Webinar

Webinar Transcript:

Supporting Optimal SRAE Staff Performance

March 12, 2020

Connie: Good afternoon everyone, we're excited about today's presentation. I want to introduce the other presenters starting with Melissa Walther, who is the National Director for Ascend. She has extensive SRAE experience at every level. She has worked with community organizations, collaborated with state officials and provided support to the SRAE field at the national level. Welcome, Melissa.

Melissa: Thanks!

Connie: Our next presenter is Bernadette Vissani. She earned her Master's in Public Health Education from Yale University. She is a former SRAE Title V State Administrator and Program Coordinator for the New Jersey Department of Health. She brings expertise in programming, program staffing and a number of other areas. Welcome, Bernadette.

Bernadette: Thank you, Connie.

Connie: Scott Roby is a Senior Project Manager for Public Strategies. He is a master trainer and curriculum specialist who has trained and evaluated facilitators in diverse settings. Scott has worked with youth, couples, adult individuals, as well as fathers in the healthy marriage and relationship field. Welcome, Scott.

Scott: Thanks. So I will start us off by thinking about hiring and as with anything, it's best I think, as the song goes, to start from the very beginning. And before we think about hiring folks, we need to think about what we do in preparation for hiring. So I'd like to throw out to our panelists to hear from you on how do you prepare for hiring new staff members. So Bernadette, I'll pass it to you.

Bernadette: Thank you, Scott. Well, of course, if your organization is of substantial size, you probably have an HR department with numerous hiring guidelines. So let's start there.

If you have to comply with your own internal hiring guidelines, it is essential that you orient, in a very significant way, those individuals who will make the final decision and/or be involved in the hiring process. As you know, only a minority of folks are truly familiar with SRAE. Hiring your optimal candidate could easily be undermined by a lack of knowledge or familiarity. If a president, executive director, or HR director is involved, that orientation will be critical. If on the other hand, you're in a smaller agency and you possess hiring responsibility, give a lot of thought to whom you will invite into the hiring process. You may establish an ad hoc committee with advisory responsibility or have a board member join the panel.

With either size agency, you can add valuable resources to your panel, including yourself, of course, such as those who are tasked with training and marketing. Perhaps the curriculum specialist if you have one, the staff who work in community outreach, your evaluator even, if that person is local, an administrative assistant who may have great instincts. Even having a veteran facilitator from your program can bring valuable insight to say nothing of how that experience will benefit professionally that current staff person. Certainly a panel approach has great value. Scott?

Connie: There are some practical considerations when creating job descriptions, just as there is when you're creating a hiring panel. So, let's talk for just a second about the job description which might inform who you would have sitting on the panel. First, consider the importance of the job description in communicating the role and attracting a good fit candidate.

A job title is also important. Be clear about the job title and the job description by accurately highlighting responsibilities and expectations. No jargon or obscure phrases such as a dynamic people person, a math wizard, someone who loves working with youth. Here are a few examples of obscure job titles. Transparency enhancement facilitators, or window cleaners. Field nourishment consultant, or restaurant server. Consider something that is very concise and clear and highlights what the role will be, nothing ambiguous.

When considering a job description, consider something like this for the description. Curriculum delivery to grades seven through nine, available Monday through Friday, some weekends, reliable transportation, mandatory training sessions, et cetera. Make sure it's clear. I have found it important to list “must pass” in the description, such as college degree, if that's desired. List those specific content areas if you choose to, or experience such as sexual risk avoidance educator or related experience, and define that. Also any training or certifications that might be required or desired for that field. So in preparation for hiring, who should write the job description?

Scott: So one of the things that you have to consider is if you're in a small organization, it may just simply be the program coordinator or even the lead facilitator that are contributing to the job description.

Connie: Right. But then a circumstance allows it can be helpful to obtain input from those that are either currently holding the position or have in the past, as Bernadette mentioned, to ensure that you're including the actual day-to-day tasks that are required for that job.

Bernadette: You can certainly have a lot of input but the project director or the key person should have the final say. Remember, you can adapt from other existing genetic postings as you formulate your job description.

Scott: Now, that's a great point, Bernadette, because you know, one of the things oftentimes, as Connie mentioned, having the right wording is critical. So do your research, go glean wording from other sources like LinkedIn or Indeed.com or other job search engines. That can be really helpful to find exactly the right wording.

And that goes along with our next topic, thinking about marketing strategies. This is part of our preparation for hiring staff is what's the exact wording that we're going to use? Because that messaging actually matters. So you really do want to tailor your wording in the job posting to convey the most critical attributes or qualifications that you have in your position, for that role and for that position. So let's think about this, so say you're hiring a facilitator. So wording that you might want to consider would revolve around the key characteristics that you want. So you may want somebody who is very creative. You may definitely want someone who is engaging and well-spoken. Maybe one of your requirements is they're comfortable leading groups or have specific experience leading groups. As a facilitator you certainly want someone who's both energetic and yet flexible at the same time. Since teaching students or young people about SRAE can have very personal, it's a very personal nature at times. You want somebody who's compassionate and at the same time able to manage the group dynamics that are inevitable when you're facilitating a group of young people.

So then consider if you're hiring someone in a supervisory position, you may have some of the same characteristics, especially if they have dual roles and are providing some facilitation. But so you also want to include characteristics of the supervisor. So you want someone who does have good organizational skills and they're self-driven and highly motivated, somebody that's confident in making decisions. Since this person is going to be supervising your facilitation staff and possible other staff, you want somebody who's very skilled at interpersonal relationships and able to manage the managerial responsibilities. This person also is likely going to be responsible for creating reports to your funders. So you want someone who has very strong written and verbal skills. And obviously they're going to be solving problems. So you want somebody who is very much a creative problem solver.

Connie: Yeah, and then, equally important, just as important as the language that you use to form the job description. It's also really important that you're intentional in drilling down on how you're going to find the best candidate. And obviously, you want to go to where they are. So different positions will demand different strengths. Facilitation will require different characteristics and strengths than a position such as a program manager or an administrative role. And also, if your facilitators team teach, you'll want to consider the strengths and weaknesses of the other facilitator in order to find a good match that will work well.

So in addition to the kind of traditional recruitment avenues, make sure to utilize those stakeholders and partner organizations that really know the work that you do. They have a really clear understanding of what you're seeking to accomplish and will be able to help identify the best candidates that will really fit with your organization well.

And so once you've identified this great pool of candidates, let's talk about the interview process. How do you assess your job candidates and their fit within the organization?

Bernadette: Well, before we discuss how you ascertain what your candidate brings to the table, what is it that you need at the table? In other words, what are you looking for? The essence of a candidate's strength as an SRAE facilitator is equal parts skill and experience and alignment with your program. Each of our SRAE programs has a culture and identity, driven by our geographical region or demographic profiles, et cetera. Is the candidate aligned with your SRAE goals?

So regarding mission, is your candidate comfortable with the SRAE approach and positions on some controversial issues? Can you sense the degree to which the candidate not only understands your mission, but also embraces it? On the subject of core values, what does the candidate's previous experience tell you that's relevant to your program? Did the candidate prepare for the interview by researching your organization and come ready to ask you some questions about your core values? And regarding cultural competence, what else has the candidate done in the community that may be relevant? Does he or she have a story?

Connie: Those are all great points, Bernadette. And as you're assessing their alignment with the mission and core values and cultural competence, you may also want to consider any certifications that they have that are relevant to the job they'll be performing. So, do they have training in the software systems that they'll need to utilize? Have they been trained in the curriculum that you're looking to deliver? Or you'll have to kind of factor in the cost for them to attend that. Are they a certified facilitator or certified project manager? What kind of experience do they have in this field specifically with sexual risk avoidance education? And do they have an understanding of this field's best practices?

Scott: Great, now the other thing to consider is: Be creative or innovative in your interviewing approaches. So role-playing interview questions may be used as part of the interview process to help you better assess candidates for their communication styles or experience with your target populations and how they would handle various situations. So interviews are an opportunity to screen for specific skills to a given position and what that position would require. So for example, having the candidate role-play through activities that he or she would be expected to perform. There's one common strategy you can use to screen for particular skills.

So let me let me give you a couple of examples, of role-playing activities. Again, let's say that you're hiring a facilitator candidate. And you might have that candidate come to the interview prepared to give a 15 minute presentation on an assigned section of your curriculum or a curriculum module. And the section identified should include a facilitation piece, taken from information within that module and then also an interactive piece, taking from an activity section within the module. That way you can see both how they present the content, but also how they interact with the group via an activity. The interactive piece should be set up so the candidate interacts with the interviewer role-playing the students and it could be a single interviewer or could be a panel.

So considering then what it would look like for a program supervisor candidate, you might present the fictional problem. For example, a student that's hard to engage in the program and have the candidate talk through how he or she would work with the staff to respond to the challenging case. So if you're hiring a staff that need to work in a multilingual environment, you also might consider having them interview and/or role-play or present in the language your clients speak, in order to ensure their mastery of the language and that they're a good fit for your program.

The next is similar but slightly different. And it would be a scenario-based interview or scenario-based questions. So asking interview questions that create a specific scenario for candidates to respond to is another way to identify qualities and strengths in a candidate. So once again, thinking about a facilitator candidate, the scenario you might pose to them would be: you're co-facilitating a workshop with five students. The learning process in these groups rely heavily on a dynamic group discussion. One individual seems to dominate the discussion, while others seem very quiet. How would you respond? That way you can hear how the facilitator would respond and the challenging situation, that's also real and they're very likely to be faced with. Another one could be: you're co-facilitating a workshop. And one student seems to be having a harder time than the others grasping a core skill that's being taught in the workshop. How do you respond to that?

So then, consider in a supervisor or candidate, you might present them with the scenario of one of the facilitator pairs that you supervise, are having trouble balancing the needs of a student who normally has a harder time grasping the concepts taught in class with the needs of the other students. So you would ask them, then, what guidance would you give to the facilitator pair to make sure that they're able to address that individual student's needs while not making the other students feel like, they're leaping ahead or they're being drug behind. Another scenario could be that as a supervisor you will observe your staff providing programs services and during one of these observations, you observe one of the facilitators does not seem to be as familiar with the curriculum content as he or she should be. You also observe that the facilitator pair does not seem to work well together and they often interrupt each other and each tries to monopolize the conversation. So your question would be, how would you structure your feedback to this facilitator team and to the individual facilitators during the following week's scheduled supervisor meeting?

So again, providing them with the scenario gives you great insight on how the person would handle real life situations. The other that Bernadette alluded to, was to have a panel interview. And again, this doesn't have to be an elaborate array of folks. You can establish a small interview panel, depending on the size of your organization, to participate in the interview and get their feedback on how a candidate responds to maybe those scenarios that we just shared. The panel though, and Bernadette again alluded to this, think about the makeup of that panel. So even in a small panel, say a panel of three to four people, you definitely want the hiring manager involved, but you also want some front-line folks. So the facilitators that actually deliver since they're going to be joining that team and are very attuned to how the information should be presented, as well as the program manager who might be providing supervision. So using a variety of staff in your interview panel brings in diverse perspectives, from each panelist to each of the different roles.

And then finally, presentation. Some program directors have asked facilitator candidates to prepare and teach a short presentation as a topic of their choice for the interview process. So again, they may be presenting to a small interview panel to get their feedback on how the candidate performs. So when hiring for an educator facilitator position, here we ask the candidate to come and observe at least one session of the workshop prior to their actual interview presentation. That way the candidate has an opportunity to ask questions, and this step really assures a couple of things: it assures that they know what they're getting into, and that their own values align with the program values.

After that point, if they're still interested, they're asked to prepare a brief 10-minute presentation on that age-old question of interviewing: tell us about yourself. So, this interview is scheduled and presented to a panel of three or four folks including the project director, supervisors and facilitators, as we mentioned. And then after the presentation, it moves to more of a traditional question-and-answer interview from the panel and then the panel actually works together to vote whether the candidate moves forward in the hiring process and that usually entails an interview with the project director or the HR staff,

Bernadette: Scott, those are all such terrific suggestions. I also wanted to say that when you allow a candidate to make a presentation, it really helps you to gauge their enthusiasm as a presenter and that's so very important.

Scott: Great point.

Connie: This is all great information. Now that you've hired the new person, let's take a look at initial onboarding of the new hire. So what type of information do you need to communicate to the new hire?

Bernadette: Well, Connie, let's start with the basics. These next five slides are not here to present you any new information because by now, these items are ingrained in your brain, right, these are the legislative criteria, the SRAE components and required topics and contraception guidelines. But you know, these are not meant to be understood and upheld solely by the project director. The entire staff needs to be well versed in them. These are your marching orders. They are what drives everything you do and against which you measure what you do. I would go so far as to suggest that these could be sent out to your candidates in advance of their interviews. That would provide them familiarity and opportunity to arrive with questions of their own and you could then assess their comfort level with these required elements.

So on this slide, you see the legislative authority for SRAE. Here again, familiar information, the five required components, the normalization of the optimal health behavior of sexual avoidance, medical accuracy, age appropriateness, adolescent learning and developmental theories as a basis, cultural appropriateness, and then we have the six required SRAE topics covering the benefits and the advantages of avoidance of early sexual activity, especially as it relates to future prospects. The increased likelihood of avoiding poverty, healthy relationships and healthy marriages and safe and stable families as a foundation. How drug and alcohol use interact with the behavior of early sexual activity and resistance skills, avoidance skills, especially with regard to consent. And here we have the two contraception guidelines, as they relate to helping students understand that contraception is risk reduction and then the restriction to keep education on this subject to information only. Connie.

Connie: That's great information to have Bernadette. It’s the foundation really, as we look at the other components of the process, fidelity monitoring as you can see really begins with the hiring process, making sure that there's alignment to the mission and to the core values, the program fidelity, all of these things, retention of staff and programs fidelity can really begin with that hiring process. So let's take a look at ongoing professional development. What support should you provide to new hires?

Scott: Yep, for new hires, if you thinking about facilitation, it's really a process. So early on in the onboarding process, your observations are going to be more focused on fidelity to the curriculum. So in the early stages, you're going to be in the workshop, looking and having the curriculum with you so that you're able to follow along and make sure they're hitting the core content. And you're also going be checking, are they using appropriate examples when they reinforce curriculum concepts?

In addition, you want to make sure that as the facilitator is sharing information, are they actually modeling the skills around communication when they respond to students’ comments. You also can get a good sense of whether or not, or what level they are prepared to teach the session content. So if things catch them off guard, you know their preparation needs to be a little more thorough. And then what you definitely want to look for is, do they have and are able to demonstrate on understanding of both the core skills that are being taught and the concepts.

So you can see early in the onboarding process, it's really about delivering the curriculum in an accurate and consistent way. Later on in the process, once they have a bit more of a mastery to the curriculum content, your observation and facilitation is going to shift for the facilitators to look, not only are they really prepared for the sessions, meaning that did they plan for, like, an opening activity to bring energy up in the group? Did they plan for an activity that illustrates core concepts? Did they gauge the flow of the content? And you want to make sure that they begin and end the sessions on time, having to respect time. And can they provide the content within the given time constraints?

You also want to check and see did they use different teaching techniques? Because just a monotone or lecture type of teaching isn't going to be very engaging for participants and it's going to significantly decrease learning. And so you want to make sure they're using a variety of teaching techniques to increase those learning opportunities. And then listen carefully for their posture within the class and the language that they use. Do they really promote a positive and comfortable environment for the students to learn within? Are they presenting a safe environment where people can explore and ask questions about the new information being shared? Are they respectful and validating the views and the opinions of the students when information is shared? So you're going to focus on, did they act in a non-judgmental way? Do they really try to foster discussion among the participants? Or is the information being shared more one-way? Did they engage the students in the curriculum? So are they asking questions to get the students to think? Do they use humor? Is the humor appropriate for the session? And then probably one of the most important skills I think, for facilitators to develop engagement, do they effectively use open-ended questions, so that they're not just asking yes or no responses from the participants? But are they really getting the participants thinking through the use of open-ended questions?

And then for a new supervisor, you want to think about things like, you want to observe them in a meeting. How do they meet with the facilitators? Are they using strength-based language and strength-based principles as they provide instruction to their facilitators? Did they choose a meeting location that really allowed for privacy and safety? Who was present at the meeting? Did they have other people involved or was it more one-on-one? What topics do they discuss? Did they acknowledge and build on the strengths of that staff member or did they go right to the deficits? Did they facilitate the staff member addressing their own issues and coming up with their own solutions or did they just tell them how to do things? You'll also want to look for if the supervisor seems to have and/or work on building a relationship with the staff member or do they have that more aloof, I'm the boss, you're the facilitator, type of an attitude because that can drastically affect your retention of quality staff. And then, are they assessing what kind of training or technical assistance that that staff member might need to address these concerns and improve upon his or her work?

Connie: You know, Scott, you've provided TA before. So, a question I think we very frequently get is about fidelity monitoring. So if we think for just second, about all the things that you've shared in terms of observing the facilitator and the role of the new supervisor, developing that relationship early on. Sounds a little bit like fidelity monitoring really begins with the hiring process and the onboarding process. So, do any of the panelists here have any experience or anything that you could draw upon to share with the grantees in terms of fidelity monitoring at this point, starting off?

I can think of a few situations myself, like with my new supervisor at a position that I had, just observation wasn't a part of what was taking place there. So as a new facilitator, the only feedback that I was really receiving was from that classroom teacher. One day I said to my supervisor, I could really be teaching anything out here because no one has really come to provide feedback. So, Scott, in terms of what you were saying, I think it's a two-way street. The new supervisor has to develop that relationship and create an environment where the feedback can take place, but also the facilitator has to be willing and able and ready to accept that.

Melissa, I know you have a little bit of experience with fidelity monitoring, can you draw on some experience you've had with observation?

Melissa: Yeah, well, I can relate to what you're saying and both being a new hire and learning program and how valuable it is to kind of get that feedback from my program manager as well as kind of being in the flip role in monitoring some of the new hire facilitators. So I'm sure there's lots of experience on the call now and how that relates and how important it is, like you said, starting on day one, to kind of include that and weave it into your onboarding process and your continuing support of your new hires.

Connie: And definitely make sure that you close the loop by taking that back to the facilitator. They have to hear that feedback, so it's not just enough to gather it. But it has to be shared with a facilitator, so that they know what ways they can improve and in what areas they're strong. What did you have to add Bernadette?

Bernadette: Yeah, Connie, I just wanted to say that I hope that, our listeners would take a look the slides that previous went through a list of observations. Because if those items were added to, let's say, an evaluation sheet that a project director might take to an observation, that's a very easy way to log in, what's being observed, but then also, that can be given to the teacher, the facilitator even ahead of time, so that they know what they're going to be evaluated on, what they're going to be observed for. It's a very nice, constructive, objective list of things that we need to look for, as we help them to the observation phase of onboarding.

Connie: And as we continue to talk about this, step-by-step walkthrough of onboarding, training and support, we've been talking about the ways that we can provide training and support and Scott mentioned something very important: sparking a human connection. We can also use that human connection between the supervisor, facilitator and something I know that's very dear to Scott’s heart is co-facilitation, developing those relationships, to create an environment to start to retain. Actually retention of talented people starts right on the front end in the hiring process and continues right on through.

So it's very important to have a purposeful, intentional, streamlined onboarding process. Because staff turnover is costly and a good retention plan can reduce the burden. Employee Benefit News reported then in 2017 that turnover can cost employers 33% of an employee's annual salary, the corporate, the hiring of a replacement, to put a dollar amount on it if the employee earns a median salary of 45,000 a year, this would cost the company or the organization $16,000 per person on top of the salary that was paid.

And that's only to look at the monetary cost of turnover. There's also a non-monetary cost. Just think about the loss of partnership within the school, that the facilitator had relationships with or other organizations that were partnering. The partner might lose confidence in the organization with a turnover. There might be a dip in employee morale as others have to step in and take over additional responsibilities. It can even impact employee wellness, as morale goes down and the climate changes of the organization. It takes eight to 12 weeks to replace a worker and another two to six months minimum for that new worker to reach full productivity. So we should plan to retain talented staff. Look at all the work that was talked about what goes into hiring a talented person.

And so, this onboarding process is very important, both monetarily and non-monetarily. It starts with a good human connection to retain the talented person, having good communication, having a retention plan that begins right with the interview of the candidate and continues on through the years. Not a one-and-done. This can be achieved by allowing the new hire to interact, early on, right at the beginning with an interview, allow them to interact with staff across departments, departments and the program materials. This will allow you to observe these interactions that determine if it's a good fit.

And then also continue those interactions and relationships throughout the onboarding process and beyond the plan to retain right from the beginning. Onboarding should be a very strategic process with moments that matters, thinking about program fidelity, sustainability, growth, and impact not just of the individual, but in the organization. One reason that staff members leave a position maybe even a position that they love and enjoy because of life of opportunity for growth. So, implement your sustainability plan by providing tools that the new hire will need to be successful and agile and adjusting to their new roles. They continue to support and provide opportunities for the new hire to grow within the current role and even into new roles. Purposely plan to keep them for a long time.

Scott: Yeah, Connie along with that, I'd just also include thinking about it from an organizational standpoint, turnovers inevitable in a long-term program. And so, for each position, you also want to think about, not only who is responsible, but how are you archiving that institutional information so that the new person, whether they're coming into a supervisory position or a facilitator, they can have a good understanding or learn about the history of the program. What's been the evolution, how have things evolved? Because if there's not that institutional knowledge shared, they can come in thinking they've got a great idea. And somebody's like, yeah, we tried that eight years ago and it didn't work, right? So, how do you archive that institutional knowledge, so that it's passed on from essentially generation to generation to the next cohort of employees that are coming on board in your program.

Connie: Scott, that is a great points and that is the next slide, which is the introduction of tools used by the organization. You brought up a really good point. One of the first places to start step one, if you will, in that onboarding process is an introduction to the tools that are going to be used in the organization. And so, curriculum training is a good place to start. But also contact lists. We talked about that institutional information that needs to be passed on. You know, I went to work for an organization that had a contact database, they had a person that contacted the school scheduled the program's delivery, and facilitators across diverse settings where we were implementing. Went from that setup to an organization that didn't even have the contact information for the schools which they've been serving. In the previous year, they had served 1800 students. I started in October and it wasn't until December that I was able to even find the contact information and partners that they've been working with. So consequently, they went from serving 1800 to 760. We immediately saw the need for organization of contact information and keeping the archives of the institutional information to be passed along to others. Bernadette, I think you have a similar story here.

Bernadette: Yeah, I think on a regular basis, it's terrific to have full of that information available, but think about it in terms of crisis management. I mean, any day of the year, you may have a facilitator calling sick, sometimes at the last minute. And as project director, you're going to have to figure out who's going to cover, where are the materials that are going to be used? Who do we even report to at a given school? So I really recommend that for each site of your program implementation, be at a school or a community site, that there's an actual binder with all this information you're talking about, Connie. Now binder sounds old-school and it is. Certainly electronic information is helpful as well. But there are times when our system go down. So if you're in that crisis moment and you need a hard copy of all the information that's required, that's going be your go-to binder.

Connie: That's a great point, Bernadette: emergency management planning. So you can see that we have lots of plans to make, and one of the things that goes along with this idea of keeping the organizational tools close. We need to plan for worst-case scenarios, to talking about tools. Binders: Where are those binders located? And let's say that I don't have the keys to get into the building and the binders in the building?

We need to plan for worst-case scenario because as you know, Bernadette, I've heard you talk about this happening. Somebody's supposed to be at the school at 7:30. The call comes at seven o'clock. I've also heard Scott talking a lot about cross-training. This would be a critical time for there to be cross training. Am I supposed to be in the school at 7:30 you get the call seven o'clock that says, not going to be able to make it, you need to be able to know who was trained to step in and who can do that. Where's that binder? Where's that information? So as you can see, all of this information, needs to be shared and communicated and somebody needs to have responsibility for that, because things do happen and generally not at the best possible time. So having a plan ahead of time, we're really helping the situation, so that you're not stuck in crisis mode, panicking about what's going to happen. There's a clear protocol and the new hire knows what that is and who they can call and who's been cross-trained, so great point.

Next would be an organization master calendar and there's no shortage of apps in today's world to help us have a master calendar that needs to be shared with a lot of folks. This should hold important events and when scheduling we should look at the calendar to see, is this a good time, I'm sure that some of the events are scheduled when facilitators are available, don't plan to build an opportunity during school hours, when you know that your staff will be in school. Create team-building times that allow for those on different schedules to be able to attend.

And as Scott said, who's responsible for archiving the institutional information? And make sure you know who is responsible for that, and keeping that in the communication was happening. After the introduction of the tools, make sure that you make an introduction to the team. Make certain that this includes job descriptions, roles and responsibilities of each team member, make sure they know whose job that is, if they have a need or who they can reach out to. So, Bernadette, it's not just important to have the binder, but who keeps the binder and who has that, and how do I access that, who's in charge of that. Making sure that they know who they can count on.

I had a situation at one organization that I worked for that, they assigned to me a buddy, and so, day one, I had a person that I could go to and ask any question and they would help me navigate the new role. How comforting it was to have somebody that had that archival information that I could turn to and ask a question and get an answer very quickly and that person was on call for me. Having tools, having team members and having clear roles, really helps the agility of a new employee and reduce that six-month window of time on the uptake for them to get acclimated to the new role. You can cut down on that by having a plan. So, Bernadette and Scott, I'm going to ask you to jump in here and provide some more information on this.

Scott: Sure, I'll start as you mentioned, I'm a real proponent of co-facilitation. And I know that's difficult or even impossible in some programs, but it can really expedite that onboarding process, when you're able to pair a new hire with a veteran facilitator because not only can they clarify what the roles and responsibilities are, but you have somebody to mentor them along, both in facilitation skills and curriculum content. It gives them somebody immediately to bounce ideas off of. And one of the other difficult things that I'll just throw out there is to recognize that turnover's inevitable, so plan ahead. Be hiring and have folks kind of in the wings at different points of entry into your program when you can, because the onboarding process is just that, it's a process. It's not just getting someone trained in a curriculum, it's really bringing them up to speed in how to present to students in your area, in your settings. And so having a co-facilitator can really help that process.

Bernadette: And clearly, we're talking about team development and how very important it is to not only the success of your program, but also to the health and well-being of each team member. So just a word of sensitivity to what's going to invariably come up which is, personal differences between staff members, difficulties communicating, getting along, working together. As a program manager or project director, you have to really be aware and very tuned in to each of your members and do those kinds of team-building things that will maximize your positives and minimize your negatives. Sometimes we have to actually go to a human resources perspective for information on that, but it is so very important as we talked earlier about retention. It's not just each individual's happiness with his or her job, it's, can I get along with these people, can I enjoy what I'm doing with them? It's really a team effort and that's the way it has to go forward.

Connie: Hi, Bernadette, we're going to ask you now to talk about goal setting and ongoing professional development.

Bernadette: Right. After all the work you've been doing to prepare to hire, to conduct interviews and carry out extensive onboarding, we wish we could say you're almost done. But the truth is that, even after you've hired your fabulous staff and they're all showing up with the best effort on a daily basis, ongoing professional development is what keeps yours a successful program. It's what keeps your messengers on their top game. And as we all know, the messenger is the message, especially in this field. That's the person that delivers your content, that's the person who demonstrates authenticity, and if there's one thing students can see through, it's a lack of authenticity. So each staff member has to feel valued and appreciated and know that they can grow.

One way to accomplish this, is to expect each team member to set goals. You've set project goals and you know that even at a quick glance at them affirms the inherent value of what you've set out to accomplish. So, setting goals maybe quarterly or semi-annually, gives your staff that same affirmation. What will their goals look like? Well, they could include professional advancement through journal reading and membership, or certification through a professional association. It might include networking within projects, schools and community organizations, which is so important for the long-term health of your project depending on the type of project and its location, they could include efforts to connect directly with students or parents, especially where there are apparently a zones in schools or there could be goals directly related to their effectiveness as facilitators. But certainly, goal setting is important for both team members, facilitators and administrators. Scott, how can a program director aid in this process by providing ongoing feedback to facilitators?

Scott: Yeah, the key to really aid in that process is, you have to have a cultural mindset and that starts with the director. You have to create a culture within your organization have an ongoing growth mindset. And that has to be both encouraged and promoted, because, as Connie mentioned, turnover costs your program money. And the reality is, is happy employees they twice as long in their jobs as their least happy colleagues. And one of the best ways to retain staff is to create an atmosphere of continual growth and learning opportunities, because then people feel valued.

Now, oftentimes, the reality is, and I understand this in a small program, there may be very limited opportunities for advancement or vertical growth in the organization. But that doesn't limit the ability to help your employees grow. The quote on the screen comes from William Craig in a recent article in Forbes magazine and it says vertical growth is like taking the elevator to higher floor and your destination, where horizontal growth is like opening a bunch of new doors on the floor you're already on. The reality is his vertical growth has a tendency to focus on a flashy new title. Horizontal growth is a way to create value. And that's what we really want to encourage and promote is, how do we increase people's value both within and to our program, but also so that I feel like I'm being invested in by my employer.

So that may be as simple as cross-training. So I know a number of programs who have their admin staff are also cross trained as facilitators. So in that last moment, if somebody calls in sick, and there's not a primary facilitator available, they can step in in a pinch. That provides a lot of added value. Likewise, cross training facilitation staff in some of the program management duties. So if the program manager or a program director is on vacation, out sick, they can take over some of those duties and there's continuity within the organization. That provides value, that makes me feel good, because I'm valued and trained by my employer.

The other thing that may seem a little counterintuitive here, this is the second point. So say you have a facilitator, having them trained in advanced facilitation skills or group dynamics for facilitators can be great. Oftentimes, we think of only providing training in areas of people's weaknesses or deficits, when the reality is that most of us have the greatest capacity to grow within our areas of strength. And so we continue to strengthen those areas that we're already strong at, and that also provides added value to me because you're feeding in to my strength categories, and it makes me feel happier. And as I said, happy employees stay around. The other way is to maybe look at motivational interview training for supervisors because supervisors are always going to be able to use those types of skills as their managing staff. So other ideas from the panel? Bernadette, anything that you have on ongoing professional development you can think of?

Bernadette: Yeah, I think this is a very practical aspect, but I do believe that some facilitators would appreciate training on classroom management. I know that on projects that I've administered, that can often be one of the most challenging things, a facilitator goes in beginning of the day, wants to deliver a wonderful message, but has to deal with very difficult classroom dynamics. And so they may very well appreciate some specific training, for their professional development as well as for just a peaceful productive day, on principles of classroom management. And of course, that has to be particular to the grade level that they're teaching. But certainly as a general rule to provide that would be very helpful.

Scott: That's a great point because oftentimes we're focused on, as a program manager or program director, we're really focused on making sure that they're trained in the curriculum. But that's only one half of the puzzle because they also have to be able to deliver that information in an effective way. So you're right that classroom management, those skills go hand in glove with the actual curriculum training. So, that's an excellent point.

Connie: You know, Scott—

Scott: Yeah

Connie: You've heard me say it so many times, that instructional design and those lesson plans are not just for teachers. When program managers are talking to facilitators, we've talked a lot about planning in the organization, but the facilitator needs to be planning as well. We talked about emergency management and crisis management, facilitators need training in that as well. What can they do if there's a disclosure from the student? Where's the resource for that, what's the protocol? The facilitators really do need to go beyond the curriculum and be trained on some classroom management and some other skills that they might need, because as you said, that's just one piece of it. And growing them into that role is, as we said, much cheaper than hiring a new one. So plan to keep them and provide opportunities for growth and the classroom management is definitely one piece of that, and lesson plans can really help with that as well.

Scott: Hmm, great point. Yeah, and I can't overstate the importance of regular observations and feedback within your programs. Now, I often have program manager say, gosh, that takes time. You're right, it does take time, but there are a few things as essential, I think, to monitoring how the information is getting passed on to the end user. How does the information get passed on to the participants? And providing that regular feedback is absolutely critical to not only the facilitator's development, but to your program as a whole.

And it's particularly important with a number of the younger folks that we're hiring as facilitators today. And bear with me, because I'm going to say it, back in my day as an old guy when you didn't hear anything from your supervisor, that was a good thing, no news was good news, but that's not so for today's younger workforce. No news is often interpreted as my supervisor doesn't like me or they just don't care about me. And so providing regular feedback is not only a good idea, I think it's absolutely essential.

And I'm not talking about a big complicated performance review. I'm talking about just paying attention, noticing what they're doing, being there, being present in the sessions and observing and then saying something simple. And it's just a brief acknowledgement like, when I observed class yesterday, you really had the folks engaged around the refusal skills role-play. I thought that was really nicely done. That's all that needs to be said, right? So it doesn't have to be a hard thing. It just takes paying attention and looking for those opportunities where I can give feedback and being able to give feedback both on the positives and on the things that people need to pay more attention to.

Now, I know some of you are out there saying, yeah, but that just isn't me, I don't do well with that. And I've known people, that it's a real struggle to give that kind of positive feedback because they think, well, they're getting a paycheck, why do I need to keep giving them strokes too? So, it's probably because you function pretty well without having those external affirmations and strokes yourself. So what I would say to you is, if it's not in your nature, you need to practice it. Because it's absolutely essential, both, again, to your program and retaining the staff that you've spent so much valuable time investing in.

Melissa: Absolutely.

Scott: So I'll get back up my soapbox and pass it along.

Melissa: I think that's a great soapbox to be on Scott, I completely agree, it's so critical and so important and even if it's things we're not comfortable with, and it doesn't negate the necessity of doing it. So we've got a practice. So, once we've established a really solid professional development process, then you can focus on optimizing for program success. So Bernadette, what kind of activities, should SRAE programs consider that would be helpful to new hires being successful?

Bernadette: Yeah, thanks, Melissa. You know, there are obviously so many needs to address during the course of a project year. But regular huddles are a way to stay in touch and connect with each other. Sometimes teaching staff have very different experiences and challenges and huddles can be a nurturing, even healing, time together. Now, obviously, they should be scheduled at times and frequencies that suit your needs. But then, you can build in special times for special impact or encouragement.

So let's say we invite to a staff gathering someone who has become a cheerleader for your program. Maybe that's a school nurse who sings your praises to the health supervisor or principal. Maybe it's an athletic coach who took your message to the locker room and we're so proud of the results. Maybe it's a budding teen advocate, to inspire your staff, or a satisfied parent who just can't speak highly enough of what your message is meaning to that parent's child. Keep in mind that we usually showcase these kinds of people, these kinds of folks, to impress or engage our community. But your staff is your first community, so be generous with this kind of encouragement. Scott?

Scott: Great point, Bernadette. So, taking this now then thinking about how we optimize program success, taking it outside of the organization. So, thinking about those external partnerships, because we don't live in a silo, we don't do this work alone, we have to develop outside partnerships. So I want to talk here at the last about three common types of partnerships that grantees enter into. And they would be service delivery partnerships, referral partnerships, and then partnerships with community-based organizations. As the guarantee, you're the one that's accountable for your partnerships. So you want them to represent your grant in the best way possible and you want to be sure that you're doing everything you can do to set them up to succeed.

So each type of partnership takes its own special attention, and its own particular maintenance. So, let's first talk about, or think about, service delivery partnerships. These partnerships are where you might train non-grant staff, so people at the partner organization, to facilitate your curriculum in their location or school or organization. For service delivery partnerships, you need to provide at the very least, monthly oversight and monitoring visits. Because you want to be there, just like in your own services you're delivering, to see not only, what they're doing in the books as far as how they're logging the program, but you want to see how your curriculum is being delivered on their site. So, it's not just monitoring are they meeting the requirements? It's really looking at it from a fidelity standpoint, both to the curriculum and to the program design that you've laid out in your partner agreement.

The next are referral partnerships. Referral partnerships are where you might make an agreement with an organization or school to refer eligible youth to your program. And for referral partnerships, grantees should be prepared to provide ongoing training to educate your partner on eligibility requirements, which is the basic, but you also want to provide them training on how to talk about your program for potential participants. Now, this can be a partnership where you have a formal partnership. It also can be a community partner where maybe you put out, if you're delivering in your organization and you have open enrollment, you may be putting out a flyer or a rack card.

Well, if that's the case, if it's a static piece of marketing, then you want to make sure that whoever that receptionist or whoever the person would see first at that organization, once they pick up your piece of information, that's the person they're going to ask about your program, and they need to be equipped and that's on you to equip them, in how to talk about your program. So, create a list talking points for your referral partners to talk to potential participants. It can be a really good idea just to have a simple one pager that have those key talking points about your program. Not just eligibility requirements, but to talk about the ins and outs of your program, how it benefits folks and in particular, how it might benefit the clientele of that partner or organization.

The last to be community based organization. And these are partnerships where you may partner with that organization for your grant staff to go on site at their location and deliver services. Now, for CBOs you need to develop a brief quarterly report so that that CBO can update you on participation and participant feedback. You need to close the loop. So, they've provided you with folks; you need to loop back to them and say, hey, this has been great, it's been right on target. Twenty of your folks have attended the program, and talk to them about what's being said about your program or services, from your satisfaction surveys or whatever other reporting mechanisms you have.

That also can work well, I would say for the referral partnerships, because if they're referring to you offsite, it could be really good again to close that loop. And let folks know that A, the referrals they're sending you are right on point, then B, here's how they're benefiting. So, respect those partnerships as a reciprocal relationship, not just one-way.

And think about how you develop those partnerships. So for example, if you're creating a referral partner or a service delivery partnership, you really want to make sure in that agreement that you have performance-based deliverables in your MOU or partnership agreement. So, it may sound something like this. If it's a referral relationship, X agency will refer 10 students a month that meet all program eligibility requirements. It could be just that simple, but you've put a hard number to it. Or if it's a service delivery partnership, X organization will provide 12 hours instruction of, let's say healthy choices curriculum and administer entrance and exit surveys to at least 20 students ages 16 to 18 years old each month for September through November of the 2021 school year.

Oftentimes people are reluctant, I don't know if it's for period being off-putting or what, people are reluctant to put hard numbers to things. But it's absolutely essential for a healthy partnership relationship. Because then you've clearly articulated what your expectations are. And your partner understands what they're getting into and they understand that they're an active partner. It's not oh, we'll refer people over there when we have a chance to, or when we think about you. It's an active partnership; you have expectations of X number of folks being referred to your program. And that's the best way that you can gauge and meet your numbers that are going to be required by your funding source. So put those hard numbers to it. Even if that seems uncomfortable, because it's just the healthiest way to develop a successful relationship with partner organizations. So, I'll pass it back to Megan, to see if we have any questions.

Megan: So just as a reminder, if you have any questions for today's presenters, you can submit them in the Q&A box located on the right-hand side of your Webex window. And we've got about 10, 15 minutes here for questions.

Connie: Scott, I wanted to add to what you said there, if I could draw a similarity between building those community partners. You talked a little bit about the same things we talked about with a new hire. So, onboarding community partners is similar to onboarding new staff, new hires. You're introducing them to the tools of the organization, you're introducing them to roles and responsibilities and setting clear expectations. So that onboarding process is very similar between the new hire and community partners.

Megan: So, we would do have one question. It says, how can you schedule team building when facilitators are spread out geographically and spend so much time in the classroom?

Melissa: Yeah, that's a great question. And I could at least start, Bernadette, I'll definitely give you a chance to answer too. But I had some really great experience with a previous organization where, the staff were really cared for as people, not just employees and so for a lot of the team building activities, it wasn't necessarily during traditional kind of work hours. There were opportunities to come together as a staff with our families and do kind of family-friendly activities and do things that were sort of supportive of our personal lives also, and cognizant of the time that they were asking for. It was really great because it gave you an opportunity not only to build the team and there could be opportunity to be specific about certain work information that maybe would need to be communicated and discuss, but it also gives you an opportunity just to get to know each other as people and that sort of just allowing that time for natural relationship development is really valuable to strengthening the team that's working together. So, Bernadette, would you have something else to add to that?

Bernadette: I can only affirm what you've said, Melissa. I remember specifically that, we would tend to use the summertime, since most of our program was delivered in school-based locations and so summertime was downtime for us. We would be getting up and gearing up for the next school year. But it allowed us some time to pull in folks that were not necessarily local to our main location. Sometimes it was an overnight just to, as you say, build relationships with folks in addition to their roles as facilitators, just to be friends with each other, just to be colleagues with each other. So however a project director can make that happen, it's always going to be worth the effort. It'll definitely cost time, making some fun. But the value of building a new team, personally, professionally, as we've been talking about one hour is just going to be so critical to the success of your programming. So, we urge all of you to take that time, put the resources to it, because it will certainly pay you back.

Melissa: Bernadette, that's a good point. I've heard of some grantees that retreat in the summer and provide that training, that additional training beyond curriculum training, classroom management, trauma sensitive approach, those types of training sessions that would not be necessarily feasible during the school year, but to take folks away on it or retreat can be low cost and provide that team building time along with additional training that is needed.

Bernadette: Right, and if I could just get back to one of the other points I made earlier on the issue of regular huddles. Sometimes it can be as simple as a 20 minute breakfast together on a regular basis. That's not the special events we're talking about, but just on a regular basis, a lot of staff go in totally different directions all day long. But depending on how you're managing the project, if you're all starting out at the same location and then moving away after that, a quick breakfast together can be one of those great ways to just huddle. And it's a little bit of an employee benefit to get a breakfast but to just have that time together at the beginning of the day is really terrific.

Megan: Thanks, Bernadette. We have a couple of additional questions here. Get them pulled up. Selena asks, "Are there any suggestions on client relations management platforms that work well for SRAE programs who need to keep track of unique data?" Are there any client relation management platforms that work well to keep track of unique data?

Okay, Selena, we might have to get an answer, see if we can get an answer for you after this webinar is concluded. We have a couple of more questions here and someone asked, "How do you get the HR manager to understand what you were looking for in a facilitator?

Bernadette: I think one of the ways you can Oh, go ahead, Scott.

Scott: Oh, I was gonna say I can start with that. Oftentimes, if the HR manager doesn't have the experience in a facilitator, then I would really lean on your facilitators of the program to talk about what are the characteristics that would be a good fit for your team and take that information and work with the HR manager to create the job description that's then posted and put out there. Oftentimes, if you're in a larger organization, HR kind of takes the lead on creating those postings, but there is a very specific and kind of nuanced set of skills and qualities that you want in an effective facilitator. And I think it's reasonable to expect that that HR director takes your lead as frontline staff and incorporates their feedback into it.

Connie: I think that's also key in terms of drawing in additional facilitators that are experienced, like what are some of the things that are unique to the community that you're serving? Are there particular characteristics that are unique to your organization, to the community we serve? And some of the challenges that might be there, there might need to be a good fit in terms of characteristics. I think back to the list you gave the thought of facilitator characteristics, just acknowledging and recognizing what those are, that might be unique to your particular organization or population, Bernadette.

Bernadette: I also think that as we have gone over the ways that you assess fit for an organization with an applicant, you can use those same core items as you orient an HR director. Because truly, if they don't understand your mission, they could simply go about hiring or suggesting hiring techniques that are not at all applicable to your needs. So if they don't understand, for instance, that our message is often countercultural, and it takes a certain kind of personality to persevere and to be winsome, all those things that are about our mission and our core values and the cultural competence that was just mentioned, that orientation, just like you would do with a new hire or an applicant has to be applied, as you asked for help from the HR responsible party. Because again, it could so undermine who you eventually hire. So, some of the same techniques we are using for onboarding, as Connie has just said, staff can be used to help get your HR department in line with what it is you're trying to do.

Connie: That's a good point, Bernadette and you brought up the A through F and the other components of the legislation. Those are key things for the HR manager to understand as well, that might drive unique characteristics and nuances in the search for a new employee.

Bernadette: Very true.

Megan: So Connie, it looks like we have one more question and they want to know, how do you encourage facilitators and your staff to practice self-care?

Scott: One of the things I'll just throw out there is that, oftentimes folks that get into this businesses, particularly as facilitators, they're heart driven, they're passionate about this work, they're passionate about helping us create healthy relationships and make healthy decisions and it can be a really common issue that people are so focused on helping others that they don't take good care of themselves.

So at some level, that becomes a function of the program manager or program director to more or less prescribe—and again, that gets back to those staff activities where people are able just to let down and have fun together, not a staff meeting, not anything that's curriculum driven, just the time where they can enjoy each other together. And it's again, that's also a part of an observation process. If I see a facilitator and I can see the passion sort of gone or they're struggling at something in the workshop, then that may be a time where I need to prescribe that facilitator to take a little break. Or again, I may want to think about how do I adjust and maybe even for a temporary time, move that person in a role where they're in more of a mentoring rather than a direct service, and let them be able to give back to another facilitator rather than actually facilitating a group. Because what oftentimes people don't recognize if you haven't facilitated is it drains energy, it's an exhausting process. Facilitators that are effective, they're worn out after they facilitate a class or a day of classes. And so I think you're right on point to recognize that, that's going to be an ongoing need. And if the individual doesn't see it, it becomes a function of the program manager, I think, to prescribe that break and whatever manner that's appropriate.

Connie: Scott, that's so true, as we know, for facilitators, this very high energy and can be very draining and so I think it is key for the program manager to be in tune with that. But also to go back to what we were saying about sparking that human connection and providing that environment of– Bernadette, I think you used the word "crisis management," just to say we have a plan for if too much life happens in the morning, before you're to be out in the school. As we know, there are bills and sick children and other things that facilitators might encounter emergencies. with health and all the roles that they're playing in their personal life that may lead them to the situation where it's overwhelming that particular day because of all the things that have happened. Too much morning before it's time to get to the site. So, it's important to provide that environment to say if you just can't do it today, because of the things that are happening, here's an alternative what you can do. So that they know that they have the freedom if something is going on in life and something has come up that's making it very challenging. So Scott, you said, high energy and it's draining and they may just not have what is needed to give that particular day. It may not be an ongoing problem just for that day. There's a plan B, or someone is cross-trained to be able to step in and give them their permission to take some time away and to collect their thoughts and you just need to go sit in the park and get in sync, again, collect yourself and calm down and regroup or go take care of the sick child or sick parents or the emergency that's happening or figure out how you're going to take care of something pressing like a bill or an errand or something that's come up very unexpected that can create that stress. It’s providing the permission and the opportunity for them to regroup, so they can come back and be the best facilitator possible to the group they're serving.

Melissa: And kind of going along with what both of you have already brought up, but having, the ability to sort of vent to the program manager as you're giving examples of facilitators that you want your staff to kind of turn to each other and rely on one another to be able to vent out some of the maybe daily frustrations or some of the challenges that they experience. And let them know ahead of time, create an environment where that allowed and supported. They should kind of sometimes just helping just be able to get it out of your system and know that you have listening ears that are compassionate and understanding is really helpful. It can be valuable.

Bernadette: And I would just add to all those wonderful recommendations that just as a project director is sensitive to each individual. If you notice that there are things that you can't handle on a personal level, because maybe it is just way too sensitive. Keep in mind that those topics might be covered in those special event gatherings we talked about earlier, inviting in a guest speaker, sort of a professional who handles maybe stress relief or relaxation techniques or the things that we've just mentioned as possibilities. Having someone from the outside come in and address them in a more generic way might meet a need without pointing out to someone in particular, that you've noticed that there's that need there. So, just another way to be a good project director and look at all the needs and try to meet them, as best as you can.

Connie: And project directors need self-care too, especially as they carry the burden on the way.

Megan: Those are all great suggestions and, I think we have come to our final questions for the day. So, first and foremost, I want to thank to everyone who attended this with us today, thank you for your patience with us while we got started, and we appreciate you. We also want to say thank you to our presenters, Scott and Connie, Bernadette and Melissa, we this is a great presentation and you guys provided a lot of guidance and a lot of knowledge, so thank you for that. As a reminder, this webinar will be available for review at a later date on the Exchange and as always, if you have any questions, please direct those to your project officer. Again, thank you guys for joining us today, and we hope you have a great rest of your Thursday.