Recruiting and Management
Finding and Keeping the Employees and Freelancers You Need

Panelists:
Katie Burke, VP and Publisher of Pomegranate Communications, Inc.
Shona Burns, Executive Director, Production & Content Management, Chronicle Books
Brad Farmer, CEO, Gibbs Smith
Cynthia Sherry, Publisher, Chicago Review Press
Areas for Discussion

1. Job Descriptions and Job Ads
2. Interviewing
3. Employee and Freelance Contracts
4. Onboarding and Company Manuals
5. Employee Management
Job Descriptions and Job Ads

Panelist: Shona Burns
Job Descriptions

What does the job need to achieve?

• What’s its **purpose** and what are the **tasks** necessary to achieve this?

• How do you **align** purpose with the other roles that work alongside this job and those that might report to the role.
Job Descriptions at Chronicle Books

Associate Design Director, Entertainment Publishing

PURPOSE OF POSITION:
Members of Chronicle Books’ Design Department create the company’s unique visual aesthetic by producing some of the most innovative, well-designed titles in the market. They manage multiple projects simultaneously and guide all elements of their projects – whether it be covers, interiors, or packaging -- from conception through manufacture. An Associate Art Director manages other Designers, guiding the quality and appropriateness of their work, and cultivating their career advancement. They also assume a leadership role within the Design Department, as well as within focused publishing groups, charged with establishing creative goals around specific categories, while driving toward the financial goals set for our publishing.

PRIMARY DUTIES:
As an Associate Design Director include but are not limited to the following:
• Art direct, project manage, and design a range of book, non-book, and book-plus titles for Entertainment categories (i.e. pop culture, tv, music, movies, humor, sports, trivia, etc); projects with licensing partners (i.e. HBO, Disney, Lucas Films, Showtime, STARZ, Sanrio); and retail proprietary projects (i.e. Target, Barnes & Noble).
• Scout and hire outside designers, illustrators, and photographers.
• Collaborate with editorial, production, and marketing team members in-house to realize a collective vision.
• Project Manage and prepare sales materials for Spring and Fall Book Clubs, book fairs (Frankfurt, Bologna, London, etc.), and catalog.
• Build and share information and expertise with fellow designers and other project team members.
• Manage 1-2 other Designers as they drive the same responsibilities outlined above.

The position also requires the Associate Design Director to participate in the Entertainment publishing group, for which tasks include, but are not limited to the following:
• Build, share, and voice expertise, not only as a designer but also as an authority on the publishing category’s consumer, marketplace, trends, and competition.
• Help develop and implement a vision and strategy for the publishing group, with the goal of publishing distinctive and profitable titles.
• Originate and develop new ideas and new formats for publication.
Marketing Projects Assistant

Purpose of Position: To support the Marketing department in key project areas.

**General**
- Report to Manager on a weekly basis.
- Handle departmental administrative tasks, including coding the company credit card.
- Attend and participate in all appropriate departmental meetings (as required), appropriate trade show planning meetings, and team-building events.
- Work openly and supportively with the entire marketing department.
- Be a team player when interacting with other departments and employees.
- Honor all company policies.
- Be able to lift parcels between 10 – 20lbs.

**PRIME DUTIES:**

**Award Submissions (40%)**
- Research new awards and grow award submission list as needed; continually seek ways to promote the awards program with the goal to increase sales. Submit titles to all eligible international, national, state, and consumer awards. Update and maintain award submission records.
- Foster positive relationships with award committee members.
- Update Sales, Marketing, Export, and relevant Pub Groups with new award announcements.
- Order award seals, manage invoices, and track award-related expenses.

**Sales Materials (40%)**
- Receive, track, and distribute advances as they arrive.
- Work with sales materials assistant to create mockups and other sales materials.
- Oversee the sales kits: collect advances and marketing materials; lead the packing and shipping of Chronicle sales kits each season, organizing colleagues to assist.
- Help create necessary materials for trade & consumer events.
- Manage the book room and catalog stock.
- Maintain organization of sales kits and show staging areas.

**Mailings, Displays, and Event Marketing (20%)**
- Work with marketing managers on mailings, book requests, donations, and prize fulfillment.
- Work with marketing managers on institutional and trade conference prep and mailings.
- Assist with maintaining up-to-date influencer mailing lists.
Job Advertisements

Why would someone want to work here?  
(other than for the pay check + benefits)

What’s this company about?  
(why are you in business...)

What will you get to do and why is it important?  
(make it sound interesting...and fun!)
Job Descriptions at Chronicle Books

Associate Design Director, Entertainment Publishing
Chronicle Books seeks an Associate Design Director to join its Entertainment publishing group which is responsible for such titles as the Inside HBO’s Game of Thrones series, Pop Trash, and I Could Pee On This. Chronicle Books’ design department creates the company’s unique visual aesthetic by producing some of the most innovative, well-designed titles in the market. Our designers manage multiple projects simultaneously and guide all elements of their projects – covers, interiors, and packaging -- from conception through manufacture. The Associate Design Director will manage...

Who We Are
Chronicle Books was founded in 1967 and continues to be one of the most admired and respected publishing companies in the United States. Over the years, we have developed a reputation for award-winning, innovative books and gift products. Our independent company continues to challenge conventional publishing wisdom, setting trends in both subject and format across a list that is as diverse as it is distinctive. We value collaboration and creativity, we have a passion for design and quality, and we insist on surprising and delighting our readers. To succeed in our work, we seek and hire people who are committed to the open exchange of ideas and who help us cultivate an atmosphere of mutual accountability and trust.

Our mission says it best:
**Inspired by the enduring magic of books, we cultivate and distribute exceptional publishing that is instantly recognizable for its spirit and creativity. Our collaborations spark the passions of adults and children worldwide, encouraging them to explore, connect, and see things differently.**

Task list or Duties as per job description.
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Task list / Duties / Primary Job Responsibilities as per job description.
Desired Qualifications.
A word about Qualifications:

- Some of the words are obviously skewed toward male stereotypes, like when tech companies seek out “ninjas.”
- A job listing might promise a work environment where “we work hard and play hard,” for example — and not realize this suggests bias against those who may think “playing hard” simply means going out for drinks all the time or being a 20-something.
- In a 4000 job description study, potential applicants found that only using masculine-themed words such as active, competitive, dominate, decisive, and objective made job descriptions less appealing to women, compared to descriptions that also used feminine-themed words such as community, dependable, responsible, and committed. Many of these words are synonyms and can be interchanged. By using a mixture of both, you create an image of a balanced culture open to both genders.

(Emily Peck, Huffington Post, Forbes, HBR 2015)
Job Description

We are looking for a technical leader to build our next generation of inventory planning, and vendor selection. We build scalable automated platforms that find the economically optimal sourcing plan for millions of unique SKU sold worldwide. This puts us at the nexus of retail, suppliers, operations, logistics, and capacity planning. Our software is a critical link to ensuring the products our customers want are available when they need them.

We have a highly scalable Distributed Systems Architecture and own about 20 services. We extensively use MapReduce, AWS Datastores like S3, Dynamo, and Performance. We have our own Research and Product Management Team. We aim high and inspire change. In this role you will work closely with some of the smartest software engineers, scientists, and product managers to define problem requirements, invent algorithms and solve highly challenging problems of supply chain. Our company mantra is Create Something Better. You will be responsible for designing the architecture, building the software, and working with the team to create and market groundbreaking solutions across the globe. You will lead inter-departmental design discussions with senior engineers and Principal Engineers. This is an opportunity to both create and see the direct impact of your work on billions of dollars of inventory in one of the world’s most advanced supply chains.

You love to dive deep into technical architectures & requirements are able to quickly identify solutions to challenges discovered during development. You are ready to work with the latest cloud computing technology. Prior experience building stable, scalable, solutions is required. Prior experience with data mining, databases, or massively distributed systems, map reduce, Cloud Computing. AWS Datastores is a plus. You love collaborative environments (deploying code continuously) that use agile planning techniques, encourage and reward creative design, intelligent risk taking, and find innovative ways to deploy cutting-edge technology.

You are a real self-starter. You will function as technical lead throughout the full development lifecycle (we do scrum), end-to-end, from scoping, planning, design, implementation and testing, to precise documentation, delivery and maintenance. We have a creative culture that creates new opportunities for technical leaders. You will provide design reviews for other engineers, including feedback on architecture and design issues, as well as integration, performance, and scalability. You will manage resources on multiple technical projects and ensure schedules and priorities are compatible with technology and business goals.

Strengths:
- Use positive language
- Limited corporate cliches
- Strong equal opportunity statement
- Strong use of active language
- Appropriate use of adjectives
- Strong use of verbs

Problems:
- Not enough bullet points
- Needs more 'you' statements

Tone:
- Negative
- Positive
- Repetitive
- Masculine
- Feminine

How does it work?
Where to advertise what works? Chronicle Books Context

In 2018

New fulltime hires: 31 people
All new hires: 51 (Part time, Contractors, Interns, Fellowships)
Total applications : 3566 (give or take)

Core turnover: 9% compared to 14% in 2017
Where to advertise what works? Chronicle Books Context

These statistics have driven us to change our approach to the hiring process.

**Before**: Publishers Weekly, Publishers Lunch, Local Associations, CB Website. LinkedIn for senior roles.

**Now**: LinkedIn Recruiter + Active Networking encouragement (Ambassadors) + Specialist Associations e.g. AIGA. BAWiP
Assessing Resumes and Candidates.

- Why are they applying – cover letter is important but it should to be personalized to catch your attention.
- How well do they know your company – says a lot.
- Ability to follow instructions...seems simple right?
- Put yourself in their shoes and consider their motivation for applying. (Read between the lines).
- Consider the outlier. It can be refreshing.
Interviewing

Panelist: Katie Burke
Interviewing for Permanent Positions

I. PHONE INTERVIEW

Always have a brief phone discussion before meeting anyone in person. You can assess their speaking skills and a bit of their personality. The phone interview should feature questions that can be quickly answered and should ideally not last more than 30 minutes.

1. Ask them what they know about your company and their understanding of the position.

2. Ask for a brief summary of the candidate’s current position and its responsibilities, primarily to assess their ability to communicate. Are they concise? Articulate? Do they ramble and go off subject?

3. Ask why they are interested in the job.
4. Review the position based on the job description and confirm that the requirements suit them, such as work schedule, travel obligations, onsite or remote work.

5. Other questions might address these points, or any others that are key to the position:
   - software experience
   - ease with public speaking
   - travel time required for the job
   - physical requirements (can you lift 35 pounds?)
   - experience working with a team

6. Ask for the candidate’s salary or hourly pay requirement.

7. Let them know when you will be back in touch.
II. VIDEO INTERVIEW

This can be a useful intermediate step between the phone call and meeting someone in person. If one person does the phone interview and isn’t certain about going forward with an in-person interview, a video conference call can include a colleague to further assess the candidate.
III. TESTS

For some positions, consider requiring the candidate to complete a test before they can be invited to an interview. Tests can also be required after or during the interview. See examples in the hand-outs.

EDITORS:

Ink on paper books:

Supply a poorly written piece and have them copy edit it, using the software you specify and your company’s style guide (or indicate they should use the *Chicago Manual of Style* or any other reference).

Supply a printed piece to proofread.

eBooks:

Devise copyediting/proofreading tests accordingly.
GRAPHIC DESIGNERS:
Supply text, images, page dimension, and a brief description of the project to provide context. Understand that if the candidate completes the test remotely, they might not have a wealth of fonts to choose from, or may not have access to InDesign outside of work.

COPY WRITERS:
Supply enough information about a person or subject and require a written piece limited to the word count you specify.

GENERAL:
Test for understanding of the basic applications the candidate will be using, such as Excel, Word, etc.
IV. IN-PERSON INTERVIEW

1. It’s extremely beneficial to have at least two people conduct the interview, if possible.

2. Write your questions down for your own reference; don’t wing it.

3. Consider creating a standard interview guide for your company. Include questions that can be asked of any position, those specific to a department, and room for the interviewer to include their own.

4. Consider a rating system: mark the candidate on a basis of 1 to 5 for each question. This can be invaluable when trying to compare candidates.

5. Don’t reveal too much about your company until you’ve learned more about the candidate.
QUESTIONS (see handouts)

THE BASICS: 
skills, experience, interests outside of work. Reaffirm that your needs are met by the candidate’s experience.

DON’T ask: age, marital status, commute time, political leanings, health issues

SITUATIONS: 
how they handle tough customers, coworkers, situations; how they solve problems. Describe a situation and ask them to solve it.

PAST AND FUTURE: 
Long-term goals, name a life disappointment, success. Don’t limit your questions to the job. You want to know who this person is. Ask about their hobbies, favorite books, the last museum they visited, etc.
POP QUIZZES DURING THE INTERVIEW (see handouts)
No matter what the subject of your pop quiz, make sure it includes obscure information. You want to see how the candidates handle not knowing an answer. Let them know you don’t expect them to know all the answers.

EXAMPLES:
Technology. Read a list of terms out loud to the candidate and ask for brief definitions.

The Focus of Your House. What does the candidate know about art, recipes, national parks, literature, travel, international currencies, contemporary culture? Rattle off some questions pertinent to your booklist, and ask for quick answers.
   Facial expressions: eye contact, biting lips, raising eyebrows
   Body Proxemics: fidgeting, personal space, crossing arms, posture, excessive nodding
   Ornaments and appearance: constantly preening, playing with jewelry

7. Assess their professional manners.
   Hand shake.
   Interrupting.
   Listening skills.
   The Glass of Water test.
8. What’s left?
Invite them to ask you any questions. If they have none, that can be a worrying sign, depending on how much they already asked.
If you require references, ask for them.
Let them know when you’ll be in touch.
After they’ve left, quickly review your notes and rating scale, alone or with the other interviewers, to solidify your impressions.
V. SECOND IN-PERSON INTERVIEWS

For higher-level positions, it’s often wise to offer a second in-person interview. You may need to bring in colleagues to get more opinions; you may just need to confirm your own decision.

Before the second interview, review carefully the information received at the first and decide on your second round of questions. It’s fine to ask some of them again; it can be illuminating to see if you get a different answer to the same question. Don’t worry about repeating yourself.
VI. MAKE THE OFFER

1. Do it in writing; send via email.

2. Include salary, work hours, all benefits, (vacation time, Federal holidays, sick time, 401K or other retirement plan, health insurance).

3. Stipulate that there will be a 90-day introductory period, after which some or all of the benefits will be initiated (dependent on your manual as well as on requirements from state and insurance companies).
HIRING FREELANCERS

1. Phone interview first.
2. Appropriate tests.
3. Second interview in person or via video.
4. Get references from freelancers other clients.
5. Make sure your specifications for the job include stages of deliverables, production schedules and deadlines, company visual branding and editorial guides, objective of the project.
RESULTS FROM BEST RECRUITING PRACTICES

1. If it’s not working, cut your losses and move on.

2. Remember to trust your gut and listen to your little voice.

3. Review the experience: consider modifying the job description, reassess the most important aspects of the position.

It’s a crapshoot!
Employee and Freelancer Contracts

Panelist: Cynthia Sherry
Do you need a contract for an employee?

• No, you do not need a written employment contract for most employees.
• Employees work under an implied contract governed by state and federal laws.
• Most states are governed by at-will employment laws, but there are some exceptions. You can search online to find out if your state is an at-will employment state.
• Know your state’s employment laws and consult with an employment-law attorney or HR professional when necessary.
What does at-will employment mean?

- At-will employment means that you can terminate an employee for whatever reason you want without “just cause” and without warning, provided the reason is not illegal.
- An illegal termination would be one based upon race, religion, sex, national origin, military service, union affiliation, marital status, whistleblowing, disability, and age (typically anyone over 40).
- In an at-will employment state, an employee is entitled to leave their job without reason or warning, but two weeks is standard notice.
What are probation periods?

• Some companies use a 30- or 90-day probation period to train new hires and give them extra feedback on their work.

• This arrangement would most likely require a written agreement.

• The idea is that if the new hire is not a good fit for your company then you could terminate their employment for any reason after the probation period.

• We do hire interns for a 3-month term and pay them. Our internship program serves a similar purpose in terms of determining company fit and skill level at the entry level.
When would an employee contract make sense?

• Sometimes high paid executives needing to relocate will want an employment contract.
• This often includes a 6-month trial period and a multi-year term with a set salary.
• It avoids expensive salary renegotiations and provides some security for both parties.
What are the benefits of written job descriptions for employees?

- They help you determine exempt versus non-exempt status.
- They help you manage your team and expectations.
- They lessen confusion and misunderstandings for both parties.
- They aid in evaluating an employee’s work.
- They make future hiring easier.
Are offer letters necessary?

• Signed offer letters are not necessary, but we like them as a formal way to start the employment.
• An offer letter gives the start date, work hours, salary, number of vacation days, and what benefits will be available.
• They make new hires feel important and respected.
• They help avoid confusion about starting salary and work hours.
How should I handle freelancer agreements?

• You should have a signed written agreement when hiring outside freelancers for cover designs, interior designs, illustrations, maps, and photographs.
• You want to secure all the necessary rights to sell your book everywhere your author contract allows.
• Don’t forget to clarify rights for e-books, audiobooks, foreign editions, paperback editions, and publicity and sales materials.
• Stipulate if this is a work-for-hire arrangement, an exclusive agreement, or a non-exclusive agreement.
What other letters or forms are useful?

- Job change forms
- Written warnings
- Severance package letters
Onboarding and Company Manuals

Panelist: Brad Farmer
MAKING CHANGE: Culture Content Commerce

February 7–9 2019 Santa Fe

DILBERT
BY SCOTT ADAMS

CATBERT: EVIL DIRECTOR OF HUMAN RESOURCES

OUR EMPLOYEE ONBOARDING PROCESS WILL GET YOU ALL MAINSTREAMED IN NO TIME AT ALL.

THIS WILL BE YOUR CUBICLE. IF WE CAN FIND ANOTHER PLACE TO STORE THIS JUNK.

YOU'LL GET A PHONE AND A COMPUTER IF THE BUDGET EVER GETS APPROVED.

THIS IS ALICE. SHE WILL BE YOUR MENTOR.

I DON'T HAVE TIME TO BABYSIT! I'M BURIED IN WORK!

I DO NOT LIKE YOU. I... DO... NOT... LIKE YOU!!

STAND IN THE HALLWAY AND READ THESE BINDERS. IF YOU LEARN ANYTHING, FORGET IT, BECAUSE KNOWLEDGE ISN'T REWARDED HERE.

TRY GIVING UP HOPE. IT TURNS THE BAD FEELING INTO EMPTINESS.
Onboarding

Four Key Areas:
1. Employee manual and documents
2. Tour & introductions
3. Job-specific training
4. Cross training
Onboarding

Core Concepts:
1. Employee manual is for answering employee questions and providing legal cover
2. Introductions are for the existing employees, not the new employee
3. Time and money invested in training makes employees want to invest time in you, and not training can be very expensive
4. Cross training builds bridges and opens up efficiencies
Onboarding

Training - Expectations Statements:

1. Rules governing a working relationship
2. Manager’s expectations could include response time, forum for asking questions, and where to go for help.
3. Employee’s expectations could include how to provide feedback, communication timing and frequency, and schedule or other flexibility.
Brad’s Expectations as a Manager

The following are the “ground rules” that are unique to our working relationship. It includes my preferred methods of working, reporting, relating, obtaining feedback, delegating assignments, conducting or attending meetings, communication, etc.

Our Working Relationship:

- Have a career orientation—I want you to grow with the company.
- Have a positive outlook and don’t give up on difficult issues.
- Pass negatives to me, positives to those you manage and other coworkers.
- Don’t let questions or concerns lay dormant – air them out immediately.
- All questions are fair game – don’t think that anything is too trivial to talk to me about.
- Expect to be challenged and to have additional responsibilities added.
- Expect to receive support for your challenges and training and coaching in new responsibilities.
- Admit your weaknesses and ask for help early.
- Expect me to explain “why”.
- Remember that one of my primary responsibilities is to support you – demand the time you need from me.
Onboarding

Training – Job Specific:

1. Written instructions for infrequent, technically difficult or involved processes rather than detailed instruction manuals

2. Detailed job descriptions
Onboarding

Written Instructions:

How to Change Product Code in SQL Server

Whenever a product code is changed in Acumen, it needs to be manually changed in Tableau or the sales won’t tie to the updated products table.

To change the product code in SQL Server/Tableau, update the following code with the new product code after the set statement and the old product code after the where statement:

```sql
update [AcumenPublisher].[dbo].[AcumenSalesandReturns]
set Product_Code = '〈insert new product code here〉'
where Product_Code = '〈insert old product code here〉.'
```

If a product code is changed to accommodate setting up a new product with the same code, this change should be done in SQL before the new product starts to have transactions. If it isn’t, additional where clauses are needed in the sql to filter out transactions with the new product.

Example adding the date to the statement:

```sql
where Product_Code = '〈insert old product code here〉' AND Invoice_Date < '20180101'
```
Onboarding

Training - Detailed Job Descriptions:

1. Broken down into key deliverables and detailed job responsibilities

2. Created for job roles, not people – some people have multiple job descriptions
ESOP Trustee

Key Deliverables:

- Ensure the ESOP plan is operated in accordance with its provisions and the law for the exclusive benefit of plan participants.

Key Responsibilities:

- Approve the annual valuation.
- Vote the ESOP shares for members of the Board of Directors.
- Work with the plan administrator to ensure all aspects of ESOP administration are happening correctly and timely.
- Train annually on ESOP laws, regulations, and responsibilities.

Key Skills and Attributes:

- Detail-oriented.
- Ability to read financial statements and understand key business financial concepts.
- Ability to make independent decisions using individual judgment.
- Desire to learn and adapt to changing regulations and requirements.
- Commitment to organized training.

Experience Required:

- Three years' experience with the company.

Detailed Responsibilities:

1. Reporting
   a. Reports to: The Board of Directors
   b. Member of ESOP Committee
   c. Does not manage employees

2. ESOP Management
   a. Hire and manage the valuation consultant annually, in particular:
      i. Evaluate and approve the valuation report and share price annually.
      ii. Read the valuation report and understand the factors that influence the share price.
      iii. Verify that the company information in the report is accurate.
      iv. Review the report with the valuation consultant to verify that the valuation
Employee Manual

Five Key Areas:
1. Introduction to the company
2. General policies
3. Performance management
4. Benefits
5. Contact information
PUBWEST

February 7–9
2019
Santa Fe

MAKING
CHANGE:
Culture
Content
Commerce

39 pages, 12,434 words
Employee Manual

Some examples of policies in our manual:

1. Attendance
2. Termination
3. Compensation
4. Performance Management
5. Employee Ownership
6. Equal Employment Opportunity
7. Harassment
8. Bullying
9. Drug-Free Workplace
10. Workplace Violence
11. Privacy
12. Nepotism
13. Outside Activities
14. Grievances
15. Work-at-Home
16. Social Media
17. Technology
18. Benefits
Behavior Expectations

Terminal Behavior: Behavior resulting from character flaws or lack of judgment so severe that there is significant risk to the reputation or financial health of the Company.

The following behaviors, once verified and not merely suspected or accused, will result in immediate termination:

- Sexual harassment in any form.
- Dishonesty, deception, or misrepresentation.
- Embezzlement or theft, any misappropriation of money, supplies, inventory, or equipment belonging to the Company.
- Insubordination, including any act which is deliberate and adverse to the Company’s best interests.
- Illegal drug use or any use of legal substances that impairs job performance.
- Any relationship with an employee of our customers or vendors that could impair judgment or create a conflict of interest.

Performance-Inhibiting Behavior: Behavior resulting from inadequate knowledge, training, skills, or experience, which impedes the employee from achieving their optimal results and may hinder other employees from achieving their optimal results.

The following behaviors will result in additional discussions with your supervisor, and may result in termination if uncorrected:

- Failure to keep the schedule outlined by your supervisor, including time to report to work, working hours, and length of breaks.
- Lack of respect for time, property, and space belonging to other employees, authors, customers, or vendors; includes any behavior that detracts from the work environment for others.
- Inadequate care for supplies, equipment, or inventory in the employee’s possession.
- Lack of professionalism and attention to detail in work.
- Failure to work towards the company’s best interest, includes lack of cooperation and teamwork.
- Any gossiping or backbiting. General negativism expressed outside of situations where input can be used for critical evaluations or improvement.
<table>
<thead>
<tr>
<th>Experience Required</th>
<th>Knowledge/Education Required</th>
<th>Job Complexity</th>
<th>Impact on Company and Accountability</th>
<th>Development and Leadership of Others</th>
<th>Creativity and Innovation</th>
</tr>
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<tbody>
<tr>
<td>Requires more than 10 years of experience with the company or in the industry.</td>
<td>Requires advanced, post-graduate education and training and specialized knowledge. Continuing professional education is also required.</td>
<td>Ability to deal with extremely complex, independent and non-repetitive threats and opportunities requiring problem-solving, reasoning and negotiating ability. Role requires the ability to think and act independently.</td>
<td>Major critical responsibilities. Significant impact on the company for decisions and execution. Company-wide budget accountability.</td>
<td>Requires extensive development and leadership of others. Core part of role is to get things done through others.</td>
<td>Generates new ideas for brands, books, lines of business, or markets with proven track record for success in marketplace. Identifies and understands overall trends in the marketplace and how to capitalize on those trends.</td>
</tr>
<tr>
<td>Requires five or more years of experience with the company or in the industry.</td>
<td>Requires at least a bachelor’s degree and specialized training and knowledge. Cannot be obtained through on-the-job training alone.</td>
<td>Requires some advanced training, trade school or some college.</td>
<td>Critical responsibilities at a business segment level. Significant impact on the business segment for decisions and execution. Business segment budget accountability.</td>
<td>Oversees department and employees within.</td>
<td>Has a proven track record of crafting winning or competitive brands, books, products to appeal to a market. Understands the needs and tastes of targeted markets. Can customize sales approaches to appeal to a broad variety of customers. Finds new effective approaches to business problems, processes, and relationships.</td>
</tr>
<tr>
<td>Requires at least two years of meaningful experience that does not have to be company- or industry-specific.</td>
<td>Requires some advanced training, trade school or some college.</td>
<td>Regulates deals with complex issues requiring problem solving with minimal input.</td>
<td>Critical responsibilities at a department or group level. Limited autonomy to make decisions without management input. Responsible for safety practices of individual department or group. Some budget accountability.</td>
<td>Supervises a team, small group, or third parties such as authors, sales or vendors. Generally does the same work as employees with some additional management responsibilities.</td>
<td>Is able to implement a creative vision established by another individual, such as a creative brief, design briefs, or sales information. With little supervision or direction. Enhances existing business processes and relationships through new ideas. Participates meaningfully in brainstorming sessions.</td>
</tr>
<tr>
<td>Some experience preferred but not required.</td>
<td>Some special training or knowledge is required.</td>
<td>Some complexity and problem solving.</td>
<td>Responsibilities at a department or group level. Limited autonomy to make decisions without management input. Responsible for safety practices of individual department or group. Some budget accountability.</td>
<td>Performs some training of other employees. May lead when the primary manager isn’t available.</td>
<td>Can implement the creative vision established by another individual with supervision. Can understand and implement business process changes.</td>
</tr>
<tr>
<td>2-3</td>
<td>May be acquired on the job.</td>
<td>Occasional complexity, little problem solving.</td>
<td>Minor responsibility mainly over workstations, equipment used, and personal safety.</td>
<td>No requirement to develop or lead others.</td>
<td>1</td>
</tr>
<tr>
<td>9-10</td>
<td>Little to no training or knowledge is required.</td>
<td>Simple, non-complex with no problem solving.</td>
<td></td>
<td>2-3</td>
<td>Creatively enhances individual job responsibilities.</td>
</tr>
</tbody>
</table>
Your Guide to Benefits and Enrollment
Plan year 2019
For copies of documents or questions, email me at

Brad.Farmer@gibbs-smith.com

bfarmer
Employee Management

Panelist: Shona Burns
Employee Management

- Values: focus to shift the 63% in the middle
- Align Constraints
- Develop Competence
- Grow Structure
- Improve Everything

Engage:
- the 24% actively disengaged
- Energize People

Culture:
- keeps the 13%, increases their number

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I FINISHED YOUR PERFORMANCE REVIEW.

TERRIFIC. IT'S NINE MONTHS LATE AND ALL YOU DID WAS SIGN WHAT I WROTE.

I THINK I ALSO READ IT, BUT I'M NOT 100% POSITIVE.
Reviews @ Chronicle Books

Previous:
- Twice a year.
- Took weeks to prepare - self reviews, scoring for organizational competencies, peer feedback, three pages of comments.

Now
- Once a year. Competencies for guidelines only. Peer feedback at managers discretion. One page.
- Mid year check-in: “should be no more than what you can write on a post it”
## Competencies +/versus Strengths

### GOALS PROGRESS AND PERFORMANCE

**Chronicle Books’ Core Competencies**

**Problem Solving & Decision Making:** Practicality, Judgment, Creativity, Adaptability, Decisiveness

**Driving Results:** Organization, Project Management, Initiative, Perseverance, Innovation, Productivity

**Communication:** Persuasion, Collaboration, Conflict Management, Information Sharing, Feedback

**Professional Competence:** Optimism, Open-Mindedness, Self-Direction, Accountability, Credibility, Fiscal Responsibility, Professional Knowledge

**Supervisory Positions Only:** Leading, Hiring/Succession Planning, Staff Development/Training, Performance Management, Change Management, Teambuilding, Strategic Thinking/Planning

### GOALS for COMING YEAR.
What are WE trying to ACHIEVE with Reviews?

1. EXPECTATIONS
Managers set clear expectations to help employees achieve business and personal goals.

2. FEEDBACK
Managers and employees provide each other with ongoing and constructive feedback.

3. DEVELOPMENT
With support from their manager, employees drive their own growth and development.

MAKING CHANGE:
Culture
Content
Commerce

February 7–9
2019
Santa Fe

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Best practices for Check-in

The purpose of Check-in is to make sure employees' expectations are clear, share feedback, and discuss development needs to enhance their performance. The flow of Check-in follows three core steps:

1. **Expectations:**
   First, agree what is expected of employees for the year in terms of deliverables, behavior and contributions.

2. **Feedback:**
   Next, provide frequent, two-way feedback to see how employees are progressing against expectations and let managers know if they could be doing something differently to better support the employee.

3. **Development:**
   Then, when employees know how they are performing, they can plan actionable goals in terms of learning, career and experience.
A word about motivation.

![Maslow's Hierarchy of Needs Applied to Employee Engagement](image-url)
Unsatisfactory work:

Performance improvement:
• Explain what behaviors, or work, is not acceptable
• Be specific, give examples.
• Explain what impact these behaviors or situations are having on the business, and why they are unacceptable.

Desired Results
• Define timeframe for improvement and build specific expectations for change. E.g’s.
  • You must be more proactive about (blank). For example, you should be researching (blank) and communicate your findings to your supervisor.
  • Rather than complaining about situations you don’t like, you must approach these frustrations with a positive and results-oriented attitude; for example, (blank).
  • If you are in or are aware of a situation which you think is unfair or disagreeable, please limit your negative comments to your supervisor rather than sharing them with your direct reports or other employees. This will be a critical piece of regaining credibility with the staff.

Agree structure of feedback and what reporting will be necessary:
• Meet regularly, and give immediate feedback.
REWARDS
Thank you for attending!