Facing the Challenge – a Commitment to Strategic Organizational Change

NCCI 2018 Conference Presentation
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Today:

- Learn steps to lead an organization-wide strategic culture/engagement change initiative
- Define success measures of an organization-wide strategic culture/ engagement change initiative
- Lessons learned
- List steps to apply in leading a change initiative

Agenda

- Welcome
- About the Division of Alumni Affairs and Development
- Strategic engagement objectives and design (March 2016 and currently on-going)
- Success measures
- Lessons learned
- Small and Large Group Discussion
- Next Steps
- Q&A

About the organization

- New Vice President

- Changing leadership

- Centralized / Decentralized

- Reputation for fundraising success

- Pressure to raise $'s

- Previous focus on results, not behaviors

- Generational and service differences

- Blind followership

- Rumblings

- Fear of speaking their truth

Change Management Decision Making Matrix

What? Payoff   ←—————— Why? Possibilities

How? Process   ←—————— Who? People
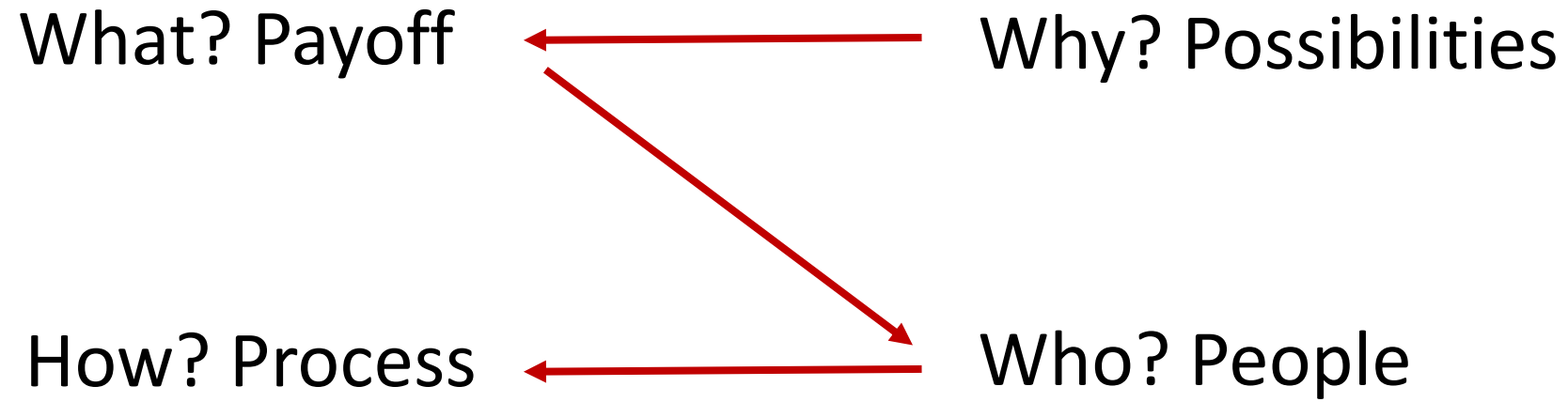
Past – What are you inheriting?

- Leadership successes and failures
- Rumblings about how things work and who was recognized
- Talent level

Present – What will you do and who will you involve?

- Understanding the current challenges
- Considering the implications of today's decision on tomorrow
- Strategic and tactical decisions to take action on the challenges
- Assessing current state against goals

Future – How will you turn your vision into reality?

- Aligning possibilities, processes, people and payoff

Process to address Engagement/Climate Issues
(March 2016 and currently on-going)

Outline of AAD Process to address Engagement/Climate issues

- Met with Fred to discuss objectives   May 2016
- Developed custom Engagement Survey   Mid-June – early-July
- Administered Engagement Survey   July 10 – 28, 2016
- Fred and Kathy met regarding results, Kathy/Linda Croll Howell developed analysis   July 29 – August 13
- Sr. Leadership Session to review results (one item of a larger agenda)   August 14
- Program Directors/Sr. Leader Session to review results   August 15
- Fred, Tracy Cary, Kathy held 8, 1-hour sessions to review data with all staff   September 14
- AAD All-Staff Meeting – Agenda item involved staff in moving forward with   September 15
- Outcome: Deeper understanding of what the data meant, next steps to address results and future programming, including the creation of a Climate Sub-committee

Moving FORWARD! All Staff Meeting Agenda

Agenda:

- Welcome and FY17 Program Year Overview (VP Alumni Affairs & Development)
  - University Agenda
  - Growth Culture
  - Goals and Performance Indicators
- A New Approach to Data (Director, Prospective Development)
- Working Groups – 2.0 (Business Intelligence Analyst)
- Creating a Culture of Two Way Feedback and Career Conversations (AVP Operations)
- Enhancing Our Work Environment (AVP Northeast Corridor, Director Diversity and Inclusion, AVP Organizational Development and Talent Management)
  - Exploring our work environment – Breakout (1:45 – 2:30)
  - Exploring how we communicate – Breakout (2:45 – 3:25)
- Connecting Our Culture to Our Work (Chair, Diversity and Inclusion Committee)
- Next Steps (Assistant Vice President AAD)
- Closing Comments (AVP Colleges and Units)

Additional actions

- March 2016: Senior leadership began talent planning discussions
- September 16, 2016 and forward: Engage a common strategy, dedicated commitment to impact culture
- By September 30, 2016: Share individual reports, without comments, with each senior leader
- October 7, 2016: Unconscious bias session to all staff
- By October 15, 2016: Senior leadership team share reports and reconvene focus group to discuss results
- October 2016: Launch working groups – 1) mission and values 2) internal communications
- October – November 2016: Kathy Burkgren to meet every senior leader and their teams to discuss their results and what they will do to improve
- October 2016: **"Creating a Culture of 2-way Feedback and Career Conversations"** with supervisors and staff following up by sharing feedback and having career conversations
- Starting January 2017: 2x per year Pulse surveys: 3-5 questions quarterly to measure how we're doing
- Late winter/spring 2017: conduct 360 evaluations with senior leadership team and review results; each leader is coached by either Kathy Burkgren or Reginald White.
  - Give leaders who need to improve 6-12 months; determine a transition plan if improvement isn't made
- Spring 2017: Reginald White facilitates values work
- April 2017: Engaged program directors in Talent Management/Succession Planning
- Summer 2017: Career Conversation workshops and office hours with Maria Wolff
- July 2017: Supervisory feedback survey
- August 2018: Administered 360's to program directors in groups of 10 through summer
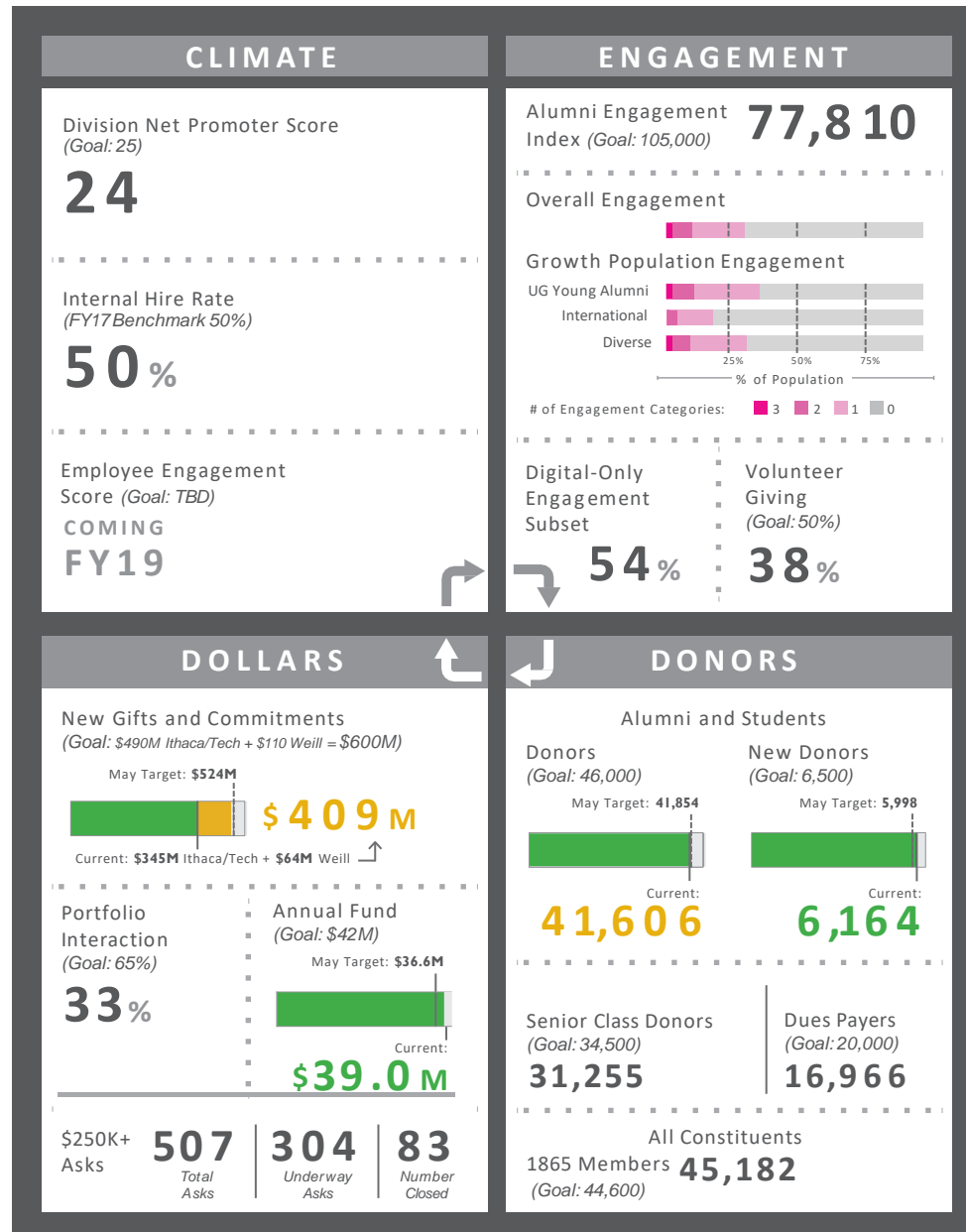
Additional actions

- Fall 2017: Unconscious Bias Training

- Fall 2017: Rollout of comprehensive training and professional development plan for staff, will continue annually

- Created semi-annual "Collaboration Days" for work planning

- Winter 2017: Rollout of new Mission, Values and Creed, created by staff committee

- Spring 2018: Annual Performance Dialogues with increased participation and healthy conversations, shifting to ongoing dialogues

- Spring 2018: Launched "Addressing Sexual Harassment in the Workplace" an on-going programming effort focusing on expected behaviors, reporting and trained responders, and training

- Continued report out of climate survey results on a semi-annual basis, present to staff, use results to adjust programming

- Efforts to continue on an on-going basis

Net Promoter Score (NPS)

Using a scale of 0 – 10, respondents that give you a 6 or below are Detractors. Respondents that give a score of 7 or 8 are called Passives. Respondents that rate a 9 or 10 are Promoters.

To calculate NPS, add the total responses from each group. To get the percentage take the group total and divide it by the total number of survey responses. Then, subtract the percentage total of Detractors from the percentage total of Promoters.

CLIMATE

Division Net Promoter Score
(Goal: 25)

24

Internal Hire Rate
(FY17 Benchmark 50%)

50%

Employee Engagement Score *(Goal: TBD)*

COMING

FY19

ENGAGEMENT

Alumni Engagement Index *(Goal: 105,000)* **77,810**

Overall Engagement

Growth Population Engagement
UG Young Alumni
International
Diverse
25% 50% 75%
% of Population

# of Engagement Categories: ■ 3 ■ 2 ■ 1 □ 0

Digital-Only Engagement Subset

54%

Volunteer Giving
(Goal: 50%)

38%

DOLLARS

New Gifts and Commitments
(Goal: $490M Ithaca/Tech + $110 Weill = $600M)

May Target: **$524M**

$409M

Current: **$345M** Ithaca/Tech + **$64M** Weill

Portfolio Interaction
(Goal: 65%)

33%

Annual Fund
(Goal: $42M)
May Target: **$36.6M**

Current:
$39.0M

$250K+ Asks **507** *Total Asks* | **304** *Underway Asks* | **83** *Number Closed*

DONORS

Alumni and Students

Donors
(Goal: 46,000)
May Target: **41,854**

Current:
41,606

New Donors
(Goal: 6,500)
May Target: **5,998**

Current:
6,164

Senior Class Donors
(Goal: 34,500)
31,255

Dues Payers
(Goal: 20,000)
16,966

All Constituents
1865 Members **45,182**
(Goal: 44,600)

These capabilities and tools are needed to achieve the quantitative FY18 Dashboard goals.

Collaboration

1. Increase opportunities to work together through aligned work plans, cross-functional task force teams, and enhanced partnerships across all university and college & unit programs
2. Engage academic leadership to achieve key priorities and plan for future big ideas

Talent Development and Pipeline

3. Extend training and experiential learning opportunities that serve both the individual and the division
4. Cultivate employee empowerment and responsibility by asking that when colleagues identify issues they also share potential solutions
5. Build stronger internal and external job candidate pipelines

Budget and Financial Management

6. Increase division resource flexibility to advance strategic opportunities
7. Execute events with a focus on return on investment and disciplined follow-up

Management of Information

8. Improve the quantity, quality, and timeliness of data entry, e.g. contact reports, biographical information, event attendance, etc.
9. Enhance forecast capabilities
10. Create a suite of 3 to 7 standard reports to track key strategy progress

Lessons Learned

- Importance of *Senior Leader* commitment, leadership by example
    - Multi-year process commitment
    - Leadership willing to change, be vulnerable, transparent and listen
    - Dedicated resources whose values are aligned to the VP
- Be bold
    - Take a stand
    - Live by stated values – align mission, vision and values to behaviors and outcomes
    - Willingness to admit mistakes and creating an environment of risk-taking
    - Involvement of multiple levels increased responsibility for change and shared ownership
    - Create metrics and responsibility placing climate as most important
- Don't ask for comments after each set of questions
- Develop a culture of feedback, developing people, and creating a sense of belonging and inclusion

Small Group discussion

From what you've learned, what can be applied to your organization?

Large group

How is this consistent with or different than what you've experienced?

Q & A