# WAITING ROOM ACTIVITY

## Directions

**1** Grab a sheet of paper. Fold it in half twice so folds look like this →

**2** Complete the writing prompts in each section...just write down your responses

## ⚡ Additional Directions

Think about your role in hiring, staff and leadership transitions. Write down 3-5 words for each prompt. Be prepared to share your responses today.

| Section 1: | Section 2: |
|---|---|
| A challenge related to hiring & staff transitions is... | An opportunity related to hiring & staff transitions is... |
| **Section 3:** | **Section 4:** |
| In the next two weeks, I want to achieve... | A question I have related to this topic is... |

# HIRING, ONBOARDING, RETENTION & LEADERSHIP TRANSITIONS

NAME, ORGANIZATION & ROLE

# LEARNING OBJECTIVES

## WHAT WE WILL COVER TODAY:

- Understand hiring best practices to build a leadership pipeline
- Review methods and processes to document organizational tasks in a consistent manner so that all of the information is stored in the same place and using the same format.

- Analyze how to manage by tasks to ensure volunteers and employees accomplish their work
- Understand how to determine and track employee tasks that are done daily, weekly or monthly.

# LEAH WEINER

## How Training was Developed:

Research, best practices and our own experience

### Individual Experience:

- Doctorate in Education from Pepperdine University
- Background in adult education, volunteer management and curriculum development
- Director of Nonprofit Learning Lab

info@nonprofitlearninglab.org

WWW.NONPROFITLEARNINGLAB.ORG

# HOW WE LEARN TOGETHER

**Recordings, handouts & slides** will be emailed to you

**Ask questions:** In control panel or unmute

**Tech support?** Connect with "Tech Support"

**Your Role:** Lots of ideas and how do they align?

# HIRING BEST PRACTICES TO BUILD A LEADERSHIP PIPELINE

# HIRING BEST PRACTICES

- Hire for 6 months to 1 a year from now
- Limited Resources
- Job Descriptions
- What does it mean to get your first hire versus 10th hire?

Share in chat or unmute: What is a current challenge or opportunity in hiring?

# WHAT ARE YOUR HIRING & TRAINING COSTS

## Cost per hire

- Internal recruiting costs = marketing + staff time
- External recruitment costs = marketing + staff time
- Hiring = staff time and coordination
- Orientation, Onboarding & Training costs = Staff Time + Supplies

Recruitment, hiring and training is a significant effort. Create a system for employees to be successful in their roles.

# HOW TO SET A WAGE WITH LIMITED BUDGET
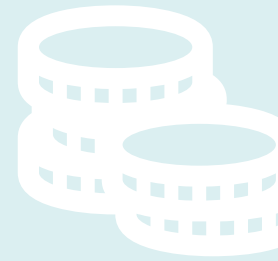
You want to hire to expand and budget constraints exist:

- Part time
- Flexibility
- Benefits
- Great Title
- Contractor versus Employee

- Compensation Reports
- Budget for payroll taxes
- Transparency in pay
- Be Detailed

# JOB DESCRIPTION TEMPLATE

- Job Title
- Job Summary
- Responsibilities
- Qualification
- Skills
- Experience
- Salary & Benefits
- Location

- Nonprofit Overview
- Reporting Structure
- Growth Opportunities
- Application Instructions
- Deadline
- Contact Info

# ADDITIONAL PRACTICES

- **Interview Rubric:** Use a set of questions focused on the job description. Create a script for your organization.

- **Hire the right person:** 2 years from today!

- 2-3 interviews and references

- **Language:** Encourage women & BIPOC people to apply. Degree not required, looking for candidates with life & work experience for this position.

# Align Language with Goals

- Encourage women & BIPOC people to apply. Degree not required, looking for candidates with life & work experience for this position.

- 5 years of work experience w/ X population

- Deep understanding & connection to X tribal community in CT

- Spanish speaking is required to perform duties of the position

# THE DIFFERENCE BETWEEN ORIENTATION, TRAINING & ONBOARDING

# ORIENTATION, TRAINING & ONBOARDING

**ORIENTATION:** Brief way to intro new staff to culture, policies, and basic information

**TRAINING:** Longer process to focus on technical skills, job-specific knowledge, compliance training for effective employment

**ONBOARDING:** Future focused for success includes goal setting, check-ins, feedback, evaluation, ongoing support & resources

# ORIENTATION, TRAINING & ONBOARDING

**ORIENTATION:** 2 weeks

- Resources
- Software
- Tools

**TRAINING:** 2 weeks to 2 months

- Process
- Procedure
- Priorities
- Programs

**ONBOARING:** 2 weeks to 6 months

- mentorship
- focus on retention
- goal planning
- job shadowing
- resources needed
- professional development

# ORIENTATION

# WHAT TO INCLUDE IN AN ORIENTATION

- Welcome letter with start date
- New Hire Forms to Complete

- Online systems to learn
- Website to review

## Orientation packet:

- Mission
- Vision
- Organizational history
- Org chart with staff and volunteers

- Important constituents
- Program information

# TRAINING

# WHAT TO INCLUDE IN A TRAINING

**HARD SKILLS:** Technical & teachable skills related to the job that are quantified and measured.

**SOFT SKILLS:**

- Less tangible
- Interpersonal interactions & emotional intelligence
- Train by experiential learning, discussions, job shadowing, mentors & coaching

# SOFT SKILLS

## Managing volunteers

- Assessing volunteers strengths and knowing needs
- Handling difficult situations

## Representing staff in coalition meetings

- Speaking on behalf of organization's goals and needs and what we can offer

## Speaking with funders

- Talking about mission, goals and the organization
- Knowing the history with the funder

## Troubleshooting programs

- Knows when flexibility is needed

# HARD SKILLS

- Donor CRM
- Event logistics
- Program evaluation and data analysis
- Event planning and coordination
- Social media management

- Graphic design
- Writing Editing
- Copy editing
- Technology skills
- Client portal
- Salesforce
- Email System Provider
- Building Alarm
- Front Desk Management

# ASSESS STAFF'S CAPACITY AS THEY LEARN THEIR ROLE

## What is rubric to use?

**1 = Doesn't know**

**2 = Been trained**

**3 = Proficient**

| Items | Alexis | Ryan |
|---|---|---|
| **Platforms to know** | | |
| Box | 2 - Been Trained | 1 - Doesn't know |
| Calendly | 2 - Been Trained | 1 - Doesn't know |
| GotoWebinar https://support.goto.com/webinar/videos | 3 - Proficient | 2 - Been Trained |
| G-Suite | 2 - Been Trained | 2 - Been Trained |
| Jotforms | 1 - Doesn't know | 1 - Doesn't know |
| Mailchimp | 1 - Doesn't know | 1 - Doesn't know |
| PicMonkey | 2 - Been Trained | 1 - Doesn't know |
| Slack | 2 - Been Trained | 2 - Been Trained |
| Trello | 2 - Been Trained | 2 - Been Trained |
| Wix | 2 - Been Trained | 1 - Doesn't know |
| Zoom | 2 - Been Trained | 2 - Been Trained |
| YAMM | 2 - Been Trained | 1 - Doesn't know |

How much time will you give to make sure employees are proficient in hard versus soft skills? Determine time it takes to get a staff member trained.

# ONBOARDING

# ONBOARDING

- **Mentorship:** Internal or External
- **Focus on retention:** What do they & you need?
- **Goal planning:** What do they want to achieve
- **Job shadowing:** How can they learn the role from you?
- **Resources needed:** Supplies or Training
- **Professional development:** External
- **Assess:** Check in to see how it is going

# ACTION STEPS

- Determine what needs to occur in orientation, training and onboarding.

- Reflect on position where training needs to occur, what are all the hard skills the employee has to train on to be successful in their job?

# LARGE GROUP REFLECTION

- How do you differentiate between orientation, onboarding and training at your organization?

- How would you describe your three strategies?

- What challenges exists related to any of these processes?

# ASSESS NEW HIRE TRANSITIONS

# 30 DAY SURVEY FOR NEW HIRES

- How well organized was your interview?
- How was your role described to your during the interview?
- How would you rate your orientation and training experience?
- I have a understand of what is expected of me at this job

- I have all the resources I needed to do this job
- I've had good training on the processes related to my role
- I have a good idea what I still need to learn to do my job
- I understand how my role contributes to the organization

## Use a scale and let people share input to make new hire changes

# HOW TO CREATE A TEMPLATE FOR STANDARD OPERATING PROCEDURES TO SUPPORT TRANSITIONS

# STANDARD OPERATING PROCEDURES

Provides context, framing and "how to" for programs, services and functions within a nonprofit.

## How to develop:

- Short Videos
- Checklists
- Screenshots
- How to docs

## Tips:

- Don't recreate resources just incorporate what exists or reference with links
- An online document

# TO CREATE YOUR TEMPLATE

## Choose location of document:
Google Doc or Software

## Determine categories that need standard op procedures:

- Volunteer Management
- Programs
- Services
- Fundraising
- Human Resources
- Staff Training
- Advocacy
- Public Policy
- Evaluation

- Compliance
- Community Outreach
- Board Relations
- Administration
- Marketing
- Communications
- Public Relations

# ADDITIONAL CATEGORIES

## Organizational Overview:

- Describes the mission
- Vision
- Values
- History
- Org chart and structure.

## Policies and Procedures:

- Related to human resources
- Finance
- Administration, and other departments.

## Roles & Responsibilities:

- Roles & responsibilities of key personnel
- Job descriptions and reporting relationships.

# ADDITIONAL CATEGORIES

## Training & Development:

- Procedures for training staff
- Volunteers
- Schedules
- Ongoing professional development opportunities
- Training materials and Resources.

## Technology Systems:

- Tech infrastructure
- Hardware
- Passwords
- Software
- Networks
- and data management practices.

## Facilities Management:

- Procedures for managing physical facilities
- Maintenance
- Security
- Access control
- and emergency preparedness.

# TO CREATE YOUR TEMPLATE

## Determine what you want to include:

- All the steps and procedures in the task
- Time it takes to do the task
- Owner of the task
- Approver of the task

- Individuals involved
- Why we do it
- Timelines
- Resources needed

# Example Outline of a Task

- The task
- Required time
- Why we do it
- Departments involved
- Positions involved

**When we do it:**

- Daily
- Weekly
- Monthly
- Annually

# FAMILY ENROLLMENT

## HOW WE DO IT

**Step 1:**

Identify returning families and set goals for enrollment.

**Step 2:**

Ad in family magazine, new family tours & send 5 enrollment emails

**Step 3:**

Review enrollment milestones and make adjustments to marketing.

**Step 4:**

Final marketing push last 4 weeks of enrollment [2 community fairs & 1 ad]

Key deliverable/mark of completion: 75 families will be enrolled for fall program by deadline

# Activity Log: Important & Essential

Spend a 10-15 minutes looking at your calendar to note recurring responsibilities and outline an annual calendar of major responsibilities and deadlines

- Things I do every week
- Things I do every month

- Things I do once a quarter
- Things I do once a year

# Retention: How to Retain Employees

- After transitions...retention...how to ensure retention happens...

- How to keep an employee -retention: benefits, salary, training. How to do the job.

- What to look out for with retention? Frame it in. hiring...frame it later with training...

- Retention levels .... Entry level versus manager or director level

# THE "SO WHAT" OF TWO FACTOR THEORY & CHECKLIST

## What motivates people to stay in a role:

- **Achievement:** Sense of accomplishment at end of task
- **Recognition:** Being acknowledged for work, raise, promotion, or important assignment
- **Advancement**
- **Creativity:** Ability to generate new ideas

- **Variety of tasks**
- **Giving employees independence in their work**
- **Responsibility:** Allow employees the autonomy to do their work
- **Personal development:** Learn new skills

# A MOVE TO THE MOON DOCUMENT

- Leadership Transitions: How long does it take to transition out as a founder, CEO or director?
- Exit Memos if pre-planned
- Shared Documents | Dashboard of resources
- Cross Training
- How to create a transition plan
- Tools...

# IF YOU MOVE TO THE MOON...

**Contact Information** — Contact information for key people.

**Financials** — Financial information, including bank account details, accountant info, payroll information, investment information, and legal counsel.

**Grant Information** — Contact information, lists of each Grant contract and status.

**Fundraising Information** — Reference to CRM which holds donor contact information, and information on key donors.

# IF YOU MOVE TO THE MOON...

**Fundraising Information:** Reference to CRM which holds donor contact information, and information on key donors.

**Insurance:** Policies, carriers, and information plans.

**Building:** Contacts for the landlord, lease, and vendor service providers for building maintenance.

**Program Information:** Contacts in the community for all Programs and services and program guidebooks.

**Strategic Plan:** Current and past strategic plans.

# AVERAGE LENGTH OF TIME SOMEONE STAYS AT A NONPROFIT...

- Average tenure of a development director: 18 months*

- At many nonprofits, the top fundraising position has been vacant for months or even years*

# HOW TO INCORPORATE THESE STRATEGIES

- What is the average employment at your organization?

- Move forward sooner rather than later

- Develop the talents of the employees you have on staff

## MADE to STICK
Why Some Ideas Survive and Others Die

Chip Heath & Dan Heath

## THINKING, FAST AND SLOW

DANIEL KAHNEMAN

WINNER OF THE NOBEL PRIZE IN ECONOMICS

## DRUCKER

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—Harvard Business Review
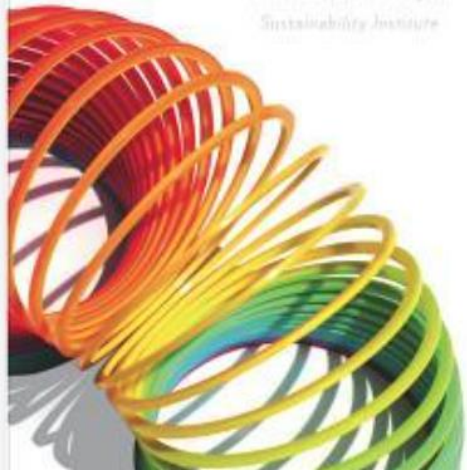
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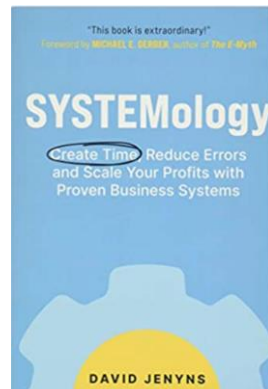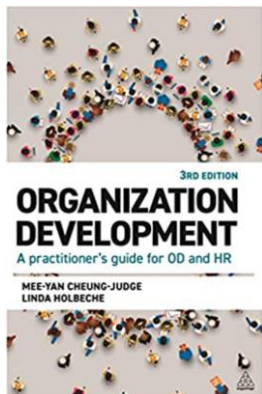ALISON GREEN
JERRY HAUSER

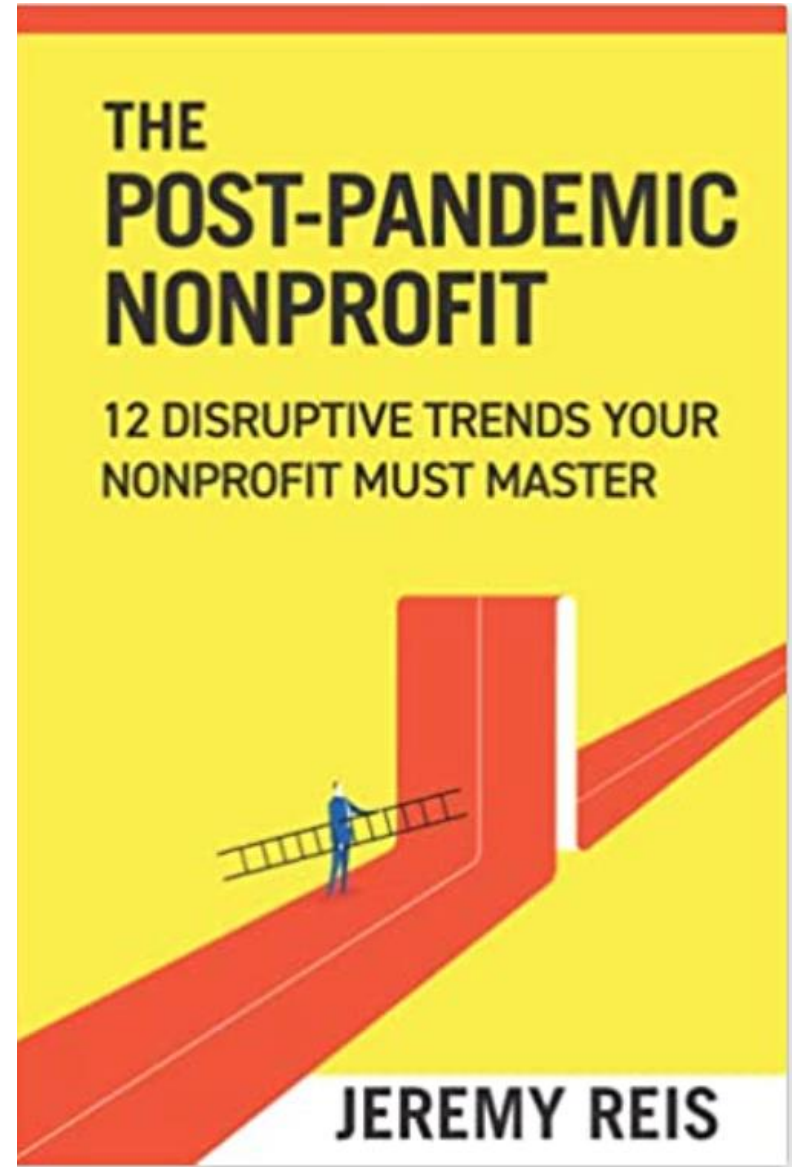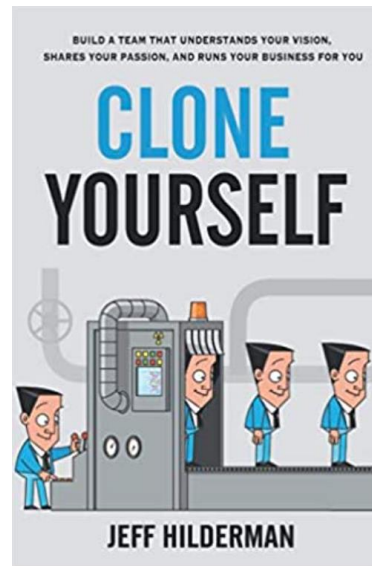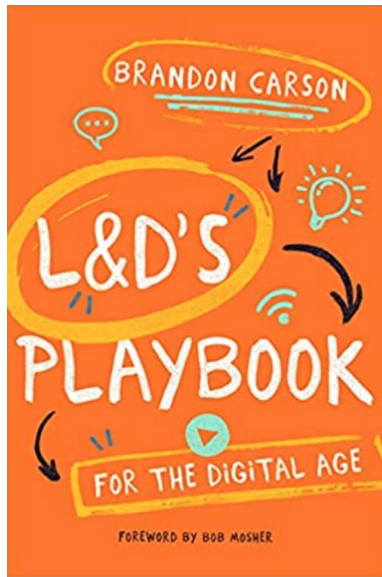**MANAGING** to CHANGE the WORLD

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DAVID JENYNS

info@nonprofitlearninglab.org