Self Study: Leader Workshop

Leader Defined

A leader is anyone at any level who takes responsibility for finding the potential in people and processes and has the courage to develop that potential.

From Dare to Lead by Brene Brown

What we will cover today

- Setting Expectations
  - Onboarding
  - First 90-days & Beyond
- Feedback/Managing Performance
  - One on One Meetings
  - Performance Feedback
  - Documentation
  - Behavior Continuum & Feedback Model
  - Corrective Action
- Managing Conflict & Intro to Difficult Conversations
- Getting The Most From Your Meetings
  - Accountability - ARCI Model; TASC
  - Working Relationships

Supervisor/Leader Role

- Develop effective working relationships
- Practice effective communication
- Manage and prioritize employee workload
- Achieve results together

Expectations

- Why have a clear onboarding process and plan?
  - Ensures that the individual:
    - Understands their role
    - Has everything they need to be successful
    - Is a good match for the role (both from the individual's perspective and the supervisor's perspective)

- Before the individual starts:
  - Create onboarding plan
    - Identify and assign mentor(s)
    - Identify what training is needed, who will provide it, and when
  - Schedule first one-on-one meeting
  - Schedule weekly check-ins
  - Add to required meeting invites (departmental meetings, committees, etc.)

- Welcoming to the role

  - Provide tour of their workspace

  - Introduce to immediate team members and other relevant constituents

  - Review onboarding plan

    - Assist with set up of email, phone, computer applications

  - Review general expectations

    - Work schedule

    - Procedures to follow if they need to miss work

    - Required training

  - Inform person of introductory (provisional) period

- Setting Position Expectations

  - Review Envisioning Middlebury Framework

  - Review departmental goals/ strategies

  - Review individual position expectations

    - Review how position supports department & Middlebury goals

    - Outline core functions of the position

    - Review responsibilities/ task lists

    - Review key contacts inside and outside of the department

    - Set priorities & goals for the next 30-days

- During the 90-day introductory period

  - Document performance & pay attention

  - Conduct informal progress checks

  - Provide a formal review around day 60

  - Before 90 day make a determination whether to extend introductory period or release from employment

    - *Note: if there are performance concerns, please work with your HR Business Partner to create a performance improvement plan and provide feedback to the individual.*

    - *The HR Business Partner must be involved in decision making related to extending the introductory period or releasing from the position.*

FIRST 90-DAYS & BEYOND ESTABLISH EXPECTATIONS

- What do you need from your staff member?

- What is helpful for a newcomer to know?

- How can they expect feedback?

- How might they provide feedback to you?

- How do you each see your roles?

- What might support for them look like?

- Circle back regularly

Clear is Kind

FEEDBACK &
PERFORMANCE MANAGEMENT

ONE ON ONE COMMUNICATION

One on One Meetings

Individual time for each of your staff members

Build relationships through regular communication

Primary focus is on your staff member

Regular & Systematic

Consistency is key

Set schedule & frequency & length

- Not ad hoc

- Weekly, bi-weekly, 15, 30, 60 min, etc.

Rarely missed & quickly rescheduled

Suggestions

Find the time

- Look 3 weeks out
- Send staff your availability with 50% more slots than needed

Take notes

Divide the time into thirds (them, you, future)

Do not promise confidentiality

FEEDBACK

- **What:** Encourage effective behavior

- **How:** Frequent performance communication

- Effective behavior gets repeated

- Ineffective behavior gets changed

- Effective leaders focus on the future, not on the past

CHECK YOUR OWN STORY

Reflect
- Increase awareness of your own thinking and reasoning

Articulate
- Make your thinking and reasoning visible to others

Ask
- Seek out the thinking and reasoning of others

PERFORMANCE DOCUMENTATION

- Keep working files for all of your staff
- Document key behaviors & results
  - Write it down
  - Keep it safe & confidential
  - Keep it brief & objective

Hand written is just fine. Short hand is ok; also keep a secure electronic folder for emails and documents.
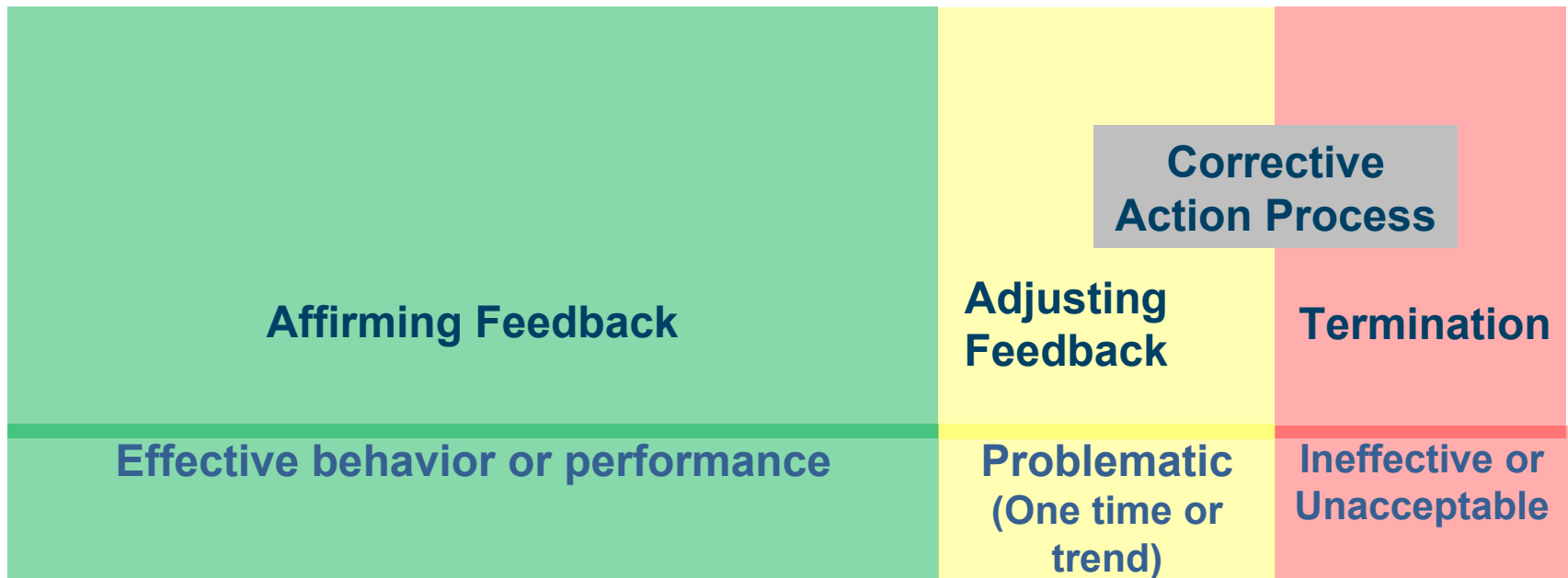
The Pinch Crunch Model

- A small pinch now or a big crunch later?

- Give a small adjustment to stay on the road

A SIMPLE FEEDBACK MODEL

Ask for their permission	Describe the behavior	Describe the impact	Close

THE BEHAVIOR CONTINUUM

Affirming Feedback	Adjusting Feedback	Corrective Action Process / Termination
Effective behavior or performance	Problematic (One time or trend)	Ineffective or Unacceptable

AFFIRMING FEEDBACK

"Can I share something with you?

I appreciate that you come to our team meetings so well prepared, that sets a great example for the rest of us, thanks!"

"Do you have a minute? I just want to let you know that helping Jen get settled in on her first day really made her feel welcome.

Thank you!"

AFFIRMING FEEDBACK PRACTICE

Write an example of actual affirming feedback that you have given or could give

Ask for their permission	Describe the behavior	Describe the impact	Close

ADJUSTING FEEDBACK

"Can we talk about the project meeting?

I noticed that you didn't have the information you that was due and we can't move forward…

(you can insert an inquiry here)

Please be sure to come prepared going forward - thanks"

"Do you have a minute?

In our meeting I noticed that you were rolling your eyes when Fred was talking, which can stifle our team's engagement…

(you can insert an inquiry here)

Please be mindful of that in the future, thanks."
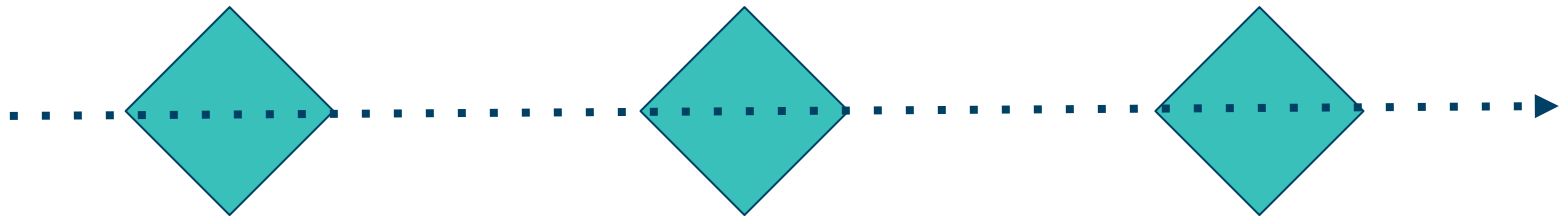
ADJUSTING FEEDBACK MODEL

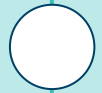| Ask for their permission	Describe the behavior Variations Get curious first	Describe the impact	Ask for change going forward

PATTERN OF POOR PERFORMANCE

- No change from adjusting feedback

- Choices

  - Ignore it

  - Give it again

  - Give feedback based on the lack of change

  - Seek advice or help

  - Start corrective action

CORRECTIVE ACTION PROCESS

Step 1: Provide feedback- informal warning #1
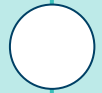
Step 2: Coaching- informal warning #2

Step 3: Verbal warning

Step 4: Written warning

Step 5: Suspension/Probation

Step 6: Termination

MANAGING CONFLICT & DIFFICULT CONVERSATIONS

Pause and use the space to
consider your response

A Difficult Conversation Is Anything You Find Hard to Talk About

- Knocks us off balance

- Something we dread

- Evokes feeling vulnerable

- Implicates self- esteem

- Impacts relationships

- A conflict - do we confront or avoid?

The Learning Conversation

- A way to deal creatively with tough problems while treating people with decency and integrity

- Moves away from blame, being right, or delivering a message

- Moves toward creative solutions and inviting the other person to help figure things out

1. Prepare by exploring multiple viewpoints

2. Check your purpose, decide - raise the issue?

   a. **No?** Reframe your perspective

   b. **Yes?** Start from the neutral story

3. Explore their story, then yours

Impact & Intent:
Don't Assume they meant it!

- Our assumptions about intentions are often wrong

- We assume the worst about others, and treat ourselves more charitably

  - Hold your view as a Hypothesis & share it

  - Prepare to:

    - Share the impact on you

    - Inquire about their intentions

    - Anticipate some defensiveness

Impact & Intent:
What if you didn't mean it?

Good intentions don't sanitize bad impact so prepare to:

- Listen past the accusations for their feelings

- Be open to reflecting on the on your intentions, they may be more complex than you realize

Abandon Blame, Embrace Contribution

- Blame is judging and looking backward

- Contribution is about understanding and looking forward

- Costs of blame: lack understanding, problem solving is hindered and things go undiscovered

- Contribution is easier to raise and encourages learning and change

Common Contributions

- Avoiding until now

- Being unapproachable

- Not recognizing and dealing with Intersections – such as differences between backgrounds, preferences, or assumptions about relationships

GETTING THE MOST FROM MEETINGS ACCOUNTABILITY MODELS

Effective Meetings

- Identify a clear "Why?"
- Pre-publish An Agenda
- Start On Time
- Set Some Ground Rules
- Divvy up the meeting labor
- Stick To Your Agenda
- Use a Parking Lot
- Fix Responsibilities
- Finish On Time
- Publish Notes quickly (not minutes)
- Continuously Improve & evaluate

Accountability

- We Identify what we own
- We are acknowledged for our successes
- If we make a mistake, we own it and make it right

Pause and use the space to
consider your response

PRIORITY MATRIX

	Urgent	**Not Urgent**
Important	**High Priority** (Do it now)	**High Priority** (Schedule & plan)
Less Important	**Lower Priority** (Delay or delegate)	**Not a Priority** (Avoid or ignore)

- What is it?

- Who is accountable for carrying it out?

- What is the deadline?

- Who needs to know?

  - Who will be impacted?

  - Who will be informed?

Decision-making: Selecting a course of action to achieve a desired result

ARCI MODEL

ACCOUNTABLE
- The person ultimately accountable for the process or task being completed appropriately
- Responsible person(s) are accountable to this person

RESPONSIBLE
- The person who actually carries out the process or task assignment
- Responsible to get the job done

CONSULTED
- People who are not directly involved with carrying out the task, but who are consulted
- May be stakeholder or subject matter expert

INFORMED
- Those who receive output from the process or task, or who have a need to stay informed

TASC

- **T** – Who owns the task?

- **A** – Do they have the authority to be held accountable?

- **S** – Do we agree that they are set up for success (time, resources, clarity)?

- **C** – Do we have a checklist of what needs to happen to accomplish the task?

Brene Brown Dare to Lead