



**Nonprofits:**  
**We're Here to**  
**Help YOU**

# LEADING NOW: Managing Performance

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**May 21, 2024**





# LEADING NOW: Performance Management

Tuesday, May 24, 2024 FACILITATOR: Linda Rich

# Jewish Community Council of Greater Coney Island's NonProfit HelpDesk

We focus on small and emerging nonprofits, offering

- Workshops
- Training
- Consulting

2,500 organizations have worked with us, benefiting from support in:

- financial management
- fundraising
- governance
- human resources
- management and operations
- marketing and social media
- strategic planning
- technology



# Linda Rich

Leadership  
Motivation  
Personality

Settings: corporate, nonprofit, faith-based

Roles: line manager, internal/external consultant

Methods: exec coaching, consulting, workshops



Assoc for Coaching presenter

Lived abroad

Crafter

Art, Architecture, Design

**performance management:  
What do you dislike most?**

**CHAT**

**share your concern(s)**

# Why We Avoid It

- **Dislike conflict**
- **Role discomfort – judge, boss**
- **Context: staff shortages, “quiet quitting”**  
*[afraid people will leave, but actually it demotivates the best employees]*



# Objectives

- Do it a little better
- Do it with a little more ease



*Clarity*  
*Documentation*  
*Year-round, ongoing, increases retention*  
*PM is a critical part of a manager's job*  
*Clarity Clarity Clarity Clarity Clarity*



# Continuous vs. Event



~~Performance Appraisal~~

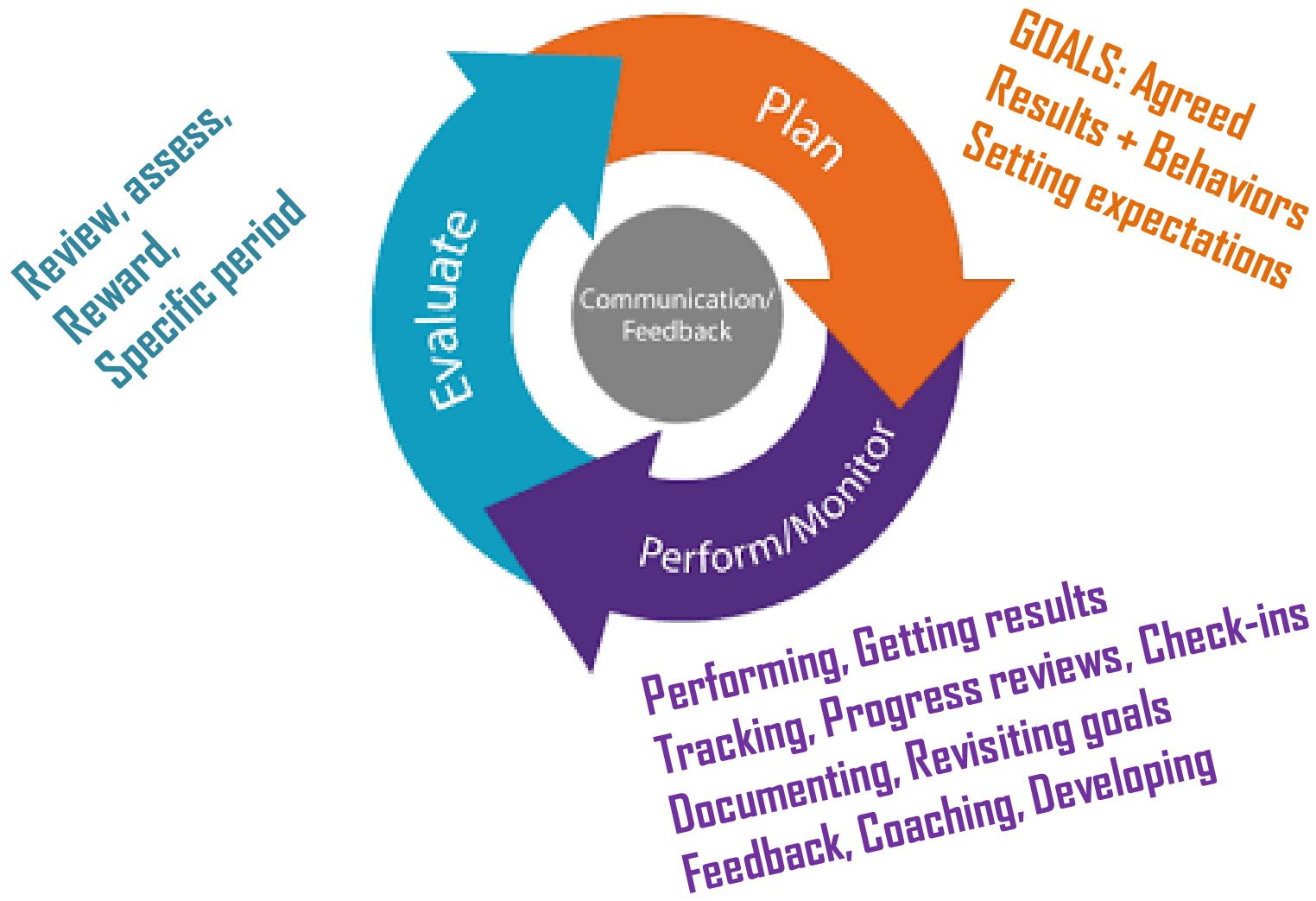
~~Performance Review~~

~~Performance Assessment~~

# PERFORMANCE MANAGEMENT



# Performance Management Cycle



# Benefits



Performance ◻ ◻ Catch problems earlier  
Motivation ◻ ◻ Growth ◻ ◻ Relationship

Engagement Pays

## RETENTION

*“My manager cares about my performance.  
are appreciated and my contributions are recognized. I get the support I need  
to help me grow. My strengths  
I feel like a valued member of the team.  
I think I’m going to stick around.”*

# Another Big **REASON**

"PM, if done well, drives **performance** excellence. ...

There's one other big reason we do this – we have an **ethical obligation**. Everyone ...wants the answers to two questions: What do you expect of me? And how am I doing at meeting those expectations? ...we have an ethical obligation to answer those two questions for people."

*Dick Grote*  
*Complete Guide to Performance Appraisal*



# Managerial Courage



Do one thing every  
day that scares you.

-Eleanor Roosevelt

# Performance Formula



## Goals

**WHAT** must be accomplished  
Standard for achievement  
Results, performance outcomes

## Competencies

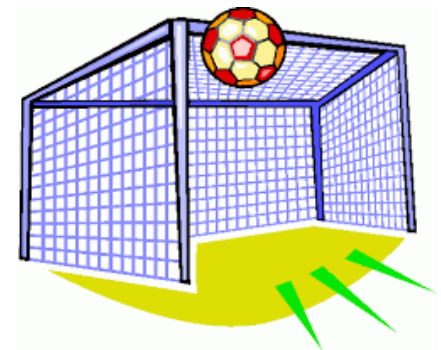
**HOW** work is to be achieved  
Behaviors to demonstrate in accomplishing  
work goals

# GOALS



## The "WHAT"

- Provide motivation and focus
- Not too many: 2-5
- Adjust as completed or priorities shift
- Specific, concrete, clear
- "Just right"



# SMART Goals



**S**pecific  
**M**easurable/Demonstrable  
**A**chievable  
**R**elevant  
**T**ime-bound

Not SMART	SMART
Recruit people for the event	Recruit 50 new participants for the June bike ride by May 1

# Measure OR Demonstrate

How will we know we've met the goal?

Describe qualitative results, paint vivid picture:

What will look/be different?

What will people say [or not say] ?

How will people feel?

etc.





# TRUST is a MUST

Think of someone you don't/didn't trust.  
Why don't/didn't you trust them?

CHAT



# TRUST

COMPONENT	REALM	EXAMPLE
Credibility	Words	I can trust what they say ...
Reliability	Actions	I can trust them to ...
Intimacy	Emotions	I'm comfortable discussing ...
Self-Orientation	Motives	I trust they care about ...

*The Trusted Advisor,*  
Maister, Green and Galford

# Documentation is Essential

Keep a file for each direct report

Record:

- incidents, positive and negative
- date, project, specific behavior, impact
- any conversation had, agreements made

Maintain confidentiality

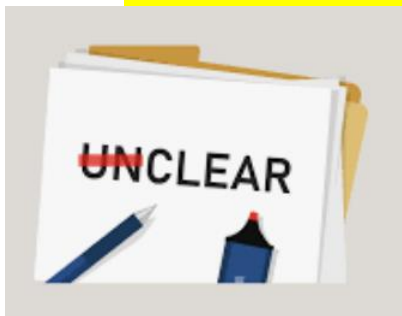
Avoid recency errors



# Reasons for Poor Performance

McKinsey:

- Lack of skills needed for success in a role (**the skill gap**).
- Not engaged/energized by the work (**the will gap**).
- Spend time in ways that don't increase value, such as poor prioritization, low-value meetings (**the time gap**).



ations + Feedback

- clear,  
agreed, prioritized, prompt

- Personal issues outside of work

# Perceived Fairness



**one  
size  
fits  
one**

**= more likely to act on**

- **Comparison to own past (temporal)**  
~~Comparison to others (social)~~
- **Outcomes reflect actual performance**
- **Specifics, time invested**
- **Included and respected**

# Competencies

purpose  
people  
process  
personal

- The **"HOW"**
- **Cluster: abilities, behaviors, mindsets...**
- **Needed to win** (not needed to play)
  - Results-Orientation**      **Empowering Others**
  - Managing Relationships**      **Flexibility**



# New Competency?

## Working remotely:



*Works effectively in virtual and hybrid spaces. Successfully uses technology and leverages its capabilities. Focuses on maintaining and building personal relationships. Participates in group/team opportunities to connect.*

## Gen AI for competencies?

# Remote/Hybrid Work

**McKinsey:** ... measure performance based on

**outputs and objectives completed**

input factors such as time spent or location.

not

## VIRTUAL

- Keep video on
- Ongoing feedback, especially positive
- Over-prepare & over-communicate
- Emphasize relationship, connection, alignment
- Pause to check if you've [been] understood
- Only after you've built trust



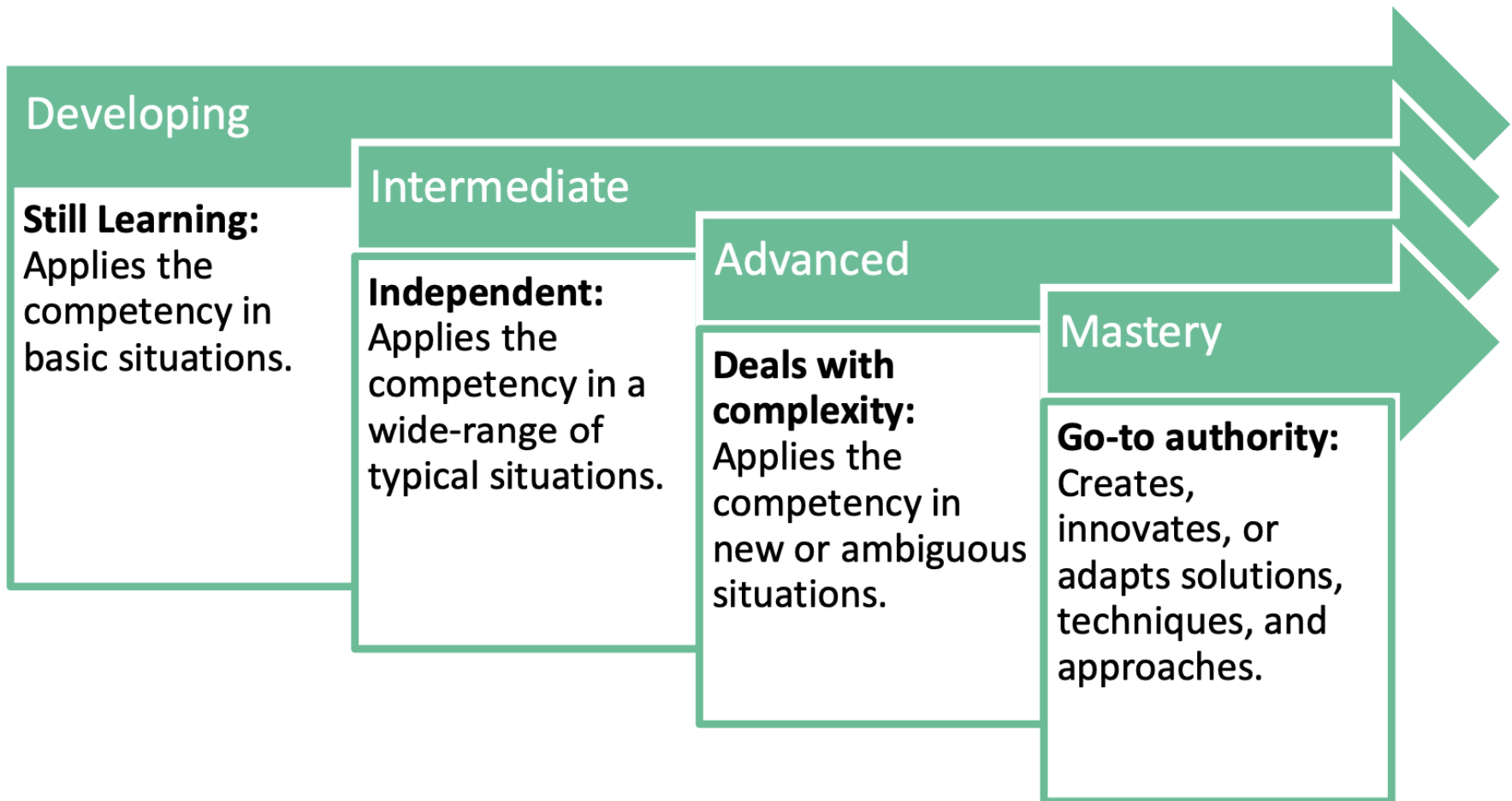


# BARS example: Problem Solving

- Frequently unable to handle problems
- Resolves standard problems
- Anticipates and resolves standard problems
- Generally anticipates and resolves both standard and non-standard problems
- Resourceful, resolves problems quickly, expertise sought out by others



# Stages: Accumulative Model



# Reminder



# “Communication”



## What isn't "communication"?

*You consistently convey complex information.... [examples]*

*You regularly check in with listeners .... [examples]*

*At times your key message gets lost amid lots of other non-essential info [examples]*



# Overused Strengths



Weaknesses may be flip-sides of strengths.  
Dial it back.

- *You're a fantastic mentor, but the amount of time you spend is effecting some of your work. [examples]*
- *You're great at empowering others, but sometimes a more forceful approach is needed. [examples]*
- *Your work is consistently high-quality, but you sometimes struggle to deliver it on time. [examples]*

# DO



- Frequent, regular conversations (**no surprises**)
- Let employee give their own assessment
- Be clear, specific, use examples
- Behaviors & actions, results & impact  
*not "person," "personality," "attitude"*
- Offer support, express confidence (most cases)

# DO NOT



- **“SANDWICH”**
- Label/generalize – always /never
- Numbers, Ranking – try to avoid
- Assume you know their motivation
- 1-sided conversations, mixed messages



# If no PMS



Goals: Make them **SMART**

Competencies:

**DO** use other models *as reference*

**DO NOT** adopt a complete framework, unless clearly relevant

Use what you have



# Objections



<b>I'm not good at this</b>	<b>Here's an opportunity to gain more experience, get better</b>
<b>No one ever did this for me</b>	<b>You learn from good managers...</b>
<b>Our PMS doesn't reflect these values</b>	<b>Use it in a smart way to get what you need</b>
<b>It takes too much time</b>	<b>Trade it in for disengagement and poor performance</b>

# Without Performance Management

You get  
the  
performance  
you  
tolerate.

And deny employees the right to know where they stand

# CHAT

**What will you do differently?**

**New impactful learning?**



# Next Session

PART II:

## DELEGATION, MOTIVATION, DEVELOPMENT

TUES, JUNE 4, noon

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# Non-Monetary Rewards

Which have you used or seen used?

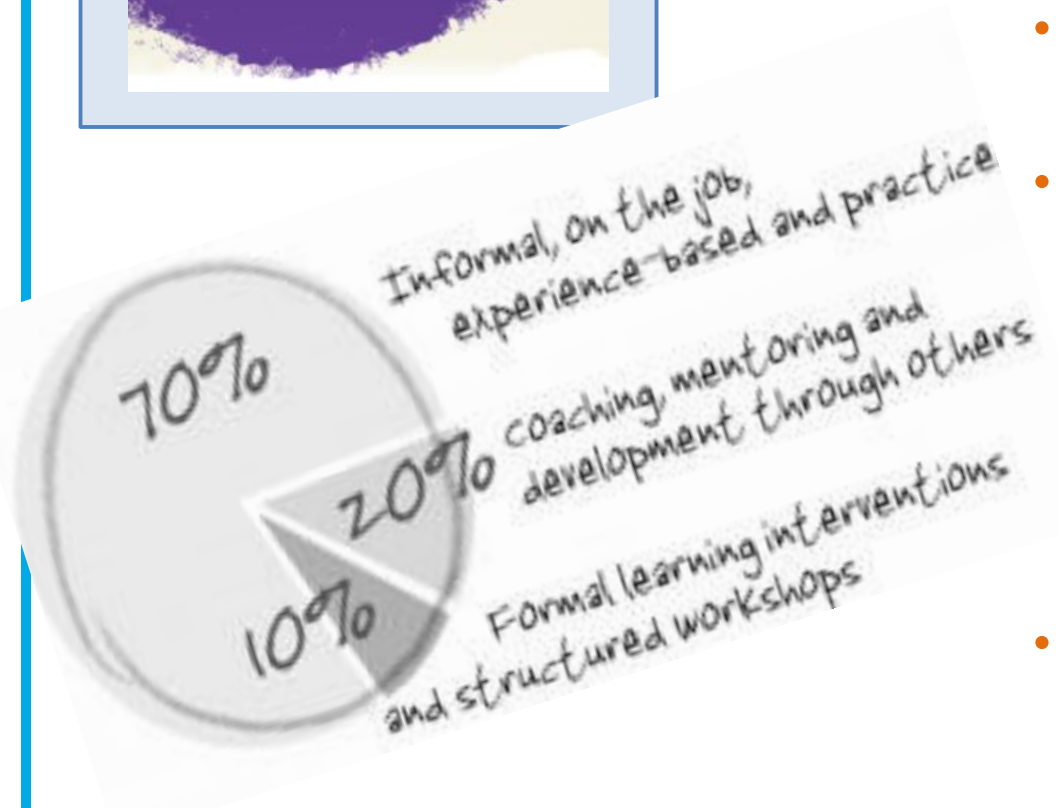
CHAT



# Non-Monetary Rewards

- Participate in a project
- Training or conference
- Exposure to senior leaders
- Tag along/Shadow
- Time to write an article
- More responsibility
- Highlight/shout out
- Help them get there
- Cross training
- Mentoring
- Flexibility
- Award
- Appreciation
- Ask them





- Experiences:  
jobs, assignments, projects...
- People:  
bosses, mentors, role models,  
coaches, peers, buddies...
- Training  
Reading  
books, articles... discussion
- Feedback/Self-Awareness

# Prepare for the Review

*Documentation, Documentation, Documentation, Documentation*

- Employees do their own
- Identify what you want from the meeting
- Peer/manager coaching
- Anticipate objections
- Practice/role play
- Other?





# CHAT

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QR?