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 & Staffing

- Skills
- Systems
- Culture
Performance Management Infrastructure

Who’s responsible for managing performance?
THEORY of CHANGE

PROBLEM or ISSUE STATEMENT
A concise and compelling description of the conditions we aim to change.

FOCUS or 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.

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.
## EXAMPLE: CompassPoint’s Core Competencies

<table>
<thead>
<tr>
<th>Leadership</th>
<th>Management</th>
<th>Strategy</th>
<th>Field</th>
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</thead>
<tbody>
<tr>
<td>Managing diverse relationships; relationship cultivation and management</td>
<td>Financial literacy</td>
<td>Competitive/market analysis: Ongoing ability to understand what’s going on in a particular space and make decisions</td>
<td>Integrating/synthesizing content and information and translating it for our clients.</td>
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<tr>
<td>Communicating effectively, written and verbal; capacity to convey information</td>
<td>Storytelling (communication)</td>
<td>Strategic agility</td>
<td>Innovation management</td>
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<td>Customer service; client-centric; empathetic</td>
<td>Personnel management</td>
<td>Comfort with ambiguity/operate with uncertainty</td>
<td>Nonprofit sector knowledge and political savvy</td>
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<tr>
<td>Working in teams; capacity to both lead as well as follow; collaborative</td>
<td>Project management</td>
<td>Integrating mission and money – applying the dual bottom line approach</td>
<td>Technical methodologies: coaching, training, consulting, research, and facilitation</td>
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<td>Coaching; developing others</td>
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<tr>
<td>EXAMPLE Competencies</td>
<td>You/ED</td>
<td>Board</td>
<td>Senior Staff</td>
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<tr>
<td>Ex: Coaching</td>
<td>2</td>
<td>1</td>
<td>3</td>
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<tr>
<td>Ex: Governance</td>
<td>2*</td>
<td>3*</td>
<td>1*</td>
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<td>3</td>
<td>2</td>
<td>4</td>
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Supervision
Roles and Responsibilities

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

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

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

Strengths-based
Multiculturalism
Organizational Culture
Political Framework
Leadership Beliefs
Field or Mission
The Ultimate Role of a Supervisor

The supervisor’s overall role is to communicate organizational needs, oversee employees’ performance, provide guidance, support, identify development needs, and manage the reciprocal relationship between staff and the organization so that each is successful.
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MUTUAL
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- Organizational Culture

- Political Framework

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- Field or Mission
Supervision Roles and Responsibilities

• **What do you do well? What does your organization do well?**

• **What “lens” impacts supervision activities the most in your organization?**
Using Competencies with Role Clarity – Exercise

Employee Name and Title:

<table>
<thead>
<tr>
<th>Roles</th>
<th>Competencies (and sub competencies needed)</th>
<th>Key Activities</th>
<th>Measures of success and development (goals/standards)</th>
<th>Time Goals by % of time</th>
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