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ACCELERATOR
Professional Development for Nonprofit Managers

PARK COUNTY
COMMUNITY
FOUNDATION

Trust
+ Performance
Management

10.26.23

Team MNA

Group Expectations:

As a group:

- We leave what's said in the room inside and apply the learning outside.
- We agree to be present when we can, using camera, chat, speaking in, and reactions to participate.
- We listen when others are sharing.
- We recognize we do not all come from the same background and speak from our own experience.
- We assume good intent but name impact.

Please do:

- Actively participate, provide advice, ask questions
- Take breaks as you need them
- Ask for what you need

Accelerator Fundamentals

- Cultivate self-awareness.
- Develop and sustain relationships built on trust.
- Create comprehensive, realistic plans that align with overall organizational needs.
- Accurately evaluate project and organizational outcomes.
- Support employee growth and development.
- Prioritize and advocate for inclusive and equitable approaches and outcomes.

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October 26th: Trust + Performance Mgmt

Learning Objectives:
- Participants will be able to explain the concept of psychological safety
- Participants will be able to identify the four components of trust
- Participants will be able to practice delegating using the Eisenhower or PTR matrix
- Participants will be prepared to develop a coaching or performance management plan for their team

Session Time:
- 12:00 – 12:30 | Intros and Overview
- 12:30 – 1:30 | Psychological Safety + Trust
- 1:30 – 1:45 | BREAK
- 1:45 – 2:45 | Tools for supporting employees
- 2:45 – 3:45 | Performance Management
- 3:45 – 4:00 | Questions + Close

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Building and Sustaining Relationships Based on Trust

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Psychological Safety

FOUR QUADRANTS OF PSYCHOLOGICAL SAFETY

INCLUSION SAFETY

Members feel safe to belong to the team.

Safe to: Know that you are valued, Treat all people fairly, Feel your experience matters, Include others regardless of title/position

LEARNER SAFETY

Members are able to learn through asking questions.

Safe to: Discover, Ask questions, Experiment, Learn from mistakes, Look for new opportunities

CONTRIBUTOR SAFETY

Members feel safe to contribute their ideas.

Safe to: Engage in an unconstrained way, Interact with colleagues, Have mutual access, Maintain open dialogue, Foster constructive debate

CHALLENGER SAFETY

Members can question others' ideas or suggest significant changes.

Safe to: Challenge the status quo, Speak up, Express ideas, Identify changes, Expose problems

Inclusion Safety

Learner Safety

Contributor Safety

Challenger Safety

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Psychological Safety

Approach conflict as a collaborator, not an adversary.

Speak human to human.

Anticipate reactions and plan countermoves.

Replace blame with curiosity.

Ask for feedback on delivery.

Measure psychological safety.

Trust + Levels of Trust

Trust: "A belief in someone or something."

Trust is a verb AND a noun.

Verb = A decision to trust and be vulnerable

Noun = A created environment to enable belief to develop and sustain

Levels of Trust

- ## Level 1: Competency
  - "I know you will do <u>the thing right</u>."

- ## Level 2: Consistency
  - "I know you will do the thing right <u>over time</u>."

- ## Level 3: Integrity
  - "I know you will do the <u>right thing</u>."

- ## Level 4: Compassion
  - "I know you will do the right thing <u>for me</u>."

Components of Trust

COMPONENTS OF TRUST WORKSHEET

Review the following actions and consider which component of trust they are related to, and whether it builds or diminishes trust. Consider any questions this raises for you.

1. **You are asked to attend a meeting but are not provided with an agenda or context on how to prepare.**
   What component(s) of trust does this demonstrate:
   Consistency   Competency   Integrity   Compassion

In your perspective, does it build or diminish trust? How or why?
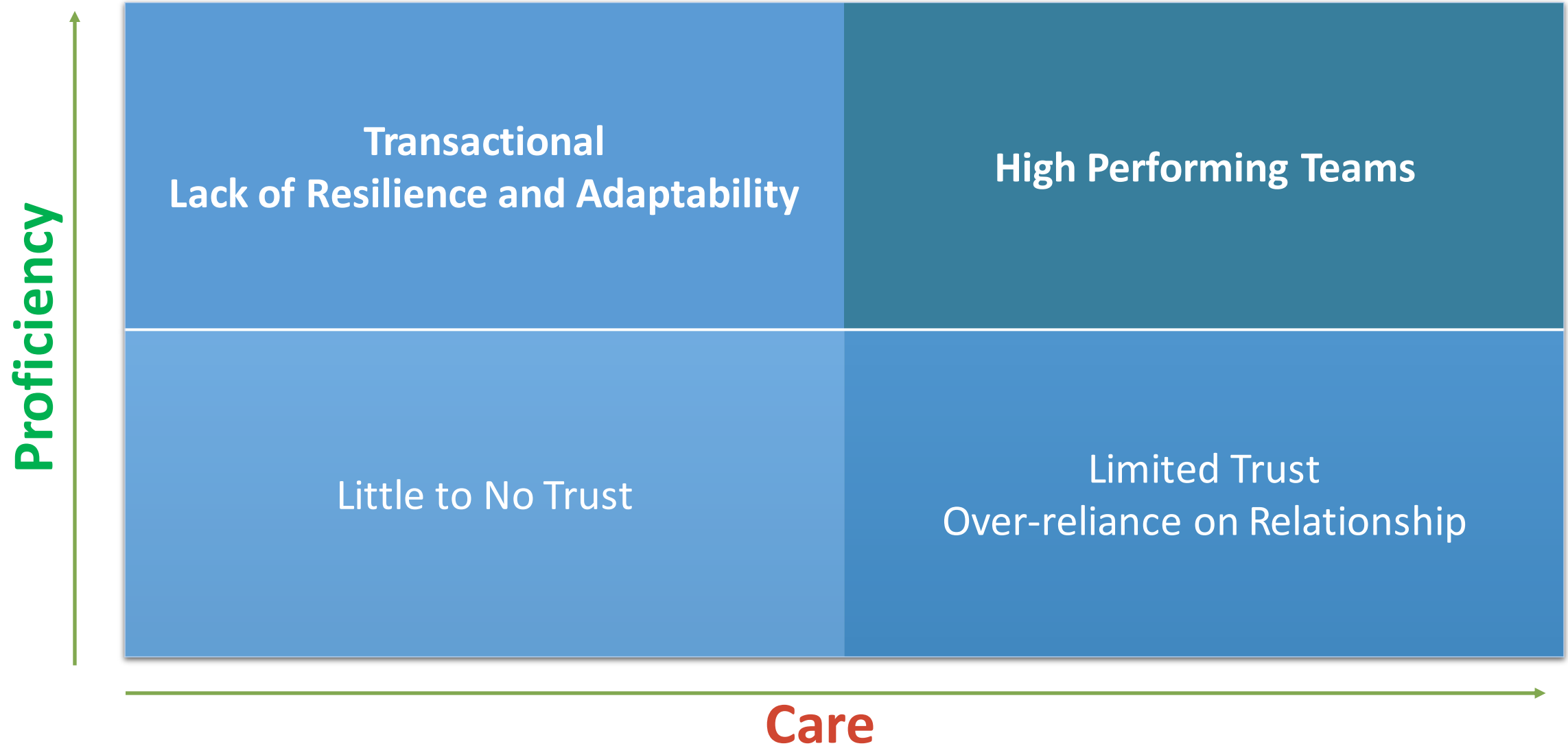
2. **You are really hungry. There is a leftover sandwich in the staff refrigerator that isn't yours. You refrain from eating it.**
   What component(s) of trust does this demonstrate:
   Consistency   Competency   Integrity   Compassion

In your perspective, does it build or diminish trust? How or why?

3. **You respond to a client call at 5:10 on Friday afternoon and put in two extra hours to ensure their needs are met.**
   What component(s) of trust does this demonstrate:
   Consistency   Competency   Integrity   Compassion

Trust + Levels of Trust

Proficiency (vertical axis)

Care (horizontal axis)

**Transactional
Lack of Resilience and Adaptability**

High Performing Teams

Little to No Trust

Limited Trust
Over-reliance on Relationship

Conversation

In small groups, introduce yourselves, identify someone to be ready to report back, then discuss:

1. How do you see your department/team/ organization within the levels of trust?
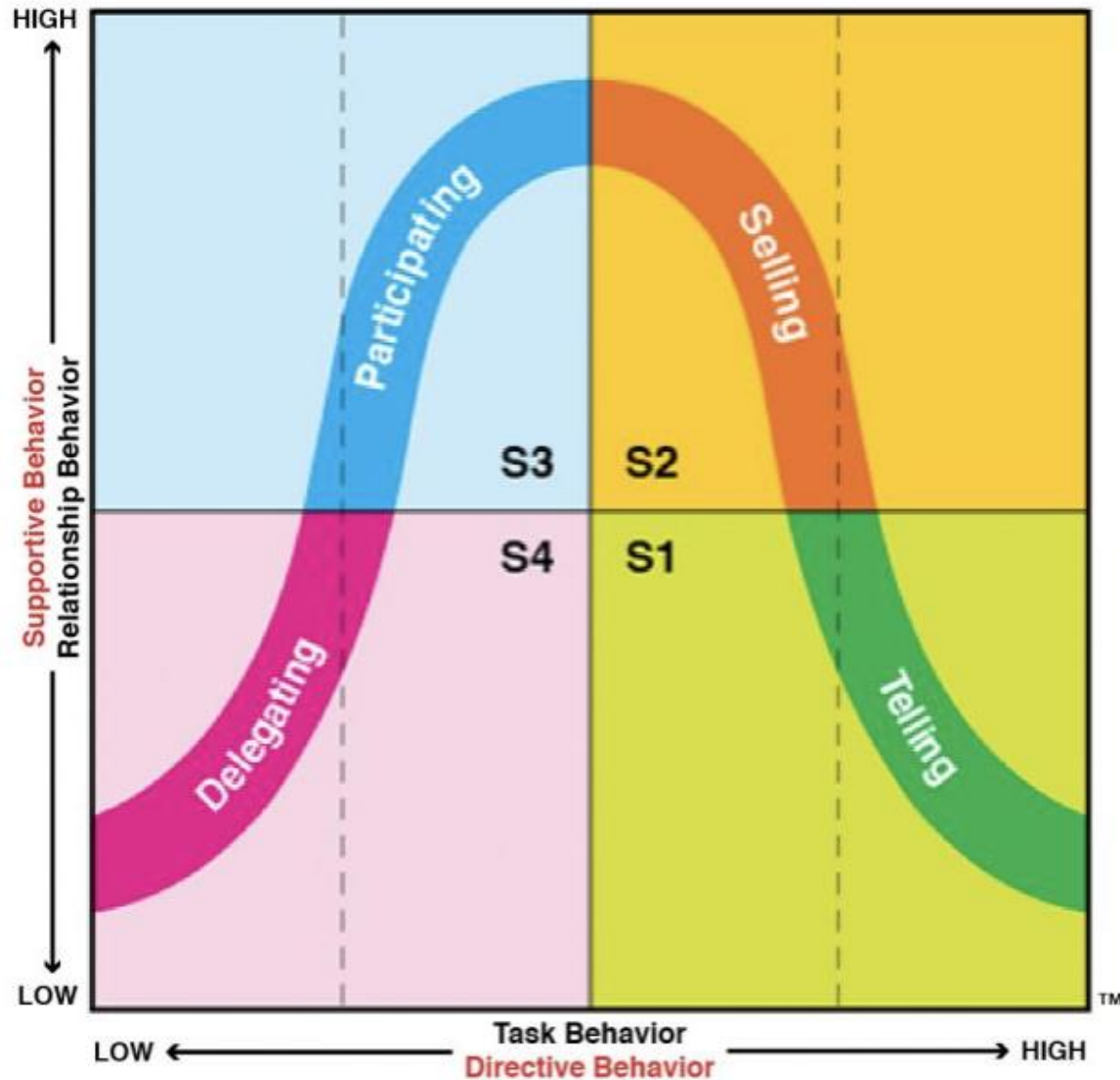2. How can you rebuild trust once eroded or build more durable trust?

Self Awareness + Trust

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Situational Leadership®
Influence Behaviors

Supportive Behavior / Relationship Behavior (vertical axis, LOW to HIGH)

Participating — S3
Selling — S2
Delegating — S4
Telling — S1

Task Behavior / Directive Behavior (horizontal axis, LOW to HIGH)

Performance Readiness®

HIGH	MODERATE		LOW
R4	**R3**	**R2**	**R1**
Able and Confident and Willing ← →	Able but Insecure or Unwilling	Unable but Confident or Willing ← →	Unable and Insecure or Unwilling

Self Directed | Leader Directed

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Types of situational leadership

You're working with your team to organize an upcoming gathering in your community. The four folks you supervise have different experiences

Dolly: Able, Confident, and Willing | "I've got this! I can't wait to welcome folks in."

Garth: Able, but Insecure or Not Willing | "Can you remind me how to take tickets?"

Reba: Unable but Confident or Willing | "I know how to do it."

Blake: Unable and Insecure or Unwilling | "This is my first event with y'all, what should I expect?"

Which "situational leadership" behavior or approach might work best with each? How do you know?
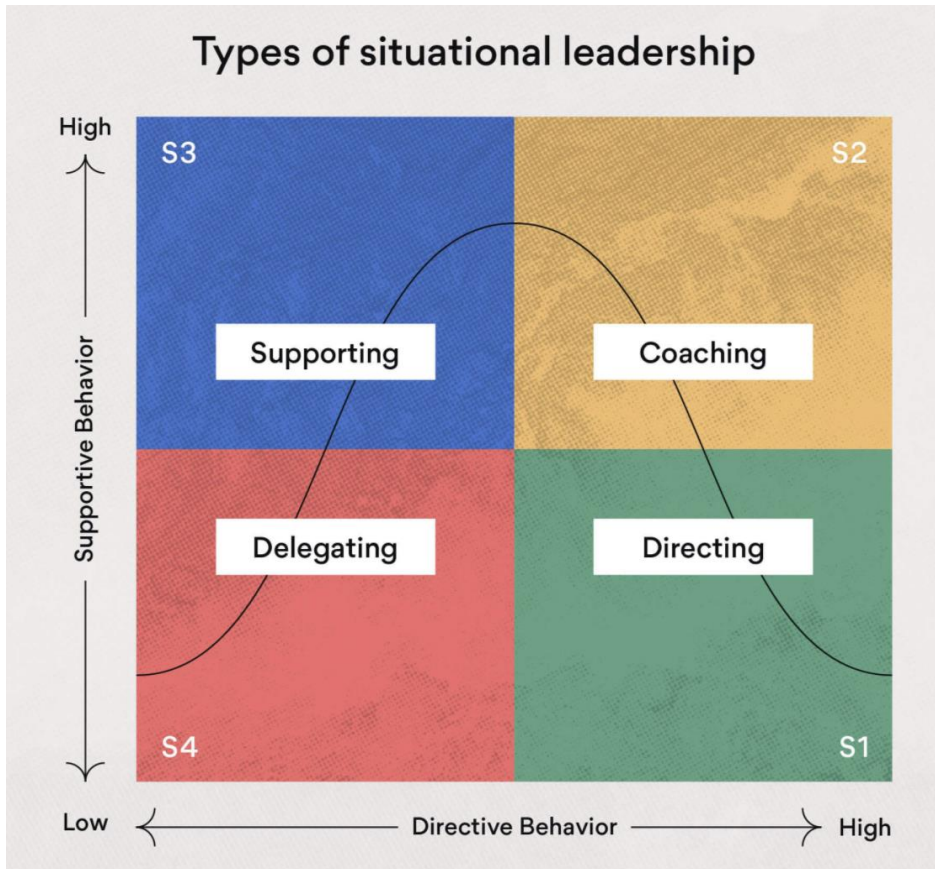
How do I know where folks are?

Proficiency

- OBSERVE

Care

- ASK

Trusted Five

Make a five-by-six grid on a piece of paper

Names of Trusted 5	Your Age/Generation	Your Gender Identity	Your Race/Ethnicity	Your Belief System/Religion
	X		X	
		Add check marks to each box that matches your demographics		
		X		
		What does your grid look like?		

Measuring and Improving Trust

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Measuring Safety + Trust: Internal

Once you've filled out the chart, reflect on the following questions:

1. Which of your staff had the highest ratings? What about the lowest? Why do you think that is?
2. What patterns (if any) do you notice, particularly with regard to race, or other identities like gender, age, educational background, etc?
3. How might lines of difference and power influence your choice points? Where could your bias be showing up? Examples:
   a. *It's harder to provide feedback to X staff member than to Y staff member because I feel like we don't communicate as well.*
   b. *When I'm having a busy or stressful week, my check-ins with X feel so much easier because we are able to connect over the many things we have in common.*
4. What impact might these choices have on equity and inclusion? For example, is one person getting overlooked for promotions because they're not getting enough stretch assignments?
5. What might change if I made a different choice with regard to [choice point] with [staff member]?

https://docs.google.com/document/d/16Q3Oo3d8I2xt3li6RsUsx5KXyE20_DsCsT8BiUCTDzI/edit

Name / Initials	Choice Points — In the last month, I've done the following to help my staff succeed:						
	Prioritized check-ins during busy weeks	Provided candid feedback that includes both pluses and deltas	Made time to see them in action or work side-by-side	Gave them stretch assignments to grow their skills	Sought their perspective on big decisions I need to make	Asked them about skills & experience they want to gain	Total
MH	3			3	2	3	11
EB	1	2	3	1	1		8
DV			2		2		4

©The Management Center

Measuring Safety + Trust: External

Questions to consider bringing into your check in or review process:

BELOW ARE QUESTIONS YOU MIGHT CONSIDER INCLUDING IN STAFF SURVEYS, EVALUATIONS, OR OTHER ANONYMOUS FEEDBACK PROCESSES TO BEGIN MEASURING SAFETY AND TRUST. SELECT OR ADAPT QUESTIONS YOU CAN ASK SAFELY TO BEGIN GATHERING EXTERNAL FEEDBACK ON TRUST.

TEAM LEARNING CLIMATE

Psychological Safety
Represents the extent to which the team views the social climate as conducive to interpersonal risk; it is a measure of people's willingness to trust others not to attempt to gain personal advantage at their expense.

- When someone makes a mistake in this team, it is often held against them.
- In this team, it is easy to discuss difficult issues and problems.
- In this team, people are sometimes rejected for being different.
- It is completely safe to take a risk on this team.
- It is difficult to ask other members of this team for help.
- Members of this team value and respect each others' contributions.

TEAM LEARNING BEHAVIOR

Team learning behaviors (internal): TLBI
Represents the extent to which team members engage in behaviors designed to monitor progress and performance against goals (single-loop TL), as well as the extent to which they engage in behaviors designed to test assumptions and create new possibilities (double-loop TL)

- Problems and errors in this team are always communicated to the appropriate people

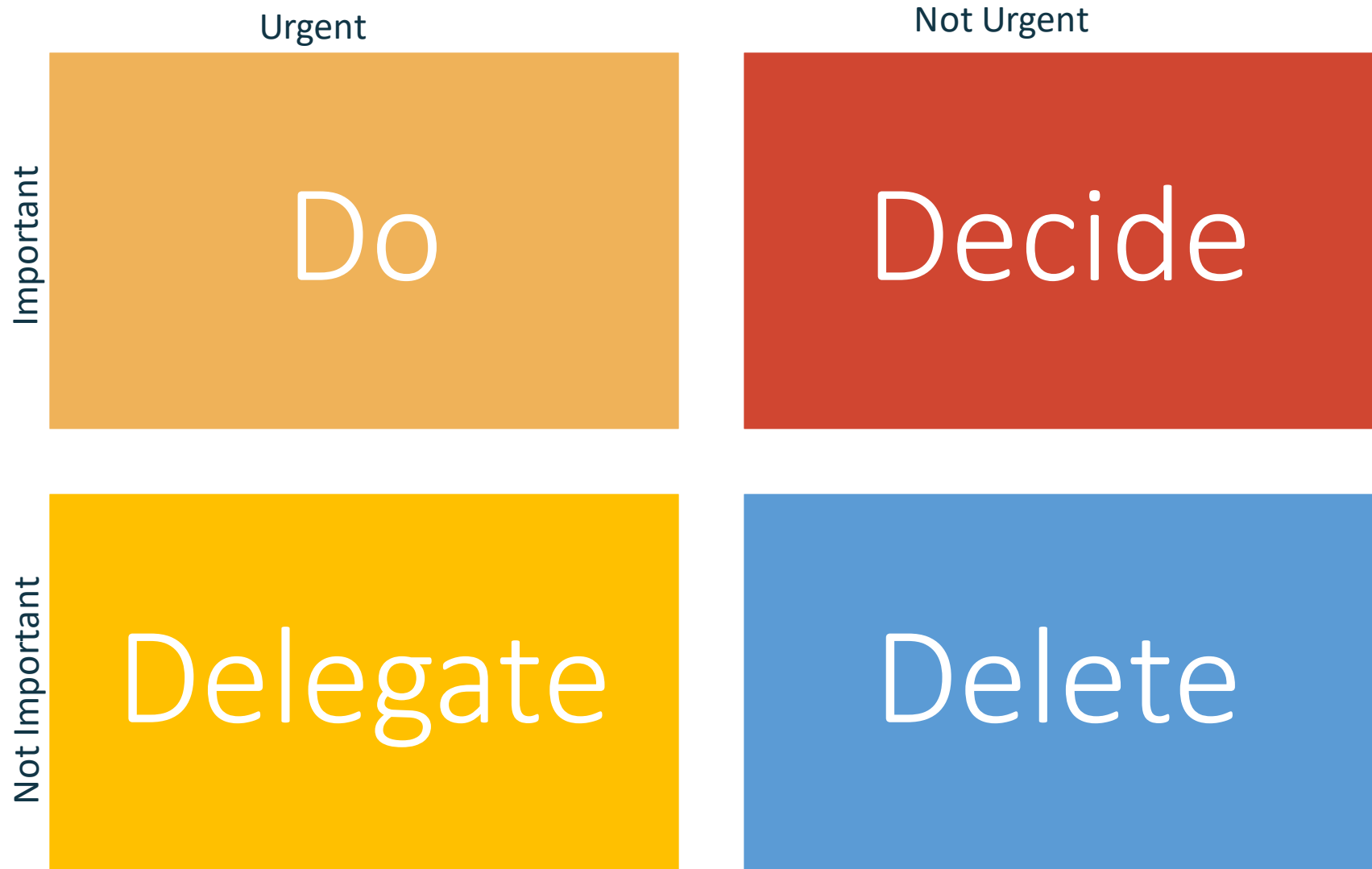Worksheet in Thinkific

Adapted from Edmondson, A. (1999). Psychological safety and learning behavior in work teams. Administrative Science Quarterly, 44, 350-383.

Skills for Supporting Employees

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Delegation Tools: Eisenhower Matrix

	Urgent	Not Urgent
Important	Do	Decide
Not Important	Delegate	Delete

+ Situational Leadership
+Planning Processes
+Job Descriptions

Delegation Tools: PTR

PREFERENCE "I prefer updates in writing ."

TRADITION "We do these weekly and send them over email."

REQUIREMENT "All team members have the info they need to make decisions, feel connected, and collaborate."

Consider the item you just decided to delegate. How would you communicate it using PTR?

Supporting Employees: Delegation

•**Manager:** Supports and holds owner accountable through delegation. Serves as a resource, shares feedback, asks probing questions, reviews progress, and intervenes if the work is off-track. This person may or may not be the owner's supervisor.

•**Owner:** Has overall responsibility for driving the project forward and coordinating steps to accomplish the goal. Ensures all the work gets done (directly or with helpers) and involves others (consults) in a meaningful way. There should only be one owner.

•**Consulted:** Provides input and perspective. May share resources or referrals.

•**Helper:** Implements aspects of the work and actively contributes to project success. The helper may own a significant area of work with its own MOCHA (we call this a cascading MOCHA).

•**Approver:** Signs off on the final product or key decisions. May be the owner or manager, though it can also be a person or group with a clear decision-making role on the project.

Trust, Supporting Employees, and Delegation

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Noun = A created environment to enable belief to develop and sustain
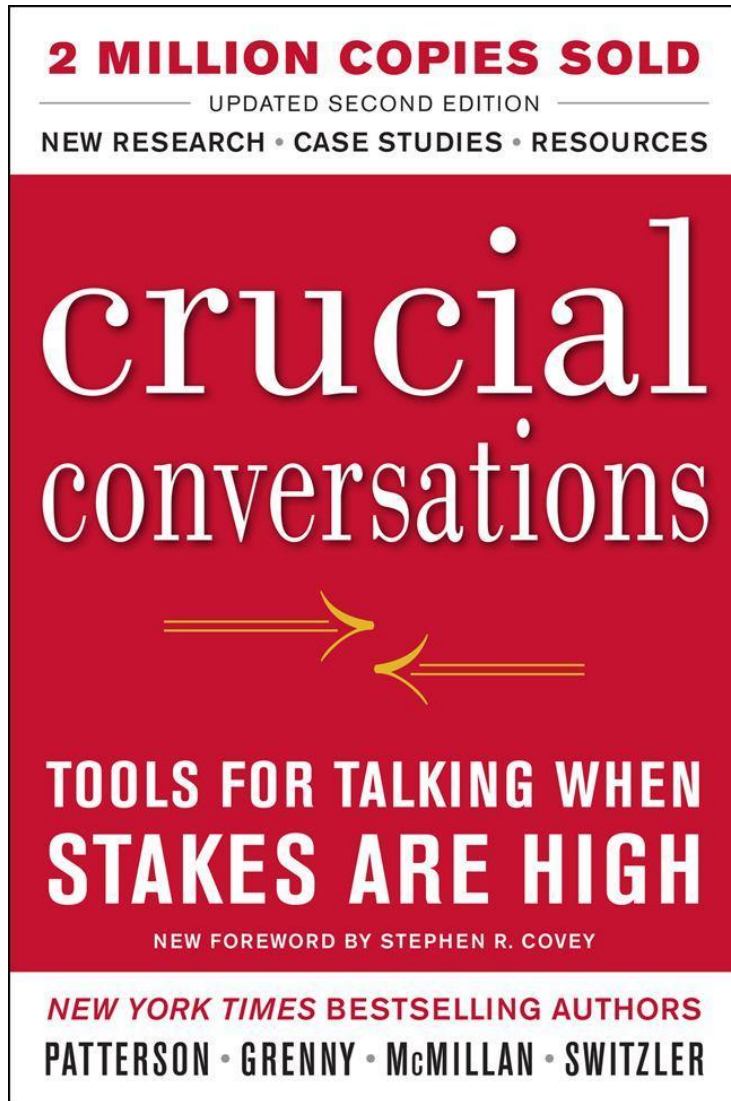
Group Conversation

DELEGATION

- What is your greatest strength when it comes to delegating or decision making? How does some of the work you've done to become a self-aware leader complement that?

- What would you like to improve on when you delegate or make team decisions?
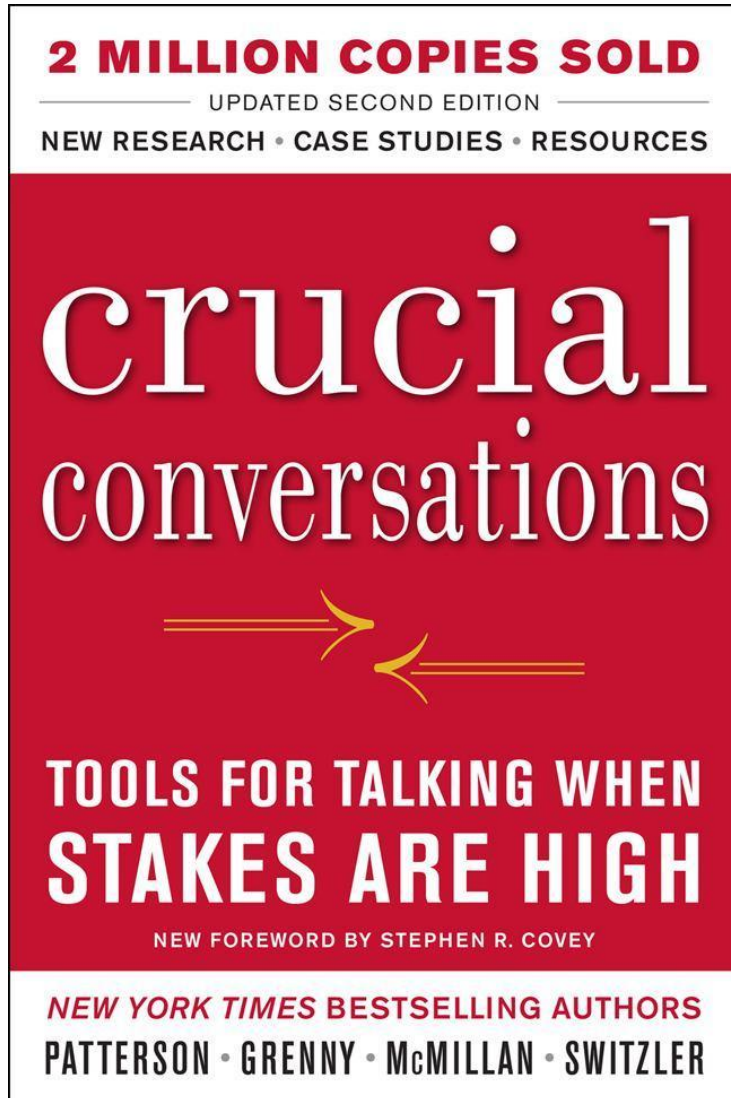
Managing Conflict

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2 MILLION COPIES SOLD

UPDATED SECOND EDITION

NEW RESEARCH • CASE STUDIES • RESOURCES

crucial
conversations

TOOLS FOR TALKING WHEN
STAKES ARE HIGH

NEW FOREWORD BY STEPHEN R. COVEY

NEW YORK TIMES BESTSELLING AUTHORS

PATTERSON • GRENNY • McMILLAN • SWITZLER

"The most surefire way to avoid all conflict (crucial conversations) is to not lead a meaningful life."

"Most relationships end because the lag time between feeling a problem and discussing a problem in a healthy way grows too large to recover from."
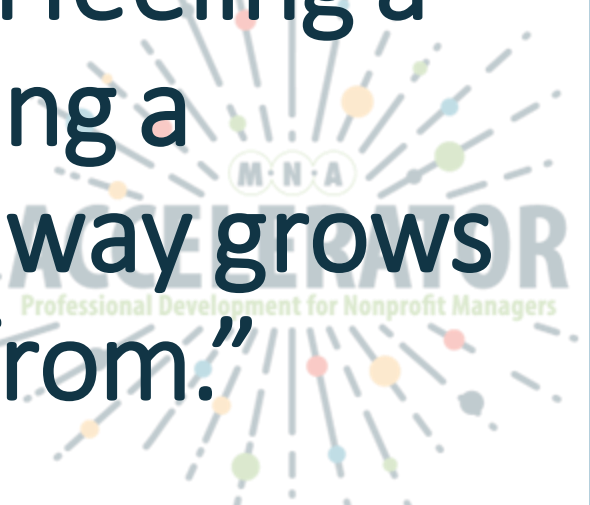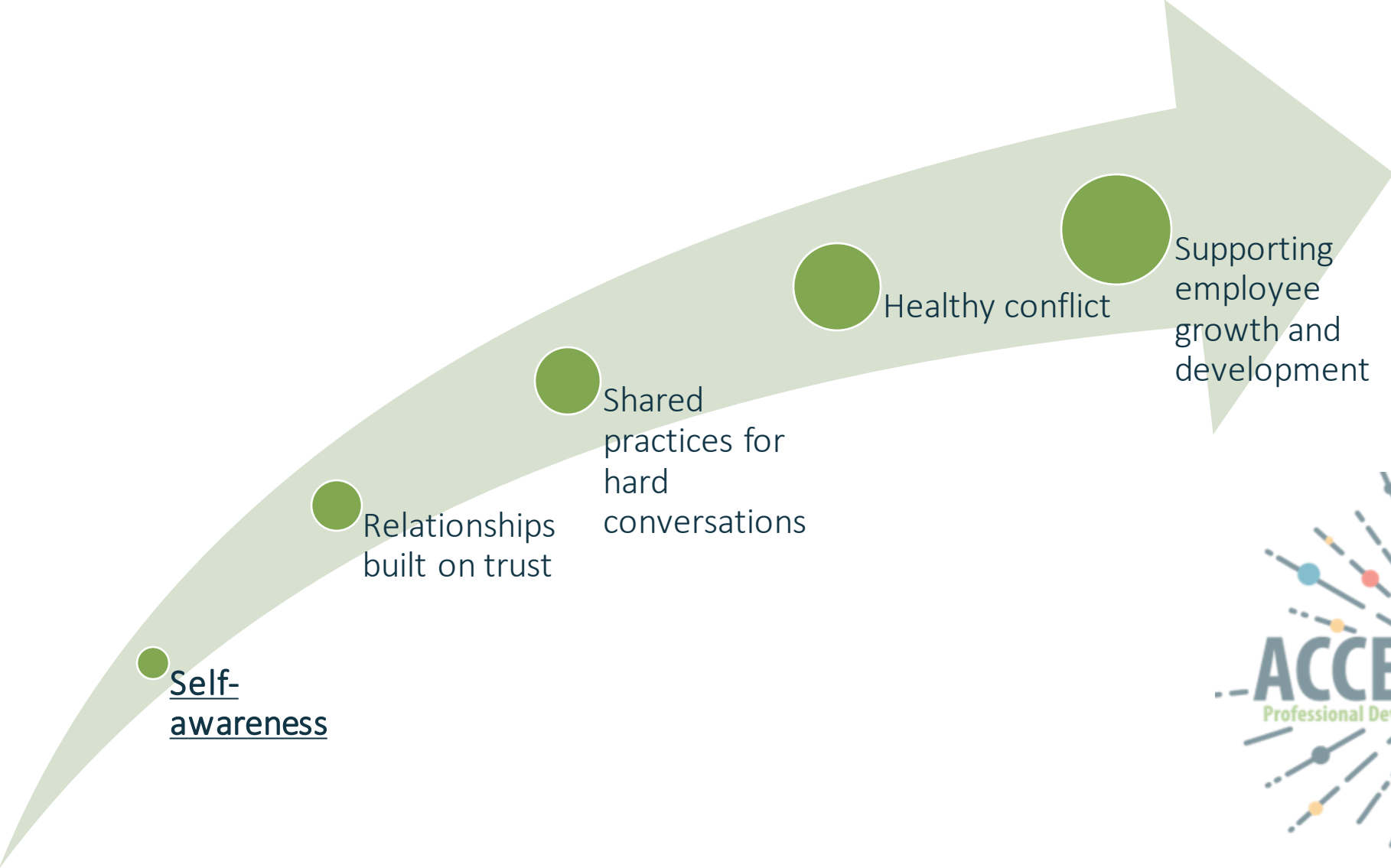
Problems may go undiscussed (avoiding conflict), but they are rarely unfelt.

Difficult Conversations + Managing Conflict

Self-awareness

Relationships built on trust

Shared practices for hard conversations

Healthy conflict

Supporting employee growth and development

Psychological Safety

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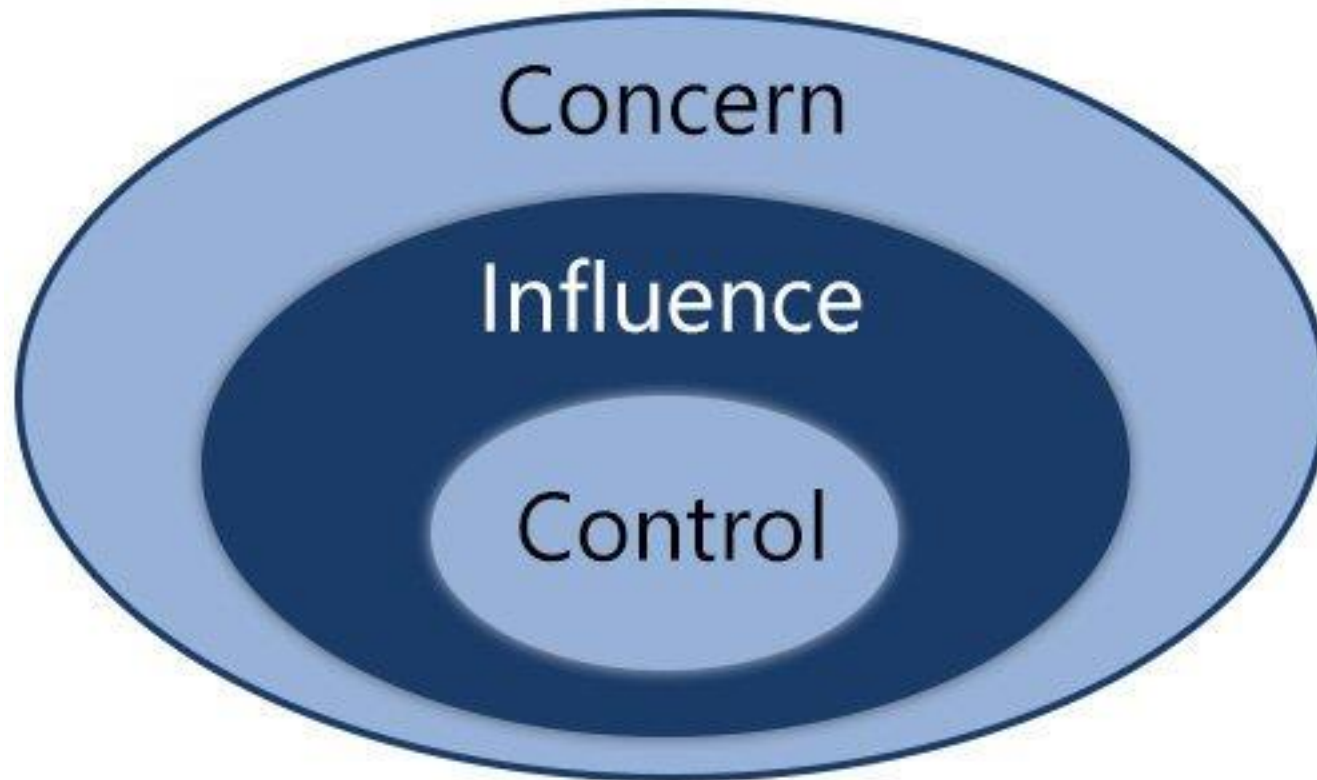
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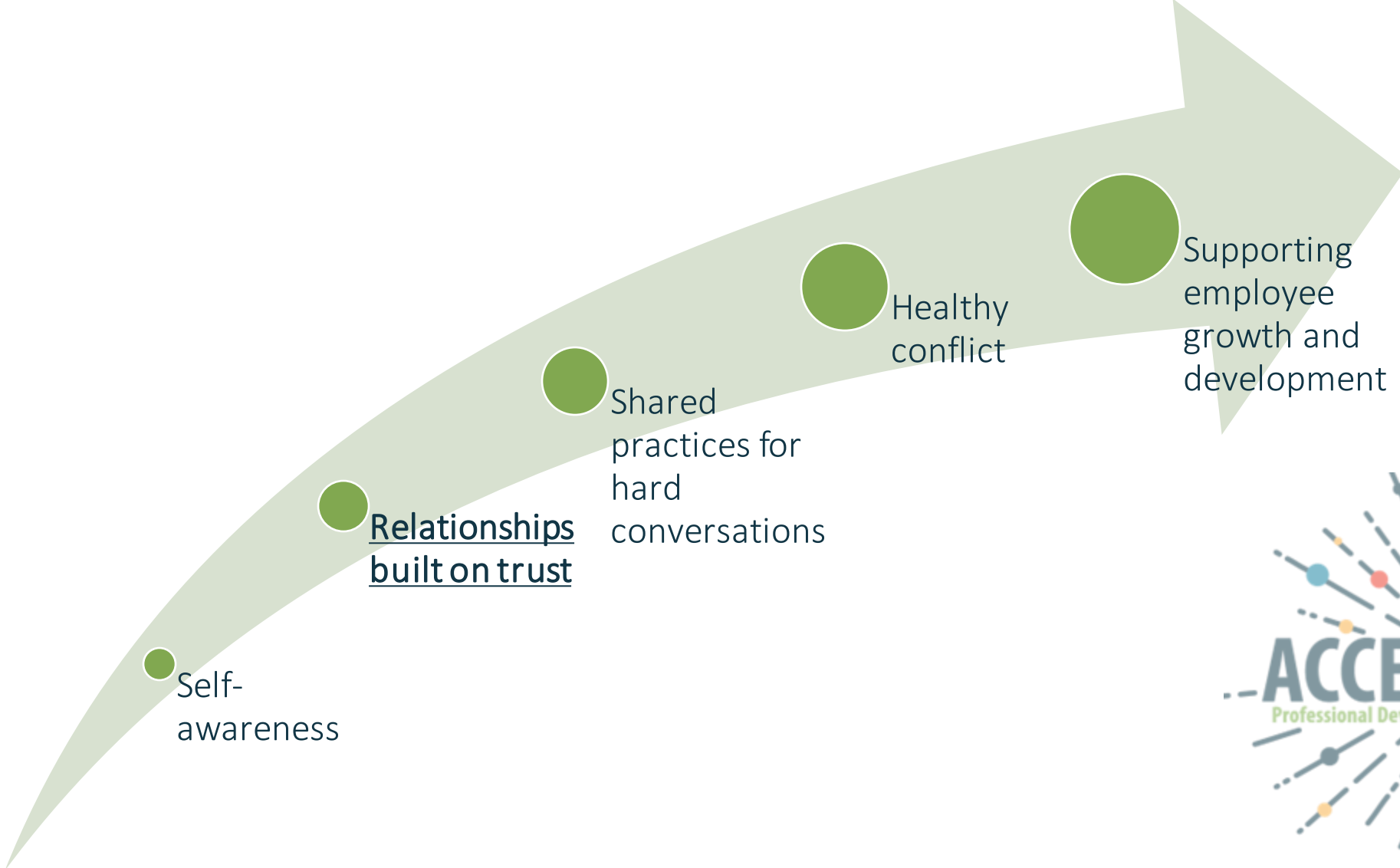
Inclusion Safety

Learner Safety

Contributor Safety

Challenger Safety

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Self Awareness + Professional Identity

Positional Authority

Difficult Conversations + Managing Conflict

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Trust + Levels of Trust

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Want Your Employees to Trust You? Show You Trust Them

by Holly Henderson Brower, Scott Wayne Lester, and M. Audrey Korsgaard

July 05, 2017

Do I show my employees that I feel confident in their skills?

Do I show my employees that I care about their welfare?

Do I show my employees that I think they are capable of performing their jobs?

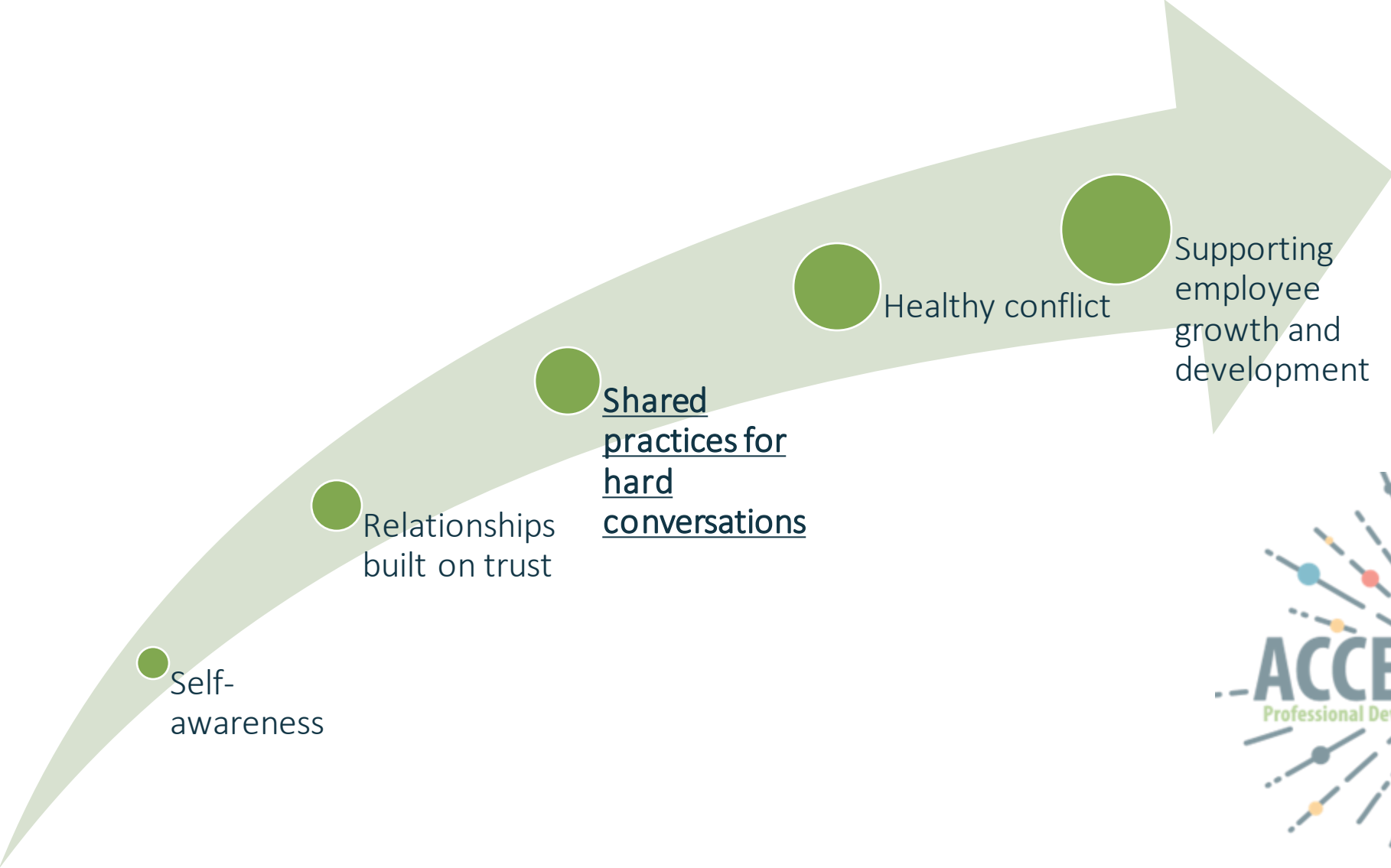Do I give my employees influence over the things that affect them most on the job?

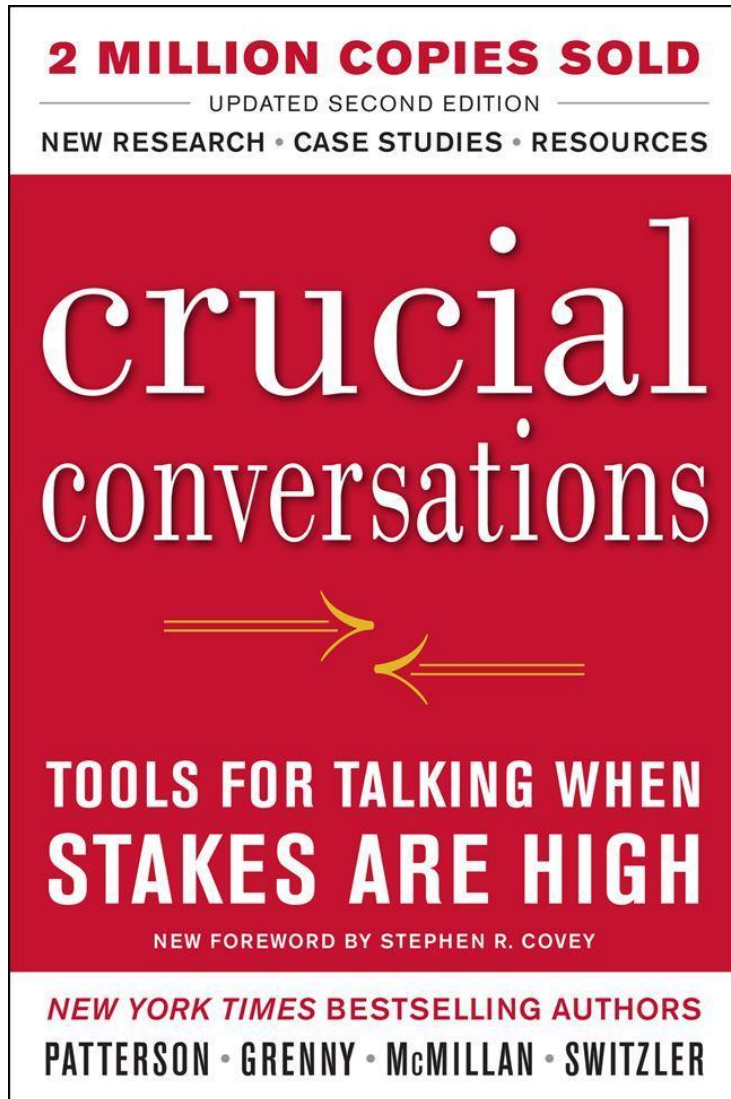Do I give my employees the opportunity to take part in making job-related decisions that affect them?

Do I encourage my employees to take risks?

Do my words and deeds convey how much I trust my employees?

Difficult Conversations + Managing Conflict

Self-awareness

Relationships built on trust

Shared practices for hard conversations

Healthy conflict

Supporting employee growth and development

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1) Start with the heart
(i.e. empathy and positive intent)

2) Stay in dialogue

3) Make it safe

4) Don't get hooked by emotion (or hook them)

5) Agree a mutual purpose

6) Separate facts from story

7) Agree a clear action plan

DIFFICULT CONVERSATION PREPARATION CHECKLIST

Self- Awareness:
- What are you feeling and thinking that makes you want to have a difficult conversation?
- Manage Perspective, Insecurities, and Emotions.
- What are some thoughts you may have a hard time bringing to the table? Make a commitment to share them while exploring the other person's perspective.

Trust:
- How should I have this conversation so that everyone feels safe? What are words/phrases to avoid?
- How can I keep an open mind and truly invest in understanding the other person's perspective?

Planning:
- Keep the conversation on track.
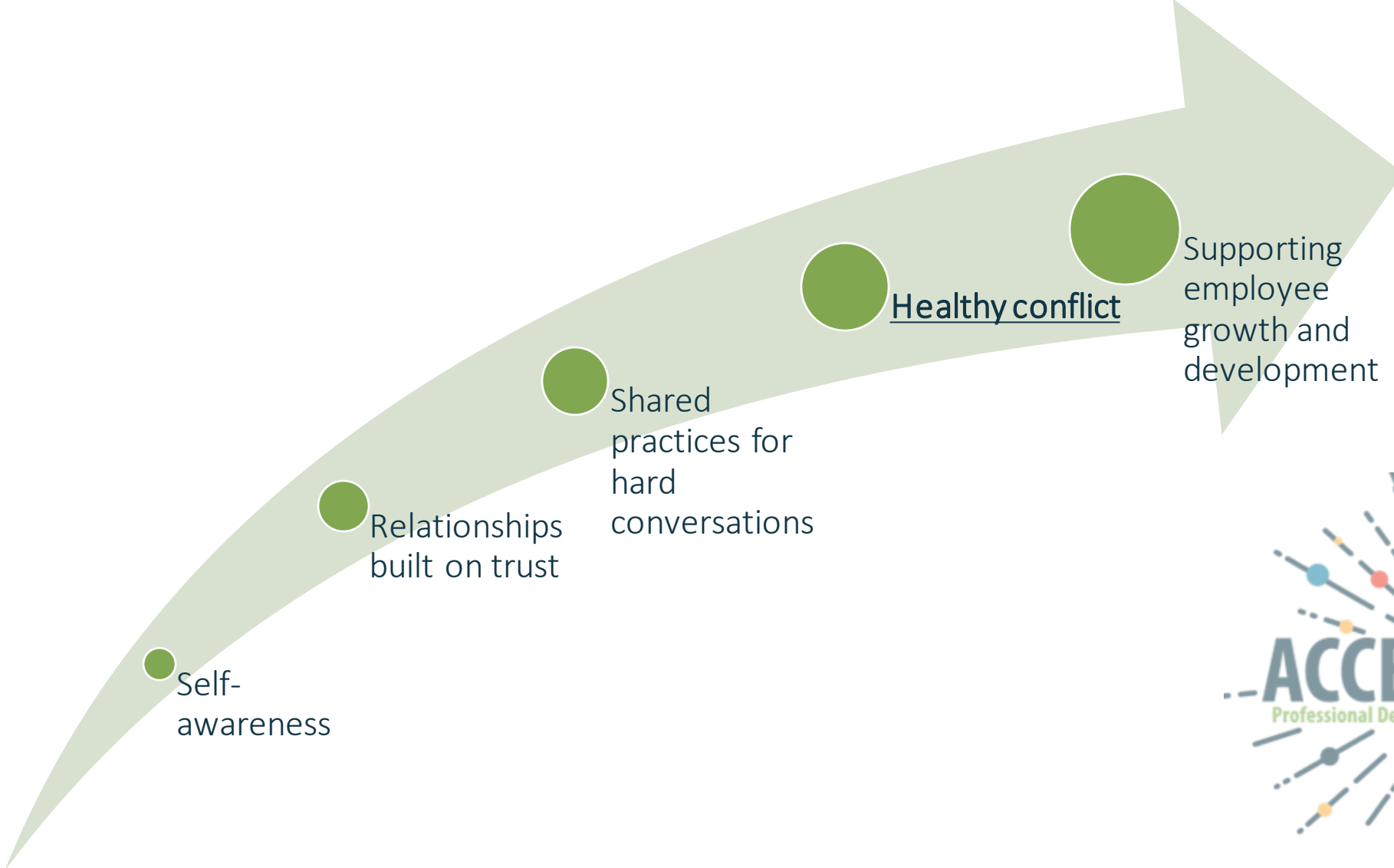- Make a plan for moving forward.

Evaluation:
- What are the potential solutions?
- What will be different as we move forward?
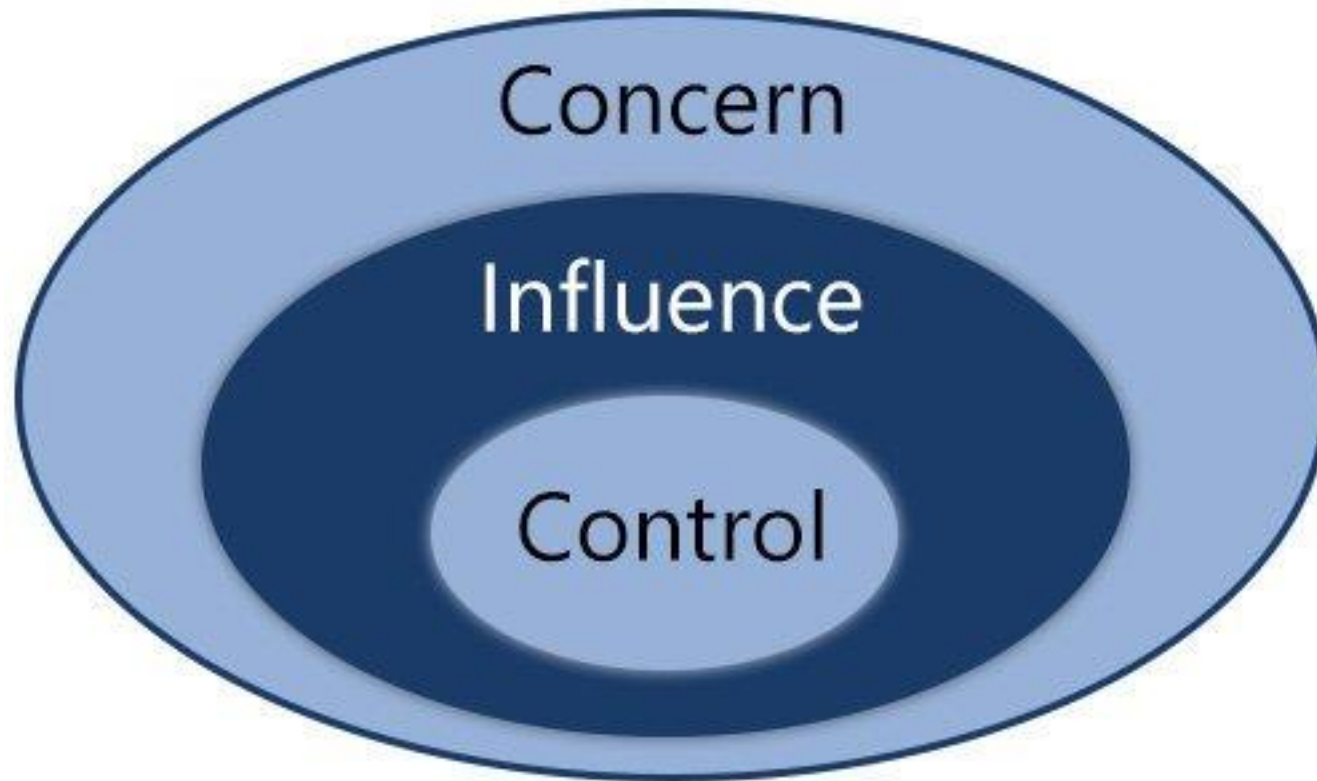- How do we follow-up and stay on track?

Equity
- What are the holes in your view? (IE, what blind spots do I have)?
- What story are you telling yourself about the other person that may hinder your ability to fully engage in a healthy process? Write your assumptions down.

Difficult Conversations + Managing Conflict

Self-awareness

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Shared practices for hard conversations

Healthy conflict

Supporting employee growth and development

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Self Awareness + Professional Identity

Communication: Antidotes + Strategies for Connecting

https://www.whitesupremacyculture.info/comfort--fear-of-conflict.html

antidotes

Antidotes or suggestions for how to show up in more connecting and healing ways:

- role play or discuss or plan for ways to handle conflict before conflict happens;
- distinguish between being polite and raising hard issues;
- don't require those who raise hard issues to raise them in 'acceptable' ways, especially if you are using the ways in which issues are raised as an excuse not to address them;
- develop your emotional intelligence so you can tell when you are hiding your emotions with the excuse that you are being "rational;"
- be transparent about power, so that everyone understands who makes the final decision and/or how the final decision is made before you dive into the conflict;
- invite a third or "neutral" party to support exploration of the conflict;
- assume that everyone has a very good reason for their position and seek to lift those up to the light of day;
- once a conflict is resolved, take the opportunity to revisit it and see how it might have been handled differently.

Reflect:

What am I protecting by avoiding difficult conversations?

What am I scared of when it comes to managing conflict and difficult conversations?

How do I move beyond "why" I am hesitant and decide "what" I am going to do about it?

Communication

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Communication Agreements

|	As a team, we agree to communicate in the following ways:		
Method	**When to Use**	**Response Time**	**Norms**
Office Messaging Platform	Informal, Update, Fun	Not Required; Casual; Whenever	Builds Relationships and Commu
Text	Urgent, easy, straightforward	15 minutes	If you can't reply immediately, at know you saw it; signal the urger
Email	Need a record, HR, Financial, More complex, Participant Info*, Specific/concrete, Recipient will need to gather info to respond, Calendar invite, Need a response	24 hours;	Sometimes request read receipt; with red exclamation; Informatio doesn't require response.
Phone	Too in-depth for email, Urgent, Complicated, back and forth needed, not sure exactly what is needed.	Immediate/ASAP	Will reach out with a different m response; voice mail would be at attention to missed calls.
Video Call	Whole team, consistent meetings, learning acquisition, policy/procedure education,	Live	All on camera unless can't be; m talking.
Face to Face	Quarterly, Planned in advance.	Live	Present, on time.

Reflect + Discuss

Performance Management

- Consider what you and your organization does well when supporting employees.
  - What is within your control?
  - What is outside your control but in your sphere of influence?

- Consider what you and your organization doesn't do well when supporting employees.
  - What is within your control?
  - What is outside your control but in your sphere of influence?

- What is common in your performance management system? What is unique?
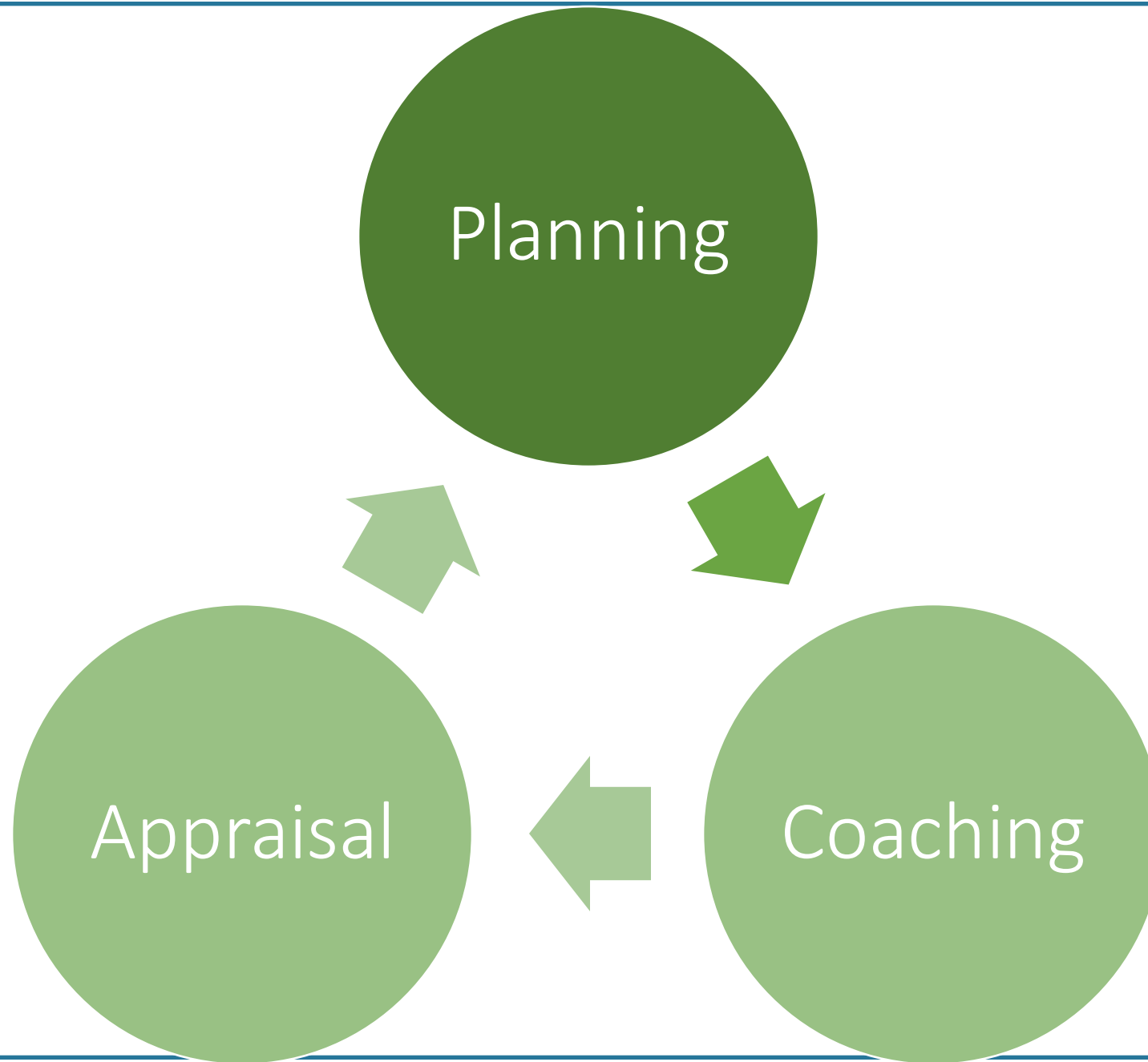
Performance Management:

Performance Planning

1. **Operational Plan**: Aligning work with the priorities and goals of the organization
2. **Job Description:** Defining unique and specific roles and responsibilities for each employee (fleet map!)
3. **Competencies:** Knowledge and skill needed to carry out the job description and operational plan
4. **Personal Goals:** Whole-person approach to work.
5. **Organizational Values:** The principles we abide by, no matter what.
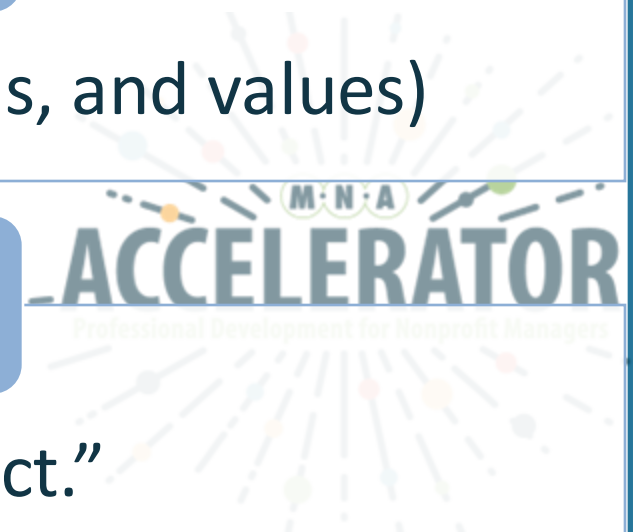
Performance Coaching – 1:1 Meetings

Consistent

- Same time, same place, same focus

Structured

- Use a template or guide (tied to goals, plans, skills, and values)

Honest

- Multi-directional feedback, resolve "little-c conflict."

Levels of Trust

- ## Level 1: Consistency
  - "I know you will do <u>the thing</u>." or "I know I will not be hurt."

- ## Level 2: Competency
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- ## Level 3: Integrity
  - "I know you will do the <u>right thing</u>."

- ## Level 4: Compassion
  - "I know you will do the right thing <u>for me</u>."

Performance Appraisals

Integrated

- Should feel like a continuation of planning and coaching system.

Routine

- Not the time for surprises in evaluating performance.

Holistic

- Should include feedback on job duties, competencies, projects, and goals.

Performance Appraisals, Incentives, Raises...

- Not necessarily tied to review process

- [All the basics on NP bonuses and comp](#)

- Moving towards compensation equity + transparency

- Letting go of negotiation processes

Performance Management: Feedback

First Things First:
- ✓ Am I interrogating my own bias and self-awareness?
- ✓ Am I fostering psychological safety?
- ✓ Am I developing relationships of trust?
- ✓ Am I basing feedback on operational plans and measured outcomes?
- ✓ Am I basing feedback on something I can reasonably expect an employee to change?
- ✓ Am I systematizing and normalizing it with my weekly 1:1 check-ins?

Refining Feedback Skills:
Like any skillset, it can be improved with intentional practice. We'll explore the SBI model, how it can be used to practice giving and receiving feedback, and how to reflect and grow.

Performance Management: Feedback

Situation | Be specific. Describe the time, place, context of the event you want to discuss

Behavior | Describe behavior you witnessed without assuming intent or bringing in outside observations not based on your own experience. "I saw....I noticed...."

Impact | Share your interpretation of the impact of what you observed.

This helps you form a quick three sentence statement to open a conversation. Asking a question of intent or capacity at the end then allows your teammate to enter the conversation:

- What is your experience of this situation?
- What was your intent?
- Want to talk through your perspective?

Performance Management: Scenario 1

Reba supervises Hannah and one day noticed her helping a client through a confusing and frustrating billing process, all while staying patient and calm. The client left happy, and Hannah resumed her work. Reba had to go on to a meeting, and didn't have time to offer a "good job" right away.

During their next scheduled check in, Reba wanted to provide feedback on Hannah's customer service, one of the core competencies in Hannah's job description. She uses the SBI model to deliver it. She waits until they are walking through that part of the agenda, and then shares:

"Last Thursday afternoon at the front desk I saw you were working with a client on what seemed to be a frustrating billing process. You kept your demeanor calm and kind, and it looks like the customer walked away happy. The way you handled that situation shows our clients we are here to meet their needs, and helps build trust when folks walk in our door, which is so important to the mission. Thank you. Do you want to share your experience of that client with me? Was it hard or easy to maintain a sense of calm?"

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Performance Management: Scenario 2

Reba supervises Hannah and one day noticed her helping a client through a confusing and frustrating billing process. The client was upset, and Reba saw Hannah's emotional state rise in response – her voice became louder and insistent. Reba had to go to a meeting and didn't have a chance to step in, but the last thing she saw was the client storming out of the door and Hannah sitting back down in the chair, crossing her arms and rolling her eyes.

During their next scheduled check in, Reba wanted to provide feedback on Hannah's customer service, one of the core competencies in Hannah's job description. She uses the SBI model to deliver it. She waits until they are walking through that part of the agenda, and then shares....

YOUR TURN

Performance Management: Scenario 3

Situation | Be specific. Describe the time, place, context of the event you want to discuss

Behavior | Describe behavior you witnessed without assuming intent or bringing in outside observations not based on your own experience. "I saw....I noticed...."

Impact | Share your interpretation of the impact of what you observed.

This helps you form a quick three sentence statement to open a conversation. Asking a question of intent or capacity at the end then allows your teammate to enter the conversation:
- What is your experience of this situation?
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Performance Management Tools

Word Doc: [Check in Template](#)

Excel: [Performance Management Planning](#)

Job Description Library: [BridgeSpan](#)

Roles + Goals: [Management Center](#)

Reflection

Performance Management

What is within my sphere of control, influence and concern? What are three things they have control over they can do right away? What are a few things they can begin to advocate for or influence in the realm of performance management?

Accelerator Fundamentals

Cultivate self-awareness.

- Objective information from evaluation demonstrates where we are succeeding and falling short, it's data we can use to enhance our understanding of our strengths and areas to grow.

Develop and sustain relationships built on trust.

- Conveying accurate information to those we lead and those who lead us demonstrates compentency.

Create comprehensive, realistic plans that align with overall organizational needs.

- Planning and evaluation processes are two sides of the same coin.

Support employee growth and development.

- When we measure outcomes, we can better track performance and provide support and supported challenges to ourselves and our team.

Prioritize and advocate for inclusive and equitable approaches and outcomes.

- We measure what matters, and what matters get measured. Progress towards equity within your mission and organization should be measured.

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Reflect

- Determine any changes or updates to your 1:1 check in process or schedule and build a timeline for implementing

October 26th: Trust + Performance Mgmt

Learning Objectives:
- Participants will be able to explain the concept of psychological safety
- Participants will be able to identify the four components of trust
- Participants will be able to practice delegating using the Eisenhower or PTR matrix.
- Participants will be prepared to develop a coaching or performance management plan for their team

Session Time:
- 12:00 – 12:30 | Intros and Overview
- 12:30 – 1:30 | Psychological Safety + Trust
- 1:30 – 1:45 | BREAK
- 1:45 – 2:45 | Tools for supporting employees
- 2:45 – 3:45 | Performance Management
- 3:45 – 4:00 | Questions + Close

Thank you!