CASE STUDY

Resources and Transitions Constrain Talent Development at Not-For-Profit

Full Interview

matrix insights

Epilepsy-Pralid, Inc

At a glance
Not-for-Profit, Human Services focused on helping people in their constituency live the life of their choosing. Based in New York state, and serving Rochester, Syracuse, and Binghamton.

Mission
At Epilepsy-Pralid Inc. (EPI), our mission is to be a successful partner for all individuals with developmental or acquired brain conditions as they strive to remove barriers to their personal fulfillments.

Vision
For all individuals in our community with developmental or acquired brain conditions to receive the support they need to live the life of their choosing.

Stephanie Reh

VP Administrative Services, Epilepsy-Pralid, Inc.

EDUCATION
Stephanie completed a Masters in Strategic Leadership from Roberts Wesleyan College in the Spring of 2015.

She's also a mother of two creative daughters, does life coaching, and professional organizing. She also enjoys orienteering, and watching her daughters as they study dance.

- ENTJ
- In-Charge
- Vision Advocate

Q: What drives your organization in terms of funding, and priorities, and how can we help raise awareness?

A: A lot of it is government funding for services we have. But for things like epilepsy services, the way they categorize it, 'epilepsy as a single diagnosis,' there is a gap. So we rely a lot on donations for that. We run a few fundraisers each year, and I'm working right now on the Salt City Walk in Syracuse in July.

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There's an education gap as well. There's a stigma about epilepsy, people don't want to talk about it, but 1 in 26 people have Epilepsy. I could say that when you look at someone with epilepsy you can't always tell, it's not apparent if well controlled with medications, but that doesn't mean they don't need other support, and those are gaps that donors can fill for us, and we appreciate when they do.

Q: What's your role, and background?

A: My current role is VP Administrative Services which includes primarily Human Resources first, but also Development (Fundraising), Marketing, Quality & Compliance, Information Technology, and the Administrative Professionals team. When I came here in October of 2013, I was the Director of HR, which was when we first started working with Matrix Insights, right around the exact same time.

When I came here, I came from Bausch + Lomb. I'd been in the for-profit arena for most of my career, actually since college, so this is my first jump into non-profit, but I love it. My focus now, and since arriving at EPI, has been Leadership Development, so the Matrix Insights partnership has been very fruitful in that regard.

Q: What was the biggest challenge moving to the non-profit world?

A: The stereotypical answer to that question is resources, but I think it's more about that the 'talent' doesn't necessarily realize they have it. In a for-profit area, people seem to have a little more confidence, and maybe that's because they're more supported with resources, and used to different infrastructure, and not having to get super creative about things. But with a non-profit where you usually have fewer resources, or at least not free reign on the dollars, you do have to get more creative, and people just assume, "I don't have that ability and we don't have that option", but that's really not the case. So I think the challenge was changing the mindset from 'we don't have, and so we can't do' to 'we don't have as much but we can *still* do.'

And the same thing I'd apply to accountability, which I think here was my biggest hurdle,

noticing after a short time that the culture wasn't all that accountable, and those two things are related, feeling like we couldn't do it, so how could anyone hold me accountable, if I'm not able to.

Q: Wasn't there a merger just around the time of your arrival?

A: Yes, actually just prior to me, earlier that year of Epilepsy Foundation, and PRALID (People Rebuilding and Living in Dignity).

Q: When you arrived, had you identified particular challenges in the leadership development and teamwork 'space?'

A: I would say I picked up on it pretty quick. There was a merger just prior to my arrival, and I was told that there were still people reeling from the merger. I was introduced almost as a neutral party, so that was helpful for me. So I had no baggage, meaning no one labeled me as one side or the other. When I first arrived, people introduced themselves to me "I'm from the Epilepsy side," or "I'm from the PRALID side." Thankfully we're past that now, and we don't do that anymore. There are a few legacy employees who still identify themselves more with one or the other. But that's really the source of the leadership opportunity, I should say, versus challenge was to bring everyone together and get them moving in the same direction. When I got here a lot of the heavylifting had been done, but the residual effects hadn't been addressed yet.

Q: What about Matrix Insights resonated in terms of addressing that challenge?

A: I think the self-awareness portion of it in particular. We started out with Interaction Styles, and I think this was a huge eye-opener for people. You asked about the for-profit NFP leap, another thing is that most people here weren't as well versed with assessments. They maybe just didn't have the opportunity to do them, and didn't understand their value. And so getting a chance to do this with Matrix Insights was very new. Most people hadn't done anything like a Meyers-Briggs for example. I wasn't used to that, I was used to people in their circles taking about all the different assessments they did, and comparing notes, versus having nothing to say.

It brought it home. It was very tangible for them. An eye opener to say, 'oh OK so when I interact with this person, sometimes it doesn't go well, and this might be why.'

Q: Do you have a favorite Lens?

A: That's interesting. Personally, I like the Personality Type lens more. Because I'm a self-assessment junkie, and I like to think about myself, and understanding why I do what I do. More so, the organization is about Interaction Styles. It's a more compelling

argument: Why should I spend time on this? Well because you have to interact with people, and in order to do that effectively, you really have to understand where they're coming from. I'm already sold on that, so for me more knowledge about why did I just respond the way I did, is even more intriguing.

Q: Has Interaction Styles entered the culture and vernacular here?

A: Actually yes, I was thinking about that today. Because there are a number of people who haven't been through the discovery process since I started, and then we've added some people since then. But the people who did discovery a long time ago, know what the Interaction Styles are. For example when we add somebody new, and it's fresh to them, they want to talk about it. And if they talk to somebody who took it two years ago, that person still knows what their style is. And that's pretty neat, and very telling because you don't always retain that information, but they can identify with it right away. Oh 'I'm Behind the Scenes,' or 'Oh, I'm an In Charge.' everyone remembers what they are, and that sparks the conversation. So even though we've had some drop-off in usage, because they got what they needed, it still stays with them.

Q: What sort of things did your organization do for team building / leader development, or onboarding before Matrix Insights?

A: I would say we didn't do a lot in that area. Historically, it was more manager focused, meaning 'this is the process that we have to do X, this is how you follow it.' Even the meetings were branded differently. When I first got here, when we brought all our supervisors together, which is the meeting you came to introduce Matrix Insights, it was called, 'The Management Meeting.' That's what we called it, and that's kind of what it was. When I got here, I did an HR needs-analysis among my peers. I asked what should HR start doing, stop doing, what are your priorities for the agency? What keeps you up at night? That conversation lead to a suggestion from a colleague that said: 'please do something about "The Management Meeting"; it's boring, and nobody wants to come to it, yet it has such potential'. So, I said the first thing we're going to do is rename it. Starting January 2014 officially, we renamed it to the Leadership Academy, and that is what it's been called since then to communicate to the leaders that this is an important thing, and you don't want to blow it off, and you're actually going to get something out of it. We also revamped the curriculum entirely, so it was much more engaging and interactive.

It helped to have Matrix Insights kick that off because again it gave more awareness as to why should we talk about these things. 'Why is it important to talk about leadership?' where before we were talking about how to follow the performance management process. It was much more clinical then, and now it's a lot more philosophical. We're a year later, and now it's time to refresh the curriculum, but the Leadership Academy

name still stands, and attendance is much better, and now we get a lot more interaction from the group.

Q: What's the constituency of your Leadership Academy?

A: About 40, and it's assistant supervisors, supervisors and managers. So that team manages the 350 employees at large in the organization.

Q: How did your team get introduced and oriented to Matrix Insights?

A: When I started I jumped right in, I think right about the same time I arrived, that you were coming in to introduce this. We had rolled it out to our leaders, basically all supervisors all the way to the top. So everybody was introduced to the Interaction Styles Lens first. The meeting I jumped in on was right after the discovery process, and we were all sharing what we thought about it. At that time we weren't real coordinated about what to do with that information afterward, but that's how we started it, and that's where the lingo started to take hold, and people talked about their styles, and that sort of thing. But that's where we started, and we've since added the Emerging Leaders Program.

Q: What inspired the Emerging Leaders Program?

A: The impetus for the program first was that we had vacancies we couldn't fill internally, which didn't make sense, because we have over 300 employees. There's no reason we shouldn't be able to develop people to fill those spots, but we didn't have them. So we identified a need to grow our leaders more. I was given the freedom to create a program. That's the nice thing about this agency, those types of suggestions are usually embraced here. I created a pilot along with my colleague Sandy Debuyser, of this Emerging Leaders Program last year. When we were doing that, I really felt like the fundamentals of leadership included self-awareness, and establishing relationships. Matrix Insights was a perfect fit for that. Especially Interaction Styles.

So when we introduced the program, I believe the first or second session we had the discovery process, and there were seven emerging leaders. And that really formed the core of the program, because the program itself included group sessions, and individual coaching, and the coaching revolved around their Interaction Style, and more individual, deeper interaction with that individual, and we'd bring it back to the group, and they would talk together about how they interact.

Q: How do you use Matrix Insights, beyond discovery, and beyond commencing a

program like your ELP? Do you Coach or Mentor leaders?

Yes, the first year we did a pilot, and the ELP is a six-month program, but the MI subscription is 1-year. So we tried to get them hooked on it so they'll use it after the program ends, and most people seem to have done that. Although if you don't stay on them, just like with everything else, people forget it's there. That's an opportunity to keep stoking the fire in that regard.

What we did in nearly every session, we'd do some kind of activity, usually provided to us by Matrix Insights, that would wrap around the lens we were doing at the time, to keep it fresh in their mind.

In the individual coaching sessions, you asked what I was doing, last year we had seven members, and I coached three of them. So every time we'd get together, we'd talk about what Development Insights did you select?,' and 'how are you doing on those?' I myself would go in as a Coach, which is a great feature, and assign development tasks, just to keep them thinking about it.

Having it front and center is really important, otherwise they'll forget about this great tool. If I'm putting it in there, and they're putting it in there, there's a built in accountability with the Coach being able to see when they logged in last. That was really helpful. It just formed the thread of the conversation throughout those six months.

This year we just started the second one, so the pilot was successful, and we're doing it again. It's basically been institutionalized, and the core remains Matrix Insights, and we've selected Interaction Styles for that. I'm coaching two people, because my role has expanded so I have less time, but the good news is we're introducing a third coach into the mix, so that gives that person development as well.

Q: So you're creating a culture of Coaching?

A: It would be nice to say that, yes. I've also offered it to a couple of the people in the future if they're interested. It's something I've talked about in other organizations, as a 'wouldn't it be nice to do that someday.' The nice thing is that I actually get to do it here. And that's going very well, the coaching is very well received.

Q: Are you comfortable sharing your Type preferences?

A: I am comfortable, yes, and it's the norm here. I don't have any issues with it. I'm an In Charge, which I laugh because at this point in the interview everyone could figure it out. I also identify ENTJ.

That's my style, and I found it very interesting that our President, and a couple of other people in leadership here are In Charge. I think one of the interesting Insights I got was the focus typically is on the other styles, as in 'how am I interacting with someone who is Chart The Course, or Behind the Scenes?' But there's just as much value in exploring how am I interacting with same-style colleagues. In my years of being self-assessed, this was a new thing for me, a kind of lightbulb that went on. Wow, if I'm interacting with my boss, and we both have the same needs, as an In Charge style, how do I need to adjust my behavior? That was pretty interesting.

Q: Great point. What do you do?

A: I think I'm more patient. Actually I have a lot of practice now, because I've just built it into my habits. There was never an issue to begin with, but I recognize the point when (my same-style colleague) is more passionate about something, versus something else, and so I try to allow my colleague to get his thought out because if I don't it's burning inside to get out. And I know that because I'm the same style, and if we're both passionate about something, to really just make sure I've got my listening skills turned up all the way.

It works out really well. It is something though that you have to stay on. So some of the email reminders and that kind of thing are helpful because I just think it's a skill you have to constantly hone. You don't just learn how to deal with your In Charge colleagues, and then you don't have to learn it again, you have to keep thinking about it.

Q: Do you find yourself channeling the other styles to fuel or smooth conversations?

A: I notice this with my direct reports as well. I can't think of one person in my group that's In Charge.

The other big insight I got was that I have at least one Behind the Scenes person on my team, and I guess if I was to pick the polar opposite of In Charge, it would be that. And that was really helpful, because it forced me to kind of sit back, and give the person time. Because silence is the enemy to an In Charge. For Behind the Scenes, they need that space. So I have been trying to sit on my hands more with those types, and I've found they'll come out of their shell more with me because I'll allow that time for them. Where when I was first here, so energized about making changes, and getting things done here, and going at the pace I was typically accustomed to in my for-profit life, I wasn't like that. So I did learn thanks to the Interaction Style insights, I had learned to back off, and at the same time that person was going through the discovery process too so that they recognized it was a style adjustment, and they were probably trying to do the same thing with me.

Q: I see you've taken the Performance Five assessment, how did you react to the new Lens?

A: Yes, very recently. I liked that it (Performance Five) was quick. I think it's nice to have a complimentary approach to the other discovery processes, which are more lengthy. It was nice to have that snapshot, you know with kind of a different way of looking at it. I thought it was pretty neat. I wasn't sure what to expect, I was dutifully going to do it no matter how long it took. forced

I know the idea is that you're supposed to answer right away, and don't think too long about any one question. I did that, and it's interesting that it's still spot on, even if you don't sit in a room and ruminate on any one question. You can kind of do that in the other discovery processes, because you know it's going to be a while, so you put more thought into it, but the outcomes are still accurate. I could identify with them.

Q: Do you see Performance Five entering your portfolio of lenses at work in your programs here?

A: I think it could, because attention spans here — and everywhere— are so short. If you're not a person like me who's totally sold on assessments, it's kind of hard to get them onboard. The discovery process if it's 45 minutes or an hour, that's just such a hurdle for people. It's unfortunate because when you get over that hurdle, you get all this reward after it. There's no time management discipline, as a culture, you know? So I think it would be an easier sell. If anything if we were starting over, although I think Interaction Styles is critical, the second thing we might do would be a shorter assessment. It would continue to whet their appetite, but it wouldn't be a huge investment of time.

But either way I think you still have to figure out after the fact, how to keep this fresh, and useable after discovery. So it's not just: 'oh that was interesting,' you're actually doing something with it later on.

Q: Do you have a favorite feature, or dimension, aspect of MI you've found powerful?

A: I think the thing that jumps out first is the Coaching Dashboard, and just the ability as I said earlier, hold others accountable.

Because if it's not natural for them to be coached, I think it's helpful for them to know, for example, in the ELP. We told them the first session, 'just so you know, we can see when you login.' That's enough to get them to do it. I think you need to get them to do it in order for them to appreciate it. You need to you have to get them in, otherwise they

are not going to stay in there.

Being able to see their activity in the system, and just them knowing that you can do that. So that's a simple thing, then taking it further, being actually able to assign Development Insights, based on your conversations, it just strengthens the Coaching relationship. It keeps Matrix Insights at the center of the conversation, versus letting it go around it. Although certainly with Coaching, things meander, you want to keep it central to the self-assessment, and to what does this mean to the person, and what have you learned about yourself.

And if you keep bringing it back that way, every time we Coach we send them back to Matrix Insights, and give them homework in Matrix Insights. We do monthly sessions, so every time they come back, they have to do something in the system typically, or something related to their Insights so it keeps it top of mind for them.

Q: It sound like you use Action Plans pretty rigorously.

A: I do. I don't know that without prompting, the employees would do it regularly. Honestly, it's a bit of a time management issue. If you're familiar with Stephen Covey's quadrants, our team spends so much time on *urgent unimportant* things, they can't get into that *sacred non-urgent important* quadrant. We've talked about that here, and people they're nodding their heads right away, they totally get it. But this is where Matrix Insights sits, right in that quadrant, and they need to be paying more attention to that, and they need to be playing more in in that quadrant, than they are.

That's kind of a parallel hurdle, I think it's just the overall how do I make time in my life, my day, my week, for this important thing, that I don't see immediate benefit for necessarily. That is something we're trying to get through to people.

So for ELP, we don't even entertain that, we just make them do it. But once we start it, they're all over it. They're in an immersive learning environment, so it's easy for them to stay engaged. It's the people who aren't in a program who are hard to keep them engaged. If they can't find time to do all their performance reviews, and everything else they need to do, it just gets pushed to the bottom of the list. I think that's a challenge every organization has.

Q: Speaking of universal challenges, when it comes to architecting a program to sacred quadrants, and Coaching, and Emerging Leaders, talk to me about your thoughts around considering costs, and ROI.

A: I did, a little bit. It's more of an opportunity cost, and that is sometimes hard to even describe to people. That's again a difference I think of for-profit, and not-for-profit. Because they don't know what they don't know. So introducing such a thing takes a

little bit more convincing, why should I do this, versus in other organizations I've been at they've already seen the benefit of that kind of development. Although you still have to convince someone to pay for it, the hurdle's not as high. As far as the ROI goes, I would say here, the easiest sell is our Emerging Leaders Program. For example last year we had six people finish program, and five of them were promoted during that time, which far exceeded any expectation I had.

The whole point of the program was to prepare them for this eventual promotion, when such a promotion was available, but because they had higher visibility through the program, and were experiencing accelerated development, their names came to the top of the list when the opportunity came up. Even if they weren't fully ready, the Senior team knew that they were getting the tools they needed. Again, the fundamental tool had to do with self-awareness, through Matrix Insights. They were ready to go.

So we were able to grow our leaders, and hire internally which is a lot cheaper than trying to find them, and trying to onboard external peoplewho don't know the organization. I think that's the major source of the ROI.

Q: Would you recommend Matrix Insights to other HR/Learning leaders ?

A: Yes, and I have. I do, every chance I get. I do think you have to think about the best way to use it. So for us, you know we went through most of the Lenses, and we tried them out in different ways. We discovered that for us, Interaction Styles is really the one that works best. Because it's the easiest sell, and I think because of where our talent is at in their self-awareness journey, that's the way to hook them in.

Continuing, you can add another Lens after the fact. We actually tried that with our first Emerging Leaders, and found that they just weren't ready for that, and it almost confused them. It might have been that the timing was so close together, and they didn't have enough time to really absorb Interaction Styles, before we added the second lens. So that was the feedback. If the program was a year long, we'd have kept both lenses, but for six months, we just needed them to focus on one.

If I was making a recommendation to an HR colleague, I'd ask what are you trying to achieve. I do think my recommendation would be more specific to an Emerging Leaders type program, because these people want the development. What I'd recommend against is imposing it on leaders who aren't looking for it. Give it to somebody who is hungry for development, and it'll be awesome.

But when you try to give it to all the leaders, because it's nice to have all the leaders in there—and it is— they just didn't see the value. It was almost like it was a nice-to-have that was optional, and you don't want to make it mandatory because then it's no longer

development really. So it's kind of a tough place to be, but I think with that kind of development program, if you have something established, it's just a great way to use technology, and wrap it around whatever curriculum you have. So I'd call it very turnkey in that sense. That's something I would definitely recommend that HR professionals consider.

Q: So, 'when the student is ready the master shall appear,' and before then it doesn't much matter what you do?

Right. I think you can probably educate people more, and get people ready and excited about development. But I think you have to prime the pump before you introduce it. Otherwise, you'll end up having a bunch of subscriptions that sit there, and then you're kind of prodding people, because you paid for it, and you want them to use it, and you know there's a value, and you wish they'd use it, and understand things like you do. And they just don't. A lot of times that's hard for HR professionals to do, because they usually come from a background where they embrace assessments, and they do not need to be sold on it, but they have to put themselves in the shoes of people who have no idea what we're talking about, and are thinking more dollars and cents. So it's the classic HR challenge, to quantify the qualitative.

Q: Can you compare Matrix Insights to any developmental tools or resources you've leveraged in the past?

A: I would say it's more modern, it's more cost-effective. It's very easy to implement. Like I said, turnkey. You can add it to anything. A lot of other assessments are — I just have this feeling that stays with me— about when you adopt something like that you have to kind of take the whole thing on. And it becomes this monstrosity you adapt as a culture. Whereas with Matrix Insights, it's not a Matrix Insights culture, it's aligning with whatever culture you have. And that's what I like about it. You don't have to get all the books, and templates, and all these things and change all the process in your organization in order to have this. A lot of the other programs are kind of like that, I think. Again, that's a feeling I take with me. It's probably not literally true, but it's just much easier to facilitate implementations. It takes no time at all to add somebody to the discovery process, and get going with it. I like that. I guess the wraparound would be the biggest sell for me, because it just can fit anywhere.

Q: Did you consider other solutions, or programs?

A: No. No. Honestly, because of the price. I didn't even go there because I knew at a non-profit there was no point even having that conversation. If I was in a for-profit

world I'd probably do my due diligence to demonstrate the difference between the two, although I still think my decision would be the same. In fact, the colleagues that I've referred to Matrix Insights have been largely for-profit.

Q: Did your Graduate Course explore assessments, or development solutions in the way that we do at Matrix Insights?

A: It was more about servant leadership, and the philosophy around things. One of the courses was HR, and we were tasked with pulling in a whole bunch of assessments. Not so much to take new ones, as to pull in all the ones you had taken. We were introduced to Strengths Finder, which I'd done before. A couple other inventories, like MBTI, which I've done many times.

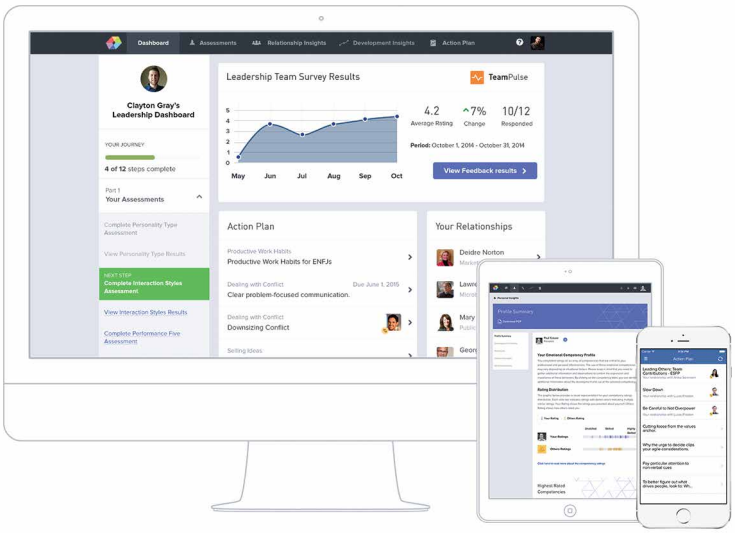
It wasn't integrated, but in this one course, the major paper for that class was to develop your own personal development plan, which was wonderful taking all those assessments, and analyze them, and distill it down to what is it I need to be working on, what do I want to do. In that regard it was very helpful, but again, I think I started my paper with: 'I am a self-assessment junkie.'

Dr. Joel Hoomans was the leader of the Masters program. He taught the HR course and Strategic Leadership as well.

Q: Was there anything else you wanted to share? You had copious notes.

A: The points I wanted to be sure we covered included built-in accountability. The fact that it's a first self-assessment experience for many emerging leaders, and so eye opening it has a lot of power. Which is another reason in marketing it to my colleagues, I would say this is a great place to put it, because these people are going to be hungry for it. Once they see it, again once you get a taste, you can appreciate why assessments are so great.

Meaningful insights even when sharing the same style, we talked about that earlier. And just that it's the cornerstone of our ELP, because it speaks to the fundamentals of self-leadership, and relationship management. With limited time and attention it's really important to give them the foundation because they're going to go different places from here. You have to teach them right away that in order to be a good leader, you have to lead yourself before you can lead others.



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