



# Achieve Atlanta

## Phase 1 Talent Management Strategy Report of Findings

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# Overview



- Introduction/Background
- Methodology
- Executive Summary
- Overall Interview Results: Competencies, Talent Philosophy, Performance Management
- Detailed Findings: Interview Themes by Job Level and Gap Analysis
- Recommendations
- Discussion
- Next Steps



# Introduction/Background



- Achieve Atlanta's (AATL) organization and staff have grown rapidly.
- This resulted in a need to organize the Talent Management process into a holistic system that supports current work and future growth.
- Purpose of the engagement: To build out Competency and Performance Management aspects of the Talent Management process.
- Point Two Consulting brings expertise in Performance Management design with a focus on employee engagement.



## **Two approaches used to align AATL's Talent Management to maximize success in current work and future growth**

### **Staff interviews**

- All full-time staff interviewed the week of Feb 22, 2021 (n=14) to determine staff perceptions of current Talent Management work
- Questions focused on current roles and match to job descriptions, competency definition and behaviors, DEI work, attributes in the Talent Philosophy and the performance review process.
- Interview data subjected to thematic analysis by job level and across job levels

### **Extensive Document review and crosswalk**

- 7 documents reviewed\* and cross walked against current competencies
- Gap analysis conducted to determine the viability of current competencies and possible missing critical competencies needed for current and future work

\* See slide 18 for list



# Executive Summary



- It is evident that staff is committed to the mission and values and are interested in helping the students and organization succeed.
- AATL has done an excellent job socializing and reinforcing the Organizational Values.
- AATL has grown and evolved rapidly, necessitating the review and updating of job descriptions
- There are multiple documents that speak to talent. The perception is that these documents:
  - are not clearly aligned;
  - do not use consistent language and;
  - cause confusion about to what AATL staff are held accountable
- While there is a lot of agreement about the definitions of the competencies among staff;
  - clarity is lacking regarding the behaviors exemplifying the definitions and,
  - in some cases, staff's definitions differ from the currently defined competencies.
- **Innovation and Bold Decisions/Risk-taking** may be thwarted by the organizational emphasis on meeting targets and avoidance of risk to scholars.



# Overall Interview Results Across Job Levels



## Job Descriptions

Overall, job roles have evolved over time due to the growth of AATL. This is most evident at the Executive and Director level, and less so at the Manager/EA level.

## Competencies

- There is a range of awareness of competencies across all job levels, from quite a bit to not at all.
- Definitions given and behaviors needed for **Organization and Self-Regulation, Mission Driven, and Team Player** competencies are generally consistent among the job levels.
  - There is less clarity about the definition of and behaviors needed to demonstrate the **Self-Regulation** component of the competency.
- Executives and Directors have more robust definitions for **Strategic Thinker** (*think big picture, long-term, including socio-political context*) than the Manager/EA group.
  - Executives cite behaviors that are more strategic
  - Directors cite some behaviors similar to Executives although focused more on tactical skills (*project management skills, etc.*);
  - Managers/EA cite behaviors that align their jobs with the mission.
  - There is some mismatch between how staff define **Strategic Thinker** and the current organizational definition.



# Overall Interview Results Across Job Levels (continued)



## Competencies (continued)

- Executives define **Leadership** in terms of *vision setting*.
  - Directors definition was more about *owning the Vision, using it to motivate others, to inspire them to grow and take risks or to take initiative*.
  - Executives and Directors gave a more robust set of behaviors upon which to assess **Leadership** than did the Manager/EA group, but all levels had these elements in common:
    - Coaching
    - Soliciting input,
    - Role modeling
  - **Leadership** definitions and behaviors cited by staff differ from how this competency is currently written.

## DEI

- All job levels defined **DEI** as *honoring, respecting and valuing others*.
- AATL establishing explicit competencies in this area would help to clarify expectations and sharpen focus (e.g., internal, community, scholar).



# Overall Interview Results Across Job Levels (continued)



## Talent Philosophy (TP)

- There is lack of awareness of the TP across job levels.
- Generally speaking, **Honoring Perspectives, Championing Social Justice** and **Living Organizational Values** are reflected in the AATL culture.
  - **Championing Social Justice** is a part of AATL's Mission
  - The Core Value “shout outs” are evidence that **Living Organizational Values** is a part of the culture.
- Job levels are mixed as to whether **Valuing Experimentation, Bold Decision Making** and **Tolerance of Failure** are reflected in the AATL culture.
  - The culture is viewed as non-punitive.
  - However, perceived risks of not meeting targets or harming students limits risk-taking and boldness.
- Managers/EA are in agreement that **Investment in Long Term Development** exists in the culture; Executives and Directors are mixed in their assessment
  - Short term development is evident;
  - Working on promoting and providing long-term development plans and opportunities within the resources (\$2000/ yr.) allocated would enhance this component of the Talent Philosophy.
  - Investment in long-term development needs to extend beyond the educational stipend.





# Overall Interview Results Across Job Levels (continued)



## Performance Review Process

- All receiving an annual review appreciated receiving feedback as part of a 2-way conversation that was constructive, honest, and positive in tone.
- Improvements cited were:
  - Leveling competencies to job level.
  - Defining what is meant by **DEI** and explicitly defining behaviors.
  - Aligning performance criteria across organizational initiatives and documents.
  - More frequent assessments (monthly to quarterly) with a greater emphasis on development.
  - Building coaching skills in order to support staff development.
  - Policies to deal with underperformers.



# Detailed Findings



# Findings: Executive Team (n=4)



- Executive jobs have evolved and expanded over time from currently written job descriptions, with the exception of the VP of Data Strategy.
- Awareness of core competencies varied;
  - the Executive Director and VP College Success were the only ones fully aware of the competencies, having been deeply involved in their creation.
- In general, definitions given, and behaviors needed for each competency are consistent among Executives;
  - however, they did not consistently match the AATL definitions, particularly in terms of **DEI** attributes embedded in the AATL competency definitions.
- Definitions given and behaviors needed for each competency are *generally* consistent with the current AATL definitions for **Organization & Self- Regulation, Mission Driven and Team Player**.
  - Executives have less clarity and provided few observable behaviors for the **Self-Regulation** component of this competency.



# Findings: Executive Team (continued)



- Definitions used to describe the **Strategic Thinker** competency differ from current AATL descriptions.
- Executives describe **Strategic Thinker** more broadly:
  - Defining it as the ability to think big-picture, long term; and
  - Integrating a variety of viewpoints, socio-political context, and cultural forces in decision-making.
  - **DEI** attributes were not organically mentioned in terms of **Strategic Thinker** by Executives.
- Definitions used to describe **Leadership** differ from current AATL descriptions.
  - Executives define **Leadership** in terms of their ability to set the tone, direction and provide a clear vision for those they lead.
  - Although the Executives generally agreed on what **Leadership** means, there is variability in ability to clearly articulate the observable behaviors.
  - **Leadership** definitions did not organically include **DEI** attributes.
- Definition and behaviors ascribed to **DEI** work appear in other competencies, however Executives did not tend to mention them when defining these competencies.



# Findings: Executive Team (continued)



- Aside from the Executive Director, Executives were less familiar with AATL Talent Philosophy
- Executives agreed that **Honoring all Perspectives, Champion Social Justice and Living Organizational Values** are reflected in the AATL culture.
- Executives believe that **Valuing Experimentation** and **Tolerance for Failure** are somewhat reflected in the AATL culture.
- **Bold Decision Making** and **Investment in Long Term Development** are not consistently reflected in the culture.
- The only behaviors Executives felt explicitly accountable for were **Champion Social Justice** and **Living Organizational Values**.
- Executives receiving annual evaluations gave the process favorable reviews and appreciate the positive tone and constructive feedback.
  - Executives are not in agreement about the effectiveness of the current review process.
  - Improvements recommended include:
    - a more user-friendly process,
    - better incorporation of ongoing development discussions, and
    - operationalizing of competencies relevant to specific job levels.
  - There was a consistent recommendation to develop a process for dealing with poor performers.



# Findings: Directors (n=6)



- Director jobs have evolved or changed over time from currently written job descriptions.
- Awareness of core competencies ranges from Quite a Bit to Not At All.
- Definitions given and behaviors needed for each competency are consistent among Directors.
- Definitions given and behaviors needed for each competency are consistent with AATL's current definitions for **Organization & Self- Regulation, Mission Driven and Team Player** competencies.
- Definitions used to describe the **Strategic Thinker** and **Leadership** competencies differ somewhat from current AATL descriptions.
  - Directors define **Strategic Thinker** as the “ability to see, plan resources, execute on and communicate about the ‘bigger picture’”.
  - Directors define **Leadership** more in terms of leadership qualities in addition to recruiting and developing diverse staff
- Definition and behaviors ascribed to **DEI** work appear in other competencies, but some Directors were unsure of AATL expectations in this area.



# Findings: Directors (continued)



- Most Directors were not aware of the AATL's Talent Philosophy (TP) and,
  - when asked, **only half** agreed the attributes contained within the TP were evident in the work environment.
  - Exceptions were **Champion Social Justice** and **Living Organizational Values** where **most** agreed these were evident
- Directors receiving annual evaluations gave the process favorable reviews and appreciated the positive tone and critical feedback.
  - Improvements cited were:
    - To synthesize performance criteria across AATL documents,
    - Start a formal mid-year review process,
    - More efforts towards long-term growth development, and
    - To ensure goals are those that are under the control of the individual.
- A need for a formal process to deal with poor performers was voiced.



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# Findings: Managers/EA (n=4)



- Similar to the Executives and Directors, the Managers/EA report that their roles have evolved over time as the organization has grown.
- Awareness of Core Competencies ranges from Quite a Bit to Not At All.
- Definitions given and behaviors identified for the competencies are fairly consistent across this group.
- Definitions given and behaviors needed for each competency are consistent with AATL's current definitions for **Organization & Self- Regulation, Mission Driven and Team Player** competencies.
- Definitions used to describe the **Strategic Thinker** and **Leadership** competencies differ somewhat from current AATL descriptions.
  - This group either doesn't feel **Strategic Thinker** is part of their role, or they define it largely as thinking ahead and having goals
- This group does not see themselves as having formal **leadership** roles within the organization; however they define it as:
  - Delegating
  - Motivating
  - Soliciting/giving input and
  - Acting as advocates for scholars.
- **DEI** definition and behaviors in this group focus more on the context of the scholars vs. the organization as a whole.



# Findings: Managers/EA (continued)



- This group is largely unaware of the Talent Philosophy.
  - When informed or reminded of the components of the TP:
    - There was agreement that **most** components are reflected in the work environment;
    - **Except for Value Experimentation or Innovative Approaches**, which were not seen as widely reflected in the work environment.
- Managers/EA reported receiving annual performance evaluations and that these are safe conversations where they receive constructive feedback.
  - Suggestions for improvement:
    - Time the annual reviews to coincide more closely with the budget cycle.
    - More consistently discuss development as well as performance
- Other feedback from this group:
  - The competencies have been shared but are not top of mind
  - The organizational values are much more well known than the competencies
  - The pandemic has caused us to become more reflective and to define success differently. We became more innovative and resilient.



# Findings: Managers/EA (continued)



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# Gap Analysis: Alignment of Competencies to Organizational Initiatives



## Purpose of gap analysis

- Determine whether current competencies align with seminal organizational documents and future work, i.e., are they the right competencies needed for AATL to achieve current work and future aspirations?

## 7 documents were reviewed

- Mission
- Vision
- Talent Philosophy
- Core Values (updated version)
- FY 2022 Annual Plan - The Four Opportunities
- Leadership Competencies for Extreme Teaming
- DEI Cultural Attributes (according to the survey definitions)

## The gap analysis highlighted some misalignments in current competencies

- As an option, to ensure your competencies support your current and future initiatives, you may consider eliminating, combining, adding or rewording current competencies.



# Potential Opportunities for Realigning Competencies \*



The examples below are a few taken from the gap analysis and staff interviews.

- **Possible eliminations**

- Attendance, punctuality, etc. within the **Organization and Self Regulation** competency are basic behaviors that can be addressed in onboarding and reinforced during performance management. These behaviors were not competencies highlighted in the review of documents.

- **Rewording and realignment**

- Some competency categories can be reworded to more accurately reflect their intended behaviors. For example, replacing **Team Player with Partnership** conveys partnering internally and externally.
- As many behaviors in the **Leadership** competency reflect staff development, this might be relabeled **Mentoring and Developing**. Remaining behaviors can be moved to other competencies.
- From staff interviews, **Organization and Self Regulation** might be relabeled **Emotional Intelligence** to pull in other **EI** behaviors either missing or contained in other competencies.
  - The **Organization & Self-Regulation** in its current form is a “compound” competency, i.e., it contains more than one concept
  - Breaking it down to its two components may lead to greater clarity in definition and associated behaviors



# Potential Opportunities for Realigning Competencies\* (continued)



- **Additions**

- Mentioned in documents but not captured in current competencies are behaviors such as **Innovation and Risk Taking and Leading Change /Change Management**
- Mentioned by staff but not captured in the **Leadership** competency are behaviors related to vision setting and long term planning and judicious use of resources.
- A **DEI** competency can be either added as a stand alone, or behaviors distributed to other competencies.
  - A stand alone competency highlights this work (and is favored by many BODs);
  - However, distributing **DEI** behaviors into other competencies builds them into the DNA of AATL.

\*It is not the purpose of this report to present a complete draft of reworked competencies, but only to suggest examples. There are additional changes that can be considered should a full review be requested.



# Recommendations



## Job Descriptions

- Update job descriptions to accurately reflect current and future work and to include competencies

## Competencies

- Decide whether to update (realign and/or rename) and possibly add to current competencies to address current and future work
  - If keeping current competencies, examine current definition of **Strategic Thinker** and **Leadership** with an eye towards how staff define these competencies
  - Decide whether to have a stand-alone **DEI** competency or to highlight these behaviors in current competencies
  - Using gap analysis findings, incorporate new attributes into competency work and/or realign current competencies into new categories. Rename categories as needed.
  - AATL to review TP, and other relevant organizational documents for consistency, alignment, and to ensure simplicity and clarity.
  - Ensure the behaviors operationalized under each competency reflect the core values of the organization
- Once decision is made about the competencies, create communication strategy to increase staff awareness of competencies



# Recommendations (continued)



## Performance review process

- Align forms with current (or new) competencies.
- Consider formal mid-year review process with more regular informal feedback sessions during the year.
- Formalize discussions on long-term growth & development and create plans using recently developed procedures and templates.
- Continue to build awareness and adoption of the 3 E model (10% Education, 20% Exposure, 70% Experience).
- Develop approach for dealing with poor performers.
- Support leaders in developing coaching skills/coaching mindset.





# Discussion



- Reactions to findings?
- Which recommendations should go forward?
  - To what extent do AATL leaders want to have current competencies realigned and reworked?
- What will be shared with staff regarding findings?
  - Suggest Leadership Team share key findings with all staff.
  - Share what you know as soon as you can.
  - Share what you don't know yet as well.
  - Point Two is available to support communication of findings, e.g., preparing documents, attending meetings as needed.



# Next Steps



- Upon agreement regarding competencies, Point Two will develop drafts of leveled competencies.
- Engage a work team to provide feedback on refined leveled competencies
  - Scheduling (who/when)
  - Communications to staff (who/what/when)
  - Decide on what levels are appropriate (e.g., individual contributor?)
- Integrate this work with recommendations contained within the Promise 54 recommendations\*
- Revise performance appraisal forms after competency work is completed

\*Achieve Atlanta Competency Integration and Performance Development and Onboarding Recommendations, Sept 2019

