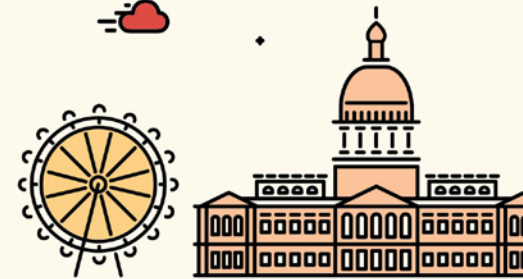
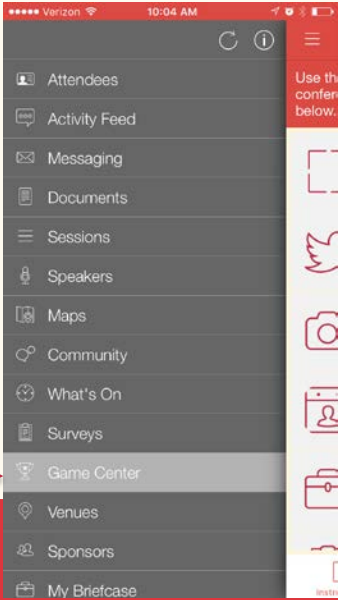




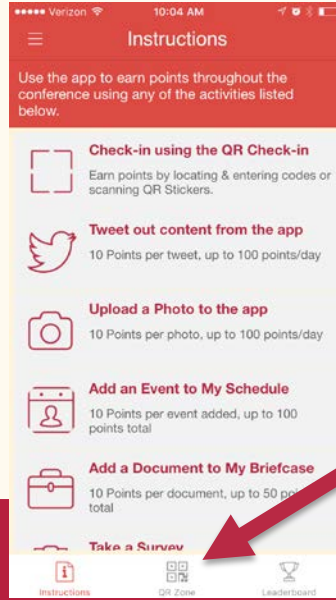
STAND TOGETHER TO FACE THE FUTURE



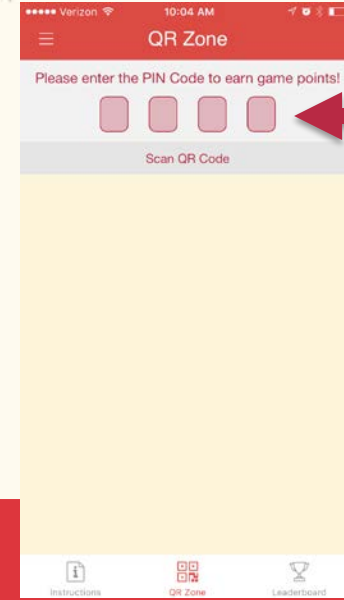
2016 NACSA LEADERSHIP CONFERENCE | ATLANTA, GA



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**SESSION NAME: Getting Where You Need to Go:
Building Staff Capacity**

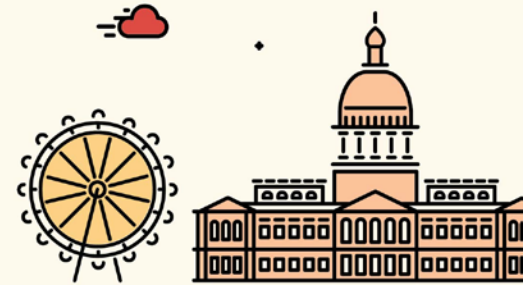
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**SESSION PIN:
#NACSAcon**

**LET YOUR
PRESENTERS
KNOW YOU'RE
HERE, AND EARN
POINTS!**

Getting Where You Need to Go: Building Staff Capacity

Rich Haglund, Illinois Network of Charter Schools
Bonnie Holliday, State Charter Schools Commission of Georgia
Mary Bradley, Office of Innovation and Incubation -
Chicago Public Schools

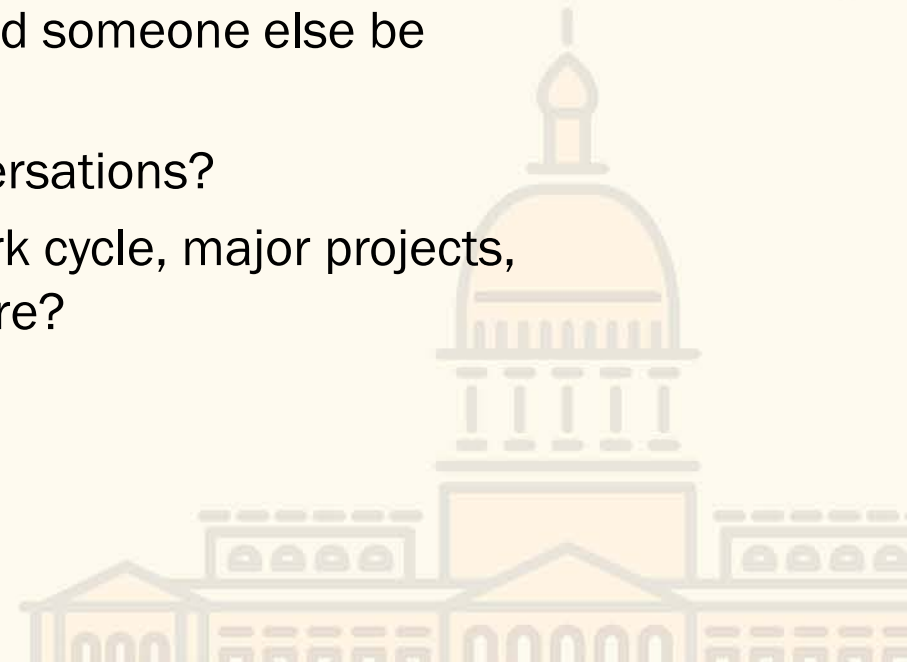


Back To Basics: Developing Capacity Through Performance Management

For professional development opportunities to benefit team members and organizations, certain preconditions are necessary.

With your team/organization in mind, please answer these questions:

1. For each role, do you have a clear job description?
2. Is important information about each position (general work cycle: major projects, annual deadlines, critical issues) memorialized somewhere? In other words, if a key staffer won the lottery and quit her job tomorrow, could someone else be brought up to speed in an efficient manner?
3. Are employees participating in regular performance conversations?
4. Is important information about each position (general work cycle, major projects, annual deadlines, critical issues) memorialized somewhere?



Back To Basics: Developing Capacity Through Performance Management

Cost-Effective Practices For Meaningful Performance Management

1. Accurate and updated job descriptions
2. Onboarding for new employees
3. Ongoing performance evaluations that incorporate the professional goals of individual staffers
4. Succession plans



Cultivating the People You Have Begin with the End in Mind.

CURRENT
NEEDS

What are the current needs of the organization?

WHO CAN FULFILL
NEEDS

Who can fulfill the current needs and who can fulfill the future needs?

FUTURE NEEDS

What are the future needs of the organization?

Organizational Needs

Cultivating the People You Have Begin with the End in Mind.

1. What are the goals of the individual?
2. How do the organizational and individual goals align?
3. In what ways can the individual grow in his/her current position that meets his/her individual growth goal and the organizations goal?
4. What experiences and growth is needed for the individual to prepare for the next position internal or external to the organization?

Individual Needs



Understanding Team Member Goals

What Do They Want and How Will You Support Them Getting There?

Determine Goals - Staff Evaluations

1. Annual with a quarterly review
2. Make it a conversation
3. Use for the purpose of development
4. Develop personal goals
5. What is the supervisor's role in their development?

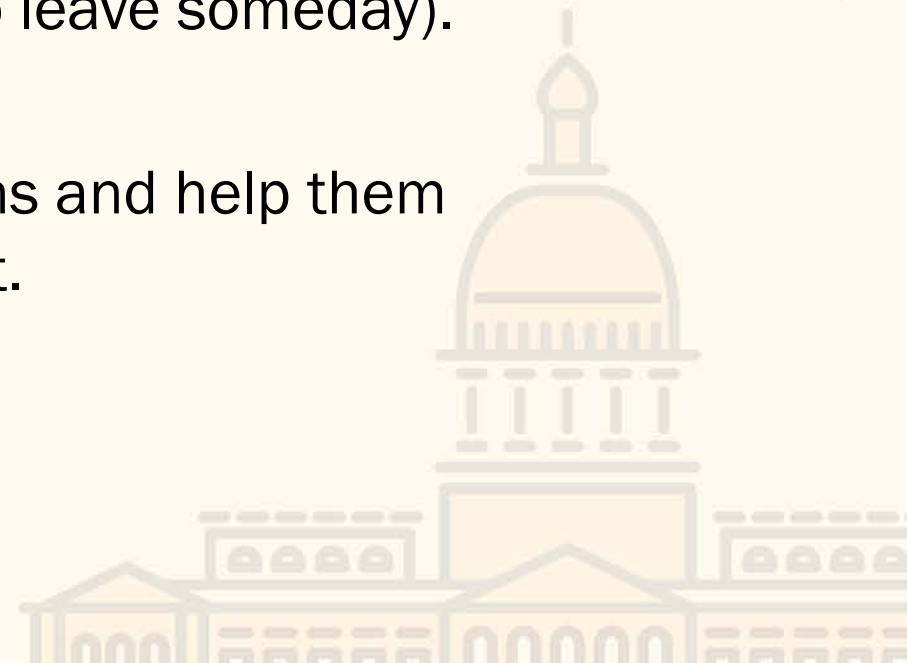
Growth - Opportunities for Staff Members

1. Traditional Professional Development
2. Special Projects
3. Opportunities to Lead
4. Exposure to new work, new people, external experiences



Development Plans

- Utilize staff evaluations as an opportunity to learn about the team member and help them to think about their future (they may not know yet and that is okay).
- Understand their aspirations both internal to the organization or external (Explain that you want to grow them for their aspirations inside the organization and outside. i.e. it's okay if they want to leave someday).
- Capture strengths, weaknesses and future aspirations and help them develop goals that make sense for their development.



Development Plans

- Decide the role that the supervisor will play in the helping the individual accomplish their goals.
- Make sure it is in writing so both parties are accountable.
- How can it fit into the organizations strategic plan.
- Work the development into one-on-ones and quarterly meetings.





AP Photo/Chris Schneider



AP Photo/Luis M. Alvarez



Succession Planning:
It's not just for athletes anymore.



Understanding Succession Planning

What is it?

- **Assessment of current and future needs** based on our strategic plan and priorities
- **Matching these needs** to our current workforce
- Developing a plan to **manage the gaps** that will arise when individuals in key positions leave or are promoted

Why is it important?

- **Maintains continuity** when key individuals leave
- **Creates alignment** between our organization's vision and human resources
- Ensures a supply of **qualified, motivated people**; a process to identify them; and a **way to develop them**
- Develops **career paths** that will help us **retain great staff** and send them a message that we value them

What's success today?

- **Increase Leadership Team buy-in** around succession planning, despite small org size
- **Create clarity around roles and expectations** of process (i.e., leadership team and HR)
- **Agree upon processes** to select individuals for vacancies

Understanding Succession Planning: Challenges Unique to Small, Non-Profit Organizations

1

Limited Development Opportunities

Flat organizational structure, limited number of positions, and regularly changing roles limit the types of available opportunities to develop high-potentials or successor candidates

2

Limited Pool of Potential Leaders

Organizational size inherently limits the size of the talent pool from which to choose possible successors

3

Limited Staff Support and Budgetary Resources

Smaller organization and training budget limits the amount of dedicated resources available for succession management or leadership development activities

4

Lack of Urgency around the Issue

Managers' busy schedules and absence of accountability and incentives lead to a lack of focus and awareness regarding the urgency of succession management



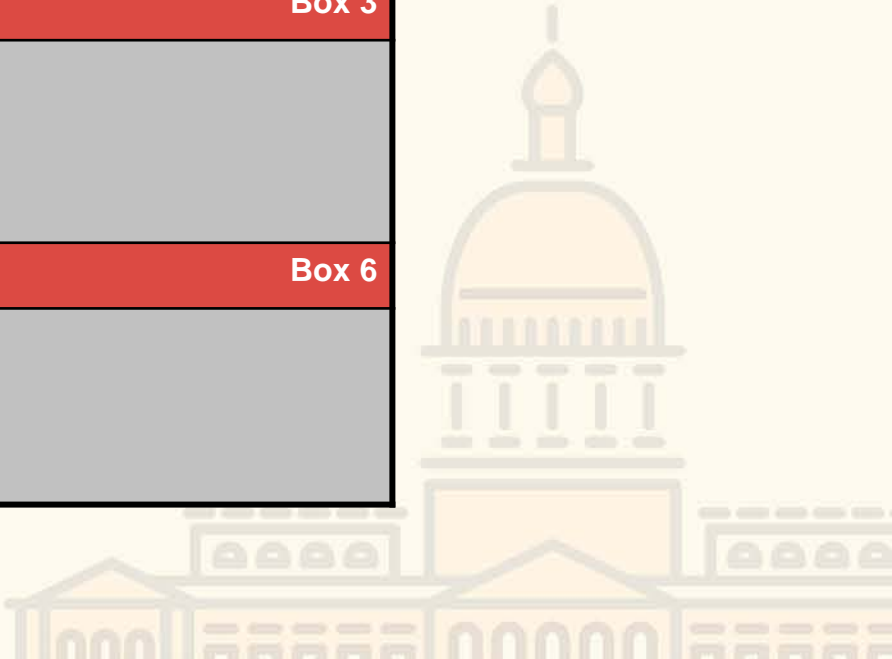
Succession Planning – Basic Steps

1. Identify legal and diversity issues to consider.
2. Establish present and future leadership roles and objectives.
3. Select key employees.
4. Evaluate the strengths, weaknesses and readiness for succession in key employees.
5. Plan for the individual development of and ways to retain key employees.
6. Identify “emergency” positions without successors.
7. Plan for positions that cannot be filled internally.



9-Box Grid

Potential	Satisfactorily Placed	High Professional	High Potential
→ → →	Remain at current level of organization, in current or similar role; has likely achieved highest career level.	Able to do the work of bigger jobs at the same management level in the next 1 to 2 years.	Able to do the work at the next management level in 3 to 5 years or sooner.
↑	Box 4	Box 2	Box 1
<i>Outstanding/Excellent</i>			
↑	Box 7	Box 5	Box 3
<i>Effective</i>			
↑	Box 9	Box 8	Box 6
<i>Needs Improvement</i>			



Thank You!!!

If you're interested in participating in an accountability/check-in call in approximately 45 days, please add your name and e-mail address to the sign-up sheet.

A stylized illustration of a city skyline at the bottom left of the slide. It features several buildings of varying heights and colors, including a prominent red building on the left and a yellow building in the center. The buildings are outlined in grey and have some internal details like windows and architectural elements.

#NACSAcon

KEEP IN TOUCH

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