Welcome to our virtual waiting room!

While you wait for the session to start, please take time to:

1. Mute yourself – audio and video
   - 1 in the picture
2. Visit the chat window
   - 2 in the picture
3. Check your name- update if incorrect
   - 3 in the picture
   - We are using these names to track attendance

BlueJeans Participant Screen

- Camera mute, Audio Mute, Share your screen and Leave meeting
- People roster, Chat, Apps and Settings
- People roster detail

Who’s talking

Hide menu
View People

Click to see only who’s talking (also shown by blue mic highlight)
Click pencil to change your name. Mute/unmute your camera or microphone.
   Note: only moderators (marked by * in next to the name) can also mute & unmute other participants
Click name to see call details and connection stats. Moderator has ability to drop them from meeting
Moderators only can Mute & Unmute All participants at once
Copy meeting link, & share with others
Leading Others:
Learn about the resources available to help you manage employees in all stages of the employee lifecycle.

A link to the slides will be emailed at the end of the week
The Employee Lifecycle refers to each stage an employee will go through during their tenure at Penn Medicine.

1. **Attract and Recruit**
2. **Hire and Onboard**
3. **Engage and Retain**
4. **Manage Performance**
5. **Develop and Deploy**
6. **Transition and/or Offboard**

Hiring the right talent and helping them grow to their optimal capabilities.

The Lifecycle starts on the day a potential employee becomes aware of Penn Medicine and lasts to the day they leave.
The Employee Lifecycle is a slight misnomer…

- Attract and Recruit
- Hire and Onboard
- Engage and Retain
- Develop and Deploy
- Manage Performance
- Transition and/or Offboard
Penn Medicine has talent management strategies for each phase of the employee lifecycle.

- Engage and Retain
- Ongoing Feedback
- Performance Management
- Manage Performance
- Develop and Deploy
- Transition and/or Offboard
- Hire and Onboard
- Onboarding
- Development Planning
- Succession/Workforce Planning
- Attract and Recruit
- Interviewing

Strategies for MANAGING TALENT
Penn Medicine has talent management strategies for each phase of the employee lifecycle.
Position Description:
Certified Nursing Assistants (CNAs) work under the direct supervision of RNs and support numerous fast-paced, high volume areas of the hospitals and practices within UPHS by delivering high quality care to patients and families through collaboration and communication with his/her team.
Interviewing Using Behavioral Competencies During Interviews

1. Identify Need
2. Finalize Job Description
3. Recruit
4. Interview

Interview Guide

Past behavior is predictive of future behavior and integrating competencies into the interview process increases the likelihood of identifying an individual who can perform successfully in the position and ultimately be a long-term asset to Penn Medicine.

This tool will allow you to develop customized interview guides to help you and your team effectively introduce behavioral-based questions into your interviews. Use this guide to assess a candidate for specific competencies (those the work gets done) related to the role. You can develop an interview guide for the role and further customize for each interviewer by selecting specific behavioral questions as desired.

Use the leveraging competencies in interviews job aid when preparing for interviews and please go to the Talent Management Interviewing website for additional information.

Get Started:

1. Role/Position
   - Enter applicant's role or position
   - NEXT
2. Competencies
3. Behavioral Questions
4. Date
5. Copies
6. Review & Print

Using Behavioral Competencies for Development Planning and Interviewing

Using competencies for interviewing

Custom Interview Guide Tool
# Using Behavioral Competencies During Interviews

## Identify Need

1. Describe a time when you had to build partnerships to achieve shared objectives.
2. Describe a time when you were praised individually but others also contributed.
3. Tell me about a time you succeeded in an initiative by collaborating with others.
4. Tell me about a time you should have collaborated with others to get something done but didn’t.

## Finalize Job Description

- **Behavioral Questions (Choose one):**
  - If person cannot come up with an example, ask them to think about a former work or school experience.
  - What was the situation?
  - How did you approach the situation?
  - Why did you select that approach?
  - What were the results?
  - If that situation were to occur again, how would you handle it differently?
  - What made your approach successful?
  - What did you take away from the situation?
  - How have you used these lessons in a different situation?

## Recruit

### Collaborates: Building partnerships and working collaboratively with others to meet shared objectives.

<table>
<thead>
<tr>
<th>Behavioral Questions (Choose one)</th>
<th>1.</th>
<th>2.</th>
<th>3.</th>
<th>4.</th>
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<tbody>
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### TOOLS TO BUILD A FEEDBACK RICH ENVIRONMENT AT PENN MEDICINE

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### Anchors

- **What to look for in the answer**
  - Puts own interests before others
  - Doesn’t give credit where it’s due
  - Prefers to work alone rather than with others
  - Doesn’t build partnerships with others to accomplish goals

### Probes

- **Follow up questions to drive to a deeper answer**
  - Cooperates with others to achieve shared objectives
  - Considers own interests as well as others
  - Partners with others to get work done
  - Gives credit to others

## Interview

### Rating:

1. Significantly Below Position Requirements
2. Below Position Requirements
3. Meets Position Requirements
4. Exceeds Position Requirements
5. Significantly Exceeds Position Requirements

---

**Interview Guide Level 1**

Adapted from Penn Competencies Development Guide
Recognize the importance of your role in onboarding

As a Hiring Manager you are instrumental in helping a new employee achieve the three primary onboarding goals:

1. Establish their credibility
2. Build relationships
3. Get an understanding of both business operations and the organization's culture.
Onboarding is a **systematic approach** designed to accelerate a new employee’s **transition** into his/her role at Penn Medicine.

To be successful, employees must quickly:
- Establish their credibility
- Build relationships
- Get an understanding of both business operations and the organization’s culture.
Onboarding
Setting Up New Colleagues For Success

Onboarding Sample

- Here is a sample of a completed Onboarding plan; use this as a guide in filling out your own.

**Onboarding Goals: The First 90 Days**

There are three key goals for your new leader’s Onboarding. Focusing these priorities at the start will facilitate a smooth integration into your role and accelerate your overall performance.

**Learn the Business**

- Key Actions: Understand the strategic priorities of Penn Medicine, align development plan for first 90 days, set expectations with any manager to sign goal.

**Build Relationships**

- Key Actions: Check in with CIO, departmental staff meeting, on-site director reports, all-entity executive meetings, CIO/CEO meeting.

**Onboarding**

- New Leader Orientation
  - Meet with CIO to review Onboarding plan for first 90 days
  - Set up desktop, laptop, VPN access, mobile phone
  - Set up knowledge link with Penn Key
  - Complete required learning modules in Knowledge Link
  - Complete e-STAR (biometric enrollment)

- Onboarding Courses
  - Focus on Business Skills
  - Focus on People
  - Focus on Quality, Improvement, Innovation
  - Focus on Performance Management
  - Focus on Service
  - Manager Fundamentals

**Tours of Entities / Facilities / Shadowing**

- Radiation Therapy, Department: ASCAN
- Radiation Department: RCT
- Penn Presbyterian Hospital: 30th Floor
- Center for Innovation and Learning

**Quick Wins**

- Key Initiatives for Quick Wins
  - Practice Manager: Scheduled on XXX
  - Administrative Assistant: Scheduled on XXX
  - Business Assistant: Scheduled on XXX
  - Key Actions: Practice Manager: Scheduled on XXX
  - Administrative Assistant: Scheduled on XXX
  - Business Assistant: Scheduled on XXX

**Lead Strong: Onboarding new Penn Medicine leaders**

- Onboarding template for new employees
- Onboarding template for new leaders
- Onboarding template for new faculty

**New leader onboarding: data collection and synthesis**

- “I have a new employee or faculty member I want to set up for success”
Onboarding Template for Anna Hazelden

<table>
<thead>
<tr>
<th>New Employee</th>
<th>Anna</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Certified Nursing Assistant</td>
</tr>
<tr>
<td>Entity</td>
<td>PMHC</td>
</tr>
<tr>
<td>Date of Hire</td>
<td>05/01/2023</td>
</tr>
<tr>
<td>Hiring Manager</td>
<td>Shane Swinton</td>
</tr>
<tr>
<td>Penn Mentor</td>
<td>Tally Winters</td>
</tr>
</tbody>
</table>

**Onboarding Goals: The First 90 Days**

There are three key goals for a new employee's onboarding. Prioritizing these priorities at the front end of your first 90 days will facilitate a smooth integration into your role and accelerate your overall performance at Penn Medicine.

- **Learn the Business**
- **Build Relationships**
- **Execute Quick Wins**

**Learn the Business**

<table>
<thead>
<tr>
<th>Onboarding</th>
<th>Key Actions</th>
<th>Date of Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend New Employee Orientation</td>
<td>N/A</td>
<td>5/1/2023</td>
</tr>
<tr>
<td>Meet with manager to go over plan for first 30 days</td>
<td>N/A</td>
<td>5/1/2023</td>
</tr>
<tr>
<td>Set up desktop and telephone</td>
<td>N/A</td>
<td>5/1/2023</td>
</tr>
<tr>
<td>Set up Knowledge Link with Penn Key</td>
<td>N/A</td>
<td>5/1/2023</td>
</tr>
<tr>
<td>Complete required learning modules in KL</td>
<td>Within first 30 days</td>
<td></td>
</tr>
<tr>
<td>Set expectations with my manager to align goals</td>
<td>Within first 30 days</td>
<td></td>
</tr>
</tbody>
</table>

**Meetings to Attend**

<table>
<thead>
<tr>
<th>Key Actions</th>
<th>Date of Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Meetings</td>
<td>Machine</td>
</tr>
<tr>
<td>Department staff meeting</td>
<td>Scheduled as per actual need</td>
</tr>
</tbody>
</table>

**I have a new employee or faculty member I want to set up for success**

- Onboarding guidelines for hiring managers
- Checklist for onboarding a new employee at Penn Medicine
- Onboarding instructions for new employees
- Onboarding instructions for new leaders
- Onboarding instructions for new faculty

- Lead Strong: Onboarding new Penn Medicine leaders
- Onboarding template for new employees
- Onboarding template for new leaders
- Onboarding template for new faculty
- New leader onboarding: data collection and synthesis
Ongoing Feedback

Building a Feedback Rich Environment

**Observation:**
Anna was especially kind to a very nervous patient, displayed great empathy and went above and beyond to make sure the patient and family we comfortable in the patient’s room.

**Impact:**
The patient became more comfortable overall which resulted in her being more compliant with post-surgery requirements.

**Communicate what to do more of in the future:**
“Your focus on what the patient really needed was exemplary. Her comfort level overall increased and she was able to really commit to doing her best to follow the team’s recommendations post-surgery. Please keep this up – it is clearly benefiting your patients.”
Ongoing Feedback
Enabling High Performance Teams

“Ongoing Feedback”

“I have a high potential employee or faculty member who is at risk of leaving.”
“I want to set a new team up for success.”
“I want to lead my virtual team successfully.”
“I want to lead engaging virtual meetings and training.”

Leadership Skills
- Motivating at a distance
- Building strong relationships
- Creating an environment of stability
- Leading with emotional intelligence
- Managing team priorities

Team Management
- Establishing and achieving a shared goal
- Creating a team charter
- Establishing team norms
- Accountable manager huddle sheet
- Participant guide to virtual meetings

Facilitating Small Groups
- 30 Minute Coach: Remote Teams
- Lead Strong - Lunch with Leaders
  - Managing throughout a crisis
  - Being a resonant leader
  - Masterclass on leading with Kevin Mahoney
  - Coping with yourself and others during stressful times
  - Attitude of gratitude: Recognizing and rewarding your team
  - The five secrets to successful virtual meetings & training
  - Engaging your virtual team

Focus on People

Responsibility Matrix
- Team Project Tracker
- Team Recognition and Celebration
- Creating Strength-Based Teams
- Leadership Development Toolkit

Penn Medicine
### Position Description:
Certified Nursing Associates (CNAs) work under the direct supervision of RNs and support numerous fast-paced, high volume areas of the hospitals and practices within UPHS by delivering high quality care to patients and families through collaboration and communication with his/her team. Tasks include, but are not limited to, the following: taking, recording and monitoring vital signs, lifting, turning and feeding patients, providing O2 therapy and reporting acute changes in ventilation and circulation; promoting infection control and safety by maintaining a clean and safe work and patient environment; meeting patients' personal hygiene needs and assisting with ADLs; and making beds.

### Minimum Requirements:
- HS Diploma or equivalent, graduate of a CNA program and CPR required. Must be certified by the State of Pennsylvania as a CNA and have at least one year of prior experience in a hospital setting. May consider nursing students who have successfully completed a clinical rotation in their nursing program.

### Additional Information:
The staff of 3 East cares for patients with Acute Cardiovascular disorders frequently requiring ambulatory telemetry monitoring, in a Progressive Care Unit environment. These include, but are not limited to, the following patient groups: Acute MIs, following transfer from critical care unit; Heart Failure; Pulmonary Edema; Primary pulmonary hypertension; Arrhythmias; Post-open heart surgery, post-endovascular procedures, and post cardiac catheterization patients: sip pacemaker and ICD insertion; Valvular Heart Disease; and medical/surgical overflow.

### Performance Feedback

"I want to make the performance review process even more productive for my employees"
"I have an employee who is underperforming or is disengaged"

- **Giving performance feedback**
- **Using competencies during performance reviews**
- **Preparing for performance evaluation manager huddle sheet**
- **Managing at Penn Medicine**
- **Focus on Performance Management**
- **Giving Feedback with the ADAPT Model**
- **Lead Strong:** Top tips for meaningful performance reviews during challenging times
- **Using Competencies During Performance Reviews**
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Using Competencies During Performance Reviews
"I want to make the performance review process even more productive for my employees"
Performance Management
Performance Evaluations

Prepare
Assess
Develop
Conduct

3 Versions
• Manager, non-exempt and professional
  • Performance Result
  • Self Reflection
  • Manager Evaluation

• Goals from prior year
• Professional Practices (KSA)
• Examples from Practice
• Peer Review
• Self Reflection
• Manager Evaluation

Preparing for performance evaluation manager huddle sheet
Performance Management
Performance Evaluations

Prepare

Assess

Develop

Conduct

Using Competencies During Performance Reviews

This tool is designed for managers developing others.

The following worksheet will help you incorporate competencies into your performance review discussions.

Use this tool prior to conducting a performance review with an employee you manage.

One of the greatest responsibilities you have as a manager is to lead an individual’s performance by drawing upon their talent, capabilities and motivation. Performance management is a continuous process to engage and support those you manage to perform at their highest level. Integration of the Penn Medicine competencies throughout the performance management process creates consistency in how work gets done and provides a common language upon which to provide ongoing feedback.

Performance review discussions provide an opportunity for you to synthesize feedback conversations regarding an employee’s performance throughout the year and follow up on prior feedback discussions in a more synthesized way.

Performance review discussions typically focus on:

- A review of what work was done (key accomplishments, performance results)
- A discussion of how the work was done for the current year
- A discussion of potential development goals for the upcoming year that focus on what and how work is to be completed
- Two-way communication

When done well, there should not be any surprises that surface in the performance review discussion; it is a continuation of ongoing conversation and feedback between you and the employee you manage.
Performance Management

Performance Evaluations

Developing competencies
Creating a development plan using competencies
Building a Development Plan

Prepare for the development feedback conversation

The content of development feedback discussions can and should change depending on your employee’s aspirations at the time of the discussion.

“I have a high potential employee or faculty member ready for further development”
“I want to have more development feedback conversations with those I manage”

Development Planning

Planning for and conducting a stay interview
Giving feedback for development
Developing yourself manager huddle sheet
Developing competencies
Creating a development plan using competencies
Guide to effective business writing

Using Behavioral Competencies for Development Planning and Interviewing

30 Minute Coach: Development Planning
Focus on the Economics of Penn Medicine
Creating a Development Plan
I have a high potential employee or faculty member ready for further development.

I want to have more development feedback conversations with those I manage.

Planning for and conducting a stay interview

Giving feedback for development

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Creating a Development Plan
Development Planning
Enabling Dream Careers

“Want to find my dream career”

Identify a Mentor for Career Growth and Development

Tips for Writing a Resume

Tips for Conducting a Successful Search

How to Prepare for a Job Interview

Undergraduate and Graduate Programs- Selecting the Best Fit

Lead Strong – Lunch with Leaders: Dream Careers Realized

30 Minute Coach: Career Conversations
I need to manage employee offboarding

Even though leaders work to develop the talent of those they manage, it is understood that some employees will eventually leave the organization. Managing the employee offboarding experience can help managers embrace the final step of the employee lifecycle and tap into it as a valuable learning opportunity.

Follow these steps to effectively manage employee offboarding:

**DISCUSS**
- Have the conversation

**COMMUNICATE**
- Communicate transition
- Conduct stay interviews

**PLAN**
- Capture job knowledge
- Create transition plan
- Define and request replacement role
- Follow transition policy

**REFLECT**
- Conduct exit interview
- Recognize and celebrate

**REPLACE**
- Identify candidates
- Craft interview process
- Build onboarding plan

Transition Announcement Template
Stay Interview
Responsibility Matrix
Transition Plan Template
Transition Checklist

Lead Strong: Elegant Offboarding
Succession / Workforce Planning
Transitioning and Offboarding

“I need to manage employee offboarding”
- Transition Announcement Template
- Stay Interview
- Responsibility Matrix
- Transition Plan Template
- Transition Checklist

Lead Strong: Elegant Offboarding
What if...

- I don’t want my “Anna” to leave?
- My “Anna” seems content to stay indefinitely?
- What if I don’t really know what they should learn in the first 30/60/90 days?
- I don’t have the time to onboard employees?
Penn Medicine Resources

- **PennCOBALT** a tool for the Penn Community that uses targeted assessments to direct you to the right level of coping support.
- **Lead Strong** Live discussions and curated resources for Penn Medicine employees around leading yourself and your team during adversity.
- **WELLfocused** a program dedicated to making living a healthy lifestyle easier, by providing tools, resources, educational campaigns and health-related challenges to help improve overall well-being.

### Penn Medicine Academy:
**Microlearnings:**
- Creating a Feedback Rich Environment
- Building a Development Plan
- Using Competencies During Performance Reviews

**Pathways:**
- "I have a new employee or faculty member I want to set up for success"
- "I want to promote a more feedback rich environment within my team"
- "I have a high potential employee or faculty member ready for further development"
- "I want to have more development feedback conversations with those I manage"
- "I want to make the performance review process even more productive for my employees"
- "I have an employee who is underperforming or is disengaged"
- "I want to find my dream career"
- "I need to manage employee offboarding"

### Articles
- Rediscover Joy at Work
- The Employee Life Cycle Is About An Experience
- Employees Are Responsible for Their Engagement Too
- Why Talent Management Is an Important Business Strategy

### LinkedIn Learning
- Mindful Working - 11 Ways to Improve How You Work
- Aligning your Values with Work Life and Everything in Between
- How to Create a Career You Love