

The  **Neighborhood  
Partnership Fund**

*Talent Management  
Keys to Staff Development*



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# The Neighborhood Partnership Fund

## *Talent Management Keys to Staff Development*



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### Learning Objectives

- Identify and manage the talent in your organization
- Develop and apply strategies for developing your staff
- Identify and develop high potential / high performance staff
- Develop effective succession plans

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### Talent Management: Keys to Staff Development

- I. A Glimpse at the Future of Non-profit Leadership
- II. Talent Management
- III. Talent Inventory
  - a. Competencies
  - b. Key Positions
  - c. Talent Assessment
- IV. Succession Planning
- V. Development Planning
  - a. Development Plans
  - b. Leadership Development
  - c. Performance Management

#### Key:



Individual Exercise



Pair Exercise



Group Exercise



Key Points



Take-aways



### Introduction

Introduce yourself.

- 1.) Share your name, your role and your organization.
  - 2.) What are some staff development challenges you are currently facing?
  - 3.) Do you currently have a succession plan in place?
  - 4.) What would you like to take away from today's session?
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## *1. A Glimpse at the Future of Non-profit Leadership*

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According to the Daring to Lead 2006 report, a national study of nonprofit executive leadership, 75% of executives say they plan to leave their jobs within five years. The Neighborhood Partnership Fund (NPF) found similar results in their Succession Planning Project, a study conducted in February, 2006. Three-fourths of the executive directors participating in the NPF survey said that they plan to leave their current position within four years. In addition, the Daring to Lead 2006 report indicates that one in three executives are eventually fired or forced out of their jobs. Planning for the succession of leadership is a critical part of the strategic planning process.

The Daring to Lead 2006 report found that only 29% of executives have discussed succession planning with their boards. The NPF Succession Planning Project found that twelve of fifteen CDC's participating in the study did not have an executive succession plan in place. Considering what we know from these surveys combined with the demographics of the aging workforce it seems clear that succession planning is an issue of highest importance.

Small organizations face a unique set of challenges in developing succession plans. Smaller organizations rarely have the bench strength to promote an internal candidate into an exiting executive's position. Daring to Lead 2006 reports that 42% of executives running organizations with 100 or more paid staff were on staff prior to becoming the executive. For organizations with 11-20 paid staff the percentage of executives hired from within dropped to just 21%.

According to the NPF study, the majority of participants described having some professional development opportunities for managers and staff. However, they identified challenges that included succession planning for executives, senior managers and long-term board members; staff development and retention; and integration of succession planning within the strategic plan.

The NPF study included hands-on succession planning with two CDCs. Key findings from the hands-on planning included the following:

- Succession planning builds solidarity and reduces executive isolation.
- Setting a departure date focuses the succession effort.
- Participatory methods engage board and staff, and build ownership of succession plans.
- Succession planning supports acknowledgement of a long-term executive's legacy.

As a result of this study, NPF recommendations for Executive Directors included welcoming succession planning as an opportunity for strategic development, initiating emergency succession planning, and developing staff.

The following training materials will focus on different approaches to staff development and will provide information on developing a succession plan as well as development plans for all staff. We'll talk about linking staff development back to your strategic goals, starting with managing the talent of your organization.

## II. Talent Management

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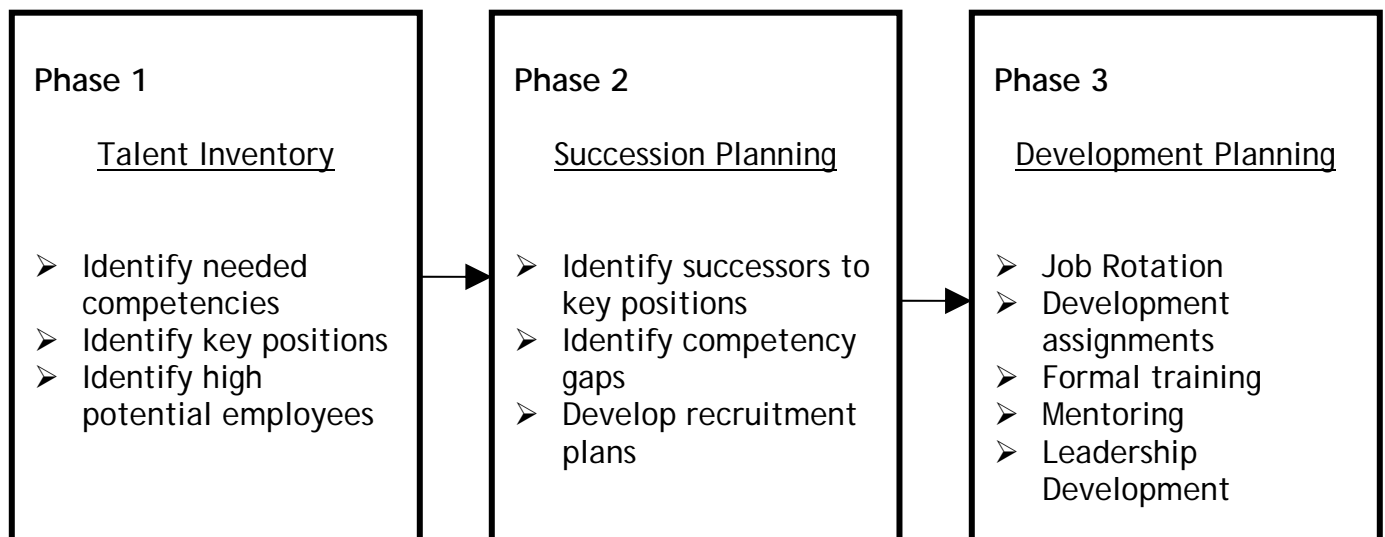
### What is Talent Management?

Managing talent is like managing your organization strategy. Talent management involves assessing and developing the skills and competencies of your staff to ensure they are able to fulfill their roles and support your organization's strategies. It involves attracting, selecting, training, developing, promoting and moving employees through the organization and ensuring they have what they need to be successful in helping the organization grow and achieve its goals.

Talent management differs from traditional HR systems approach to employee development. Traditional approaches come from the perspective of developing competencies in the organization. Although talent management takes into consideration the overall competencies of the organization, it goes further by enhancing the potential of each employee through developing their capacity to learn, think, relate and act.

### Talent Management Process

Talent management is a phased process. The phases overlap each other and are not stand alone nor mutually exclusive.



The success of the process is dependent upon several factors:

- Senior management's support and willingness to devote time, energy and resources - both financial and human - to the process
- The organization's readiness to actualize the process
- The organization's ability to link people and processes in a way that is understandable and has quantifiable value add to the organization
- Evaluation and review to ensure the process is effective and on track

Good talent management systems can add real benefit to your organization by inspiring employees and generating tangible amounts of enthusiasm and commitment, all of which are essential to the organization. In the sections that follow, we'll explore different programs that you can use to manage and grow the talent in your organization.

## Components of a Talent Management System

### *Organizational Work*

This is the responsibility of the organization.

- Strategic Plan - the mission, vision, values (1-3 year plan).
- Talent Management Plan - the number and types of positions, critical jobs, key talent, succession plan and recruitment plan.

### *Interactive Work*

Manager and employee work together.

- Development plans, mentoring program, job rotation, formal training, development assignments.
- Regular review of development plans with revisions as needed.
- Performance Appraisals.

### *Individual Work*

This is the responsibility of either the employee or the manager.

- Employee - communicates career goals, identify development needs.
- Manager - Identify development needs, provide development opportunities, offer feedback and coaching.

### III. Talent Inventory

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## Competencies

Talent management starts with assessing the competencies your organization needs to meet its goals. Competencies are the knowledge, skills and abilities plus other characteristics such as values, motivation and initiative that are essential to perform a job. Each employee contributes his/her unique set of competencies that are necessary for successful job performance and achieving organizational goals. Identifying which competencies exist among your staff and those needed to achieve organizational goals indicates where development and performance management efforts can focus.

Competencies are a critical tool in staff development, succession planning and performance management because they:

- Identify capabilities, attitudes, and attributes needed to meet current and future staffing needs of the organization.
- Focus employee development efforts to eliminate gaps between capabilities needed and those that currently exist.

### Core Competencies and Role-specific Competencies

There are two categories of competencies. **Core competencies** are those that apply to all positions across the organization. **Role-specific competencies** apply to only certain positions:

#### *Example: Accountant*

Core Competencies	Role-Specific Competencies
<ul style="list-style-type: none"><li>• Adaptability</li><li>• Client Focus</li><li>• Written and Verbal Communication</li><li>• Organizational Awareness</li><li>• Problem Solving and Judgment</li><li>• Results Orientation</li><li>• Teamwork</li></ul>	<ul style="list-style-type: none"><li>• Knowledge of Generally Accepted Accounting Principles</li><li>• Attention to Detail</li><li>• Analytical Thinking</li><li>• Deductive Reasoning</li><li>• Exceptional Mathematical Skills</li><li>• Experience with XYZ Accounting Software</li></ul>

## How Competencies are Linked to Strategic Goals

The competencies that you want to develop in your staff should be linked back to your overall organizational strategy. Below are examples of strategic goals and which competencies might be linked to those goals. By using this approach, you can ensure the development areas of focus for your employees remain consistent with the overarching strategy of your organization.

### *Example:*

Strategic Goals	Related Competency
Increase fundraising abilities.	<ul style="list-style-type: none"><li>• Experience managing financial resources</li><li>• Experience managing capital campaign</li><li>• Grant-writing</li><li>• Public speaking</li><li>• Ability to persuade others</li><li>• Innovation</li></ul>
Build alliances with other organizations.	<ul style="list-style-type: none"><li>• Build and maintain relationships</li><li>• Exceptional communication skills</li><li>• Active Listening</li><li>• Initiative</li></ul>



## Group Exercise

1.) In groups of three:

- Discuss the top two strategic objectives of your organization.
- Identify the core competencies needed to accomplish those objectives.

2.) Identify and discuss the role-specific competencies associated with your own job.

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## Identifying Key Positions

A key position has critical influence strategically, operationally or both over the activities of the organization. A position may be considered “key” because of the unique skills and qualifications of the current incumbent, the responsibilities the position assumes, the level of importance placed on that position, or any other criterion of the position that significantly impacts the strategic and/or operations goals of the organization. The title of the position alone may not distinguish it as a key position.



### Identifying Key Position

- **Critical Role:** Any position that would stop critical action from taking place if it were left vacant.
- **Specialized Skills:** Any position that requires specialty or unique expertise.
- **Future Projects:** What are the functions to be? What is the direction your organization is going and what type of skills or leadership will you need to get there?
- **Influence:** Is the position a critical part of the process by which decisions are made?



In the Appendix of this guide, you will find a Key Position Assessment form that you can use to identify key positions in your organization.



## Pair Exercise

- 1.) With a partner, identify the key positions in your organization? Discuss why are they are considered "key?"
  - 2.) Complete the Key Position Assessment form for one of those positions.
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**TALENT INVENTORY  
KEY POSITION ASSESSMENT**

Position: \_\_\_\_\_

What critical work would stop if this position were left vacant?

Is specialty or unique expertise required for this position?

What are the role-specific competencies required?

Rate the impact of this position on fulfilling the mission / goals of the organization using a 1 - 10 scale (1= low impact, 10 = high impact).

Who are the likely successors to this position?

## Individual Talent Assessment

An effective talent management plan takes into consideration current competencies, aspirations and areas the employee needs to develop. It looks at how well each employee is performing his/her current role and assesses employees' potential for making a greater contribution to the organization.

Consider the following areas when assessing your employees' talent:

- **Work history.** Experience and history in the organization and prior work experience.
- **Major accomplishments.** Successful implementation of a new initiative, key role in implementing significant change.
- **Unique value the person brings to work.** Key attributes and strengths, i.e. new thinking, approach, innovation, passion, respect.
- **Specific contributions to the team, clients and mission.** Integrated communications, strategic counsel, business knowledge, management of clients, team and personal leadership.
- **Individual's aspiration, both personal and career.**
- **Motivators / De-motivators.** What feeds or drives the employee? What pulls him/her down? What does s/he enjoy doing, would like to do more of, or would like to learn?
- **Areas where the employee could make a greater contribution organization-wide.** Unrealized talent, untapped competencies.
- **Areas for development.** New competencies, team and personal leadership, experiences, clients or technologies to acquire, etc.



In the Appendix of this guide, you will find an Employee Talent Assessment form that you can use to assess the talent of your employees.



## Individual Exercise

Identify a high potential employee in your organization. Complete the Employee Talent Assessment form for that employee.

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## TALENT INVENTORY EMPLOYEE TALENT ASSESSMENT

Name: \_\_\_\_\_ Title: \_\_\_\_\_  
 Dept. / Team: \_\_\_\_\_ Date: \_\_\_\_\_  
 Manager: \_\_\_\_\_

**Job History:**

Dates	Position	Key Functions (top 1-3)
<i>Internal Jobs</i>		
<i>External Jobs</i>		

**Key Attributes / Strengths / Special Skills:**

**Major Accomplishments / Special Contributions:**

**Aspirations / Motivators:**

**Developmental Needs:**

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\_\_\_\_\_ Performance Rating - Rating from last performance review  
 \_\_\_\_\_ Potential Rating - Rate 1-10 scale (1=no potential to move beyond current job; 10=high potential for growth into more responsible position)

## IV. Succession Planning

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### Effective Talent Management

One of the goals of a talent management program is to create talent pools that feed particular jobs with a focus on the competencies and behaviors that make those jobs - and the employees in those jobs - successful in the future. Succession planning is the process by which an organization plans the hiring, training, and development of employees to ensure their growth from one position to the next as part of the strategic plan. It is not strictly reserved for top leadership positions. It also helps maintain a continuous cycle of succession planning for all key positions at every level of the organization. It is typically an ongoing process that plans, administers, and assesses each employee, while training them to attain higher levels of responsibility.



#### Ongoing Succession Planning

A succession plan identifies the management roles and people resources that are needed over the next three to five years. It is typically developed years in advance of expected needs and is modified and updated as needed. It assesses what skills your current staff has and needs and identifies the coaching and education requirements they need for professional development. The plan also identifies what to look for in new hires. Every organization should regularly assess its needs and resources to determine where it should have successors in place.

Each succession candidate should have a concise, determined path toward an established career goal and a path toward that goal that is flexible so that it may be changed as needed or as events dictate. The succession plan should take into consideration the length of time a candidate must be involved or exposed to the training needed. For example, if someone is expected to become a Finance Director, the plan should address the skills and competencies needed and identify the gaps in the succession candidate's experience. Factors such as past experience and current knowledge that the individual brings to the job will affect the succession time frame.



In the Appendix of this guide, you will find a form you can use for Succession Planning.

To properly train a successor, your organization needs sufficient time to expose him or her to the full array of opportunities within the organization, as well as any desired or required education and experience opportunities outside the organization.

The plan should be focused on enhancing the capacity of your staff so they can take on more responsibilities as the organization grows. However, it should also address contingencies for sudden departures.



## Emergency Succession Planning

All too often an executive departs with little notice or warning. Whether they accept another job or leave for health or personal reasons the impact is the same. One step that all organizations, large and small can take is to develop an Emergency Succession Plan. Such a plan should address how the role will be filled, by whom, and address all management and governance issues associated with interim management.



In the Appendix of this guide, you will find a template you can use for developing an Emergency Succession Plan.

## Is Your Organizational Culture Compatible with Succession Planning?

There should be an established link between succession planning and the broader goals of your organization. It's important to foster an organizational culture that is accepting of employees in roles outside their normal jobs and assuming projects beyond their normal job functions which are necessary for their development. In order for this to happen, there needs to be strong visible support from the leadership team.

Having development plans for all employees, even those not on a succession plan path can help establish this culture. Create development plans throughout the organization to prevent resentment of high potential employees who are being groomed. Creating individual development plans for all employees will reinforce your organization's commitment to professional development.

Succession planning helps ensure your employees have what they need to develop their skills and capabilities while helping your organization achieve its goals. There are obvious benefits to putting a succession plan in place. But there are also pitfalls to avoid as you create and implement your plan.

## Benefits to Having a Succession Plan

- A well-trained and capable team that is engaged and knowledgeable in the breadth and depth of the organization.
- A continuous flow of people who are regularly reviewing, questioning and refining procedures and processes, helping to improve the quality inside the organization and the services the organization offers to clients and customers.
- A reputation as a good, challenging, and stimulating place to work, which could result in your ability to hire ever better people.
- Enhanced leadership.
- Talent pool to support organizational plans and objectives.

## Possible Pitfalls to Succession Planning

- Lack of a formal written plan for each key person or position.
- A rigid, inflexible plan not tailored to the needs and abilities of the employees involved.
- Too long a wait for real movement or promotion, potentially resulting in good people leaving due to apparent inertia in the system.
- Too superficial of an approach. The succession candidate not exposed to the full depth and breadth of the position.
- Selection of unqualified or unmotivated people for inclusion in the succession plan.



## Keys to Developing a Succession Plan

- Inventory your team.
- Identify the key positions which require continuity within the organization.
- Identify successors for each key position.
- Identify the high performing staff that you want to develop and nurture for the future.
- Identify the high potential staff.
- Design a development plan for each high performing / high potential staff member.

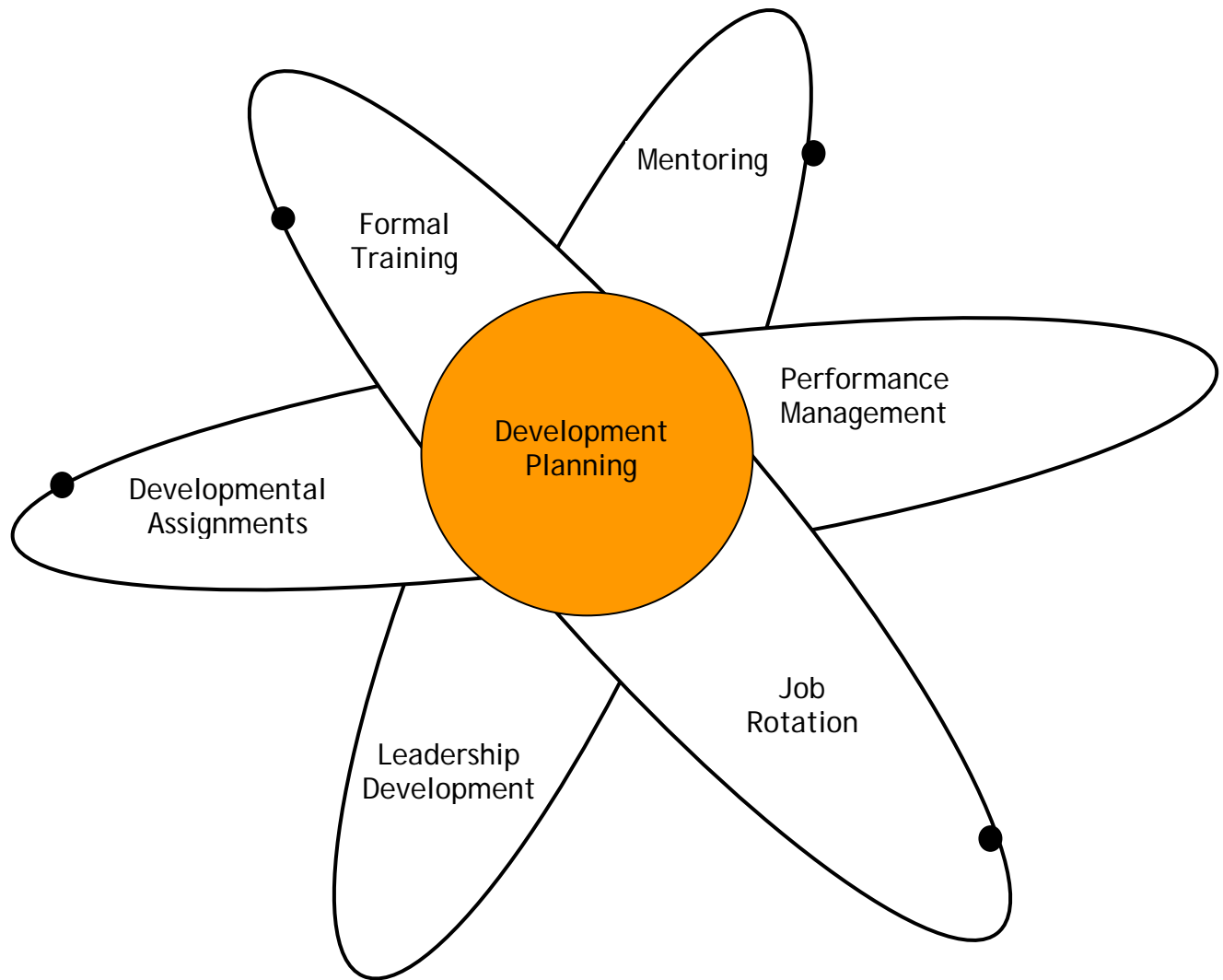


## Individual Exercise

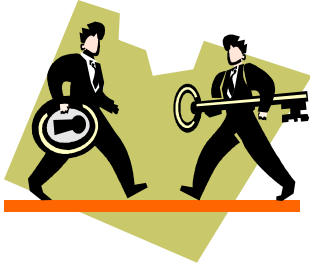
Choose one of the key positions you identified on the Key Position Assessment form. Add that position to the Succession Planning form. Complete all sections, including "Possible Successors" for the position.

## V. Development Planning

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## Development Plans



Your organization can nurture each employee's unique talents and potential through individual career planning and development activities. Development plans are tools you can use to help employees develop their competencies, achieve career goals, and further the organization's mission. A development plan is a written plan that outlines professional developmental objectives and identifies the activities to achieve those objectives.

Typically, development plans take a holistic approach to the employee's development needs by approaching the employee's development from various aspects and offering a variety of development experiences. They give managers and employees the opportunity to establish objectives that support both the organization's and the employee's goals and provides the manager a means through which to channel the employee's efforts in ways that help the organization achieve its goals and mission.

Development plans are effective tools for managers to motivate employees and should be linked to performance management programs. Consider development plans to be "living documents" that are assessed periodically to determine their effectiveness in terms of development goals and methods for accomplishing those goals and modified as necessary to realign development goals with the organization's strategies and the changing development needs of the employee.

### Customized to the Employee's Needs

The best way to begin the development planning process is by talking with the employee about his/her successes, strengths, needs, and aspirations. Creating a development plan is a collaborative effort between manager and employee. Together, they identify the competencies needed for the employee to efficiently perform current job functions and meet career and professional goals. They also identify training and development needs and provide a means to plan development experiences. These could include special project assignments, on-the-job training, formal training, job rotation, mentoring, educational opportunities, and any other activity the employee needs for development. The plan gives the employee a clear guide for working toward long-term career goals and helps to organize and set priorities for learning.

## Employee's Role

Although the development plan is a collaborative effort between the manager and the employee, they are essentially driven by the employee. Together the manager and employee determine what the development goals are, identify development activities, and write out the development plan. However, the planning process requires the employee to be self-motivated and committed to growth.

### *The employee should:*

- Collaborate with manager to draft the plan.
- Assess own existing competencies and development needs.
- Set goals and objectives that will benefit the organization while enhancing own career.
- Research ways of meeting professional and career goals and improving work performance.
- Evaluate own progress and keep manager informed.

## Manager's Role

The manager provides the employee with information and resources to help facilitate relevant developmental experiences. This helps enhance the employee's job performance and provides the employee tools to be successful in future jobs as the employee grows in the organization.

### *The Manager Should:*

- Help the employee assess competencies and development needs. This can be done by utilizing a 360 Degree assessment.
- Identify competencies needed to fulfill the organization's mission.
- Ensure development goals are clear.
- Advocate for the employee to ensure development opportunities are available.



## Keys to Creating a Development Plan

**Identify development goals and objectives.** These should be linked to the organization's strategies and the required competencies to meet organizational goals.

**Assess performance in current position.** Identify the employee's strengths and weaknesses in performing current work assignments. Build on the employee's strengths to better serve the needs of the organization and reach developmental goals.

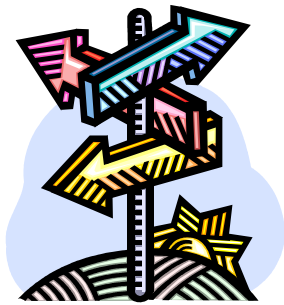
**Development of new skills.** Identify gaps between the employee's current skills and competencies and those required to perform in his/her current position. Focus on areas where the employee is weak or lacking experience and/or knowledge. Identify the activities that will address these gaps.

**Identify and prioritize training and development activities.** These could include any one or combination of the following:

- Development assignments outside the employee's normal job functions in other parts of the organization
- Job enrichment / job enhancement by adding new responsibilities or increasing the level of responsibility in current job functions
- On-the-job training or coaching
- Job Rotation
- Cross-training
- Formal training
- Mentoring
- Shadowing with more experienced employees
- Distance learning through the internet or intranet
- Assignment to a project team
- Exposure to managerial responsibilities
- Temporary assignments in other offices if possible
- Self-study
- Activities in professional associations or societies

## Development Experiences

On-the-job, practical experience is the most effective way for employees to learn new skills and develop competencies. According to The Leadership Machine, by Michael Lombardo and Robert Eichinger, 70 % of effective development comes from jobs and assignments; 20 % comes from feedback from others, such as through 360 degree feedback, coaching and mentoring; and 10 % comes from training courses and independent reading.



### Development Assignments

Development assignments provide the employee opportunities to perform work outside his/her normal responsibilities. They are designed to develop or enhance the employee's skills and competencies and are linked to the employee's development plan. A development assignment may be an opportunity for the employee to lead a particular project, assume a higher level of responsibility over a certain process, or temporarily be assigned a different function.

### Job Rotation

Job rotation is an outstanding way to build skills and competencies by moving employees from one job to another in order to provide broader experience. Job rotation is effective for cross-training within a department or can be used to give a high potential employee a deeper understanding of the overall organization as a part of a leadership development program. The new assignment may be within the same or similar field of work or it may be in an area where the employee has no previous experience or exposure.

The length of the rotation assignment can be from one week to several months depending on the complexity of the temporary assignment, the level of responsibility of the assignment and the degree of development the employee needs to achieve in order to meet development goals.

For example, cross-training an accounting team could include rotating the team through each of the primary areas including accounts payable, accounts receivable and payroll. The employees that comprise that department might rotate every three months between the three functions. This benefits each employee by broadening his/her experience and skills. It also benefits the organization in that should one of the three employees need to be out for an extended period of time or suddenly leave the company, the other two

can absorb the responsibilities of the exiting employee with little disruption to the operation of the department.

Job rotation is widely used as a central component of a leadership development program that is linked to succession planning. Here the goal is to provide learning experiences which deepen the individual's understanding of the whole organization and to facilitate changes in thinking and perspective. For example, a successor candidate for the Executive Director position could be rotated through Programs, Development, and finance in order to prepare him/her to lead the entire organization.

## **Formal Training**

Formal training provides the employee the opportunity to attend classes and workshops in order to build skills and competencies. The classes and workshops must correspond to the development needs identified in the employee's development plan or performance management document and fit into the organizational culture.

## **Mentoring**

Mentoring establishes one-to-one professional relationships between people with different levels of experience and expertise. Mentoring provides development opportunities that pair employees with more experienced peers, employees in higher level positions or with employees in a different function or discipline. A mentor can help a less experienced person learn the skills and competencies needed to achieve career goals.

There are various types of mentoring programs, all of which help to increase morale, commitment, motivation, and transferability of skills: peer mentoring, buddy system, cross-functional mentoring, skills mentoring, career mentoring.

### *How to Begin*

Start with a review of the employee's development plan. With the employee, explore which competencies the mentor/mentee relationship would be most beneficial in developing. Determine what areas of expertise, personal knowledge and experience you can offer in helping the employee develop those competencies.

### *Establishing Goals:*

Once a few potential competencies have been identified, ask the employee to choose one and write a specific goal for it. For example, the employee may want to improve the skill of "thinking on my feet." What three goals could s/he set?

1. To become an expert on my subject before presenting to a challenging audience.
2. To identify at least 50 questions and comments I'm likely to receive.
3. To develop and practice (with my mentor) several credible replies.

This will help the employee to break down the larger difficult target into smaller feasible pieces that s/he can practice and master.



In the Appendix of this guide, you will find a form that you can use to create a Development Plan.



## Individual Exercise

Refer to the Employee Talent Assessment form you created earlier. Now create a development plan using the Development Plan form.

## DEVELOPMENT PLAN

Employee: \_\_\_\_\_

Signature \_\_\_\_\_

Date: \_\_\_\_\_

Supervisor/Manager: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Department: \_\_\_\_\_

Date of Appraisal: \_\_\_\_\_

Time Scale	Development Goal <i>(competency or contribution to be developed)</i>	Training and/or Development Activities	Target Completion Date	Expected Outcome / Measures
<i>Short-term (to meet needs of current role)</i>				
<i>Medium term (to meet changing needs of this/new role)</i>				
<i>Long-term (to meet career objectives)</i>				

## The Piano Story

A mother wished to encourage her small girl's interest in the piano and so she took her to a local concert featuring an excellent pianist. In the foyer the mother met an old friend and the two stopped to talk. The little girl was keen to see inside the hall and so wandered off, unnoticed by her mother.

The girl's mother became concerned when she entered the hall and could see no sign of her daughter. Staff were notified and an announcement was made asking the audience to look out for the little lost girl. With the concert due to start, the little girl had still not been found. In preparation for the pianist's entrance, the curtains drew aside, to reveal the little girl sitting at the great piano, focused in concentration, quietly picking out the notes of 'Twinkle Twinkle Little Star'.

The audience's amusement turned to curiosity when the pianist entered the stage, walked up to the little girl, and said "Keep playing."

The pianist sat down beside her, listened for a few seconds, and whispered some more words of encouragement. He then began quietly to play a bass accompaniment, and then a few bars later reached around the little girl to add more accompaniment. At the end of the impromptu performance the audience applauded loudly as the pianist took the little girl back to her seat to be reunited with her mother. The experience was inspirational for everyone, not least the small girl.

It takes just a few moments to make somebody's day, to help someone with their own personal aims and dreams - especially someone who looks up to you for encouragement and support.



## Leading the Organization

Leadership development requires a long term commitment and often significant expense. The most effective leadership development programs include many, if not all of the development experiences we have covered in this session. Often potential leaders are involved in a job rotation program, are assigned a mentor and may attend formal training in a variety of areas. Formal training programs often stretch out over a year or more providing a person with opportunities to interact with leaders from other organizations and expand their knowledge of leadership issues.



In the Appendix of this guide, you will find Leadership Development Competencies you can use to determine where your organization should focus leadership development.

Developing leaders need:

- Perspective broadening experiences,
- Self-directed learning alternatives,
- Various on-the-job opportunities for leadership, and
- Education/training events.

Perspective Broadening	Self-Directed	Education/Training	On the Job Experience
Cross-functional assignments	Reading a book	Technical upgrading	Receiving constructive performance feedback
Customer contact for technical people	Career planning	Individual skill building workshops	Multi-rater feedback
Headquarters assignments for field staff	Focused research	Supervisory or management training	Representing a team at a meeting
Conferences	Self-paced learning modules	Educational upgrading or certificate programs	Coaching others or being coached
Participation in recruitment and selection	Computer-based training	Business literacy training	Presenting to internal or external groups
Participation on cross-functional or cross-departmental teams	Internet research or learning assignments	Seminars and classes	Working on special projects
	Leadership experiences outside work		Preparing budgets or proposals
	Self-assessments		

The development options you choose will be determined by the:

- Specific development needs of the individual - how can these best be addressed?
- Amount of time and money available to support development - what can you afford?
- Availability of others to provide support - are there potential coaches or mentors available?
- Nature of the work - does it provide opportunities for developing new skills?
- Individual's own preferences - how does he or she learn best?



In the Appendix of this guide, you will find a listing of leadership development programs you can use as a resource.



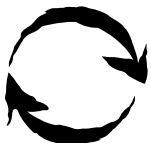
## Performance Management

Performance management is rarely viewed as a staff development tool and yet no development program can succeed without a strong performance feedback component.

Performance is a key indicator of the current levels of talent in your organization. Managing employees' performance is an ongoing practice of coaching, developing, monitoring and documenting performance. Much like an individual development plan, the most effective performance management system is one that is a collaborative effort between the employee and manager.

### Performance Appraisals

Performance appraisals are a valuable tool to provide feedback and coaching to staff that is directly linked to the competencies identified by the organization as critical to its mission. While the review looks back to determine the employee's strengths and weakness, it does so primarily to determine the proper approach to enhance future performance. It is part of a continuous improvement process for the employee and the organization. The whole process should help the employee understand expectations and help the manager understand the employee's developmental needs. In short, it begins with establishing clear performance objectives, continues with regular reviews of progress and culminates in a formal performance appraisal at year end.



### 360 Degree Feedback

If used properly, 360 degree feedback can increase the effectiveness of a staff development program. Multi-rater feedback allows each individual to understand how his/her effectiveness as an employee, coworker, or staff member is viewed by others. The most effective 360 degree feedback processes provide feedback that is based on behaviors that other employees can see.

The feedback provides insight about the skills and behaviors desired in the organization to accomplish the mission, vision, and goals and live the values. The feedback is firmly planted in competencies identified as critical to meeting organizational goals and objectives.

People who are chosen as raters generally interact routinely with the employee receiving the feedback are decided upon mutually by the employee and his/her manager.

The purpose of the 360 degree feedback is to assist each individual to understand his/her strengths and weaknesses, and to contribute insights into aspects of his/her work needing professional development.

The process provides well-rounded feedback from peers, reporting staff, coworkers, and supervisors. This can be a definite improvement over feedback from a single individual. Coworker perception is important and the process helps people understand how other employees view their work.

Multi-rater feedback makes team members more accountable to each other as they share the knowledge that they will provide input on each staff member's performance. 360 degree feedback is one of the best methods for understanding personal and organizational developmental needs.

Multi-rater feedback can provide excellent information to an individual about what s/he needs to do to enhance his/her career. Finally, many employees feel 360 degree feedback is more accurate, more reflective of their performance, and more validating than prior feedback from the supervisor alone. This makes the information more useful for both career and personal development.

## 360 Feedback Appraisal vs. Performance Appraisal

### Use 360 feedback appraisal to:

- Identify the competencies, behaviors and practices needed to achieve goals, outcomes, and results.
- Measure proficiencies in competencies, behaviors and practices.
- Assess where improvement is needed to achieve desired results.
- Create targeted development plans that increase capabilities and performance.
- Assess what environment will bring out the best results from individuals and teams.

### Use performance appraisal to:

- Set clear, specific goals.
- Establish measurements to determine outcomes and results.
- Evaluate the degree to which outcomes and results were achieved.
- May also be used to determine what pay increase or bonus is due.



## Group Discussion

- 1) From a staff development aspect, what changes would you like to make in your organization?
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