Nonprofit**HR**

Investing In, Developing and Growing Your Teams for Greater Mission Impact

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An intentional strategic approach for recognizing and developing talent can help organizations engage and retain their best and brightest people versus losing them to outside growth opportunities. Over half of organizations surveyed in Nonprofit HR's 2021 Talent Management Priorities Survey want to prioritize employee engagement, but only a quarter had a formal talent management plan in place. In this conversation, we'll explore why this discrepancy occurs throughout mission-driven organizations and how to communicate the imperative of investing in talent to your leadership team.

This webinar is for you if you're ready to:

- Take existing subject matter and translate it to address urgent and emerging business needs related to talent
- Hear about how common pitfalls occur when focusing on learning and development, including leadership development
- Learn how to transition your organization's development experiences from struggles to success stories
- Understand four actionable phases in a team's evolution
- Discover ways to get started right now, regardless of size or budget constraints

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CONVERSATION HOSTS

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GUEST PANELISTS

Dr. Antione Smith
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Atokatha Ashmond Brew: Hello and welcome. Thank you for joining us this afternoon for Nonprofit HR's Virtual Learning Education Event. Today's session is entitled, Investing in, Developing and Growing Your Teams for Greater Mission Impact. My name is a Atokatha Ashmond Brew, and I'm Managing Director of Marketing & Strategic Communication for Nonprofit HR. I'll be your conversation moderator for today. We have a lot of great content to cover. Before we get started, though, I would like to go over a few items so you know how to participate in today's event.

You've joined the presentation listening using your computer's speaker system by default. If you would prefer to join over the telephone, just select telephone in the audio pane, and the dial-in information will be displayed. You will have the opportunity to submit text questions throughout today's presentation by typing your questions into the questions pane of the control panel. You may send in your questions anytime during the presentation. We will collect these and address them during the event, and also during a more formal Q&A session at the end of the presentation.

Today's event is being recorded, and you will receive a follow-up email within the next few days with a link to the recording and 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 social sector organizations, 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. Nonprofit HR was founded with one goal in mind: to strengthen the social impact sector talent management capacity by strengthening its people.

Today's conversation will be led by our Strategy & Advisory experts, Alex Taylor and Lisa Wright Ponce. They will be joined by our panelists, Dr. Antione Smith, Senior Director of HR and Administration at the American Foreign Service Protection Association, and Amanda Upshaw, Chief of Staff with CLASP.

You will have an opportunity to ask questions throughout the webinar and during the Q&A session, again, at the end of the webinar. And now, a little about Alex Taylor.

Senior L&D Consultant, Strategy & Advisory and DEI, Alex brings over 20 years of nonprofit experience, focused on strengthening organizations around diversity, equity and inclusion; leadership development and staff training; nonprofit operations and talent management; philanthropy; strategic planning; and stakeholder engagement. Prior to joining Nonprofit HR, Alex served as the Vice President of Development and Endowment for the YMCA of Greater Houston, where she served for over 15 years in a variety of roles in philanthropy, social equity, board development and operations.

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

Alex Taylor: Would help if I unmuted myself. Thank you so much, Atokatha, for that introduction. And just wanted to also let my colleague, Lisa Wright Ponce, introduce herself and then I'm going to give a little bit of an overview of where we're headed today.

We're having a few little technological issues with our slides, so give us a moment to get that figured out. Even if we have a problem with that, don't worry, we're ready. We'll take you through an engaging and interactive presentation today. Lots of conversation — here we go — with Dr. Smith and Amanda. We're going to make this as interactive as possible, even though it is a webinar.

So, we'll be sharing some content, will be sharing some ideas, will be sharing some best practices. We're going to let our panelists respond and we're going to want you all to respond, so I will be the one prompting you as we move through our time together, encouraging you to ask questions or make comments, and we'll have some specific places. But before we get to that, I'll let Lisa introduce herself.

Lisa Wright Ponce: Great. Thanks, Alex. Thank you, Atokatha. My name is Lisa Wright Ponce, and I am a Senior Consultant in the Strategy & Advisory practice with Nonprofit HR.

And I've been in the HR industry for 20-plus years at this point in my career, serving in both the private and nonprofit sectors, the last nine and a half years of which I've been with Nonprofit HR in a consulting capacity. More often than not, the work that I'm doing is really focused on organizational assessments: leading those assessments, leading change management that may occur as a result of those organizational assessments and oftentimes serving as an interim HR leader, really focused on building the strategy, the human capital strategy, to align with where the organization is moving in next phases. As you can imagine, my work spans the entire talent management lifecycle, which we'll talk about in a minute — everything from finding the right talent, growing that talent and then rewarding that talent as it's in the organization.

So, thank you so much for being here, and we look forward to the conversation this afternoon.

Alex Taylor: All right. So, what we're going to talk about today is thinking about our strategic approach to recognizing and developing talent.

Because one of the things that we understand at Nonprofit HR, and that Dr. Smith and Amanda certainly experienced in their careers in developing our staff, is that organizations have to engage and retain our best and brightest people. If we don't do it in an intentional and strategic way — and you're going to hear those words a lot today — we risk losing them, sometimes to other growth opportunities. And I think we're all very cognizant of what's going on in the workforce right now, and how relevant this is, I think that's why we have so many folks joining us this afternoon to participate in this conversation.

In fact, over half of the organizations that we surveyed last year in the Nonprofit HR Talent Management Priorities Survey wanted to prioritize employee engagement, but only about a quarter said that they had some sort of formal plan in place. And so, one of the things we're also going to ... challenge everyone today to think about is, regardless of the size of your organization, there needs to be some strategy and intention and thought about what we're doing to develop our staff. We're going to be talking about that.

We're going to explore a little bit more about why this happens and really talk about why it's important to invest in the talent. We're going to talk a little bit about some of the business needs related to talent. What are some of the challenges? And we're going to let our panelists talk about that: challenges and successes that they've experienced around this and how to transition your organization, from some of the struggles hopefully into some success stories ... [At the end] Lisa is going to share four actionable phases to think through how to put a plan in place and how to get started right now, regardless of your size.

 ... I'm going to give a brief bio on each of the panelists and let them also introduce themselves a little bit.

 ... Amanda Upshaw, as you heard, is CLASP's Chief of Staff. She's a strategic partner to their CEO and on the Executive Leadership Team. She's responsible for organizational culture, communications, development and execution of strategic plans and special priorities.

Before joining CLASP, she worked as a project manager for various companies in education research, pharmaceuticals and manufacturing. Diverse responsibilities in her career have included planning, events, volunteer coordination and supervision, data analysis and mentoring. She has a Project Management Professional certification [and] a Master of Arts in the Philosophy of History — that's an interesting one — and a BA (Bachelor of Arts) with a double major in History and Political Science. Obviously, someone who loves history.

I'm going to let Amanda and Dr. Smith share a little bit more ... about themselves in response to my question for them. So I'm going to read Dr. Smith's file first, then let them answer our question.

Dr. Smith brings more than 25 years of human resource management experience, as well as research and analytical skills to provide specialized and unique approaches to HR leadership. He has served in senior HR leadership roles in the greater D.C. area throughout his career. He has a Ph.D. in Personality Psychology — that's another interesting one — from the University of Michigan, and is also SPHR and SHRM-SCP certified. Dr. Smith has a certification from Georgetown in Organization Development, and certifications from the Academy for the Innovation of Human Resources in Data Analytics and DEI. Expertise includes strategies, statistical data analysis, org development, employer relations, DEI and the full range of HR operational activities. [Dr. Smith is] motivated by opportunities to look under the hoods of organizations — I love that — to see where core business data relates to organizational improvement.

So, I'm going to let you all build off of that with our first question for you. I know both of you, because I've worked with both of you for a little while here ... [You each] have a real passion and commitment to developing your staff and developing leaders in your organization. Where did that start for you? So, Amanda, let's start with you, then Dr. Smith, I'll let you answer that as well.

Amanda Upshaw: Great, thank you, Alex. Hello, everyone. It's a pleasure to be with you today.

And I would say for me, the commitment to developing leaders started when, in my own experience throughout my life, I found myself time after time in leadership roles — sometimes intentionally, sometimes unintentionally — and not always well equipped for those positions and those roles. [I found] myself drinking from a fire hose, if you will, and really understanding: I wish I would have had the opportunity to learn some of these things when it wasn't an emergency, when it wasn't a sink-or-swim situation.

And so, I don't ever want anyone who works at our organization to find themselves in that position. So, understanding that equipping people with skills — maybe even before they need them — is setting them up for success. And, understanding that trying to train someone after they've already failed is just discouraging; it's just a recipe for disaster for both the person and the organization.

So, it's my own experience and also just my own drive to learn and grow myself, and [intentionally] surrounding myself in an organization with like-minded folks who are always looking to grow, develop, learn and stretch themselves.

... I guess [it's] my journey of just knowing: It's best to have the tools before you need them. That's when we set ourselves up for success, so that's what's really driven me to make sure that we are equipping all of our people with those tools right off the bat.

Alex Taylor: Great, thank you, Amanda. And Dr. Smith, same question for you.

Antione Smith: Sure. Good afternoon, and thank you for joining us today.

For me, it's ... a two-part answer to that question. Since grad school, I've been a professor or junior professor, so I've always loved teaching ... the concept of sharing knowledge and ... information with others, seeing the value that it brings to the individual as well as the organizations [they] are associated with. So I started early and even through my middle career in HR, I've had an opportunity to teach HR to young professionals that you and I see ... It's that continual love for giving back, and teaching and developing people myself.

... The other part of the answer has to do with a realization I had as a young HR person: Very frequently, [in] a lot of the challenges that an organization will face, management is the problem. And so, realizing that and, as I became more mature, I also realized that those problems — or whatever challenges an organization faces — management is also the solution.

So, if I can find a way to transition from management — not necessarily having the tools and skills it needs to effectively lead an organization — to providing opportunities for them to have those things, we can turn a problem or weakness into very powerful strength for the organization. Those are the things that drove me to develop this love and passion for developing individuals.

Alex Taylor: Fantastic. Well, thank you ... both, for sharing, and we're going to hear more from them in just a couple of minutes. I'm going to turn it back over to Lisa to take us through where we're headed today.

Lisa Wright Ponce: Great. Thanks to each of you for sharing.

So [here's] where we're headed today, as we talk about the journey of learning and development in an organization: First, we're going to do a strategic check-in to talk about how this investment in people in the organization is defined, qualified, quantified and outcomes driven. That's really a focus on the first six bullets that you see on the agenda.

Where do we start with our investment? What's the lifecycle of that investment? How do we unlock doors to leadership development? How do career development conversations build people, and how does equity play a role? Then, when does the investment start to really impact retention?

But then we're going to take a reality check because strategy and philosophy are perfect entities, but we know that implementing and executing on those sometimes can be challenging, and there are obstacles in the way of organizations.

So, we'll really talk about where you are individually in your organizations on a learning and development journey. And for those of you who have already begun that journey, how is this investment materializing in your organization? So, a lot of good conversations to come.

Alex Taylor: And the first thing we're going to do ... is ask a question: Where do we start? For some of us coming into this webinar today, we may be very early in thinking about this. Maybe we're in a new organization. Maybe we've had this desire to have a strategy; to think about developing our people; to think about investing; maybe we've started to have those conversations. But we haven't maybe moved past that. And for some of us, we're further along.

We really love these collective conversations because it's an opportunity for those of you [where] it's a newer role for you, it's maybe an earlier part in the conversation, an earlier part in the process, to ask those questions. Chime in. Use the question function to do that.

For those of you who have a little more experience, like Dr. Smith and Amanda, we're going to hear some of the things that have worked, some of the things that haven't worked and learn from each other, right? And this is that opportunity. Even in a webinar, where the only voices you're hearing are the four of us, we want you to interact with each other as much as possible that way. [We] want to just remind you of that.

So ... it's an ongoing commitment, right? So, it's not just, "Oh, we start here, and it's just this linear thing and it just keeps moving along." It's an ongoing commitment of coming back and saying, what does it look like now? Given who our workforce is, given who's come in, given who's left, given whatever the current challenges and opportunities are, what does it look like now? And it's not just financial resources. I think that's where we go first sometimes.

What is it going to cost the organization financially to do this? It's also [about] time, energy [and] strategy to listen, understand and respond to the needs of your people in alignment with your organization's goals. And we're going to be pushing a couple of questions forward around career development that hopefully challenge you a little bit to think about this in maybe a little simpler way, right? It's not just formalized professional development plans — although those have their place — it's conversations, and it's time and intention.

Thinking of ways to deepen the investment in your people is a great first step to expanding this ... more holistic approach to learning and development ... Going back to our survey results, because I know some folks like to hear a little bit of the data.

We said 60% of nonprofits listed learning and development as a top priority. The first piece of that — the top three within those priorities underlying learning and development — was developing a strategy or program ... 36%; expanding investments and developing and strengthening teams ... 22%; and implementing a staff mentoring program ... 15%.

We're not going to talk as much about the staff mentoring program, that's probably a whole separate conversation we could have. But we are going to focus a little bit on, how do I create a strategy? How do I create a program, regardless of my organizational size? And even if I have something, what could it look like to really expand some of that investment? And before we get into that, Lisa is going to take us through a little bit of ... the talent management lifecycle again ... as we frame our conversation.

Lisa Wright Ponce: So I reference this just in terms of the work that I do, really focusing on how candidates come to the organization — ultimately, how candidates are valued [and] how they grow at organizations. As we look at this model, think of the conversation we're having today, really living in the growth part. You've attracted the right talent, now you're focused on how to keep them.

So in attracting, you're just determining how you define talent, find talent and integrate talent into the mission in your organization. In growth, we're really talking about: What are the tools and resources that take that next step into integrating talent into your mission? So we're talking about goal setting, coaching, performance management, career pathing, [and] learning and development. And valuing is really that exchange. What do you offer staff in your organization: Compensation, benefits, intangible and tangible pieces for the time they're bringing to the organization?

So, again, we're really focused on growing talent today, and a subset of that growth is really having a solid learning and development strategy.

Alex Taylor: Great. Thank you, Lisa.

So, we want to just touch on this, too. Again, this is all foundational to where we're going. There has to be a pathway. And if you were part of our webinar we did in the fall, from our Strategy & Advisory department, where we brought in some experts in leadership development and learning development, we talked about this quite a bit, about this creating a pathway. And it's this holistic perspective — we're assessing where we are as an organization: surveys, interviews, focus groups, reviewing policies [and] procedures, looking at our culture, all of those kinds of things, before we get started.

Then, we may be leaning into competencies. If we have leadership competencies, we're looking at that. How's that going to undergird [or] set the foundation for what we want folks to look at in terms of their own development? How that's going to help them move to another role? How [is that] going to help them grow within their own role?

Looking at it, sometimes ... as part of a performance management system that's grounded in continuous feedback ... That's something we talk a lot about with our clients.

[Use] that continuous bidirectional feedback model to ensure that you're hearing both sides and that you have good, solid conversation. [Create] some attract for your staff — that can be a part of it as well. Really [look] at courses and trainings that develop them as leaders, [at] whatever level of work within the organization that they're in. We sometimes encourage folks to look at 360 assessments as part of this. That's usually ... when you're a little further along. So I start to [ask for] ... not just the feedback between me and my manager, but [also] feedback with my peers, with stakeholders, with other people in the organization. Then, [I use] all of this to create a very robust professional development plan, something that's a little more formalized. And then [there's] ongoing coaching that's happening throughout this process.

So we want to lay out a very robust pathway. And then, we're going to focus in on some things that are conversation starters — some things for you to think about, again, regardless of the size of your organization, where you can get started.

So, one of the first things we're going to talk a little bit about is career development ... We're going to bring back some statements and questions throughout our conversation today around career development.

I want you all to take a look at this next quote, so we can go to the next slide.

Thank you, Atokatha.

Read this quote. I would strongly encourage you — this is a book I recently read, "Help Them Go or Watch Them Go." I love that catchy title. This is a really powerful quote, I think. And what I would like you to do is try to reflect on this and tell me, if you want, in the question and answer, your thoughts about this and do you agree or disagree with this.

"Career development is among the most frequently forgotten tools for driving business results ... Yet it's completely within a manager's sphere of influence."

And I think that we have some reactions to that. So I would love to hear Dr. Smith or Amanda, I know you all had a chance to look at this a little bit. What are your thoughts about that quote?

Antione Smith: I'll chime in. For me, I think there's a large organizational culture component of this. And so, what I've historically focused on is a couple of things.

There's a tendency of some managers to — whether out of a sense of self-protection or their own role protection — limit the growth and opportunities to learn for their direct reports or their staff. So you really have to overcome that and get folks to really invest in creating their replacement, so to speak. It's a fundamental shift in the culture of an organization to say, "We want folks to invest in folks who need them, so that they continue to grow and not be afraid of creating their own replacements." So that's ... one issue.

And the second I would say, once again, related to culture, is creating an environment where folks aren't afraid — where leadership aren't afraid — to lose their folks to another department, because, once again, it's [about focusing] on what's best for the organization, not department. So I'd rather lose an employee from finance to HR than from AFSPA to somewhere else ... Once again it's a culture shift. We have to train management to think broadly and more organizationally rather than individually, so that folks are able to do cross-training and learn other functional areas or whatever it looks like to build skills. [That way] you're keeping your best and brightest within the organization, which is the most important, rather than keeping them within the department that they're in.

Alex Taylor: Hmm. Good. Yeah, Amanda, any thoughts or reflections on this?

Amanda Upshaw: Sure, I totally agree with what Dr. Smith said that it's certainly an organizational culture question, as far as it being among frequently forgotten tools, I 100% agree with that. As far as, you know, we get so often focused on the impacts, right? So whatever our metrics are for — whether that's dollars or number of people served or whatever it is, we get so focused on the impact that we forget about the people that are driving those impacts within our organization. So I agree with that.

I sort of agree and disagree with the second part of the sentence.

And I think that the third part of the organizational culture piece, to piggyback on what Dr. Smith was saying, [is] that there is a culture of empowering people to speak up for themselves and their own development needs ... To say that it's completely within a manager's sphere of influence, I don't think that's true. I think it's a partnership between a manager and their teammates, right? So whoever works for them.

I have to be invested enough in my own development to take initiative and ask for what I need. Then I need to work with my manager to figure out how to realize that. Right? I have responsibility for myself. I can't just expect my managers and the leadership of my organization to drive my career development, my leadership development. I have to have a stake in that, and I have to be driving that, too.

Now, the responsibility of creating a culture where people feel safe and people feel empowered to do that and own their own career development, it's certainly the responsibility of leadership, right? You have to create that workplace where people feel empowered to do that.

But within that workplace, I think it's a partnership between each individual employee and their leadership of understanding that, I'm not going to expect my manager to be looking out for my career development if I'm not doing it myself. But I do expect my manager to support me, work with me and partner with me to figure out what my growth path looks like. And if I'm a manager, I want to know that my folks are motivated and empowered to come to me with what they feel are the ways in which they'd like to grow.

Alex Taylor: Excellent. Good reflections. Yeah, there's some real challenge in this, right? There are a lot of different factors, layers, nuances to this.

Atokatha, did we get any questions or comments in the question bar?

Atokatha Ashmond Brew: Yes, Alex, you're getting a lot of agreement and a couple of people chimed in. One said, "I don't know if it's forgotten. I think most of the time, it's implemented incorrectly."

Another person said, "There are also employees that are familiar with career development from other organizations and leave to obtain it."

Alex Taylor: Hmm. Yeah. Well, I think that's — look at the title of this book, right? If we're not doing this, and I agree with Amanda that, yes, I — as the individual employee — have to own it. I had a manager tell me this once: "No one is going to care more about your growth than you." Right? So, you might have the greatest leader, greatest manager, in the world who is invested in you. They still aren't thinking about it as much as you are, about your own career growth.

So, yes, we have to own that part. But then we, who sit in management and leadership roles, have that opportunity to really think about how this relates to us being successful as an organization ... Retention is probably one of the key places where we see it ... [with] diverse perspectives, and all the things that people bring into the organization.

So, just again, study after study shows that best-in-class managers — those who are consistently developing the most capable, flexible and engaged teams — are able to drive exceptional business results. They all share one quality, and that's making this a priority.

So, just thinking about how ... and maybe asking ourselves some questions about that, which we're going to get to here in a minute.

So, Lisa's going to talk to us a little bit about equity and retention and how that factors in as well.

Lisa Wright Ponce: Absolutely.

Especially for those who are starting to really develop a learning strategy or education strategy, it's really important to think about the framework your organization can implement. Think about, as you're establishing that framework, adding a lens of diversity, equity and inclusion to that framework, so that really what you're setting up is a framework or a strategy that everyone has equal access to.

We certainly understand ... a lot of folks will tell us as we're doing learning and development assessments that: "Well, if you work for X manager, you get everything that you need to further your career and your growth. But if you worked for a different manager, you have to fight tooth and nail for a little nugget here or there." So, that's not equitable, that's not inclusive. Really [ensure] that it's a framework that's built on equity and inclusion.

And it's a little more than the traditional thought about, "I only get professional development as it aligns very strictly within my role." That's critical, hands down. That absolutely should be a given. But ... there's also learning and development that can happen outside that professional role that helps the staff member, the employee, bring their whole selves to the workplace.

We'll talk a little bit about how some of those things bubble up in the workplace and how they're beneficial in unexpected ways. But it's really about ... ensuring ... that not only are you looking at it with a DEI lens, but you're also maintaining a consistent cadence of basic offerings.

So, you have a baseline of training for new hires. You may have a cohort of managers that are stepping into management for the first time, there's a series that those folks go through. Then, you have senior managers who are ready for more strategic leadership and exploring leadership styles. [It's about] building that foundation as you think about different levels of the organization, and ensuring that year after year you're revisiting those ideas. But having that foundation to build from and ensuring that it's — first and foremost — equitable and accessible and inclusive really makes it easier to adapt that platform or that foundation for the future.

As we think about how that manifests itself, we really start thinking about the impact of retention. Even if you don't have a large budget allocated, which many organizations don't yet. If you just don't have a large budget allocated to learning and development, think about starting with what you have internally and looking for resources as you go.

You may find, when we talk about the assessment phase of the four stages of developing a learning and development strategy ... internally: You have a project management expert who understands Gantt charts or has worked through Six Sigma training. You may find internally, you've got some great expertise. You may find that there's someone who is an expert on specific topics or programs that your organization offers, who can do some great new hire orientation as well. So think about what you have internally and how that fits into your platform.

... It's always great to hear my colleagues talk about what they're doing and what they do well because they've got some street cred already. We're in this together, we're aligned with the mission, and they can truly bring the knowledge and context to whatever topic we're learning about at the time.

There is also a wealth of online resources that come to organizations at no cost, and lots of relationships you may have in your own professional networks, where you can bring an expert to come and talk, maybe at a limited or no cost. So, think creatively about where you can find the resources. But, ultimately, when the staff are seeing that investment, and that opportunity to grow and that everyone can access it equally, that's a big retention factor.

I think earlier, it might've been Dr. Smith who was saying: Here's an organization that [does] the mission and supports the mission well. But at the same time, folks know that we're not the learning and development organization, so somebody's going to leave the organization solely for that piece of their career development.

So, it does have an impact. And, I think, continuing to really advertise [L&D] is really helpful, so that staff know what's available [and] how to access it. Then [they] can share out beyond their own training and learning with their colleagues [about] what they've learned and brought to the table. There's a lot to think on in terms of immediate results and retaining staff.

Alex Taylor: Great. Thank you, Lisa.

Well, we have our next question to think on, but I feel like we ... got some response already from our panelists around this and from you all as well.

So, any other thoughts around career development and what's involved, or what your role might be? I want to give Dr. Smith and Amanda a chance ... in case you wanted to say something that you didn't already for the question in our last discussion.

Basically ... We sort of talked about this in our last discussion question.

Antione Smith: The only thing I would add is ...

Alex Taylor: Nope, we good?

Atokatha Ashmond Brew: Yes, Alex.

Alex Taylor: There you go. You're good. Go ahead, Dr. Smith.

Oh, I'm sorry. Go ahead, Dr. Smith.

Antione Smith: OK. I would add, it's possible to go too far in the right direction. And by that, I mean — and I'm guilty of it is — as management, our primary role, our primary responsibility, is to provide the opportunity for our staff.

... I went through what I thought was a very wonderful training. And ... I couldn't wait to bring it back to my organization, my HR staff ... I enrolled them all and I said, "You have until the end of April to get this particular training done." So very, very paternalistic.

And so, then I had to kind of reflect on that ... knowing that they've got lots of other priorities they're working on. So, I had to ... back away from, "You must do this. You need to be the HR professional [that] you will be." Once again, my role is to provide the opportunity, be supportive in that particular regard, then allow them to go at their pace because there are a host of things that they could do in this training that I provided to them — the opportunity — and let them chart their own course as HR folks. Once again, to provide our folks the opportunity and allow them to move through it as they see fit. And so, I definitely agree with Amanda's point that it's a partnership, between the employee and the employer about, "I'll give you the opportunity; take advantage of it as you need to take advantage of it." So, I absolutely agree with what Amanda said.

Amanda Upshaw: Yeah, and I would say, additionally, what's involved [is] a lot of really honest conversations, and that can be ... a little bit uncomfortable. Whether that is me as an organizational leader saying to one of my staff, "Listen, we really need you to step it up in this one area; or we'd really like you to take some training around this thing. That can often be heard as: I'm lacking in some way, right? If I'm saying this to my staff member. And so, those can be some hard conversations. But there has to be really open, honest dialogue. Or, if I am the employee, I'm going to my manager and saying, "Listen, I want to learn more about this. I want to grow." Like Dr. Smith was saying earlier, my manager's going to be thinking, "Well, are they trying to grow ... away from me?" Right? That can be a little tricky, but we've just got to have really, really honest conversations about what the needs are.

And my particular role, as the Chief of Staff at CLASP, is to really listen ... to what our team members are saying that they're interested in, listening to what our leaders are saying the organization needs [are] and using my position as the eyes on all the things to see: What does the organization need, then [make] connections, right? And saying, "OK, here's what I'm hearing from the staff. Here's what I know the organization needs. Here's what our leadership is saying we need to do. Where can we those diagrams come together? And what do ... we need to focus in on as our org-wide development opportunities?" Or, "I'm hearing from this staff ... that they'd really like to grow in this way. What kind of resources can I find for them?"

So my job, similarly, is to be a listener, be a connector and make sure that the opportunities that both meet the needs of the organization and the needs of our staff are there.

Alex Taylor: Excellent.

I know we [have] some more comments, Atokatha, I think we'll hold off and come back to those towards the end if that's OK. And maybe [we can] offer some of those, because we're going to come back to some more career development questions here in a few.

So, let's dig in a little bit more into some of what you all have done specifically within your organizational context. And so, our first question for Dr. Smith and Amanda is about leadership development, learning and development strategies at your organization. So, if you all can give, each of you, give ... an overview of, what does this look like? Maybe a little bit of how it's evolved. So, yeah, just share what's working, what you all are doing within AFSPA and CLASP.

Antione Smith: Amanda, you want to [start]?

Amanda Upshaw: Sure, yeah, I can start.

So, I would say that we have made a concerted effort over the last few years to actually codify what our development, learning and growth strategy looks like. And that comes from a priority within CLASP on promoting from within and growing people through all levels of the organization. And the only way to do that is to help them grow and learn, right? That's the best way to make sure that we are empowering leaders from within the organization to continue to grow through the ranks.

So, one of the things that we've done that I think has worked really well is, we instituted, we use a system called OKRs — Objectives and Key Results — as our organizational impact measurement tool. And one of the OKRs — every team comes up with these — basically [their] goals and how they are going to achieve them ... Each individual comes up with their goals and how they're going to achieve them, for the year. And most of those are around what their programmatic impacts are going to be.

But what we've implemented over the last couple of years is that [for] each person, one of their objectives concerns their professional development goals for the year. So, they write down what their goal is, the steps that they're going to take to achieve that, and how they're going to measure success, right? And then they check in. When they have their quarterly check-ins — or however often they check in with their management — they're saying, "OK, here's the measurable progress that has been made against my professional development goal," which was made in conversation with their supervisor. And, "Here's what I need from you, as my boss. Here's what I need from the organization, in order to continue to make progress on this."

So, it is putting legs on our commitment to grow our own people, by saying, "We want you to come up with goals for yourself for each year, in conversation with your manager, then have a very clear, measurable way to track progress against those goals. And we're going to revisit those every quarter to decide, is still the goal that's right for you? Is this still the measurement tool that's right for us?"

And so, having those regular check-ins really means that there's dual accountability between a manager and a staff person to make sure that each person is doing what they need to do in order to grow ... that they're meeting their goals, and that their goals are appropriate — both for what they do at the org and where they want to go.

Alex Taylor: Perfect. Dr. Smith?

Antione Smith: For us ... I made the decision, and I've been with AFSPA for 16 years this month. But early on, I realized something from a prior organization, which was: Sitting around lots of executive team tables, realizing there are lots of folks who use the word "strategic" who don't necessarily know what the word "strategic" means. And so, I realized early on to not assume a level of expertise that isn't necessarily around the table. So when I came to AFSPA, one of the very first things I did was I built what we've referred to as the AFSPA Academy, which is a series of five trainings to get back to the basics; to no longer assume that managers have a particular level of expertise regardless of how many years of experience [with which] they come to us — 10, 15, 20, I don't care. I'm not going to assume that you've mastered the basics of being a good leader.

And so, we focus on things like strategic thinking — what it is to be a strategic thinker. We have an employment law, so they don't get themselves in trouble before I have to rescue them as head of HR. We do management frames of reference, we do HR law and another one that's escaping me at this particular point. But once again, focusing on the basics, making sure that folks have a fundamental scope — Oh, we do an in-depth new leader, new manager, training that takes an entire day, focusing on all the nuts and bolts as well as expectations about what it is to be a leader in our organization. So, once again, not assuming that they have expertise, we're going to make sure that you walk out with it.

And the continuation of that is our recent — not too recent — but our recent partnership with Nonprofit HR where, from the employment satisfaction survey, we realized that, once again, management was a problem. Employees were complaining about the quality of leadership. And so, once again, we went back to the basics. We had all our existing managers go through a basic management skills training with Nonprofit HR. We wanted to address what it is to be a leader from the most basic level.

And then, to follow that up, we gave every manager, every leader in the organization from supervisor and above, mandatory executive coaching — one-on-one to work on whatever area of concern that the most feel will impact their ability to be a successful leader. And then the third thing we do is a ... mandatory leadership training [three times a year] on a topic of relevance. Actually, tomorrow Alex is leading [a training] on feedback and how to give appropriate feedback. Once again, not assuming that there's expertise, but drumming it in from our perspective: [Leading from example], this is how we want you to do it. So, that's ... our strategy for making sure that we've got the right folks in the right positions.

Alex Taylor: And I hope you all are hearing the intentionality. Each CLASP and AFSPA are different organizations. They're approaching things in different ways, but there is intentionality and strategy in thinking through this.

And so, the next question is — we'll start with Dr. Smith on this one and then flip back to Amanda — what is one outcome that has had a real impact on your organization? So when you think about that strategy and pulled one outcome, what is one outcome that's had a real impact?

Antione Smith: The thing I could probably most closely align it with was seeing a dramatic and significant increase year over year in our employee satisfaction scores, tied closely to the perception of the quality of leadership. The scores ... go on an average of almost 8-9% a year since we started doing this ... [approximately] three years ago with Nonprofit HR. And so, employees are recognizing the efforts and recognizing that there is a change going on in management — a tangible, quantifiable change in the quality of leadership as well as who we're bringing in ... Even the current leaders who've been there 10–15 years, like myself, they're recognizing that, "Hey, it's a different day, and I'm feeling it. I'm feeling better about it and I'm more inclined to stay with the organization than I was three, four, five years ago."

Alex Taylor: Hmm, Amanda?

Amanda Upshaw: Sure.

I would say the confidence that we see our, particularly newer leaders exhibit when they're handling tricky situations. So, how often has our CEO or our other senior leadership [or HR] had to get involved ... in conversations or problems, if you will? And we've seen that the number of times our senior most leaders have had to step in go down because ... our leaders [and] managers are more confident in how they handle these situations. They're more confident in being proactive, so they don't become problems ... Knowing that these are the things they need to do from the get-go, right on the front end as a leader, to make sure that these things don't become problems later.

And so, I would say that's a real tangible outcome that we've seen — the confidence that our managers, particularly our newer managers, are exhibiting when handling all sorts of issues, right? Where ... normally ... they might come to our senior leaders and say help. They're handling them on their own and they're handling them in professional, healthy ways that are resulting in everybody coming out of it being satisfied, moving on and working towards our impact.

Alex Taylor: Yeah. So, engagement, belief in the organization, feeling connected and ... feeling confident, right? ... Whatever leadership role you're in, [it's important to be] able to handle issues, have that initial conversation ... with an employee without it escalating into something else.

So, we want to come back and let our audience jump back in on another reflection question. So, this is another statement.:

"Careers are developed one conversation at a time ... over time."

And so, I shared this with Lisa, Dr. Smith and Amanda and wanted to give anybody an opportunity to share a personal story, if there was something you thought of when you saw this. Lisa, you're smiling and nodding, so I'll let you go first. If you have a conversation or something that you're thinking about, a series of conversations that you've had with staff, or that someone has had with you, I'd love to hear. And then, we'll let the audience kind of respond as you're sharing, and then, I'll let Atokatha tell us if we've got some responses.

Lisa Wright Ponce: Yeah, I'm smiling because, at the time, even as an HR professional early in my career, I didn't know the conversation was happening.

I had a list of things that I thought I didn't want to do, including supervising people and leading an HR department — I thought I wanted to be a specialist. A very sudden opportunity came up. And my supervisor at the time, who was the chief HR officer, said, "Well, why don't you switch from this training manager role to this HR manager role?" And I said, "Because I'm not sure I know how to do that." I have a master's degree, but I've been focused on this training. She said, "I think you're going to be fine." So, she ... pushed me in that direction, and I thought, "Oh, so she is paying attention to what I'm talking about, but she sees something that I don't see yet." So that was an interesting way of stepping into that role.

Fast forward about three years later, I had been talking to her ... "I've been doing the same thing for a couple of years ... what's next?" I don't know what's next and looking for some guidance — even HR folks have these questions, by the way. And she said, "Well, you know, there's an executive position opening." And I said, "Well, I've only been doing this for a little while." She says, "You know what? Big shoes to fill, but it's the right place at the right time. You need to go explore the opportunity."

So, she really pushed me in different directions that I don't think I would have gone on my own. So, there were these opportunities that presented themselves that weren't a planned segue into training manager, HR manager, HR leader. But I found that, in fact, all of the things I had on my "don't do" list were things that I truly enjoyed. And then, being a specialist was not the way I was going to go. But I wouldn't ... necessarily ... have taken that risk at that point of my career not feeling wholly prepared for something I'd like to be prepared for, if I hadn't had her behind me pushing.

Alex Taylor: Hmm, very cool.

Atokatha, do we have any responses to this statement and questions from the participants?

Atokatha Ashmond Brew: We do Alex, and this may be a spillover from the last one, though.

Alex Taylor: That's fine.

Atokatha Ashmond Brew: You are the only HR person at the mid-level in the organization. If you do not have any input in the budget allocation for L&D, how do you make a case for equity?

Alex Taylor: Oh, that's a heavy one. Does anyone want to take a stab at that?

I would say that one of the things that come to mind, and — actually, I feel like Lisa, you and I talked about this in a client webinar we did — there is ... what we were talking about at the beginning, and this even goes into retention. Sometimes being really direct and blunt with folks who are making the budget decisions about ... the reality is: Here are stats, research [and] trends I'm looking at in our industry or in the nonprofit space, that show if we don't invest in folks, if we aren't training our managers and our leadership on how to have these kinds of conversations [it will have a negative impact] ... It's not just about [having] a big budget and ... all these resources ... to do all these formalized trainings.

Yes, that's great. That's a piece of it. But it's even: If we're not being intentional, having conversations, bringing up career development and professional growth with people, whatever the resources are that we have, we are going to lose folks.

And so, sometimes it just has to be said, I feel like, that bluntly. I think there's a recognition too that sometimes, whatever budget … you have — especially if you're with a limited budget — may be impacted, and this may be one of the first places that people who sit in the financial seats look to cut. But I think we're also seeing now what's happening across our sector when we don't invest in our people. However, we're defining that and how we're putting energy and intention into that. So I don't know if anyone else has any other reflections to that question.

Antione Smith: I agree with you, Alex. And I would, in addition to being blunt and direct, which I'm a huge fan of, as a psychologist, I believe in data. Drown them in data. Externally, there is a wealth of data available about the impact of these initiatives on organizations. But also, get your internal data. Do … satisfaction surveys, and gather data. Do interviews, stay interviews, exit interviews. All are going to paint a picture about: "This is the impact if we do or don't do this."

And, the other thing I would say is, as Lisa introduced earlier, find cheap or inexpensive resources and track the consequences or impact of those, so you're building a picture that shows, "This is why it's important. The outside data says it, the inside data says it. When we've done it, it's produced this." If you're able to paint this big picture, they have no choice but to listen. Drown them in data.

Alex Taylor: Oh, go ahead.

Lisa Wright Ponce: I was going to say, I think there are four or five points in terms of making your pitch to the leadership team.

 … What's the organizational challenge they may or may not been aware of? As Alex and Dr. Smith said. How does that organizational challenge compare to what's happening in the marketplace? Is it a trend in the workplace? Certainly, it's bringing to bear the data piece of it. You've got to have the data behind it, or it will fall on its face. And then, bringing forth a couple of solutions. And then, lastly, what are the metrics that you're going to use?

I think those are all points that Alex and Dr. Smith targeted. But thinking about structuring your pitch in that way can be helpful.

Alex Taylor: And I think this really leads us ... to our next question. So we may have some other comments. We'll circle back to those if we have time at the end, I just want to make sure we get through a couple more questions and then let Lisa share some of the strategy piece.

So this, I think, actually leads to this question. What are some challenges, Dr. Smith and Amanda? We'll start with Amanda, if you don't mind. What are some challenges that you're facing right now with your strategy? And so, this is your opportunity to let us look under the hood, right? Like Dr. Smith said in his bio, what are some challenges you're facing?

Amanda Upshaw: Sure.

First and foremost is just time, right? Everyone is so just flat-against-the-wall busy with their work. Especially working for an impact-driven organization, there is always more work to do. There is always more impact to go after. And so, I think everybody recognizes, everyone's on the same page, we all agree about the value of professional development and growth, but who has the time, right? To attend the training, or to watch a webinar, or whatever it is. So, I think that's the biggest challenge.

And I would say connected to that, too, is helping everyone understand that professional development means more than just ... technical development, right? So, we have a group of people who are subject matter experts in their field, and it's very technical, and they're always looking for ways to grow their technical skills. But to understand, too, that there are other parts of becoming a leader and growing as a professional than the technical side of your job, and helping everyone understand the value of both and that we have to prioritize both and make time for both is a challenge, I think, when, again, people are so focused and so busy with the good work that they're doing.

And also, they say, "OK, if I'm going to take the time out, I'm going to take the time to grow my technical skills," as opposed to soft skills. And helping them understand that no, actually, you really need to do both, and you have to make time and space and priority for both of those. I would say that's been our biggest challenge.

Antione Smith: For us, I would say resistance to change is probably the biggest challenge.

As HR folks, we have an obligation and responsibility to champion, in the best-case scenario, champion the culture of an organization, what we aspire to be. And I think in the worst-case scenario, we call out when it's a disparity between what we say we want to be and who we actually are.

And so, there are times when I went up against the walls of people who have been doing what they've been doing for years and years, beyond my tenure at AFSPA, and getting them to recognize that we have a different way of doing things, particularly around L&D. And that there is a priority in terms of developing folks, despite the fact you may have an internalized fear of being replaced, we still need you to do it this way, or see the value of developing folks for their next job.

The fight is always real and always ongoing. It's not as though I can ... lay down the lantern to say I'm done. We fixed it. So, there's always an ongoing battle that I think I win more days than I lose. And it gets ... easier as you bring in folks that are less institutionalized and you're ... able to bend them early on, and this is not a factor based on age or anything. It's really based on openness to experience and openness in thinking differently about recognizing that you don't have all the answers. I don't have all the answers and I've been doing HR for as long as I have. And so, once again, that resistance is, for me, the biggest challenge.

Alex Taylor: Mhmm.

So, last question for you all, and then we're going to pose another question — a direct question — to the audience before we go into our four steps of creating a strategy. Anything else you'd say about how you're measuring success?

You all talked a little bit about this in the very first question, just about how you're creating that strategy, and I think there were some success indicators in there. Is there anything else you would want to share with the group about how you're measuring the success of your L&D efforts, outside of the things that you've already mentioned?

Antione Smith: For me, I'd say when I sit and look at my succession plan for the organization, and I'm 85–90% confident that we've ... identified, the next generation of stars and that we're giving them the opportunities to grow and we ... know where they can go [— that's a good indicator]. And I'm close to that. So, I'm measuring it by how far I'm able to push the succession plan to make sure that we've got the next generation of leadership already in line, in place, and that we're not losing those folks to other organizations — that's my yardstick for, "OK, we're on target where we're doing well," or, "We would need to beef it up, and we're really missing 10 key slots that we're going to be really, really messed up, if we don't give them filled. So the succession plan is my instrument.

Alex Taylor: Excellent. Amanda?

Amanda Upshaw: Similarly, I personally look at our organization and say, how many of our leaders have come up through the organization, or how many of them came in as managers from an outside organization? How many of our senior leaders have been with us for a while and have come through different levels in the org and now they're in the position of organizational leadership, right? To me that tells us [whether we] are doing a good job or not of developing and growing our people.

So that's part of it, but then, I would say, the second part is, do people feel comfortable? Are they forthcoming with what they need in their own development? Or are they closed off, or are they too afraid to say anything? You know, when I go out to folks and say, "What do you need?" Do I get responses or not? Right? Or is it just crickets?

And so, if I'm not getting responses then I know I need to do a better job of encouraging learning and development in our organization. So, both seeing how our organization has grown leaders over time and how we continue to do that and seeing how much people will speak up for what they need is how I measure success.

Alex Taylor: Oh, those are great.

Well, our last question for the audience — and I'm going to let Dr. Smith and Amanda respond to this one as well — this really tees us up how we create a strategy. Because one of the things we have to ask is, what does the culture of development look like? What are those indicators that exist within our organizational culture that show that we value developing staff?

So, yeah. Dr. Smith, Amanda or Lisa, anyone want to respond to this? … I would love to hear from the audience, as well … Put this in the question pane and then I'll ask Atokatha here in a minute if we've got any responses.

Antione Smith: I guess I'll jump in. For me, I think it's a shared commitment to the idea and the philosophy of development that is mirrored from the very top of the organization all throughout the leadership. There's an actual commitment. You put the resources, the dollars, the time, the energy behind making sure that folks get that opportunity. And one of the most recent things that we're doing now is, to the extent that folks who are able to do so, I encourage you to find a great learning management system (LMS). They are worth their weight in gold if you find one.

And so, we have one that has a library of 3,000 trainings ... We have a three-step model for dealing with development that was brought in, despite the expense for the CEO. Level one is our mandatory training — things that we're required to do for our contract, the sexual harassment stuff, the usual stuff. Level two is decided upon by the department leaders to identify relevant training that will help folks do their jobs better. So for me, it's HR training that my folks can take through the LMS that focuses on employee relations or whatever. So it's mandatory. They have to do three a year. Every department buys in and makes sure their folks do at least three trainings, and it's really related to their job.

And then [there's] level four — because there are so many other trainings in the system — we've opened it up to staff to do whatever training that they want to do on their own, on the company. We allow up to three hours. So if they want to learn Spanish, go learn Spanish. If you want to learn Cobalt or whatever the latest IT thing is, go learn it, on the company. That's the commitment from the organization that we just want to be a learning organization — go forth and learn. So, that commitment is what it looked like for me.

Lisa Wright Ponce: Hmm, yeah, and I like that idea. We talked earlier about being a learning organization and that learning occurring — maybe around the edges of someone's role, or maybe more related to who they are as a person and things that they find interesting — enabling a staff member to go forth and conquer in that way is fantastic. Because there aren't restrictions on learning. To me, that's neat.

I always think about the metrics side of it. We've talked a little bit about how you measure a successful program. And so, I think part of that culture is measure. How do you measure? What are the metrics? How can you suggest that learning Spanish is helpful to someone doing their role? Or [how] taking another kind of course helpful to who they are and how productive and engaged they are? Those are some tough metrics, but it has to be pretty focused on the outcomes or the results so that you can prove ... there's an ROI on that investment.

Alex Taylor: All right. Well, let's — oh, go ahead, Amanda. Did you want to chime in?

Amanda Upshaw: Just going to say ... I agree with everything that's been said. And I think a learning culture really comes from ... What's the proof, right?

So, how often do development or training requests get approved or denied, right? If you have an organization that has a really high approval rate ... that speaks for itself ... that you are approving ... that your employees are coming in saying, "I would like to do this, and this is how, this is why." And then it's approved.

So having that, but then also taking the initiative, like I said before, and recognizing this is what we see as an organizational need. So we're not going to wait for folks to come and tell us they need this. We're going to offer that proactively, whether that's leadership development or whether that's something around DEI, how to communicate interculturally, things like that. So it's being — how you react to requests and how you're proactive.

And I think that this can go beyond just the webinars or seminars or things like that. In our organization, we highly encourage people to go back to school, right? Go and do more formal education, if that is what is necessary for you to do your job, and we are going to support you, through tuition reimbursement or student loan reimbursement, or things like that.

And so, we want to create a learning culture that's not just defined by what CLASP offers during business hours. But also, we encourage folks and we support folks to continue to have this eagerness to learn, this sort of thirst for learning and growing and developing, even outside of office hours, right?

Alex Taylor: Yeah. We're going to actually — I love that. We're going to come back to that in a future webinar coming for our department around the learning culture, right? How do we create that culture of learning? Because it goes beyond what we're talking about here, which may be more formalized things, into that desire, and actually that goes — Atokatha if you want to go to the next slide — I'll just show you all.

This came from the same book, the "Help Me Grow" book. I loved this though. I thought it was really, again, the language that was used, the ideas — you all have touched on many of these things. The opportunities to collaborate across departments and teams, that goes back directly to what Dr. Smith was talking about. So we're not worried about, "Oh, this only is happening within my team or department." We're information rich. It's an environment of openness and transparency. We're sharing a lot of resources and ideas. We have results that we're focused on, so that goes to the metrics that Lisa was talking about. We're patient with this process, giving ourselves time and space to shift things within the culture or to give people the opportunity to change. We're curious. I love that. I do a lot of coaching, and it's one of the most critical skills to have — curiosity — ... so we want to constantly listen to our folks and hear what they're going to say.

So, we are going to let Lisa wrap us up. And then, I know that some people should [have] probably shared some responses to this. We'll come back to that.

We're giving ourselves about 15 minutes at the end for any other comments from the audience, questions, so if you have more questions for any of us, start putting those into the question pane as Lisa takes us through an actual four-step approach … You'll get the slides afterwards. This will be something you can come back and reference as well.

So, take it away, Lisa.

Lisa Wright Ponce: Great. So we've talked a lot of strategy, a lot of philosophy, we've talked about outcomes and metrics. Let's talk about how to do it. What are the first steps that really help you on your journey, whether you're engaged in that journey or you're just starting that journey toward being a learning organization? We're going to break down, assess, align, analyze and repeat. So, really, it's three steps, you just do the others, again. So it's even more straightforward.

When we talk about really assessing, we've touched on this, but it's really critical to pause before you jump in. Do some assessments, because, as Amanda was saying earlier, having a great learning and development strategy and program is much more than simply making things available, making courses available, or saying, "This is what we're going to do." So, really identify, what are the needs of staff? Or the organization's needs. And you might do that through an online survey. You might do some focus groups.

Perhaps those groups are aligned around your organization's core values … Find out what's most important to your folks, where they feel there are opportunities for growth and what staff need in order to be successful as part of the organization. Are there competencies? We talked about those earlier— leadership competencies, overall organizational competencies … how can learning and educational opportunities support those? So you're really putting your — in essence — money where your mouth is when you talk about values and competencies.

… Other questions, that you can ask in this assessment phase are around how folks experience equity. We talked early on about the importance of equity and inclusiveness in designing your program. And so, once you have a sense of where all those ideas land, you have a foundation for what staffers say they need … Then you're going to take a step back and … go to the next step: aligning.

So, how do you ensure that what staff need align with, perhaps what's [in] your strategic plan? Again, those additional competencies, if you don't have them, you may be developing them in this process. Then, determine that phased-in approach for training. This isn't intended to be overwhelming.

So, both Amanda and Dr. Smith talked about different tiers of training that they do in each of their organizations, so start with the basics. Determine what a budget might be if you budget. We've talked about lots of other things that don't cost a lot of money to do. So really thinking, here are your staff needs and now aligning it with your strategic plan, with the competencies, to ensure that later on, you're going to see some outcomes related to those values, related to the strategic plan, that performance of staff. That's really important.

So, next is ... we've assessed, we've aligned, we're now really looking at analyzing. We talked about: You've created and implemented a framework for your workforce. You're measuring the effectiveness of the initiatives that you've put into place through the training program, constantly checking in to ensure that they're relevant, that they're making impact and then you revisit those efforts to gauge things. Is there some little tweak that you need to do differently to make a course more meaningful or to drive a different outcome? Maybe you found that it's having outcomes you didn't expect, which are great, but maybe you're really driving for a more specific outcome related to that strategic plan.

This is where you can start thinking about how you're setting goals. I think it was Amanda, you talked about that earlier. How are those goals set? Where is the space for those goals around professional or personal development? So that really starts to, as you start to add in the goal setting, you're really creating accountability, an intention, across the organization ... For the organization — both for teams and ... for individual employees. So your framework starts to become even more robust at this stage. But you'll notice, it's all about benchmarks, graduating into metrics, reviewing that data, adapting as needed and coming back to that focus on accountability.

And the last step is doing it all over again. Back to some of the points that were made early on in this program, we talked about the need to continuously align and realign. It's a journey, it's not a one-and-done. You don't have a strategy that remains static, even if you phase in all the supports, and then you're done. It's starting that process again, at regular intervals, so that maybe it's an annual process. Maybe it's biannual after you phase things in. But, repeat that process, because learning is an evolution in and of itself. So what you're learning today will impact what you need to learn in the future and your program may need to shift or change. If you've had a significant influx of new staff, who, as Dr. Smith said, need to come up to, "This is how we do it here."

So, lots of things, but if you just think about assess, align, analyze and repeat, I think that'll give you some solid structure for starting on your journey.

Alex Taylor: Fantastic. Thank you, Lisa.

... I'm going to briefly just touch on, again, some of the things that we mentioned, that we, at Nonprofit HR, can help support through our Strategy & Advisory team and practice area. So, these are things we mentioned earlier. And then, we're going to get to final thoughts from our panelists, as well as your questions ... So, now is the time. If there is a comment, a question, something you want to raise with us, any of us, get that into the question box. Get that sent over to Atokatha.

But if you are also looking for any sort of help or partnership just to explore initially what this could look like, here are all the ways that we can help support you. We do organizational assessments, both HR and DEI focus. We even do hybrids of those. We help develop L&D strategies with clients. We work on competency models and so, we have a couple of different approaches that we use with that to work with organizations who are looking to develop leadership competencies, if you haven't done that before. Obviously, learning and development tracks. We do a lot of training in different areas and have the opportunity to, again, integrate into what you as an organization want to do and move forward within your leadership team, within your managers, within your staff — Advisory on Demand. So, we offer, again, just a partnership, an opportunity if you need to pick our brains about something related to Strategy & Advisory, related to L&D, HR, 360 assessments. We have a tool and resource that we use for that, and then we have coaches that can come alongside and help coach staff through the 360 process, and just ongoing manager and leadership coaching. We do one-on-ones as well as groups. So, my email address is there. You'll see it again at the end. If there's something you have questions about or need a little more information, let me know.

All right. Now, let's get to some Q&A.

So, Atokatha, I don't know if we have some questions that you've pulled from participants that you might want to share with us?

Atokatha Ashmond Brew: Yes, Alex, here's the first one. What are some L&D strategy baseline measurement tools? Dr. Smith noted employee satisfaction scores, are there others to consider?

Alex Taylor: I'm going to let other folks respond to that first. [Does] anybody have something else that you would say is a metric around L&D?

Lisa Wright Ponce: I'd say something ... we were talking about this earlier ... [to set an] initial benchmark around, how has the goal been set? We talked about goal setting as part of learning and development ... Was that goal achieved?

Just a simple, it was set, it was achieved. That's important to know, that folks are going through the process, not sticking that piece of paper in the drawer and waiting a year later to say, "Oh, I didn't have time to do it." I think that's an important metric, just as a benchmark.

Alex Taylor: Other metrics?

Antione Smith: Information can also be gathered, even if you introduce stay interviews ... off-cycle, informal — how are we doing as it relates to L&D? What would you like to see more of? Are you getting what you need? So it gives you a point in time from a cross-section of the organization that allows you to have some data about your efforts and how they're progressing.

Lisa Wright Ponce: ... We were talking about.

Alex Taylor: Retention?

Lisa Wright Ponce: Yup.

Alex Taylor: Yeah, retention [with the] the engagement survey. But ... if the needle moves on your retention and how you're able to keep staff, that is a key indicator ... of the impact of your strategy, particularly over some time.

Amanda Upshaw: Yeah, I definitely think many different tools can be employed for both the short term and long term.

... Something like surveys or interviews are great ... pulse checks maybe in the shorter term, whether that's over a period of months or a year, to see progress both on how your organization feels that your learning and development program is doing, and also how your employees or ... staff feel that they're getting their own needs met, right? Are they growing within? So those are certainly tools that are great for ... the short- and mid-term.

I think longer term is really looking at the trends — whether that's retention ... [or] promotion ... [those are] overall trends in satisfaction, whether that [answers the question:] Do you have folks taking a whole lot of mental health days or vacation days? Are people not taking time off when they have it? Right?

All of these are trends that you can look at over time to see the overall health of your organization, but also particularly, do folks feel like they're learning, growing and developing in your organization, and is it showing by how they move? Move around and up within your org. So I think there are different tools you can employ to see how you're doing in different time periods.

Alex Taylor: All right. Atokatha, another question or comment?

Atokatha Ashmond Brew: Yes.

We are a small organization and can't afford to put a big training program in place. How can we develop our staff?

Lisa Wright Ponce: Well, I honestly think it begins with the process we just discussed ... our four-step process. Understanding what staff need first, understanding what's called for and just, open the floodgates. Talk about anything and everything, no restrictions. You're not talking about money, you're just really going and waving the magic wand, and understanding what staff need — what you feel is helpful based on trends you see in the organization.

I think going from that standpoint, we talked about ways to capitalize on internal talent. Have you done a survey of folks to say, "Hey, what do you do? What are you good at in your job? Or, does anybody know a yoga instructor? Or, when we talk about mental health and well-being, [are we] really understanding what the skill sets are that live in the organization? How can you capitalize on that in order to present some helpful training and education opportunities?

There are a couple of lower-cost, or, in some cases, some free coursework that's available through different online providers. You can also look to organizations if you partner with an employment law, employment attorney counsel, they oftentimes can come in and help with some of the compliance training. There are organizations that sometimes will do that pro bono, sometimes not.

So thinking about, can staff attend a session on a topic that you need and then turn that back into your own customized version? Be careful of trademarks and licensing and all of that, but how can staff go out, and one or two people learn, then bring it back to the organization? So ... there are lots of ways to think creatively about how you do that. And, when you really capitalize on internal talent, that's giving folks an opportunity to showcase their skills and become the go-to person. And that's another retention tool, in and of itself.

Antione Smith: And I — sorry.

Alex Taylor: Oh, no. Go ahead, Dr. Smith.

Antione Smith: And I would add, somewhat facetiously, but in seriousness that YouTube is more than just cat videos. And so, I think you can learn surgery from YouTube, so there are a host of absolutely free resources. We've used YouTube to supplement our existing trainings. There's some really good content on YouTube, or those kinds of sources, that you can use to put together a really good program, at absolutely no cost. So don't underestimate the importance of things like YouTube.

Alex Taylor: There's a lot. There's a lot out there ... The other thing to just highlight, and then I'll let Amanda jump in, is when we talk about staff development and when we train around it, we talk a lot about the 70-20-10 model of learning. And so, this is just something I want to highlight as well.

Training is very important. Obviously. This is what Lisa and I do. This is what Dr. Smith and Amanda spend a lot of time thinking about as well, and many of you, so I'm not trying to underestimate the impact and value of that. But the reality is that for adult learners ... 70% of how they learn is on the job ... skill training and getting those experiences. Well, those are things you can create within your organization.

So, that's why having these career development conversations, being intentional in talking with your folks and finding out what it is that they want to develop, and assessing your organization to know, "Here are the places where we're going to need more people to have more of the skill, to have more of that background, to have more expertise," [is important]. Then, helping people find ways to connect. That's going to cost some time. But in terms of investing in a formal strategy, or formal ... training structure, that's not part of that. This is the internal piece of this. So, I just wanted to highlight that to make sure that's on people's radars as well.

And, Amanda, what did you want to share as well?

Amanda Upshaw: Sure. This question rings very true. We're also a small organization, a small nonprofit, so we have limited resources, and making sure that we're being really great stewards of our funders' resources.

And so, for us, it really started with ... three things. Number one is understanding what people need, and not just starting from a place of, "OK, you want this? Go for it. You want that? Go for it. You want this? Go for it." Hopefully, we get to that place, but with understanding: Is there a theme? Are we seeing recurring responses? So, we know half of our organization is really interested in communications training ... we're going to put resources towards that, because it's going to be a huge return on investment ... it's not one or two people who are looking for this. It's half of our organization who are looking for this. So, [it's about] really finding out first what it is that people are interested in and seeing, is there something where we could ... with one hit, respond to a whole bunch of needs? [It's about] understanding that first.

[It's] like what Lisa said with leveraging your internal resources. Half of our staff is interested in communications training. We have an excellent chief comms officer who can come in and not only talk about communications in general, but the real value there comes because she can bring in what it means for our organization. It's not just how you communicate, it's how do we communicate at CLASP? How do we communicate as CLASP?

And so, that's, again, a huge return because she's giving these building blocks of communications training, but also really bringing in: "This is what it means for our organization, and this is how we communicate at our organization."

And then, the third thing, I totally agree with Dr. Smith about YouTube. I would absolutely endorse that, as well as LinkedIn. There are a ton of resources on LinkedIn, trainings you can take [and] LinkedIn Learning ... Some of that's free, some of it's not, but it's not usually a huge cost. And that comes back to the do the research part, right? And like you said, Alex, it's going to take a little time.

But, there are lots of resources out there that you can utilize, both for what it means for your organization, and [by asking]: "OK, you, Alex, are the one person who's interested in this one thing? OK, let's find you a resource that's reasonable that you can use," to still be encouraging this culture of learning.

Alex Taylor: Atokatha, maybe one more question or comment.

Atokatha Ashmond Brew: Yeah. How do you balance an employee's ideas or areas for development with the strategic goals of the organization?

Alex Taylor: That's a good one to end on, huh?

Amanda Upshaw: Save the really easy one for last!

Antione Smith: I think it's about communication, and how well your staff [are] versed in the strategic priorities of the organization. How good a job have [they've] done in sharing what's important and why; where we're going as an organization; and getting them to buy into that understanding of alignment.

I think the better you're able to communicate where we are as a company and where we're going; I think a large percentage — I won't say the majority — of employees will get it and go: "OK, then what I'm looking for needs to be, in some way, at least as beneficial to the organization as it is to me." So [part of it is] how well you communicate the vision of the organization.

Alex Taylor: Hmm, hmm, hmm.

Amanda Upshaw: Yeah, I 100% agree with that, 100%.

It's really [about] getting the message out there as far as: "These are the organization's strategic priorities." How do you push that down through each level, and how do you make that land for each person so they understand: "OK, this is the organization's strategic priority, and this is how I contribute to that as an individual." And that's a conversation that has to happen all the way down the line — from your senior leadership to your managers to the people that they supervise — so that they understand, "This is my contribution through my work, but this is also how I contribute through my growth."

And so, again, making sure that they understand this is my part. They [need] buy in. They have to really feel like they own it just as much as the CEO — that will be the lens through which they look at their work. And that will be the lens through which they look for development opportunities.

Alex Taylor: All right. So, any final thoughts from Amanda? Dr. Smith? Anything else that you would love to share, that you were just dying to say in this last hour and a half that you didn't get a chance to share?

Antione Smith: I'll just reiterate the point I made earlier about, don't assume. Don't assume proficiency, don't assume expertise of even your most senior [leaders]. Some CEOs need a little tweaking every now and then in terms of areas of expertise. And so, don't assume ... Work to at least build a common level of competence for your organization. Insist that we at least have a common basic understanding of how we do things here and then build on that.

Amanda Upshaw: Yeah. That's great. And I would also just add that, don't — this is not just a bunch of don'ts — but be open to non-traditional paths of learning and development, and leadership. Right?

So, be open to giving someone who may not have a traditional leadership education or background opportunities for leadership, growth and development. Or be open to routes or resources that may seem a little unorthodox, right? ... that can absolutely be valuable. And be open to the discussion.

That's the key. It's got to be a discussion and [be] open to the conversation about all kinds of different routes for people to learn, because people learn differently. They learn through different means and at different paces.

And so, understanding that it's customized, right? There's not a one-size-fits-all learning and development plan for each person — being open to that is really important.

Alex Taylor: That's beautiful.

Well, I want to thank you both, for giving us time this afternoon, for sharing your perspective, your learnings, the things you're continuing to learn. It's a journey, and I think for all of us who are engaged in this [it's about] the opportunity to come together and hear from each other.

I want to thank Lisa for being my co-host today and sharing her wisdom and perspective as well, and her insights into what we're seeing happen. It's always a privilege to be with everybody from the internal Nonprofit HR team, and our partners like Amanda and Dr. Smith. And so, with that, I'm going to turn it back over to Atokatha to close us out and we will wrap up.

Atokatha Ashmond Brew: Thank you so much, Alex, and thank you so much to the panel, again. Thank you to everyone who attended today's webinar, as well. We hope you found it valuable.

Thank you, again, for our wonderful panelists. And please know that we will be sending out slides and the recording to this webinar within the week. There are many more webinars coming up in 2022. Be sure to check out our events calendar at nonprofithr.com/events.

Also, please be sure to complete our feedback survey that will pop up once the webcast has ended. Your comments help us with our planning and can inform topics we cover as well. If you'd like more information about Nonprofit HR and our available services to support your talent management priorities, visit us online at nonprofithr.com, or email us at info@nonprofithr.com. Thanks again, and have a wonderful day.

Alex Taylor: Thanks, everyone.