

# Performance Management & Staffing

- ✓ Be able to identify what needs can be met through performance management.
- ✓ Use competencies approach in staffing strategy.
- ✓ Know the roles and responsibilities of supervision.
- ✓ Create role clarity using a competencies approach.

# A Sustainable Model for Performance Management:

The purpose of an organization's performance planning, management, and review process is to guide, support, and develop staff to **ensure both employee and organizational success.**

# Performance Management Infrastructure



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Who's responsible for managing performance?

**ORGANIZATION** Mission, Priorities, and Goals

**DEPARTMENT** Goal Setting and Alignment by Area

**INDIVIDUAL**



# THEORY of CHANGE

## PROBLEM or ISSUE STATEMENT

A concise and compelling description of the conditions we aim to change.

## ORGANIZATIONAL STRATEGIES

The distinctive, cross-cutting approaches we take to our work.

## ANTICIPATED CHANGES

Specific, observable changes that indicate that the problem is being solved.

## FOCUS of CHANGE

The people among whom we will focus our efforts and resources.

## VALUES & GUIDING PRINCIPLES

- VALUES: Fundamental, intrinsic beliefs that guide the work.
- GUIDING PRINCIPLES: How the organization expresses its values; the organization's character in action. Guiding principles describe the way the values manifest on a daily basis.

1 = None/Extremely low

2 = Low

3 = Medium

4 = High

EXAMPLE Competencies	You/ED	Board	Senior Staff	Mid Staff	Entry Staff	Other/Externals	Where prevalence most needed?	STAR priority need areas
Ex: Leading/Managing Teams	3*	1	2*	1*	1	2	<i>No priority needs at this time. Heavy use of affiliates for coaching programs alleviates urgency.</i>	
Ex: Governance	2*	3*	1*	1	1	1	<i>Board and senior staff priority, others "nice to have" Sr. staff highest priority.</i>	
Ex: Financial Literacy	2*	1*	4*	1	1	1	<i>Want base-line across the entire staff and board. Focus on board, but possibly some basics for other staff.</i>	
Ex: Diversity, Equity, Inclusion	3*	1*	2*	3*	3*		<i>This is a priority across the whole organization/</i>	

# Supervision Roles and Responsibilities

*Strengths-based*

*Multiculturalism*

*Organizational Culture*

*Political Framework*

*Leadership Beliefs*

*Field or Mission*

## ORGANIZATION

Mission, Priorities, and Goals

### Expectation Setting

- New staff orientation
- Setting annual goals
- Creating professional development plans
- Reviewing and revising workplans
- Delegating
- Assigning projects
- Reviewing and revising job description

**MUTUAL**

### Performance Review

- Quarterly and/or biannual performance reviews
- Annual performance reviews
- Setting annual goals
- Creating professional development plans

**NO SURPRISES**

### Regular Communication

- Discussing current projects, work load, and deadlines
- Identifying and solving problems
- Giving timely appreciative and developmental feedback
- Coaching and supporting

**ONGOING**

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<u>Roles</u>	<u>Key Activities/Accountabilities</u>	<u>Competencies (skills, strengths). Rate 1, 2, 3 – Current level of individual</u>	<u>Measures of success and development (goals/standards)</u>	<u>Time Goals by %</u>
<p><u>EXAMPLE:</u></p> <p><u>1. Lead/create/design and execute evaluations for programs and proposals.</u></p>	<ul style="list-style-type: none"> <li>• Develop evaluation plans for cohort learning programs, consulting, training, and field building.</li> <li>• Steward and oversee the implementation of plans.</li> <li>• Serve as lead and/or thought partner in making sense out of evaluation data and integrating back into ongoing program development.</li> <li>• Involved in all major program planning phases. Provide input on design.</li> <li>• Convene and facilitate program team debrief meetings to integrate learning from across business lines.</li> <li>• Write evaluation reports</li> </ul>	<ul style="list-style-type: none"> <li>• Program evaluation and data analysis (3)</li> <li>• Project management (2)</li> <li>• Meeting facilitation and design (2)</li> <li>• Racial justice informed (2)</li> <li>• Report writing (3)</li> <li>• Team management (1)</li> </ul>	<ul style="list-style-type: none"> <li>• All programs have evaluation plans that will measure the outcomes stated for the programs.</li> <li>• All programs complete evaluations as planned</li> <li>• Participate in program planning in all program planning meetings</li> <li>• Participate in program, curriculum design</li> <li>• Write evaluation reports for all programs, meet deadlines and quality measures: – reports are written with clear analysis of data; has highlights of major findings; is proofed and edited.</li> </ul>	<p><u>15%</u></p>
<p><u>EXAMPLE:</u></p> <p><u>2. Financial sustainability and management of programs.</u></p>	<ul style="list-style-type: none"> <li>• Creating annual budget for program</li> <li>• Monitoring budget throughout the year</li> <li>• Recommending programmatic changes to support financial sustainability.</li> <li>• Deciding any fee based strategies for programs.</li> <li>• Recommending revenue strategy for all programs (including grants, fees, and individual donations).</li> <li>• Reviewing and approving all program grants.</li> </ul>	<ul style="list-style-type: none"> <li>• Budgeting (3)</li> <li>• Financial Analysis(2)</li> <li>• Grant management (2)</li> <li>• Business modeling (2)</li> <li>• Process &amp; Systems Development (1)</li> <li>• Financial Reporting (1)</li> <li>• Team Management (2)</li> <li>• Strategic Decision Making (2)</li> </ul>	<ul style="list-style-type: none"> <li>• Draft budgets are created during the budgeting process for all programs with the descriptive narrative explaining major expense and revenue line items; meet with CFO to review/revise budgets.</li> <li>• Quarterly analysis of budgets are provided to management team with analysis of financial position and forecasting any trends near future issues.</li> <li>• All grants and grant budgets represent the true cost of the programs/projects.</li> <li>• Project and program plans are adjusted appropriately to meet “reality” of revenue and projected revenue.</li> <li>• Total programs have a 5% surplus at the end of the year.</li> </ul>	<p><u>20%</u></p>