



Best Practices & Creative Solutions to your Human Capital Needs

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Today's Discussion

- We are experiencing a sector-wide demand for strong leaders and effective managers.
- Strategies for retention, succession planning, and effective recruitment of advancement professionals are critical to the success of your institution.
- What can you do to mitigate these challenges?
- How can you work proactively to create more effective talent management and leadership development strategies and practices in your institution?

Current Post-Secondary Climate

- Budget cutbacks
 - Shrunk endowments
 - Heightened scrutiny & accountability
- 
- Human resources challenges
 - Hiring freezes?
 - Wage freezes?
 - No net-new positions
 - Contract positions

CRISIS

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A time of danger;

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A time of opportunity;

In the face of challenges...

■ Regroup & Refocus

- Why do you do what you do?
- How do you do what you do?

■ Restructure

- Opportunity & excuse to move people around!

■ Focus on Retention & Succession Planning

- Provide growth opportunities
- In-source PD & training
- Cultivate for future opportunities
 - Advancement Staff
 - Staff elsewhere in University?
 - Past 'stars'

[UWaterloo]

How is the University of Waterloo operating in the current fiscal environment?

- Engage the Advancement team in finding solutions that address the budget crunch
 - a way to develop leadership competencies
 - a way to solidify the team
 - a way to innovate

Succession Planning: A key success factor

- a key component of any institution's strategic plan
- forces you to think about the personal attributes and values that are important to running and leading your organization
- involves everyone yet is the responsibility of the senior management team and the Board
- about the *identification, cultivation and stewardship* of future leaders

Succession Planning & the Strategic Plan

- Knowing where you are going is one thing
 - Having the right leaders to get your there is quite another
- A great institution with a poor leader can become a struggling, dysfunctional institution
- A floundering institution with a great leader can become a great institution
- E.g.. *A great shirt makes a bad suit look good. A bad shirt will make a great suit look bad.*

The Values and Attributes that are key to managing and leading

- What are the values of your institution?
- What are the character attributes that distinguish your institution?
- What are the attributes essential to effective leadership in your institution?
- Who demonstrates those values and attributes?

Succession Planning: Whose responsibility is it?

- **First:** The board is responsible for ensuring a succession plan exists and is robust
- **Second:** the CEO is responsible for the development and ongoing execution of a succession plan
- **Third:** senior management is responsible for the identification, cultivation and stewardship of future leaders
- **Fourth:** all managers and staff are responsible for keeping the succession plan alive and relevant

Identifying, cultivating & stewarding your future ...

Your institution's future is tied to its future leaders

- **Identify** those with the potential to lead who have the values and attributes that match those of your institution
- **Cultivate** those individuals through encouragement to become a leader and by creating opportunities for development
- **Engage** them in tasks that test their leadership ability and nurture that ability
- **Steward** them through a leadership development process that keeps them engaged and excited about leadership possibilities

How do you start a succession plan?

- Inventory your current managers
- Inventory those who you call on for special projects
- Inventory those who seek opportunities for personal and professional development
- Itemize the values and attributes that distinguish each person in the inventory
- Match the people's values and attributes with those of the institution

How do you assess who is ready to lead?

- Use your gut
- Assess each individual who is a “match” and assess whether they are ready now, ready in 1 to 3 years, needs development over 3 to 5 years or future prospect in 5 to 7 years
- Itemize what each individual needs to develop
- Itemize what your institution can do to provide that development and who will make sure it happens

How do you make it happen?

- Assign responsibility for development to each person that is a “match”
- Meet with the senior team to discuss your findings and to critique and challenge your findings
- Re-assign and adjust based on the feedback from the senior team
- Make it happen and keep monitoring

How do you know it is working?

- Test your plan and own your plan
- Whenever you have a vacancy assign someone on the list as an “acting” or “interim” leadership post
- Take risks on your future prospects through special project assignments
- Remember that sometimes you will be wrong
- Meet with each person on your list at least once every two years if you have a long list or once a year if it is a small list

Succession Planning
can't happen without...

Employee Retention

Retention: Sector Snapshot

From AFP 2007 Canadian Survey

- 49% plan to serve in their present position indefinitely
- **18% of employees want to move into a higher management level**
- Only 5% of employees want to leave fundraising for a different field
- Asked whether they looked for a job with another employer in the previous 12 months 43% of Canadian respondents said yes

From HR Council on the Voluntary & Non-Profit Sector

- About 2 in 3 employers recruited employees in the past year; nearly 50% report difficulty
- When recruiting efforts fail, 1 in 3 employers distribute work to existing employees
- Most common actions taken to make workplaces more attractive?
 - “Nothing” (29%)
 - “Increase Salaries” (16.5%)

Why do people stay?

- ___ Great people
- ___ Flexibility – work hours, dress code, etc.
- ___ Being part of a team
- ___ Good boss
- ___ Career growth, learning & development
- ___ Fun on the job
- ___ Recognition for work well done
- ___ Good pay and benefits
- ___ Autonomy, sense of control over work
- ___ Exciting, challenging, meaningful work

Survey says...

3. Great people
9. Flexibility – work hours, dress code, etc.
4. Being part of a team
5. Good boss
- 1. Career growth, learning & development**
7. Fun on the job
6. Recognition for work well done
10. Good pay and benefits
8. Autonomy, sense of control over work
- 2. Exciting, challenging, meaningful work**

From *“Love ‘em or Lose ‘em: Getting Good People to Stay”* by Beverley Kaye

Understanding Total Compensation

The Employee Value Proposition

Financial Rewards

- Salary
- Pension or RRSP match
- Benefits plan
- Paid vacation
- Incentive or bonus pay

Non-Financial Rewards

- Work-Life balance
- Organizational culture/environment
- Feeling of belonging
- Employee Recognition Plans

Career Rewards

- Visibility in the organization/profession
- Professional Development/Training
- Career and Skills Advancement
- Promotion

Job Rewards

- Enjoyment of role and work
- Meaningful contribution
- Constructive performance feedback
- Independence and autonomy

Retention plans must frame recruitment strategies

*Hiring for “fit” + Retaining for “fit”
= Succession Success*

- Fit with your mission, vision, value
- Fit with institution style, structure, team
- Fit with the role (skill set, experience, interests)
- Fit with the future (employee career goals vs. institution planning)

*How often do you reassess
the fit of each employee?*

Retention Best Practices

- Ask employees if their needs are being met
 - What could be done differently or better?
 - Don't box them in: provide exciting, challenging, meaningful work and opportunities for growth>>>Build engagement in their work
- Ask employees what they want from their career
 - and when they want this
 - Consider age/stage...as lives change, plans change>>>Involve them in succession planning
- Make tough decisions about underperformers>>>Keeping these people sends the wrong message

Retention Best Practices

- Provide recognition for work well done
 - Internally share success with Univ. Admin., staff, peers
 - Externally, share successes with Board, donors, alumni, community
- Team activities
 - At work: town hall meetings; seek input, ideas, opinions
 - After work: encourage social opportunities and community voluntarism

Retention Tactics: Meeting the Needs of the Workforce

- Flexible work arrangements
 - Work from home
 - Job sharing
 - Reduced work week
 - Unpaid vacation
- Fair pay and benefits
 - Vacation may be more valued than pay
 - What other trade-offs matter to each person?

Retention Tactics: Opportunities for Growth

- Internal
 - “Acting” assignments (official or unofficial)
 - Lateral moves
 - Mentoring, training, coaching
 - Job shadowing
 - Cross-training/internal “exchange” programs

- External
 - Job shadowing & External “exchange” programs
 - Mentoring
 - Management/leadership education
 - courses, seminars, workshops conferences
 - study leaves, sabbaticals, continuing academic education