



Bolstering Retention Through Policies and Procedures

Martina Durant, M.P.A., and Allen Fowler, M.A.

Advocates for Human Potential, Inc.

September 9, 2024



Indigenous Land Acknowledgement

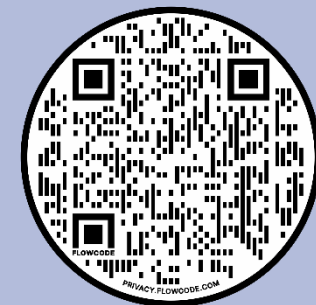
- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.
- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California and in displaying respect, honor, and gratitude for all indigenous people.

Whose land are you on?

Option 1: Text your ZIP code to 1-907-312-5085

Option 2: Enter your location at [Native Land CA](#)

Option 3: Access Native Land website via QR Code



Community Agreements

- Be present and be an active listener.
- Remember: One mic, one voice.
- Practice inclusivity.
- Honor pronouns and gender identity.
- Show respect. (This may look different for each person.)
- Allow conflicting perspectives to exist.
- Assume best intentions.
- Take space, make space.
- Share what you are comfortable sharing.
- Protect individual privacy.
- Practice self-care.
- Encourage growth of self and for others.
- Support resource sharing.



Today's Learning Objectives



- **Make the connection between policies and procedures in addressing retention challenges.**
- **Recognize and address issues of burnout.**
- **Recognize and address issues of psychological safety and establishing inclusion.**
- **Explore effective approaches to management and supervision.**

Importance of Policies and Practices



Fairness: Ensure employees understand expectations (and consequences) and are treated consistently.



Equity: Ensure flexibility to meet the diverse needs of staff while upholding core values.



Accountability: Promote transparency and consistency by holding all staff to the same standards.

Formal and Informal

Formal Policies and Practices

- Clearly outlined rules, procedures, and expectations within an organization
 - Written/documented
 - Enforceable
 - Clear

Informal Policies and Practices

- Unwritten norms and casual practices shaped by organizational culture
 - Culture-driven
 - Casual
 - Adaptable

Addressing Burnout

- **Boundaries:** Guidelines that define limits of responsibilities and acceptable behavior
- **Workload:** Realistic, manageable, and equitable distribution of tasks assigned to employees
- **Work–life harmony:** Autonomy to guide how one aligns professional, personal, and other aspects of their lives



Boundaries

Formal:

- All employees are required to adhere to a designated work schedule and are not expected to respond to work-related emails or calls outside of regular business hours, unless previously arranged with their supervisor.

Informal:

- Team respects, does not interrupt or try to schedule over colleague's scheduled focus time.



Workload

Formal:

- All overtime work must be preapproved by a supervisor. Unless handling a client emergency, a request form should be submitted 48 hours in advance for any additional hours beyond the standard schedule.

Informal:

- It's common practice to discuss task priorities during team meetings. If you're feeling overwhelmed, let your team know so adjustments can be made to balance the workload more effectively.



Work–Life Harmony

Formal:

- Supervisors are required to monitor employees' accrued Paid Time Off (PTO) and engage in formal conversations when PTO balances exceed a certain threshold.

Informal:

- Employees can informally adjust schedules as needed to address personal matters.

POLL

With a better sense of how a policy might be written to provide guidance on a workplace culture issue, what are the areas within your organization that need some clear policies and procedures?

- Boundaries
- Workload
- Work–life harmony
- Psychological safety
- Inclusion and equity
- Employee feedback/input
- Leadership leading the way
- Supervisory practices



Addressing Psychological Safety and Establishing Inclusion



Defining the Terms



Aspects of Psychological Safety



“ The belief that one will not be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes, and that the team is safe for interpersonal risk-taking. ”

Defining the Terms

- Psychological safety exists within a culture of safety, trust, and respect.
- Inclusion exists when all staff, regardless of their social identities, feel welcomed, respected, and valued.
- Full inclusion requires staff to have a voice in decision-making and feel at home in the workplace.



(Source: [Center for Creative Leadership](#), 2024)

Psychological Safety Comes from Being...

Included

- Asked for input
- Valued for qualities and experience

Able to learn,
grow, and make
mistakes

- Comfortable asking questions
- Readily seeking feedback

Able to share and
contribute

- Autonomy to participate fully
- Readily offering constructive feedback

Able to challenge
the status quo

- Contributes to a culture of curiosity and transparency
- Encouraged to be candid



Formal

- Committees or working groups must have representation across staffing levels.
- Management and supervisors will complete trainings in trauma-informed practices and motivational interviewing.



Informal

- In meetings, be intentional when deciding who speaks first.
- Provide opportunities for others to lead, co-lead, facilitate, or co-facilitate part or all of a meeting or workshop.

“Psychological safety at work doesn’t mean that everybody is nice all the time. It means that you embrace the conflict, and you speak up, knowing that your team has your back, and you have their backs.”



Management and Supervision



Roles and Responsibilities



Supervisors

Manager
Teacher
Coach

Roles and Responsibilities

- **Formal:**

- Each role within the organization has a formal, documented job description that outlines specific duties, responsibilities, and reporting structures.

- **Informal:**

- Employees who demonstrate initiative may take on a leadership role in specific projects or tasks as part of a stretch project.

Effective Supervision

- **Formal:**
 - Standard operating procedure requires all supervisors to have a minimum of two check-in meetings with employees each month. At least one of those check-ins must be a 1:1 conversation.
- **Informal:**
 - Supervisors encourage teams to take breaks, leave on time, and disconnect after hours and during PTO.



Manager

Handles the day-to-day activities of the organization and its staff by:

- Delegating responsibilities
- Maintaining clear and proper channels of communication
- Addressing inappropriate employee behavior
- Negotiating conflict

Teacher

Imparts knowledge on and models the followi

- Workplace expectations (e.g., business etiquette)
- Mission, vision, and structure of the agency
- Competencies and skills required
- Personnel policies





Coach

Promotes growth and development of staff as individuals and a team by fostering:

- A culture of learning
- Self-efficacy and professional development
- Career exploration and planning



Supervisory Practices

Formal:

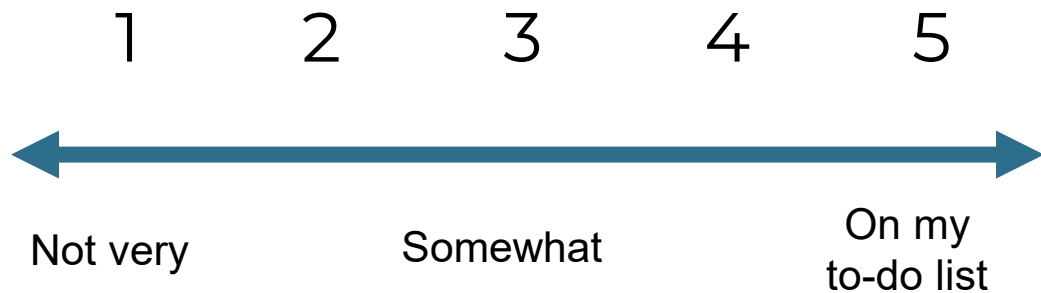
- Supervisors co-create SMART goals with each employee at the beginning of each performance cycle.

Informal:

- Extended staff meeting once a quarter dedicated to team-building activities.

Where are you now?

How well-prepared do you feel now to go back and have conversations with your leadership and colleagues regarding reviewing, revising, or establishing policies and procedures around strategies to bolster retention?



QUESTIONS?





Please fill out the attendance form and feedback survey in the chat to meet your requirements for today's event.



Thank You

References

Center for Creative Leadership (2024, April 10). [*How leaders can build psychological safety at work.*](#)

Clark, T.R. (2020). [*The 4 stages of psychological safety: defining the path to inclusion and innovation.*](#) Berrett-Koehler Publishers.

Edmondson, A. (1999). [*Psychological safety and learning behavior in work teams.*](#) *Administrative Science Quarterly*, 44(2), 350–383.

Gundemir, S., Homan, A.C., & Greer, L. (2023, March 21). [*Overcoming the inclusion facade.*](#) *MIT Sloan Management Review*.