

Recognition & Motivation: How to Reward People Appropriately

David McClelland's research helps us understand why one person values a particular kind of recognition while another person looks at the same reward as worthless. In his studies, he found that all of us have three kinds of motivations with one being predominate over the others.

Achievement-Oriented People:

- Need measurable goals and believe this is what makes people happy
- Want checkpoints to assess progress
- Make to-do lists and like to check off items
- Enjoy organizing and setting up systems
- Think in terms of numbers and individual parts of assignments
- Want recognition that notes specific, tangible achievements
- Can (and often prefer to) work alone

Affiliation-Oriented People:

- Need to have good relationships with co-workers, clients, members, etc.
- Enjoy working in teams and collaborations
- Want everyone to be happy --- dislike conflict and tension
- Love to socialize --- will bring food without being asked!
- Think about how people *feel* about work
- Believe rewards come from good relationships
- Measure success by how harmonious situations are

Power-Oriented People:

- Need to find ways to impact and influence others
- Measure success in terms of change and improvement
- Enjoy a challenge --- especially when others say something can't be done!
- Like to create new things, to strategize
- Think in terms of how to improve things (products and services)
- Believe people are happiest when they have made a difference
- Think recognition should be based on innovation and problem solving
- Can work alone easily or form coalitions to get work done

These lists offer clues to what each type of person would prefer for recognition and/or rewards:

- **Achievers** like tangible rewards that specifically mark accomplishments such as increased revenues or attendance. Personal letters to them or their supervisors are appreciated.
- **Affiliators** like recognition that highlights relationships they have established. They like to be recognized in the presence of friends and family and enjoy personal letters from people they've helped.
- **Power-oriented people** like recognition that draws attention to the cause or vision of the group. They respond well to articles written about them or their work that influence others to get involved in making a difference. They are most rewarded when the organization thrives and are content to stay out of the limelight.

Sample pre-retreat questionnaire - 2

PROCESSES

	1	2	3	4	5	Comments
1. The separate but collaborative roles of staff and volunteers are clear to me						
2. Our work plan and allocation of resources is guided by our strategic vision						
3. The decision-making processes of our group are open and effective						
4. Systems for introducing and evaluating new ideas / opportunities are in place and used						
5. The board engages in lively debate on issues to make sure all views are explored						
6. Materials sent in advance of meetings / deliberations are sufficient to make informed decisions						
7. Lines of communications between our leaders and members are open / productive						
8. Volunteers are provided with enough quality training and mentoring to complete their tasks / fulfill their responsibilities						

PARTICIPATION LEVELS

	Yes	No	Could Improve	Comments
1. I understand what is expected of me as an Academy leader				
2. I prepare for and actively participate at leadership / committee meetings				
3. My time is well spent at meetings and our efforts are productive				
4. I am diligent about staying current with trends that impact the Academy				

Board Agreements
Performance Expectations

We the board, agree to hold each other and ourselves accountable for:

- ✓ Being prepared and actively engaged at board meetings
- ✓ Being willing to study issues and options to make informed decisions
- ✓ Being realistic about the Academy’s capacity and available resources
- ✓ Being both an active listener and advocate
- ✓ Soliciting varying perspectives then working together to solve problems
- ✓ Accepting, supporting and carrying out board decisions
- ✓ Operating within the bylaws
- ✓ Exercising fiscal prudence
- ✓ Focusing on board-related issues --- vision, policies, budget, oversight and NOT management
- ✓
- ✓
- ✓



TIP: *Review these expectations with board members and solicit feedback.
Ask the board to develop its own list and accountability systems.*

Board Agreements

As a board we Value...

- ◆ the limited resources we operate with and know we must make strategic choices based on priorities---our capabilities and capacity
- ◆ our leadership role --- thinking long term and acting short term
- ◆ teamwork and encourage cooperation and collaboration
- ◆ our policy and oversight roles and avoid getting distracted by operational activities and issues
- ◆ the Academy as a whole and avoid conflicts of interest between our own personal agendas and the good of the organization
- ◆ treating everyone with respect and fairness
- ◆
- ◆
- ◆



TIP: *Review these sample value statements with board members and solicit feedback. Ask the board to develop its own core value statements to lead by.*

SAMPLE

Annual Board Agreement

Many boards are now asking their members to sign an annual reaffirmation such as this one:

Annual Board Agreement

1. I continue to be fully supportive of the Academy's mission, purpose and goals.
2. I understand I am expected to be actively engaged in the Academy's work and to be responsible for all preparations necessary to make informed decisions.
3. I am aware of the attendance requirements for meetings and intend to be at all functions unless an emergency prevents me from fulfilling this obligation.
4. I have reviewed, signed and intend to comply with our board policies on confidentiality and conflict of interest.
5. (add other items appropriate for your Chapter)
6. If anything should occur during the year that would not allow me to keep these intentions of being a positive contributor to our board, I will take the initiative to talk with the officers about a voluntary resignation or re-assignment of responsibilities to allow another member to serve who is able to be fully involved.

Signed: _____ Date: _____



TIP: *Discussing board accountability and commitment strengthens the board team and helps focus on the importance of the board role.*

Leadership Characteristics Checklist

Vision

- ◆ leaders develop and are driven by a clear vision of what can be/is desirable
- ◆ leaders articulate their vision, share it with others to generate ownership, and build strong support around and for it
- ◆ leaders ensure there is a plan and a strategy to implement the vision
- ◆ leaders are self-aware; they are clear who they are and what they can contribute

Values

- ◆ leaders operate consistently based on a set of values
- ◆ leaders build a culture within the organization that is an expression of its values
- ◆ leaders model the behavior they expect
- ◆ leaders speak from a viewpoint of passion – sincerity
- ◆ leadership is service to organizational goals, to a “higher good” and to individuals

Perspective

- ◆ leaders have perspective; they understand the world around them – its impact and opportunities
- ◆ leaders are in touch with the needs, issues and viewpoints of their constituencies (e.g. members)
- ◆ leaders build and operate through others, maximizing connections and relationships to achieve the goals of the organization
- ◆ leaders take short-term action in a long-term context, understanding the consequences of their actions
- ◆ leaders can live with ambiguity; they are comfortable with and embrace change

Human Potential

- ◆ the key role of the leader is the development of human potential ... they inspire others to achieve
- ◆ leaders believe that it is through the development of others that the goals of the organization are achieved
- ◆ leaders believe that each individual has something to contribute (ideas, experience, expertise, perspective, talent) toward the accomplishment of the goal
- ◆ leaders seek to match tasks to skills, potential, interest, desire, goals
- ◆ leadership is not ‘position’ specific; leadership can be exhibited by anyone in a given situation

Evaluation

- ◆ leaders evaluate, embrace productive criticism, and seek continual improvement, both personally and organizationally
- ◆ leaders are committed to lifelong learning

These principles are reflected in a number of key skills and qualities exhibited by effective leaders, including:

Skills

- ◆ strategic thinking/ visioning
- ◆ problem solving/creativity
- ◆ consensus building
- ◆ conflict resolution
- ◆ coaching/mentoring
- ◆ delegating
- ◆ facilitating
- ◆ negotiating
- ◆ evaluation/assessment/analysis

- ◆ communications (listening, positioning, etc.)
- ◆ empowering



TIP: *Review this checklist with leaders at an annual orientation / assessment*

Qualities

- ◆ moral, ethical, honest
- ◆ willing to work hard
- ◆ focused on 'what is right'
- ◆ passionate about the job, cause
- ◆ open minded; objective...looks for the facts, not quick to judge
- ◆ flexible; able to deal with diversity, work style differences, change loops
- ◆ calculated risk-taker / curious
- ◆ goal oriented / not complacent
- ◆ positive



TIP: *The Leadership Development Committee should review this checklist when evaluating potential leaders.*

Job Description Checklist

In defining a volunteer's role and performance expectations, it is advisable to include the following:

- ✓ **Position title** (remember "volunteer" is a pay category not a title)
- ✓ **Description of the job or assignment** (scope of work)
- ✓ **Outline of Volunteer's specific responsibilities** (tasks, directions)
- ✓ **Desired outcomes / Goals:** (define how success will be measured)
- ✓ **Reporting process** (to whom, how often and in what format?)
- ✓ **Time Commitment** (estimated duration of assignment)
- ✓ **Qualifications** (list both skills and knowledge needed AND character traits desired)
- ✓ **Benefits** (what will the volunteer receive in exchange for the gifts of time / talent / treasure?)



TIP: *Talk through these items with each work group chair and provide the information to the [Leadership Development Committee](#) so it can help identify appropriate prospects for each job.*

TIP: *See sample job descriptions from [BoardSource](#).*

TIP: *Review information at www.knowledgepoint.com -- the web site for human relations professionals that covers performance evaluations to get ideas on job descriptions and accountability that can be applied to volunteers*

Handling “Challenging” Volunteers

In every group, there are well-meaning volunteers who frustrate others with their counter-productive behavior and who impede the smooth operations of the organization. Here are some typical “challenging types” and a few suggestions for handling them.

1. The Dictator: *Everyone is entitled to my opinion!*

The challenge here is to not let this person dominate discussions. Use brainstorming and facilitation techniques such as asking everyone around the board table to make one point (without others evaluating them), list the points then break up into small groups to rank ideas... caution: don't start or stop the discussions with this person. Another way to handle the dictator is to ask them to be the silent scribe...or have a well-respected senior statesman from your board or a past board suggest to the Dictator that he/she needs to be more open.

2. The Procrastinator: *The deadline is not here yet...relax!*

While these people can give you heartburn... you need to assess if they are just perpetually late, but always get the work to you or if they truly don't know how to get started. If they are just last-minute types, set frequent and earlier deadlines so they get their adrenalin rushes without holding everyone else up.

If the volunteer is hesitating because he/she isn't certain where or how to start, assign a mentor or a buddy...provide some additional training, share summary reports, photos, videos, programs from the past to give them inspiration, break the project down into manageable sections and create some short term wins as confidence builders.

3. The Inexperienced Know-it-all: *The answer is so obvious...why do we need to think this through any more?*

Things always look easier from the outside and a newcomer to the board will have to learn the complexities of the issues. Assigning a mentor or board buddy can help. Make sure this person has read through his/her orientation materials. Be clear about protocol and expectations. Ask the Leadership Development Committee chair or the board chair to talk with them. Assigning a project where they have to evaluate several options can give them experience with seeing differing points of view.

4. The Wanderer: *Getting there is most of the fun... here's an interesting tangent!*

Beware of keeping this person on point so as to not lose the group's focus. Having detailed strategic and operating plans and clear work group charges allows the group to say... “that's interesting, but not relevant”...and to move on.

5. The Doomsayer: *We already tried that and it didn't work! What a crazy idea!*

Often Doomsayers don't have real facts to back up their surety that something won't work. They may be risk adverse or just posturing the negative viewpoint.

Ask them to detail what were the variables that caused failure in the past and ask if these still apply today. Ask the group to brainstorm ways to overcome potential roadblocks and list alternative strategies for accomplishing a project or implementing a plan, then evaluate these involving everyone in the discussion... which can neutralize the impact of the Doomsayer.

Word of caution... sometimes the Doomsayer is playing an important "*Devil's Advocate*" role and may save a group from taking an ill-advised action.

6. The Founder Member: *But we've always done it this way!*

Some Founder's keep abreast of everything new and encourage groups to grow and stretch. Others get stuck in the past. If a Founder can't continue to move forward with the rest of the group, he/she should not be placed in positions of current oversight and planning. Honor these people's contributions and use their knowledge and dedication as institutional memory for celebrations, not real-time deliberations. Term limits for board service should help keep the board refreshed... but don't waste talent, passion and contacts, if the Founder is willing to keep current. Find important work for them recruiting members, contacting legislators, serving as informed mentors.

7. The Well-Intentioned Big Talker... *who never follows through!*

Mentors and co-chairs may be able to help, but the best advice is to assign small, short-term projects to these types...and hold them accountable. Stress how their contributions impact everyone else's assignments. If they fail to deliver, use them in roles that call for generating ideas, not actions. One of the traps organizations fall into is recognizing everyone on a committee, even if all of them did not participate. By only acknowledging extraordinary commitment, some of these people will get the message that actions DO speak louder than words.



TIP: *Talk about these "challenging" volunteer types at a board retreat or orientation. Ask the members to think of ways to alter undesirable behavior and to commit to more appropriate and productive involvement.*

NOTE: Retention requirements vary according to state law. Check with legal counsel when developing your own Retention Policy....this is only an example!

OAFP Records Retention Policy

Associations routinely maintain files and records in a variety of areas, including membership, finances, programs and personnel. In order to retain business records at a manageable level and still comply with legal requirements in the record keeping area, the Ohio Academy of Family Physicians has developed this records retention schedule.

Guidelines have two primary purposes:

1. To ensure that records that should be retained are not discarded
2. To ensure that records for which there is no reason to retain are disposed of in a timely manner.

With these two purposes in mind, the Ohio Academy of Family Physicians records retention policy can be summarized as follows:

- Subject to the exceptions specifically described in this document, file materials in general should not be retained for more than three years.
- Records that are either duplicative of other records or of little consequence from both the operational and legal standpoint need not be retained for three years. Conversely, various laws and regulations, in addition to prudent business practices, require that certain records be retained for more than three years. Those exceptions are described beginning on the second page of this document.
- It can generally be assumed that the three-year record retention period applies to a type of record not listed on the attached schedule. Each individual should exercise common sense in determining whether a file falls outside the general "three-year rule." Check with the Executive Vice President if you are unsure as to what category a particular document falls into or if you believe there may be circumstances that warrant a deviation from the stated policy.
- Regardless of any established record retention period, once an association has any knowledge of an actual or potential legal investigation, claim, proceeding or suit, any records that may have a bearing on the outcome of the matter must be preserved until the matter is concluded.
- If you determine that a particular file should not be discarded, that file should be retained by you as part of your working files or stored in such a manner that it can readily be identified and retrieved.

EXAMPLE ONLY

Specific OAFP Records Retention Requirements*

Accounts payable ledgers and schedules	7 years
Accounts receivable ledgers and schedules	7 years
Annual Members Assembly/House of Delegates handbooks and transcripts	Permanently
Articles of Incorporation	Permanently
Audit/review reports of accountants	Permanently
Bank reconciliation	2 years
Benefit, pension, and insurance plans (with supporting data)	6 years following termination of plan
Board minutes	Permanently
Board meeting agendas, handouts and supplemental materials	3 years
Bylaws	Permanently
Capital stock and bond records	Permanently
Cash books	7 years
Chart of Accounts	7 years
Checks (cancelled)	7 years
Committee Data Forms (with conflict of interest statements)	3 years
Committee Minutes	Permanently
Committee Agendas, Handouts and Supplemental Materials	3 years

* Check state laws before setting policy!

EXAMPLE ONLY

Continuing Medical Education (per ACCME guidelines) - all documentation associated with program development (minutes, promotional brochure, printed program, attendee list, evaluations, and CME approval form).	6 years
Continuing Medical Education Accreditation Applications (Reprint 102 forms)	2 years
Contracts and leases: Expired	10 years
Still in Effect	Permanently
Correspondence: General	3 years
Legal and important matters only	Permanently
Deeds, mortgages, bills of sale	Permanently
Depreciation schedules	Permanently
Employee personnel records: Current employees	Permanently
After termination	3 years
E-mail	60 days
Financial Statements: End of Year	Permanent
Monthly	2 years
History, OAFP (published 1995)	Permanently
Insurance Policies: Claims made	3 years after payment
Workers compensation claims	Permanently
Expired policies	Permanently
Current policies	Permanently
Current incident reports, claims, policies, etc.	Permanently
Inventory list	Permanently
Invoices: To members	7 years
To customers	7 years
To vendors	7 years

Journals	7 years
Lobbyist Registration Statements	Permanently
Membership Records:	
Electronic records for all members since 1995	Permanently
Paper records for deceased members (discontinued paper records for new members in 2000)	3 years following members' death
Paper records for dropped members	4 years following drop date without re-enrolling
Minutes:	
For OAFP Board of Directors meetings	Permanently
For OAFP Commission meetings	Permanently
For OAFP Committee meetings	Permanently
For OAFP Forum and Task Force meetings	Permanently
Notes Receivable Ledgers and Schedules	7 years
Payroll Records and Summaries	5 years
Pension Payment Information	5 years
Petty Cash Voucher	3 years
Property Appraisals (by outside appraisers)	Permanently
Property Records of Properties no longer owned - including costs, depreciation reserves, end-of-year trial balances, and depreciation schedules	7 years
Publications of Enduring Materials:	
<i>The Ohio Family Physician</i> (bound copies of all past issues are kept in library office; in addition 25 copies of each issue are kept from last 3 years).	Permanently
Tax returns and other pertinent records	7 years
Time sheets	5 years
Trademark, service mark and copyright registrations	5 years

Voucher register and schedules 7 years

Vouchers for payments to vendors, employees, etc. 7 years
(includes allowances and reimbursement of employees,
officers, etc. for travel and entertainment expenses.

In the event of pending or threatened legal investigations, claims, proceedings or lawsuits, all records relevant to the matter must be preserved until the matter is concluded.

Dated: 2/2002

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EXAMPLE ONLY == Check state law before setting policy / review with legal counsel