worked. Well, how are we going to do that? You could use the same components that you did in your analysis. So, when we look back to see if things are working, let's actively listen again and let's make sure that what we're hearing, verbal feedback, from our employees is successful. Let's also continue to develop on best practices and trends within the performance management system. Remember, this is a state of continuous improvement, so you should continuously look back to make sure what you're doing is best for your organization.

These are really some key components that will make you successful in the shift, from the traditional to the continuous feedback model. Remember, the goal here is not to completely eliminate what you're already doing. There's still value in the annual review process, there's still value in what you're doing right now, there's still value in what you answered in our first audience question of today, but just remember, to shift to continuous feedback means you're adding different components through different feedback mechanisms.

Let's talk a little bit now about the skills gap. So, we've done an analysis of our current feedback model. We know we want to make the shift. We've talked a little bit about the way to make a shift. So, we know that we need to have transparent communication, we need to examine different feedback mechanisms to use and we need to make sure we're staying up to speed on best practices. So, take a couple steps forward, and now we're in the continuous feedback model. You have your management team meeting with each other as peers to give feedback on their management style. You have direct supervisors meeting with their staff in a much more informal and frequent way. And one of the biggest results of a continuous feedback model is identifying a skills gap.

## When & How to Shift Your Organization's Performance Management System

Now, this is not something new. The skills gap likely can be identified during an annual review process, or something that's a little bit more traditional. But the downside to that is how long it takes to identify the skills gap. Another benefit of the continuous feedback model is that we're able to course correct in a much more timely manner.

I want to open it up for a question to you all and ask if you have an example of a skills gap scenario you've experienced with an employee.

So, my example is, I'm an accounting manager, and I have an accountant on my staff who is responsible for both accounts receivable and accounts payable. Well, I notice in my continuous check-ins with ... — him or her or [them] — that this staff member is not doing well in their accounts receivable duties, so that's what we consider a skills gap. And you all can share an example of maybe a skills gap that you've identified within your staff, that'd be great. I'm interested to know what you all have interacted with in regard to skills gaps.

**Atokatha Ashmond Brew:** We've got one so far, Jennifer, and I'm sure others will be coming in quickly. I'll just give it a second for people to chime in.

**Jennifer Morgan:** Great.

**Atokatha Ashmond Brew:** One person said, "Yes, most often when an employee is promoted to a supervisory position with no training in managing people."

Another person said, "For peer-to-peer support and communicating effectively for success."

Someone else said, "Time management."

**Jennifer Morgan:** Yeah, these are all great. Thank you. So, what you all have shared are very common reveals of a skills gap. A lot of times, it is when someone is promoted or transferred to a different area of the organization.

The continuous feedback model really helps resolve that because the hope is that prior to this promotion, if you've shifted to a continuous feedback model, then you're able to identify that [the] staff member is not necessarily ready for promotion just yet. And instead, how can we develop them for that? Instead of looking at a review process that may have occurred months ago, if you're able through your continuous feedback model to identify a skills gap and course correct [that], hopefully, [at] the smallest level possible.

## When & How to Shift Your Organization's Performance Management System

Remember, in all of your examples ... this is not a performer that is — ... a staff member who is not performing well in all areas. But instead, a skills gap truly means you have a performer who is, excuse me, you have a staff member who is performing well in many areas, but there's one gap that you need to resolve before they're either promoted, before they're given more duties or before they're recommended in another part of the organization. So let's hear a few more, Atokatha, I'd love to hear what other people are typing.

**Atokatha Ashmond Brew:** Sure.

Another person said, "Excel and spreadsheets skills."

Another person said, "My CIO is a member of the senior staff team, expert at technology but lacks in strategic planning."

Another person said, "I had a staff member take an Excel class at the community college to better help departmental information."

And another person said, "Comfort level when introducing new technology." So it seems like there's a tech theme here.

**Jennifer Morgan:** Yeah, absolutely. And a lot of times, that skills gap is in a technical skill. The great thing about it is a skills gap can be overcome, so let's talk about the ways that we can do that. You know, we've got all of these great examples, but how does that fit into the continuous feedback model? Again, through the continuous feedback model, this skills gap is recognized early on, and hopefully at the most simplified point in the development.

So ... now that we've identified a skills gap, we can't just ... sit there, right? We have a responsibility to try and overcome the skills gap, that's the whole point of the continuous feedback process. So, one way to overcome that is a supervisor or peer as a subject matter — expert coaching. External training. So I know some of you ... commented that you sent a staff member to develop in a certain area, and the goal in that is to have them develop specifically in that skill.

We talked a little bit about how a development plan is a mechanism for feedback, and so once you identify a skills gap, a development plan, or timeline, [it] is a great way to implement that mechanism into your continuous feedback model. Using the example I gave, if I have an accountant who is not well versed in a specific piece of the accounting duties, accounts receivable, how am I going to develop that staff member to get to where I need to be? A development timeline is a great way to do that. And it also reinforces that continuous feedback, because you want to be checking in on that development timeline to see if there has been success or more development as needed.

## When & How to Shift Your Organization's Performance Management System

You can also realign job duties when you notice a skills gap now. We don't mean to restructure your entire organization for one employee. Certainly, that's not what we want as HR professionals. But instead what we mean is, could there be a task exchange that makes sense to your organization? In this example I'm using, among my accounting team, is there somebody that's really, really good at accounts receivable? Maybe they don't enjoy another task that falls under their umbrella. Is there something that I could do to maybe switch and realign the job duties?

If we want to do this, I always recommend that you're certain to consult with your HR consultant, or again, reach out to Nonprofit HR to learn about our different engagement structures. Because we want to make sure that if we are going to realign job duties, it's something that's sustainable. You don't want to have to move job duties back and forth because that really can affect your entire organizational structure.

Then finally, just as I said, consult with us, the experts at Nonprofit HR. Sometimes a skills gap can be difficult to resolve, depending on what it is. One of you all gave an example of a member of a senior leadership team. Well, we have to determine: How can we address this in a way that still maintains dignity, that is respectful and professional, that maybe doesn't disengage them from a board member? We don't want to put them in the spotlight too much. So, consulting with us to learn about additional ways to achieve a skills gap is always helpful.

Let's talk a little bit about the training itself. So, we've talked about the analysis, we've talked about [the] framework for this shift, we've talked about what that can reveal: a skills gap. But we also need to find out how are we going to carry this out successfully. We're going to dig a little bit deeper into some of the topics that we already reviewed earlier in the presentation, but I love this visual, because it talks about the benefits of a check-in. Again, many times, when we stress the importance of a check in periodically, continuously with our clients, we are met with some resistance, because: "Who has the time?" is the question. But we're going to talk about why that time is so important. And if you're trained appropriately, if your leaders are trained on how to have a proper check-in, really, the time upfront used helps in all areas, especially the most important, which is driving your mission forward.

So, the benefits of a check-in, they're our goals. Check-ins help track progress and the goals. A lot of times you may have established a goal-setting exercise for your organization, then no one really knows what happens to that. So, with the continuous feedback model and with check-ins, you're able to make sure you're monitoring those development goals in a timely manner.



## When & How to Shift Your Organization's Performance Management System

There's employee empowerment. I want you all to remember that for a check-in, it does not have to be a supervisor requesting the check-in from a staff member. Staff members are certainly able to request continuous check-ins with their direct supervisor, with a peer, truly across the entire organization, and so that leads to employee empowerment. These check-ins make sure that not just the direct supervisor, but the employee and the manager are engaged about the direction and the expectations of performance.

Course correction. Just how we talked about that skills gap. So rather than having to wait at a quarterly or annual review to see that there's been a little off step in terms of where we're trying to go, continuous check-ins make sure that you can do immediate and rapid course correction.

Our number one benefit that we've talked about before is engagement or the feelings of progress. Eighty-three percent of organizations say, excuse me, that the quality of conversation improves with more frequent check-ins, you all already shared that as one of your benefits to the continuous improvement model. So not only are you having the check-ins themselves, but you're also learning each other's communication style, how you both work under times of stress, how you're able to really drive the conversation to make it the most effective and impactful.

And then finally, that value investment: In the past two years, now going into the third year of the pandemic, we're finding that employees are not just interested in developing, but they're interested in knowing that they're being valued at their organization, that all of their hard work in driving the mission forward means something. A check-in makes sure that you have the platform and opportunity to show a staff member how valued they are.

Let's talk a little bit about the different types of check-ins. And so, there are two types. There's performance check-ins, and there's development check-ins. Performance check-ins you probably do more commonly in what you consider your standard check-in. And when you stop by a peer's desk or online meeting, and say, "How's it going with this task? How is it going on this long-term project?" That's the performance check-in. So usually when people think of check-ins, they think of performance check-ins. You don't want to forget to also talk about recent accomplishments. Remember, recognition and reward go a long way. And then also for performance check-ins, look at those goals consistently and continuously. Do those goals need to be realigned? Do things need to be shifted?

One thing that is not as common and it's because we are all so busy — we have a lot of work to do to drive these missions forward — are the development check-ins.

## When & How to Shift Your Organization's Performance Management System

We've kind of worked our way up to this one because we've talked about a development plan as not only a feedback mechanism, but also a solution to resolving a skills gap. So let's make sure that we're having development check-ins as well. We want to know the status of the training. So we've assigned a staff member, a specific training, to develop more in a certain skill. We want to find out if the staff member has a new training request. And remember, it can go from staff member up or from management down.

So, if you, as an employee, needed a certain amount of training, it's your responsibility to take accountability for that and have that check-in with your manager. Let them know what training you need.

Are there any new skills gaps that we may have identified that's in a development check-in as well? We want to make sure that you have the systems and skills in place to be successful, but, in doing so, [ask]: Have we identified another area that we could maybe develop in?

And then finally, a review of the journey. Let's go back to making sure that staff member feels valued. We want to make sure that we know that what they're doing here and today falls in line with their career goals, which falls in line with the organizational goals. So, it's always great to have not just a performance check-in, but also development check-ins. Both of those structures are very important in the model of continuous improvement.

Some barriers in training and empowering the leaders. Let's talk about that.

Remember, a leader doesn't necessarily mean that you're in a leadership position within the organization, it means that you are a champion of the continuous feedback model. So, sometimes the [barrier is] the time commitment. Again, if you're already hearing from staff, [that] they don't have time for the annual performance review, they're not really sure what the purpose is, then how are we going to get them on board with a continuous feedback model? Well, the solution is pretty simple there. We have to let everyone in the organization know that spending this time up front — 15 to 30 minutes per week — is really going to help with retention time down the line.

Unfortunately, if your employees aren't engaged — which remember, is the number one benefit of the continuous feedback model — then it may lead to some retention concerns. That employee is not engaged and they're much more likely to leave the organization. So be sure to stress to your staff members that, yes, it is a time commitment, but it's a marathon, not a sprint. When we say check-ins, we don't necessarily mean it has to be an hour long every week, but it can simply be 15 to 20 minutes and that time upfront is definitely going to save us down the line.

## When & How to Shift Your Organization's Performance Management System

The document strain. So, people are very hesitant to shift to the continuous feedback model because of all this documentation that's needed. They automatically assume that their desk is going to pile up with papers. There'll be post it notes everywhere with little development things and performance check-in notes. But let's always remember: People over paperwork. You can follow-up via email and said, "Hey, it was great to chat today. Thanks for letting me know that you can use some more help in this area." That's considered documentation. You don't have to have a formal system. You don't have to have a formal form. But, it is important that the progress is tracked somewhere. Keep it very simple.

Another barrier is the lack of communication. So we kind of talked about this in the initial part of the presentation. And that is, why is this shift being made? And what is the reason behind it? You're not going to get people to support this shift if you don't have transparent and continuous communication. So remember in your planning, remember in drafting your framework, that you're still communicating out to staff the progress and the reason behind the change.

And then lastly — and one of the most important — is the fear of change. And I'm sure we've all experienced that in some capacity, change is hard. There is a reason that people get entire educational disciplines in change management. But remember that with change comes the engaged employee. And so, what we need to make sure is that the leaders of the organization understand that there may be hesitation to change, but that they need to show the value and the value of that is engagement across the organization.

So, those are some of the common barriers when it comes to empowering your leaders, and hopefully you all feel supported in these best practices that you can put in place to help overcome these barriers.

That is everything that I have to discuss today. So, we're actually going to move into our Q&A session for the last portion of the presentation, and I know some of you ... submitted some questions beforehand. And so, we can certainly review those, if we have time. But I wanted to open up the floor to you all and talk a little bit about what ... your key takeaways are from this session and certainly answer any questions that you have across the performance feedback model.

**Atokatha Ashmond Brew:** Thank you so much, Jennifer, for all the information you shared this afternoon. What a great, great presentation. Again, if there are any other questions, please type them into the questions box. We will get to as many of them as possible during our remaining time together.

## When & How to Shift Your Organization's Performance Management System

Jennifer, one question so far is, what frequency of check-ins is most common for performance and for development? And, do you recommend addressing both in the same meeting?

**Jennifer Morgan:** That's a great question. I would recommend that you keep them separate, and that way, you can make sure that you have enough time to make it – whether it's performance structure or the development structure – effective and impactful. Now, when we looked at the cadence of how often you're doing these check-ins, you're really going to have to look at some key areas within your organization and what makes sense. So if we've got an organization that is five people, then it may be difficult to have check-ins every week. That may be too time consuming, it may seem redundant and not beneficial. But if you have, let's say you're on the busy season of your organization and really, when you know everybody has hands on deck, you'll probably want to increase your frequency, at least when it comes to the performance check-in. So that goal of course correction can come very quickly. And we don't waste any time during your busy season in getting things done at the performance expectation.

So how often you have these check-ins could vary. I would say that you start with something that is realistic. You really want to look at the same platforms you would use in goal setting. So, we want it to be realistic, because we want to be sure to continue to do it. And so, if you start with a check-in once a month and decide that you have the capacity for more, that works just fine. Remember with those look backs, it's OK if we continuously adjust things, because this should be a fluid process.

So, if you start with once a month and don't find that valuable, that you need more, continue on with a little bit more frequency. Remember, check-ins are not the only feedback mechanism in this model. So if you have a check-in at once a month, but maybe you have a recognition for all the employees in another team meeting later in the month, that still is continuous feedback. So, incorporate a variety of mechanisms beyond the check-in.

**Atokatha Ashmond Brew:** Great, Jennifer, here's another question: Do we have guidance on how to evaluate both qualitative and quantitative aspects of performance?

**Jennifer Morgan:** That's a great question.

And so, when I shared, I know I went over with you all ... an example of pulse surveys and that rating scale. So when we share that component of the presentation, you'll definitely see a way to evaluate on a quantitative scale and some best practices there. When you evaluate performance management that is more qualitative. You're not going to change too much, probably, from what you're already doing in your day-to-day performance management.

## When & How to Shift Your Organization's Performance Management System

Whether that means you're managing up or down, what you want to know is if this person's check-in is saying, hey, they missed the deadline again for the third week in a row, well, that evaluation typically means something isn't going right. There's a misstep somewhere, so what do we need to look at? Do we need to look at how instructions are being communicated? Do we need to look at the learning style of that staff member? And maybe, are we communicating deadlines verbally, whether it needs to be followed up via email?

So, not too much needs to change in terms of your evaluation of your continuous feedback model. But I think where your question is coming from is typically in an annual, quarterly, monthly review that's much more formal. You do see much more weight on that evaluation side. But just remember, continuous feedback is successful because it's not as formal, and it can be a little less structured. So, generally speaking, your qualitative evaluation is: Are the performance expectations being met? And if not, then the evaluation is not going to be favorable, and we need to decide what we can do to resolve that.

**Atokatha Ashmond Brew:** OK, Jennifer. The next question is: I'm looking for current ideas that I can tie back to the mission and strategic objectives at each level in the organization.

**Jennifer Morgan:** Great. Wonderful. I'm glad that we're touching on this because, remember, before we go into making the shift and creating the feedback, we want to make sure that our organizational goals for performance management tie into the mechanisms that we decide to use. And the same can be said for your question in terms of how we make sure that what we're doing ties back to our mission, our values, even competencies, if you will. Well, one, you want to make sure that everyone has a clear understanding of what those are.

So rather than making sure that at each level, what we're doing in terms of performance and development expectations are being met, does everybody know what those should be? So I always start with some learning behind, "Let's have a refresher. Let's make sure that we're all on the same page in terms of what our mission, our value statement, is, our competencies even and then certainly what our overarching organizational goal is." And then from there, after you've done a little bit of the learning, you can try out a variety of ways, in terms of how to make sure, at each level, that this continuous feedback model meets those [requirements]. For instance, if you choose to go — if you look at one of your competencies for your organization, at each level you can apply, how does that competency fit in with their specific feedback mechanism?

So if my competency is mutual respect, then how does that fit in — at the executive leadership level, at the management level and at the staff level — with my check-ins?

## When & How to Shift Your Organization's Performance Management System

So mutual respect means in this check-in, even if I don't have the best feedback to deliver, it's really critical feedback to set that person up for success, I need to make sure I'm doing so under the premise of that competency of mutual respect. So you want to look at what your organizational values, mission and competencies are, and then at each level, you can formulate how you want to tie those into your check-ins. You could have a monthly theme: All check-ins this month needs to be about this competency or about our mission or about our value statement. So that's how I would recommend doing it.

**Atokatha Ashmond Brew:** Great. And our next question is you mentioned continuous feedback is less biased. Can you speak more to that?

**Jennifer Morgan:** Yeah, absolutely.

So by that ... continuous feedback means that we're not going into a formal feedback setting once a year with these pre-conceived notions that may have come from past performance events. So, let's say that, in your annual review process, you're just now learning that four months ago, a duty wasn't met or a responsibility wasn't met. Or let's say that you heard six months ago something personal about one of your staff members, that was then affecting their work performance.

If you're only doing a traditional model, you're really giving yourself a lot of time to build up these biases related to an employee, to a peer, to a staff member's performance. And with the continuous check-in, what you're allowing is for that not to build [up] or snowball, if you will. You're able to go into it without the bias, because, you know what has just happened within the past week or month, and that instance has been resolved because of the continuous feedback model. So, that's what I mean by that. Does that answer your question?

**Atokatha Ashmond Brew:** I hope so, I'm sure we will hear back from her again, if she has a follow up.

Another person says, when you talk about addressing a skills gap, can you talk about differences in approach? When the skills gap pertains to current job duties versus a skills gap related to a desired promotion?

**Jennifer Morgan:** Yeah, that's a great question.

So a skills gap related to current job duties is something that you're going to reveal in a performance check-in. These are current duties, status of current tasks and you recognize the skills gap in their current role.

## When & How to Shift Your Organization's Performance Management System

So, really how you want to address that is with the development plan, stating that, “Hey, you're not meeting my performance expectations in this area, so we're going to get you some peer coaching. We're going to have you work with us, this staff member, to shadow.” Or, “We're going to send you this training session, because we really need you to rise to the occasion.” With performance in the current duty, the skills gap is much more immediate in terms of meeting resolution, because we want to have that course correction happen rapidly.

When the skills gap is identified for someone who's up for promotion, or maybe transferred to a different role, this is going to fall more on your development check-in. And so you have a little bit more time because this employee is performing well in their current role. They have great potential to move to the next step, but they're just not there yet. And so, this development plan is different, because it can go a little bit longer in time. So you want to approach this by saying, “My goal and my responsibility is to make sure that you're set up for success. And at this time, if we were to move you into this role, you wouldn't be successful. But I don't want to stop there. Here's the reasons why because I don't think you would be successful in these tasks, and what can we do? How can we collaborate together to get you eligible and qualified for that next role?” And so, it's not as immediate because their current performance is not impacting driving your mission forward, it's not impacting overall morale, it's not impacting engagement. But if you were to move them to that promotion unprepared, it would. And so, if it's for a future promotion or step where they're trying to get to, you have time to really map out that development timeline and what you want it to look like so at the end, it can be successful. If it's for somebody in their current role in that skills gap, it really needs to be rapid course correction.

**Atokatha Ashmond Brew:** Jennifer, someone is asking if you can speak to tying performance feedback to compensation reviews.

**Jennifer Morgan:** Very commonly, we hear from clients that staff members need their performance review because they know it's time for raises soon or compensation increases. And so, many times, clients are having to go back to their staff to really educate them on the difference between the two. So we, as HR professionals, first look at how that organization is structured in terms of compensation.

So, is it a pay-for-performance organization, or is it not? That's really one of the key indicators about whether or not you're going to tie the continuous feedback model to compensation. If you're not in an organization that does a pay-for-performance model, then what you'll want to explain to your employee is that working with your compensation, whether you have a team — an accounting team, a finance team — or your Nonprofit HR consultant, you'll want to make sure that they understand that pay increases are not tied to performance. But instead, pay increases are tied to a completely different model.

## When & How to Shift Your Organization's Performance Management System

This could be what the budget has available, what the board has approved. But when it comes to the performance feedback, and they say, "Well, then, what is this for? You know, I thought I was doing all these check-ins so I can make sure I get a raise at the end of the year." We want to make sure that they understand it's for their professional development. We're doing these check-ins not so that they relate to their compensation, but so that they can remain engaged in the organization, that they can feel value in the work that they do successfully. And then also, that we can show them, "We see potential. We want to continue to develop your skills. We want you to feel that community feel that so many want right now."

So that would be the main thing about whether or not your organization has the pay-for-performance structure, and then if not, making sure that you have very clear and transparent communication, and answer that why question.

**Atokatha Ashmond Brew:** OK, here's another question. One of the biggest hurdles is managing the ongoing communication and notes for the annual evaluation or even the performance improvement plans. Any tools or other advice?

**Jennifer Morgan:** Yes, that is one of the biggest barriers, because a lot of times as HR professionals, we will hear about a variety of employee relations matters, and we will say, "Well, let me see the documentation of the past," and unfortunately, it's not there. My suggestion is, while we always prefer as HR professionals to have as much detail as possible, sometimes, that is just not realistic. And we understand that, but what we do ask is that you capture and document feedback immediately following an event. So, when it comes to performance management, I know your question was about the annual performance reviews, we asked that the feedback is captured and then immediately submitted to whatever your approval chain or process is.

For these more continuous feedback models, don't feel as though it has to be as extensive as the feedback that you've captured during a more traditional annual or quarterly review. Remember, just say, especially if there's a performance or skills gap that you need to address, you want to follow up to that employee via email. You can also just say, "Hey, check in with me before you leave for the weekend. Let's make sure we're on the same page." Having any kind of documentation in an email or chat format, it just helps us make sure that we know what the current status is.

And so, a lot of times, people are hesitant because of that documentation strain. But I want to make sure you all understand that this part is really fluid. Yes, with the annual review, you likely have a system or forms, and we do need to look at that process and make sure it's consistent from year to year.



## When & How to Shift Your Organization's Performance Management System

But beyond that, just know that the continuous feedback model works because there is not the documentation strain that a lot of people assume that there is. A quick follow-up note or even sending something to your HR consultant works just fine.

**Atokatha Ashmond Brew:** Great, Jennifer here comes another one.

Someone is looking for current ideas that they can – I'm sorry, that one, I think you've already covered that one regarding mission. Here's another one.

We have a very small team and want to find the right balance between structure and formality for performance management for transparency and fairness, without overdoing it given our size and scale, any insights?

**Jennifer Morgan:** Yeah, the biggest insight is to be transparent with your smaller staff, that we may try something in regard to performance management and it may not work out. And if that's the case, we welcome your feedback as to why, so we can adjust and shift as necessary. That's always the first step I recommend, is that, especially with a smaller staff, in that transparent communication, before you even get started ... is [declare]: "We have a need for a performance management system. We understand that we have different constraints, one of them is the size of our staff. So, if something's not working, please know that we're not going to have this as a permanent solution. But we do ask that you participate and give us timely feedback." So, that's the first thing: Communicating that continuous improvement process to your smaller staff.

Then, from there, you, again, want to look at what is realistic for your staff. So, if you have a smaller staff, is it realistic to require every manager to check in with every direct support weekly? No. That doesn't seem realistic. Things can seem redundant, and then they don't feel as though they are effective or efficient. But with a smaller staff, you may be able to do some much more, larger feedback mechanisms, like sending out a pulse survey. You can have one member of your team, maybe someone in an administration, send out a pulse survey to all staff once a month. And then that way, it's not as time consuming, but the leaders of this shift are still able to gauge feedback.

Another one is, a lot of times people eat lunch during the day. We all don't like to work during lunch. But I've had clients that use their lunch hour as a quick performance check-in, and it doesn't have to be all about work at that time. It's your lunch. It can be, "How are you doing? How are you feeling? How are things going?" But, again, it's not taking away or coming across as a burden to implement this model.

## When & How to Shift Your Organization's Performance Management System

The last thing I would say for a smaller shop is [to] be sure to empower everyone. Let's make sure that everyone is ... a part of the continuous feedback model. It doesn't just have to fall on the responsibility of the managers. Let's make sure that it also falls to everyone on staff, so it doesn't just have to be your leaders requesting these check-ins, you can make sure that the employees know, "We want you to be checking in this many times a month," so on and so forth.

**Atokatha Ashmond Brew:** Thank you, Jennifer. Here's another question. What other models exist for compensation other than pay for performance?

**Jennifer Morgan:** That's a great question. And we ... have many experts within our consulting team. But the pay for performance, the different compensation models ... can vary. But typically, what I see with my clients is that they don't have the pay-for-performance model. What I would recommend is if you currently partner with Nonprofit HR, to reach out to your consultant to talk a little bit more about the specifics of your organization, and what possibly could apply in terms of different compensation models. Or, if not, you can certainly reach out to us to see if we're able to support you in that way. That was a little bit trickier to answer, because it certainly ... depends on what your compensation philosophy is; what's your organizational goals are; and has a lot of different factors to go into detail about the different compensation models.

**Atokatha Ashmond Brew:** Thank you, Jennifer. Here's another question.

How do we balance a department process such as this [where] we're talking about ... the requirements from HR with our city or ... local jurisdiction or even state?

**Jennifer Morgan:** Yeah, so this should be a point of collaboration. I'm assuming this question comes from an organization where you have an overarching governing affiliate to your organization. And so, in addition to planning out the framework of your continuous feedback model, you'll want to make sure that it ties with not only your organizational goals behind performance management, but [also] ties in with the goals of those affiliates as well. So, for instance, if you are a local affiliate that also has interactions with ... a national affiliate, you'll want to make sure that it ties in with their HR as well.

I always recommend [that you run the plans by] ... any sort of governing body that is over your organization just as you would with any other project. So that's the best thing because what we want to make sure of is that we're implementing continuous feedback models with feedback mechanisms that are sustainable.

## When & How to Shift Your Organization's Performance Management System

And so, what we would hate is to go through the process of transparent communication, getting all this buy-in, getting staff excited about the shift to this model, only to have another body come in and say, "This isn't aligned with what we're trying to do"; or "This is inconsistent with something we're planning." So I would definitely recommend that you collaborate with them on all of your design.

**Atokatha Ashmond Brew:** Great, another question and comment.

I dread reviews, as I have one staff member [who] is very intimidating and does not take feedback very well. Any tips for dealing with polarizing personalities?

**Jennifer Morgan:** Yeah, that's great.

There's many training topics out there on how to have that difficult conversation and what you're describing is that difficult conversation. If I consider a staff member to be someone who doesn't receive feedback well to the point that I'm hesitant or as you said, dreading having that conversation, then that is [something requiring] that rapid course correction ... we need to not only communicate to that employee, but we need to also make sure that they're held to that expectation.

So, dreading the annual performance review is likely because you have not communicated this feedback to the employee in a continuous manner. And so, it is a difficult conversation to have. I would recommend that you work with leadership or your HR contact to make sure that you come up with the talking points for that conversation, because you want that employee to hear the feedback.

But by shifting to a continuous feedback model, hopefully that will take away some of the burden of having to really wait a full year to give them feedback on 12 months of progress. Instead, you're giving that feedback immediately, and you just started very transparently. "You know, it's difficult for me sometimes to deliver this communication, because I feel as though in your professional work, you don't receive feedback really well. So, I have that as one of our development goals, how to receive feedback professionally."

And you can find some different resources for that and share [them] with the employee ... that could be a development check-in, so by the time you get to the performance review, even if they're still meeting that expectation, it's not going to be a surprise.

## When & How to Shift Your Organization's Performance Management System

Unfortunately, also, we can't control everyone's reaction, so you have to remember that too. It's your job to make sure you're setting your employee up for success, and you're doing so by giving that feedback and trying to make sure that they have resources to improve. Beyond that, if they don't meet the expectations, then that's a different conversation that they'll need to have with the employee.

**Atokatha Ashmond Brew:** Great. Thank you, Jennifer. And someone says: I like the idea of monthly themes for feedback. Do you have a few ideas of themes that I can write down now to get some ideas going?

**Jennifer Morgan:** Yeah, absolutely. So, when you look at different themes, let's just start with what some traditional competencies are. [With] performance feedback, you can do managing competing priorities. How is the staff member or the manager managing competing priorities?

You can also look at ... collaboration techniques as a topic. How are we collaborating as a team? Is a staff member just getting stuck at a barrier or a roadblock and not doing anything? Are they collaborating with peers to get over that?

You can also do a very traditional one which is communication, but our communication styles have had to change so much since the pandemic. I always like to include it as a theme regardless because we can touch on how to make sure we're effectively communicating virtually. Effectively communicating with both internal peers and external customers is a great topic.

I'm trying to think of some other ones here that would be great ... a good one [is] problem-solving skills, which goes hand-in-hand with initiative, if you want to note that one as well. Is initiative a competency that we can look at this month and kind of gauge where the staff members take ... initiative? [Did] they finish all their projects for that week or that month? Did they ask for more work? Did they go do more work or get ... training on their own? Did they shadow train with the peer? So, those are a few topics that I think would work as a great starting point ... Of course, you're always able to ask us and partner with us to find out more about that.

**Atokatha Ashmond Brew:** All right, Jennifer, we'll take a couple more questions. The next one has to do with alignment. And how do you ensure alignment to the strategic direction, i.e., balanced scorecard, when you're integrating this type of program?

## When & How to Shift Your Organization's Performance Management System

**Jennifer Morgan:** Yeah, so alignment with anything, but especially with performance management — we've got to make sure that we've had buy-in from the top. So, when we talked about it, first, you want to make sure there's transparent communication behind the “why” the shift is made. OK. Well, you're correct. How do we make sure that they're aligned?

Truly, going back to that commitment to the shift — this is probably where you would end up spending your most planning time, is in that alignment. Because it really does, in this area, start from the top down.

So, what is the organization board or governing bodies saying in terms of what performance management should be? And after you have that answer, there needs to be a collaboration among your leadership team. Again, leadership team means anyone that could champion this shift, not necessarily a member of leaders. And so, with that said, you [will have] already ... made sure that there's alignment before going forward. What you don't want to have is your group of managers coming together to determine what the best feedback mechanism is for the organization ... then [having] to go back and take that to senior leadership or even at the board level to make sure it aligns, because then frustration starts. And, just like with any project, it's like, “Well, we've done all this work, and now we have to throw it out.”

So, in this particular area, you do want to start from the top down, even though we know that everyone is involved in the continuous feedback model and everyone can initiate those check-ins and feedback mechanisms. In terms of alignment and how it's structured, it is important that you start at the top and get buy-in there before moving forward.

**Atokatha Ashmond Brew:** OK, Jennifer. Our final question is, we are in the middle of drafting a work-out-of-class compensation policy. Is there a min/max percentage for exempt and non-exempt employees regarding pay?

**Jennifer Morgan:** That one's difficult to answer. I'll see if we can follow up directly with you on that one, but it's difficult for me to answer in this immediate instance, only because there's a variety of factors that can contribute to that min and max. Also, when you're talking about out of class, I would want to know a little bit more detail about what that particularly means. Is it outside of working hours? Is it during business hours? So, [there are] definitely some recommendations that we can make, and I will work with Atokatha to see if there's a way that someone from our team may be able to follow up with you.

**Atokatha Ashmond Brew:** Thank you so much, Jennifer.

**Jennifer Morgan:** Thank you. Thank you all so much for joining, and I look forward to seeing you all next time.

## When & How to Shift Your Organization's Performance Management System

**Atokatha Ashmond Brew:** That's all the time we have today for Q&A. Thank you to everyone for attending today's webinar. We hope you found it to be valuable. Thank you, again, to our presenter, Jennifer, for leading such a dynamic presentation. And there are many more webinars that are coming your way in 2022, so be sure to check out our events calendar at [nonprofithr.com/events](https://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. If you'd like more information about Nonprofit HR and the available services we offer to nonprofits and social impact organizations, email us at [info@nonprofithr.com](mailto:info@nonprofithr.com), or visit us online at [nonprofithr.com](https://nonprofithr.com). Thanks again for attending. Thank you, again, to Jennifer. Have a wonderful afternoon.