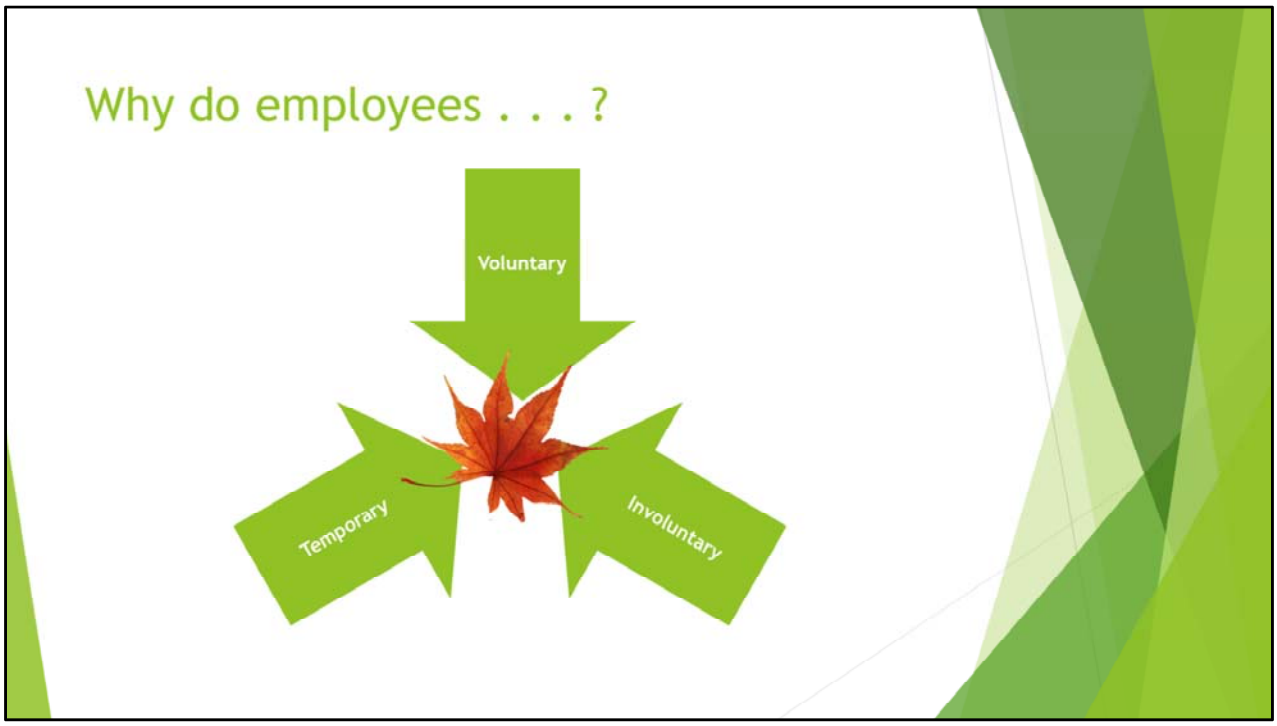
Lemonade from Lemons

Improving your work environment in the wake of an employee's departure....

presented by Debbie Rabishaw, SPHR, SHRM-SCP | IKS health | January 25, 2018

Today's Agenda

- Introductions
- Learning & Sharing
- Survey Development (& Sharing!)



Temporary
- Nature of the job

Voluntary
- Retirement
- Career Development
- Burn out
- Personal – move out of state, raise kids, etc.
- Different path (non-education)

Reasons for data collection
- Knowledge transfer
- Culture and Process Improvement
- What else?

Involuntary
- Disciplinary/Misconduct
- Poor performance
- Fluctuating student population
- Efficiencies
- Budgets (non-tenured releases, funding issues)

Should we collect data from this group? Isn't it awkward to interview staff who are involuntarily leaving?
- Not all invol terms are performance based.

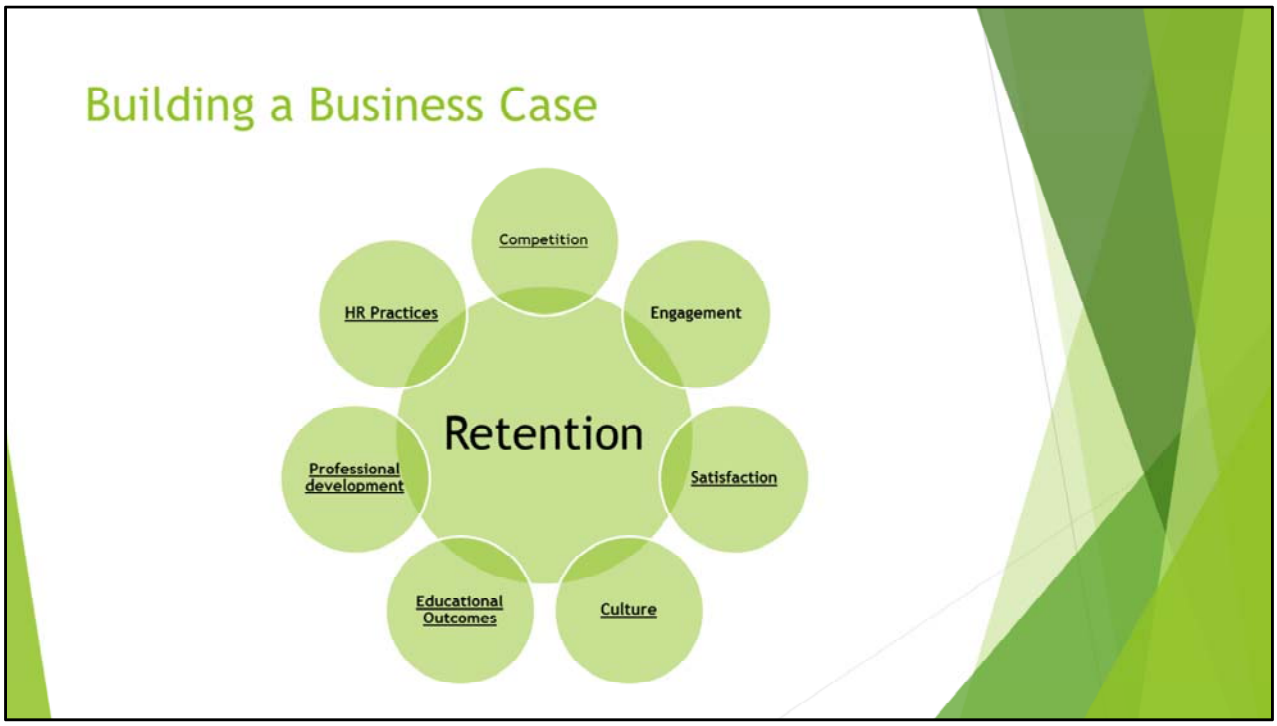
Your Stakeholders: How are these groups impacted by Employee Turnover?

The Role of the Board of Ed in Turnover

- First and foremost school boards look out for students. Education is not a line item on the school board's agenda—it is the only item.
- When making decisions about school programs, school boards incorporate their community's view of what students should know and be able to do.
- School boards are accessible to the public and accountable for the performance of their schools.
- School boards are the education watchdog for their communities, ensuring that students get the best education for the tax dollars spent.

How do we collect information that may help you improve your district?

- Staff Sat/EE Engagement Surveys
- Informal Feedback loops (grapevine, hall chats)
- Social media
- **Exit Interviews**
- **Stay Interviews**

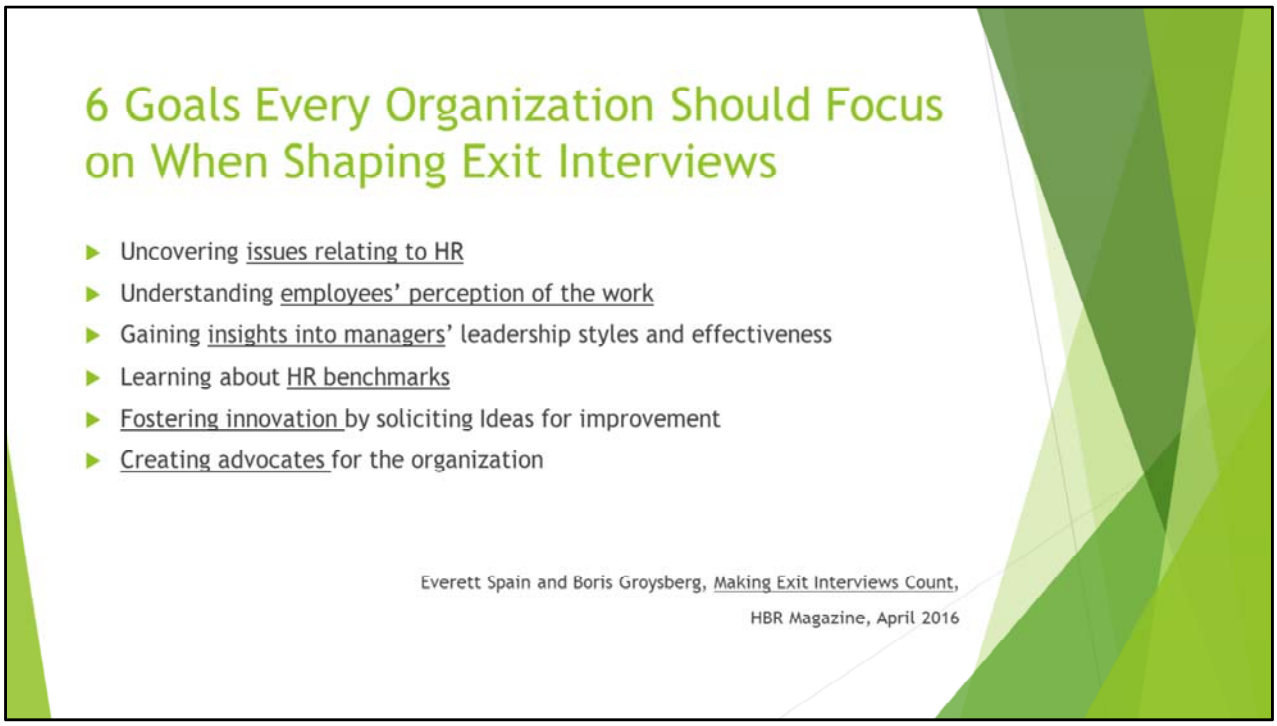


I. Primary Driver
   a. Retention – It's costly and we can't reach other objectives
II. What does retention affect?
   I. Your standing in a Competitive Environment
      I. For students, and also for financial, volunteer and human resources
      II. What affects your competitive position?
   II. Satisfaction
      I. The obvious for retention, but also district reputation
   III. Engagement
      I. Employees who are Productive, innovative, collaborative
   IV. Culture
      I. Internal (staff) & External Perceptions (candidates) (loop back to stakeholders)
         I. Enables employees to air views in a safe and confidential environment
         II. Existing staff can feel secure that departing employees are airing thoughts that current employees may not feel comfortable to voice
      II. Promotes a learning & listening culture
      III. Part of Continual Quality Improvement
   V. Greater Educational Outcomes
      I. Knowledge retention within your district
      II. Stability
   VI. Professional Development
      I. do you repeat the same learnings, or can you progress?
      II. Dipstick on Professional Development both what they received to be successful and what current employees may need
   VII. HR Practices
      I. Identify workplace trends (and ones you may have been unaware of)
      II. a litmus for recruitment and induction processes
      III. Cost effective way to identify themes for staff engagement surveys
      IV. as a practitioner – TIME!

What sort of analytics do you currently measure?
What do you do with the data?

- Do you measure trends?
- Establish Baselines and goals?
- Determine how you want to move the needle?
- Recruiting stats – cost increase or decrease? Days open? Quality of staff?

Exit Interviews

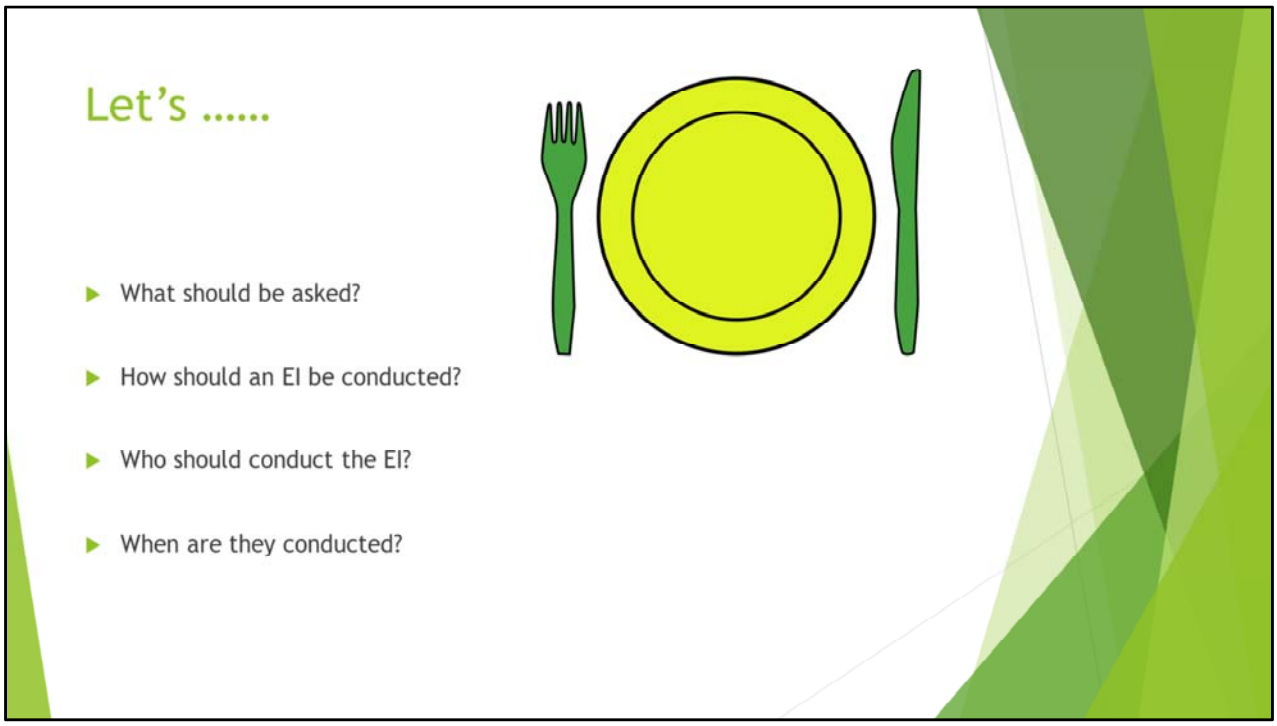


Traditionally

- get the departing employee to divulge why she is leaving and how she feels about her experience

Alternatively

- Organizational Health Check
  - obtain relevant and useful data directly into training needs analysis and training planning processes.
  - improve recruitment, on-boarding and staff retention.
  - obtaining and transferring useful knowledge, contacts, insights, tips and experience,
- Reduce employee turnover and improve retention
- Publis Relations and leaving on good terms
- Knowledge transfer opportunity
- Supporting an organization's proper HR practices. (state requirements, final exit info)

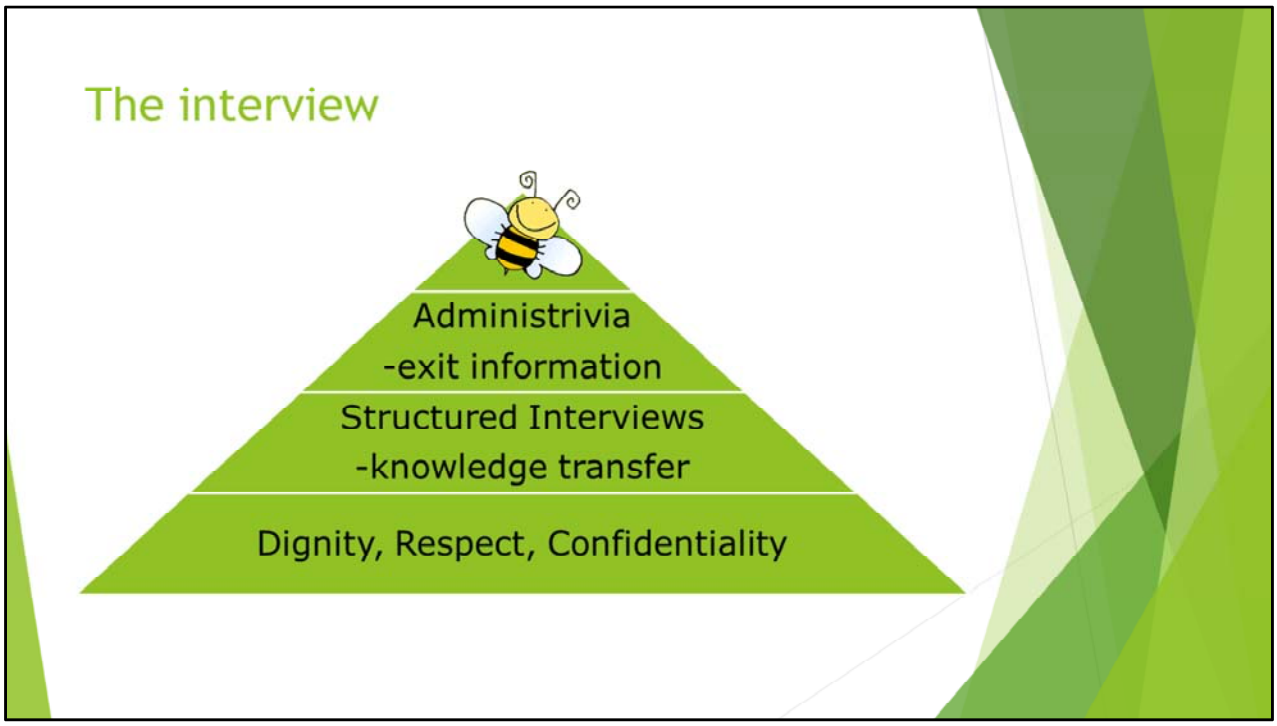


What should be asked?
- What is it you want to learn?
- Most of the questions revolve around what we COULD have done
- Serve as a Litmus for us and our processes
- This will also determine who your target audience is (all voluntary? Vol & Invol?)

How should an EI be conducted?
- Setting the tone
    - Confidentially
    - Anonymous v. Credited
- Computer v. Paper v. In person v. mailer

Who should conduct the EI?
- HR? Supervisor? Principal?

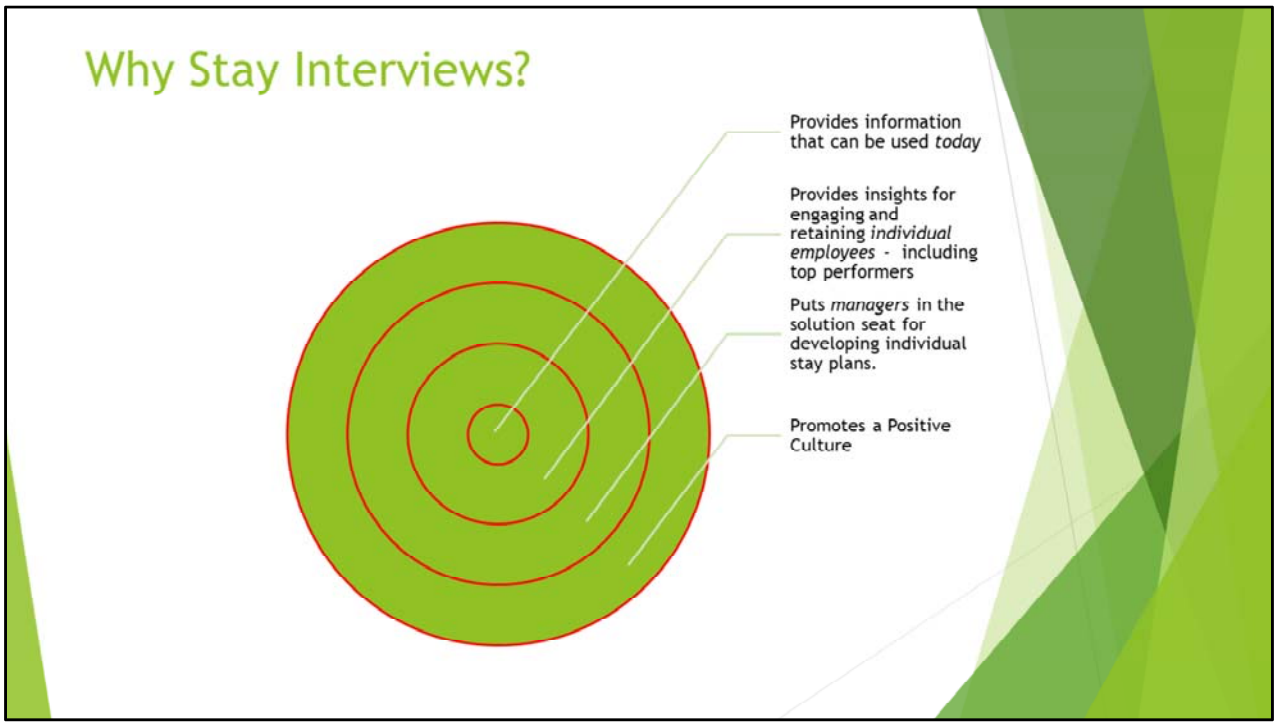
When exactly are they conducted?
Last week? Last day?



What are some obstacles you might encounter in conducting an EI?

- Reluctance to be honest
    - Need references
- Belief that nothing has been done in the past
- Are there Union issues around this?
- What's the nature of the termination?
- Discounting the information once you receive it

Stay Interviews



Stay Interviews represent a tool that equips managers to anticipate, learn, and solve employee concerns to the best of their abilities, and while employees are still on board.

Not in Hind sight, like an exit interview

Two Types:

1. Proactive – at points during an employee's tenure
2. surveying the team members who remain after a colleague's or like-employee's departure

Stay Interviews v. Engagement Surveys

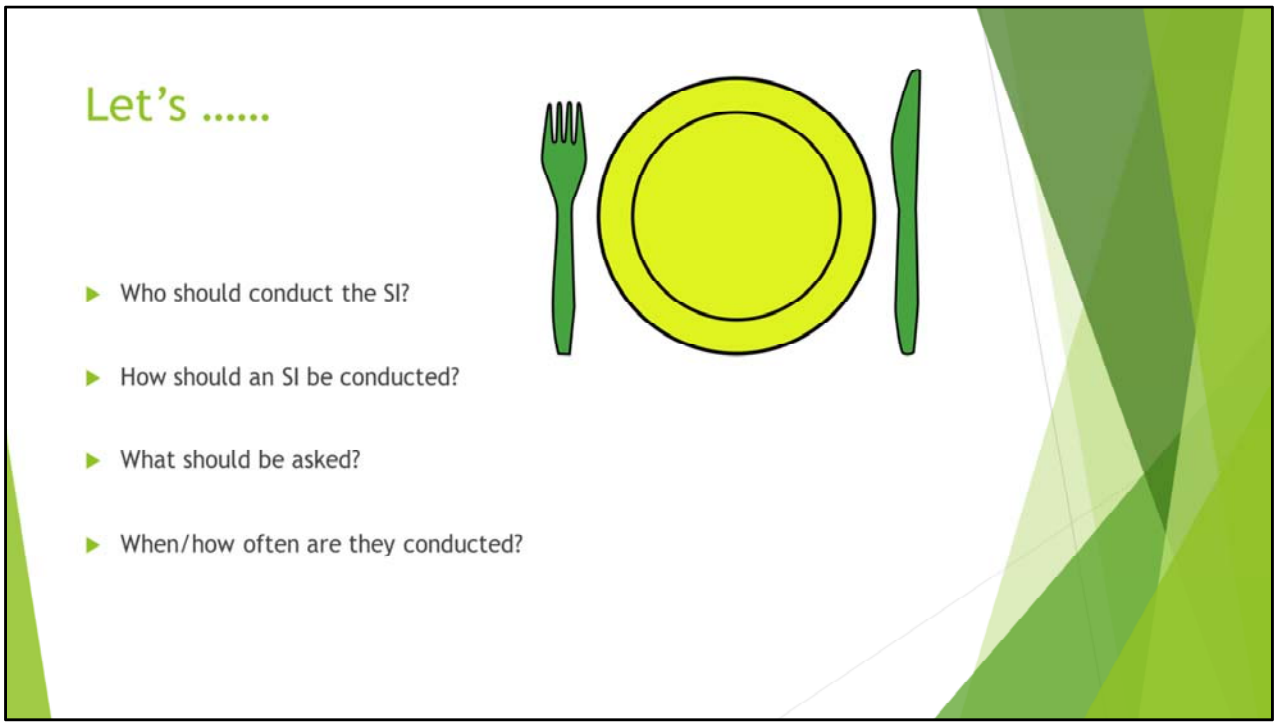
- Stay interviews are immediate
- Stay interviews provide an opportunity to build trust
- two-way conversations – you can ask questions, and follow-up on ideas; not with how the employee felt last month or over the past quarter or the year.
- In Real time - can ask for examples or educate

What if your organization lacks trust?

- You'll get - no answers
- You'll get - False answers that lead you to fixes you don't need
- Your assessment of your organization culture in areas such as staff turnover, innovation, sales per employee, employee longevity, attendance, total sales, and profitability tells you a story of whether your organization is in a position to hold stay interviews.

To Make stay interviews effective

- **Commit to change and communicate that change**



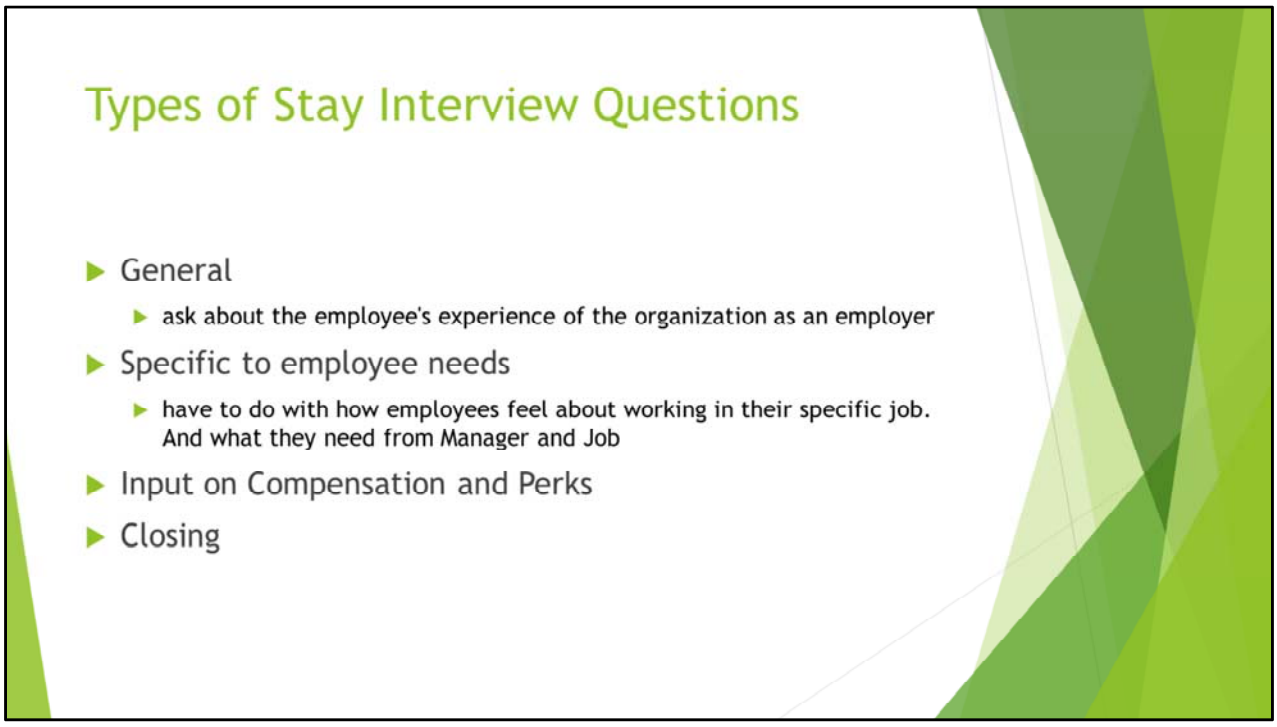
I. The employee's manager should conduct the stay interviews.
    I. Human Resources staff can help with difficult interviews, but the stay interview should encourage open communication between an employee and his or her manager. The manager is the person who can most readily have an impact on the employee's everyday working conditions.
    II. Before conducting a stay interview, managers need training on how to conduct the interview, the questions to ask, how to build trust, and how to effectively listen, making the interview more effective and productive.

II. SI conducted as a conversation. The manager should actively listen and engage the employee in an open-ended conversation; may jot notes.

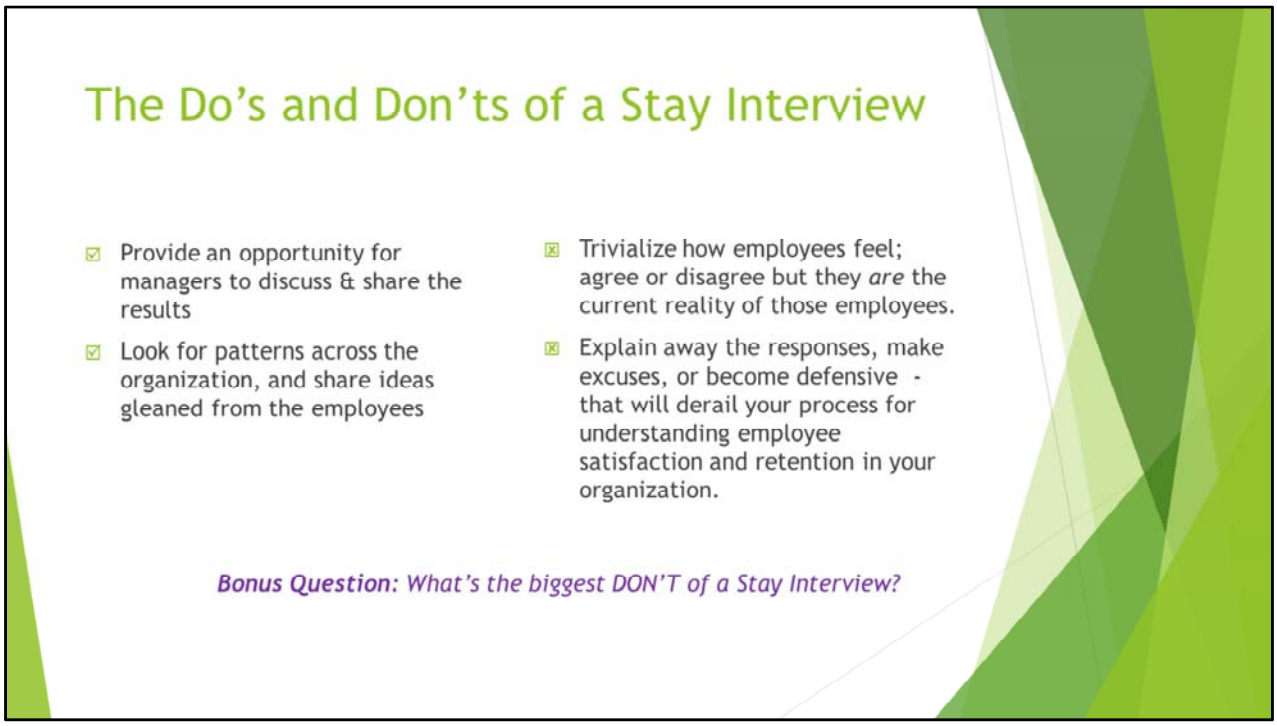
III. Start your stay interview with general, easy-to-answer questions. As the interview progresses, you can ask tougher questions after the ice has been broken.
    - Select the questions that appear to have the most utility for your organization.
    - Unless an employee has a lot of thoughts to offer, the stay interview should take around a half hour to an hour.
    - When you ask an employee to participate in a stay interview, don't expect that you can ask the employee why or if he or she is thinking of leaving as your first question. The chances are that he or she has a well-rehearsed answer that leaves no bridges burning. But, this answer won't give you the information you need to help your organization become more attractive for employees.
    - After regularly conducting stay interviews, you will find the questions that yield the most useful information from your employees.

IV. Depends how big the target audience is. Don't combine with performance conversations.

V. As employees see their organization respond to their concerns and needs, the addition of the stay interview to the Human Resources arsenal of tools will have a positive impact on employee morale.



Opportunity to review these later



Doing Nothing - It's the fastest way to negate all your efforts at soliciting feedback.

Actualizing the Data from your EI & SI

Compiling and analyzing results → Trend spotting → Identify Areas for Improvement

So what do you do after you have the data? You fix it!

Identify whether your fixing Tactical (immediate) or Strategic (planned)

-Did you find any similar data from your stay interviews that you have identified in your exit interviews?

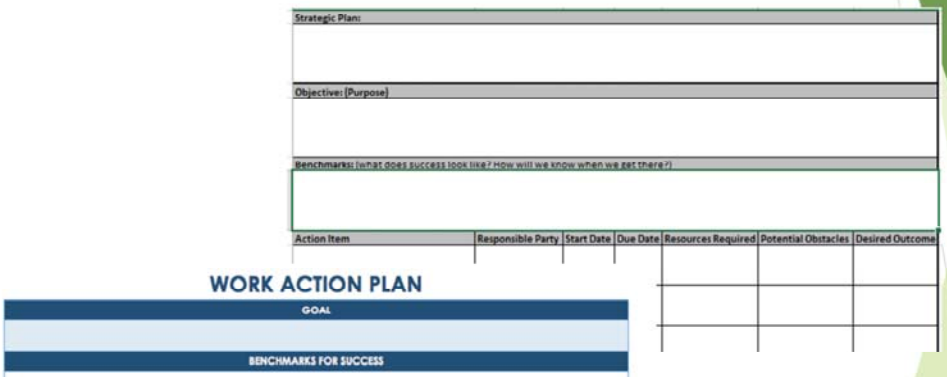
Who should be part of the corrective action? Depends….

Is there a natural point at which you would provide insight to the process with your shareholders?

Who are the right Shareholders to share this with?

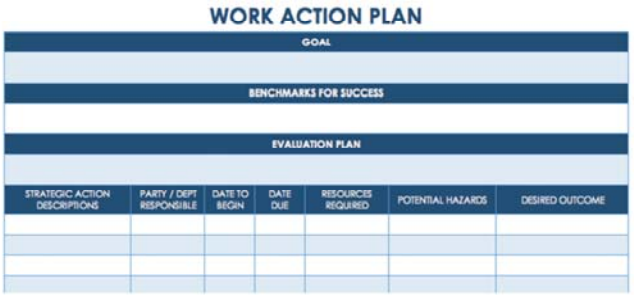
Creating Action Plans

Sample Action Plans



Strategic Plan:
Objective: [Purpose]
Benchmarks: (what does success look like? How will we know when we get there?)

Action Item	Responsible Party	Start Date	Due Date	Resources Required	Potential Obstacles	Desired Outcome



WORK ACTION PLAN

GOAL
BENCHMARKS FOR SUCCESS
EVALUATION PLAN

STRATEGIC ACTION DESCRIPTIONS	PARTY / DEPT RESPONSIBLE	DATE TO BEGIN	DATE DUE	RESOURCES REQUIRED	POTENTIAL HAZARDS	DESIRED OUTCOME

Next Steps

1) Begin to develop your tool(s)
    1) Determine who you're targeting
    2) Do you need to differentiate questions by audience?
    3) Would one tool work better in your environment?
2) How would you action a PDSA cycle?
3) How will you communicate your outcomes, to whom, and how often?
4) Identify Obstacles in your environment that may prevent you from successful implementation

Questions as you prepare

- *What kind of **culture** do you have? Will that influence how you solicit feedback? What questions you ask?*
- *Think about who the **stakeholders** are in your environment that you need to include in the process.*
- *Think about any analytics that you currently capture. Do you need to modify those or develop different indicators?*