Stefanie Keto: Welcome to SRAI Shop Talk, a monthly podcast spotlighting the people, practices and evolving landscape of research administration and the community that works collectively to support it. Whether you are new to the field or a seasoned pro, each episode features insights from experts across institutions, big and small, working in pre-award and post-award compliance, communication and everything in between.

I'm Stefanie Keto based at the Office of Post-Award Financial Services at North Carolina State University. This season we're exploring the theme Bridge Builders: Creating unity across roles, generations and technologies.

Research administration has grown into an incredibly vast and complex landscape, which means building a bridge between the leaders of today and the rising talent of tomorrow is one of the most critical challenges our institutions face. When we look to the next generation of employees to step into a leadership role, we have to ask ourselves some tough questions. Is your unit actually ready for a leadership shift? Do you have a real succession plan in place? Or is your current model starting to show some cracks?

In today's episode, we are navigating these exact transitions. We are joined by two experienced administrators in our field who have tackled this exact challenge in their respective institutions, Dr. Robert Nobles and Gloria Greene. Together, we are exploring how to build a proper foundation for succession planning, cultivate a winning team culture, and protect our institutions for the long haul. So let's get started on building that strong foundation.

Welcome to today's episode of Shop Talk. Joining me, I have a wonderful group of folks who are going to talk about succession planning and specifically in the realm of leadership. But first off, we have a surprise for everybody. We have a wonderful co-host joining us today. So I'm going to ask, will you please introduce yourself and provide an overview of what you do?

Kania Greer: Sure. Hi, everyone. My name is Dr. Kania Greer. I am a research liaison at Kennesaw State University in Georgia. My job is to be the in between the research office and the faculty to help the faculty with minor administrative questions that they might have as they're submitting proposals and taking care of post-award.

Stefanie Keto: Thank you. I'm really excited that you have decided to join us for today's episode in hosting.

Now we're going to move to our wonderful guests that have afforded their opportunity to share their knowledge with us about leadership succession planning. So will you both be able to introduce yourselves and provide an overview of your roles and expertise?

Dr. Robert Nobles: We'll do ladies first.

Gloria Greene: Oh, [inaudible 00:03:09]. Thank you. I am Gloria Greene. I am the assistant vice president for contracts and grants and research compliance at the University of Alabama in Huntsville. I have been doing this for over 30 years. I've been involved in research administration, including pre-award contracts, grants management, research compliance, and organization leadership. So I've been dabbling in all the little nuances of research administration.

In addition to my institutional role, I have been actively involved in SRAI, including serving as president, immediate past president. I absolutely love professional development. So anytime I'm given the opportunity to present a session or a workshop or anything to talk about professional development, I'm the first one to raise my hand. So throughout my career, I have learned that our greatest responsibility is not managing current work, but also preparing others to lead in the future. And that's what I always attempt to do.

Dr. Robert Nobles: Yeah. So I'm Dr. Robert Nobles, Senior Vice President for Health Sciences Enterprise and Research Innovation at Florida A&M University. Transitioned over to Florida A&M a couple months ago. I was at Emory University for six and a half years prior to that as vice president for research administration, and then University of Tennessee before that as interim vice chancellor for research for the volunteers. And so I spent six years there, Texas A&M, before that, University of Texas. But what I'll say is Gloria gave her update on the role that she plays with SRAI. I am currently a conference co-chair for Honolulu in October and look forward to really having as many individuals join us. We created a new professional development leadership track at this upcoming SRAI meeting to really dig down into strategy in research administrative offices and helping people transition away from just the operational components for which they have responsibilities for.

But background-wise, I'm an epidemiologist. I used to be with CDC, Centers for Disease Control and Prevention. In the '90s, I was a faculty member and I love administration, so I kind of toggle between the two and I'm a lifelong giver of educational opportunities for others. So any way that I can help others, I'm all in.

Stefanie Keto: Well, thank you both for coming and joining, and also thank you, Kania, for coming as well.

To kick it off, we'll just start off with our first question for you. Many institutions are preparing for significant leadership transitions over the next decade. I know mine definitely has a bunch knocking on the door. So from your perspectives, what does an effective succession planning look like for research administrators and when do organizations need to start beginning to prepare their future leaders?

Dr. Robert Nobles: It's a really good question. Gloria, you mind if I go first?

Gloria Greene: Oh, absolutely go ahead.

Dr. Robert Nobles: All right. Because we find this cycle in research administration to be much more fluid than what it has been in years past. And I'll say this, many years ago, I was looking at leadership roles, vice president and AVP level with the Association for public and land-grant universities, and we saw that the average tenure of a vice president of research was about three years a decade ago. What happened as a result of that and what was the phenomenon going on really came down to people being hired into roles and not having the orientation and understanding of that role. So they spent a year trying to figure it out. They upset people in year two, and then the institution spent the whole third year trying to get rid of the individual.

Stefanie Keto: That's one way to put it.

Dr. Robert Nobles: And then they repeat the cycle. And so one of the things that a colleague of mine, Alicia Knoedler, who runs the GRANTED program with NSF, we wanted to do was we created a fellowship for rising leaders within the research office to prepare individuals that were directors, assistant VPs, and associate VPs for whenever they wanted to pursue an opportunity of heightened leadership opportunities or just expand their understanding to support the research enterprise so that the longevity of the person who's sitting in the vice president seat could be extended. And so we created this fellowship and began really digging into professional development activities, creating cohorts and finding opportunities for colleagues to leverage the knowledge of other colleagues so that they're not doing it by themselves.

So you asked the question, when is it time? I think it's beyond the time of when we need to start preparing for leadership and leadership roles. I think where we're going to go in this conversation is how to operationalize this sense of urgency around building capacity and building up teams so that the next leader will be ready day one instead of needing a ramp up of months or sometimes years of experimenting with leadership before they actually get it right. And I think we, in our respective role, should prepare individuals for what is forthcoming, should they desire. And that's the other thing that I've learned along the way. Not everyone is interested in rising to other leadership roles, and we need to be respectful of that. I would not force anybody down the leadership altruistic role of taking care of other people when they don't want to do it. That's like forcing somebody into parenthood and they really, really want to focus on themselves.

And so I think there's some work here, but I'll turn it over to Ms. Greene to talk a little bit from her perspective and then we'll engage in this conversation.

Gloria Greene: Well, I do. I agree with what you said. I also believe that in research administration where we look at... We have regulations that are involving expertise is gained through experience. So succession planning should start when an employee joined the organization, not when someone announced retirement. Like you said, there are times when we bring individuals, put them in positions, find out that the individual put in a position isn't working out well, and then three years later, they're gone. So we also need to take in consideration as Robert stated is that not everyone wants to go in advance. Some people are perfectly happy and comfortable where they sit. And if you see this rising star in your organization, I would caution us as to not push that individual to move on to some area that they may not want to be in or they're not comfortable in.

The whole purpose of succession planning is to build organization resilience rather than rely on a few key individuals.

Kania Greer: I absolutely agree with you. I'm sorry, Dr. Nobles, you were going to say something else?

Dr. Robert Nobles: Well, I was just thinking about some of the rising stars that we have. The only thing I'll add and then turn back over to you, Kania, is that there is something beautiful about people who are really good at their job of production.

Gloria Greene: Yes.

Dr. Robert Nobles: Right?

Gloria Greene: Yes.

Dr. Robert Nobles: And if you're really, really good at your job of production and don't have a desire to help other people produce, you should stay in the production job-

Gloria Greene: Absolutely.

Dr. Robert Nobles: ... where you are successful.

Gloria Greene: For real. Absolutely. Yes.

Dr. Robert Nobles: Right?

Gloria Greene: Yes.

Dr. Robert Nobles: And so I think people want more. They want more title, they want more income, they want more impact, but they have to be real with themselves, right?

Stefanie Keto: More money.

Dr. Robert Nobles: Yeah, they do want more money. You should have a different way of rewarding your super producers that don't go into a management track because the management supervision track is that you need to be selfless in giving yourself to others. And I'll tell you, what I found with faculty getting into vice president roles or even AVP roles is that they're so focused on themselves they can't get beyond thinking about their own disciplinary area that extend it to other people. Those people fail in those leadership roles. That would be the same for a director level. That would be the same for an assistant director level, all the way through our organizations. If you're not ready to cultivate and help others, then you're not really ready to lead in the way that organizations need it for continuity purposes.

Gloria Greene: That's true because you can have all the technical knowledge in the world... And I honestly believe this truly. The technical knowledge can be taught, but it is that character mindset that is much more difficult to develop. We used to say soft skills was communication, empathy and everything. I don't believe those are soft skills. I believe those are necessary skills that you must have. And if you do not possess those, if you're not willing to learn those soft skills, then I think maybe stay in, as Dr. Noble said, that production stage of your career and not try to move up to that managerial stage of the career.

Kania Greer: I agree with you completely on those points. I'm going to ask two questions. One, you had talked about the SRAI at the conference in Honolulu has a leadership track, but it starts with assistant directors and directors. So how do we get people that are in those production roles that want to move up to want to go into these? They don't think that's for them, that leadership course. And then second, we're at the mercy of HR and HR policies, but what risks do institutions face when they don't start thinking about and planning for succession and transition of knowledge and leadership?

Dr. Robert Nobles: For SRAI, getting individuals to know that it's for them, there's a couple components. One, people should do a self-reflection piece. And it really comes down to, for me, two components. Before you can get into a role where you lead, you have to have accomplished something. You should know your field, your discipline, your pre-award, your post-award. You should be good at something before you can deliver assistance in building up other people in that area. That's one. So there needs to be a reflection piece that, look, I've become an expert at X. That's first piece.

Second piece is desire. And this is not just a desire that is to give more resources, but there's a desire in your heart and your mind to help other people know as much or to do as good as you have done, if not better. So there's a teaching component, a nurturing component of that second piece. You should ask yourself.

Now, I haven't seen a good questionnaire or survey to see people's readiness skill and to get into supervisory roles. Maybe that's something SRAI should develop in the future related to how willing are you? We have all these other personality assessments, but maybe we need one related to readiness and to supervisory managerial responsibilities. But it's really those two things. And once the person says, "You know what? I feel confident that I can teach other people how to perform this activity or cover this scope of activities," once they say that and they're ready to help other people, once you could do both, then I think... And I see it, and I'll just say this, I see that for some, they want to check all of the boxes before they're ready. And mostly we see that with... Well, this new generation's a little different.

The new generation, they come out and they want to be supervisors before they even learned anything, which is really interesting, but the generations prior to, I see women leaders that want to check every box before they go for that next opportunity. And then I get applications from guys who haven't done the thing but believe that they can. And those two things are lopsided from my perspective. So it's really just having the confidence to say that you're willing to.

And so that's what we want to demonstrate at SRAI. I personally believe once you give people exposures of what types of stimuli and things you have to deal with when you sit in those seats, it will get individuals' wheels turning on if that is something they believe that they can contribute to and be successful. So that's the discussion for getting people into this upward mobility training activity at SRAI or just come and become content experts.

Gloria Greene: SRAI has an intensive, it's a middle manager intensive that's offered, and it's for individuals that are moving from, I'm going to keep using Robert's word, productionist, to that leadership role. And so when that intensive was developed, it was developed based on is that as leaders in our organization, we often promote people to positions and do not train them on what they need for those positions. So SRAI, what we did is that we developed an intensive that focused just on that. How do I as a middle manager lead individuals within my organization? What are things that I need to know? How do I do these? If there's things that I need to do prepare, do a PIP or a performance improvement plan, how do I help them write standard operating procedures? What are my policies and procedures within my organization? Those are things that I think individuals coming into these roles or wanting to come into these roles, that's the type of training that they need to look at and to engage in.

So then you can ask the question, am I really ready for this? Because I may think I'm ready for it because I'm a superstar in pre-award. I may think I'm ready for it, but when I get to that stage, when I finally get to that stage, I apply for that position, I'm accepted, I'm put in that position, then all of a sudden now those individuals, I am now managing my peers. Am I ready for that? Am I able to switch that hat around from being one of us, one of them, to now being the manager or supervisor of them?

So yeah, SRA I think has done a really good job in developing training for individuals wanting to advance and get into senior upper leadership. And that middle manager toolkit is a great start. It helps them identify those areas that they're going to encounter and engage and try to get them prepared for it.

I often tell individuals that when I do professional development and everything, when you apply for a position, understand that they're selecting you for this position based on the fact that they want more out of you. You could be the most beautiful person in the world, but they're not hiring for your looks. They want work from you. They want things done. They want processes implemented. They want procedures developed. They want things out of you. And a lot of times, the question is, are you really truly actively engaged? Is this something that you want to do or are you chasing dollars? And so I think we need to... That should be part of, which in essence is part of the middle manager leadership. Am I ready for this role?

Dr. Robert Nobles: Yeah. Let me just add something to that, Gloria, and then we'll answer your HR question, Kania. When we talk about middle management, managing your peers, et cetera, I think where I've seen some early leaders fail is that they took the title and converted it to a paternal role that they're going to play with other adults. It should be conceptualized much more delicately than I am rating someone else's performance, I am the judge of how well this person is succeeding. Because when you tackle it from that perspective, you're going to fail because no smart, well-intended adult wants somebody else... You understand? You get it already.

Stefanie Keto: Yeah.

Dr. Robert Nobles: Okay. It's good. Nobody wants micromanagement and nobody wants to not be respected as an individual. And so what I often do, and you could talk to people for which that I supervise, is that I empower them and I say, "Look, let's take titles off. I'm here to support you in being the best professional you could be. That's my job. My job is to help elevate you and the team. So I'm on the team. I happen to be the team lead, even though I'm a vice president. But you are a professional with sets of responsibilities of carrying out your job and I have to remove barriers for you. I have to help support you and I have to help problem solve. I'm not here to manage you or to judge

you, even though that's part of the mandatory thing you do as a supervisor, but that is not the whole thing." And it's such a small part.

Go ahead, Gloria.

Gloria Greene: And we recognize that or that should be recognized. Now, the whole part of that is how do you get that mindset into someone just entering into that field? Because they go in with an understanding that I am here to manage these individuals. I am here to make sure that the job get done. Like I said, we promote people into positions and we don't prepare them for these positions because we focus on maybe one or two traits that stand out that this individual have. And we say, "Oh, that person would be a great team lead," or, "That person will be a great supervisor," or, "Yeah, that director position is open. Go for it. You can do that."

Dr. Robert Nobles: Let me give you a quick story of how I learned it. And maybe we need to infuse people. And then Kania, we'll get to your HR question. We will get there.

Quick story. In the '90s, I created a program to monitor the safety of the beaches of the state of Florida. So I was in the state health office. I wrote this program of monitoring and sampling out of the water and then doing public notification related to if the water is safe to go into based on bacterial growth, et cetera, et cetera, et cetera. Okay, fine.

And so I'm in my 20s, I created this program and I had people double my age reporting to me. And I used to, when I first started my leadership, come in and treated it as if it was really robotic. I come in, these are the objectives. This is what I'm doing. Tell me what you're doing. Let's hit our milestones of what we need to do. You report out. In and out, 15 minutes, we're gone. We give you direction. You give me answers. We know what we need to do. We go our own separate ways. And I was leading the team like that for at least the first month.

I had a retired Marine, his name was Jack Pittman, stop me. And he said, "Robert, you never ask me how I'm doing." And I'm like, "Well, why would I do that? We were just doing work. Jack, how are you doing?" Well, he's like, "That's not the point. You don't even ask me about my family." And I'm like, "Why would we talk about our families at work? Work is for work. Home is for home. We'll keep it separate." He said, "You don't ask me how I feel." And I'm like, "I'm sorry. I didn't know that this was important conversations to have in the workplace, especially for a retired Marine, how you feel." I'm like, "My dad was a Marine. We don't talk about feelings. I'm so lost. Help me."

This is what he said. He said, "Robert, the way that you're leading me is good when all things are going well." He said, "But at any point our project gets off the rails, we're going to be blaming each other because we don't know each other and we haven't taken the time to

get a feel of how we work and what we're trying to do and what our intentions are." He said, "So if you want the most production out of me as an employee, I need you to slow down and get to know me as an individual." And I was still perplexed. He's like, "You should stop and have coffee with me." And I'm like, "Really?" I said, in my mind, "That would be so inefficient from a leadership standpoint to waste time when we could be talking about the project and moving forward. I have a lot of work to do."

What he taught me was that if my job as a manager supervisor is to elevate the team, then I need to do whatever is necessary to have them create alignment and connection back with me so that we can support each other on achieving the objectives and the mission. And I changed my whole leadership style as a result of that engagement because it was to fulfill what somebody else's needs instead of... It was natural for me, but I just thought, based on how I learned about leadership of watching TV in the '80s, that I needed to be more regimented on how I engage with people.

And so, Gloria, to your point, how do we teach them? I think we need to give these up and coming future leaders, early leaders, the empowerment that it's okay not to be perfect and to be personable with your team so that y'all can roll up your sleeves and achieve together instead of telling people what to do and you judging it. So I think we need to give them the encouragement that that is okay and it's actually the right way to elevate the team.

Gloria Greene: Yeah, we need to make sure that they understand that there's no such thing as perfection. There is no perfection out there. There's no perfect. I learned how being personable from when we were stationed in Germany and I had a commanding general that would every day go around and talk to the civilians and the active duty and the military personnel. And he would ask questions like, "What did you do last night? How's the family going? I understand that your son is playing softball. How's that going?" And I watched him do that. And I watched how him doing that made the soldiers and even the civilians that worked there, made us feel like we were all part of this organization, that our contribution, whether in the office or at home, mattered to him. He cared. He really did care about that.

So I think what it does is that when you let employees know, first of all, that they're recognized for their contributions, but also that you hear them. It's called empathy, right? It's like if I come in every day and ask you how you're doing or do you want to have a cup of coffee or what's going on, I notice that something is changing you or your demeanor today is not like it was yesterday, then what I am doing is, that's empathy. I do not have to experience it in order to empathize with you.

Let's get to your HR question because I honestly believe that Robert and I could take this to a whole podcast and what it's intended for.

Dr. Robert Nobles: Fair. Okay, for the HR question, you said how do we get through the HR? One of the things that I've implemented historically is that I created a internal training program where a couple things that I believed as part of this training program. One is if you're interested in gaining more perspective and climbing to leadership, you need to understand what people experience outside of your own office. Your perspective needs to be broadened.

So then I create these mini in-office intern floating rotations where I give everybody four hours a week or four hours every other week to work in another group to start learning and being oriented to those level of activities to give them exposure and have them rotate through different levels of the office. And I can create that without even calling it succession planning. I also, in addition to that, I would host every other week or monthly, leadership conversations. I would have these cohorts of people signing up and saying, "Hey, this is a whole year class with me as your teacher and we're going to talk about different components of leadership. Tackle problems, explore this. I'll tell you what's going on in my mind. I want to hear from you," and give people an opportunity to volunteer to be in my leadership cohort for the year. And so with the rotational activity plus my leadership training, I think those are two critical components.

The third component, which I think is just as important, is encouraging the leaders, whatever level they are, directors or otherwise, to have their team members present information for which that they are generating and not just take the information and present it on their behalf, to give them exposure of meeting and talking to the upper leadership up the chain. And so the more exposure you give people, you can start reading and leadership will become exposed to these individuals and understand what they're capable of and how they think, which is also a way of elevating the visibility and thinking through succession. If this person wasn't here, who am I impressed with that I would put in that role to help cultivate the team? But you got to be introduced to those people along the way. If you keep them suppressed and silent, then for a leader, it's just like going outside the organization. You don't know anybody under those individuals, so then they get the same level of vote of confidence that somebody from an outside and you're just looking at resumes.

And so those three things is what I've done historically and it really helped elevate the team. Gloria, any more from an HR standpoint?

Gloria Greene: No, absolutely not because for one, I do not remember the question.

Kania Greer: That's okay. The question really was, since we all work at state institutions, most likely we have HR policies we have to follow when it comes to succession and interviews and hiring and how we can elevate people. And so I'm wondering what the risks are to institutions who don't start planning for that leadership or at least knowledge transition even while navigating an HR hiring situation.

Gloria Greene: One unique thing that we are doing here at UAH is really we have what they call HR business partners. And so these individuals are actually assigned or they are dotted line reporting. So we will have an individual that reports to me and the VP for research office, and then that individual also reports to HR. What they do is, first of all, they get to understand the needs of the organization. What's the strategic goals of the organization? What do we need to continue to grow and function and create those new leaders that we're going to need? We have center directors. People are retiring. They're really truly getting out of dodge as quick as they possibly can given all the stuff that's going on. So we lose a lot of knowledge. How do we replace that knowledge? Not the individuals, but the knowledge, bring someone in equally.

And so having that HR business partner embedded in an organization with the unit helps. So I think that's how we are dealing with it. I'd be interested to know how other universities deal with it. It has given us the opportunity to converse with HR to let them know that we know more about our needs in our organization than you do. Yes, we recognize that there are state rules and regulations and everything on how you hire and that there are labor laws that you have to comply with and the heaven forbid that you don't want anybody to protest something or file a complaint about a decision made. But in the end, that leader of that organization know more about who they need and why they need that person than the HR. And so having that HR business partner is helping us. It's helping fill those needs when we have center directors leave or when you have individuals that are looking for your next department chair or you can recognize that dean can work with that person to get who they need to meet that need.

So I think having that person in place helps with that next step of succession planning.

Dr. Robert Nobles: Yeah. I guess the trick that I would say that I've implemented is I don't call it succession planning. I call it capacity building and backup mechanisms. Because when you use succession planning, it implies an expectation that somebody's next in line for a role. So I don't even use that because that's where you get in trouble with implicit expectations versus explicit expectation. I say anytime that we have an opening, we're having an open competition for it. What I'm interested in is making sure we have adequate backup should this person be out. Who did you assign to be responsible when you're

out? What do they know? How did you orient them to their responsibilities while you're away on vacation? Even though that is somewhat like succession planning, from an HR perspective, I don't call it that.

Kania Greer: Just call it something different.

Dr. Robert Nobles: I call it something different.

Gloria Greene: Yeah, I was going to tell Robert it's succession planning with cute eyelashes.

Kania Greer: Love it.

Dr. Robert Nobles: Well, trust me, I get cute. We make the real estate. Stefanie, what were you saying?

Stefanie Keto: Oh, I was going to say, I come from corporate America before I came to higher ed and we had shadow training. And so I brought shadow training with me. That was what we implemented in the office was everybody needs to know how everybody does their job just because, like you said, if someone's gone, heaven forbid, you're hit by a bus-

Dr. Robert Nobles: Or you win the lottery.

Stefanie Keto: ... or you win the lottery, you're not here, you get a new job, you leave, you don't want to be working anymore, yeah, everybody needs to know how to do everybody's job. And there should be some sort of continuity. If people are doing similar-ish jobs that there should be some sort of continuity between what they are doing so they can be each other's backups, but everybody should know how to do everything.

Gloria Greene: You're right, Stefanie. There are two things that we implemented in the Office of Sponsor program. One of them was cross-training because that is so important. It really truly is. The cross-training is important because it also strengthened the team. It also helps that individual build confidence in what they're doing, their ability. I talked to a lot of organizations out here and these individuals are only pre-award. They only do the pre-award. And then in the pre-award, they only work with a particular agency. And what I think what you're doing is I call it pigeonholing. Why are you pigeonholing a person into one area where that's all they can do? And should someone leave the organization, who's going to step in until that role is filled again? So the cross-training...

Also what I feel is important is mentoring. Again, as Robert said, let's not call it succession planning, but let's call it mentoring where you pair experienced individuals with your novice, the ones that are new coming in, and you help them build and structure those relationships,

you're exchanging knowledge, you're training that individual. They may not be wanting to move to that next level of leadership in any form or another, but that have the knowledge and the ability to answer questions, to work with their peers, to mentor someone else is so important.

So yeah, cross-training and mentoring are two very important strategic things that need to be implemented at every institution. If we don't want to call it session planning, then let's call it cross-training and mentoring.

Stefanie Keto: Mentoring.

Gloria Greene: Yeah, it's important to do both.

Dr. Robert Nobles: And I would say you start with the coalition of the willing because some people are like, "No, I don't want to do any extra work." Well, you know they couldn't be the right people that you want to elevate to do all this extra work. And so I think people weed themselves out in that process as well.

Gloria Greene: I don't have a problem with that. If a person don't want to do it, then like you said, I think Robert said that early on, let's not force you and put you in that position because in essence, if I'm going to push you into something that you didn't want to do in the beginning, then what am I doing? Am I elevating you or am I setting you up for failure? That's the important thing right there, that we not set individuals up for failure.

Stefanie Keto: Well, I think the last question I have for y'all... This has been great conversation. Y'all have just kind of taken it off. But the last real question I think for y'all would be, I don't know how often you hear on social media, "Oh, it's a free pizza party or it's free coffee in the break room." That doesn't fix the environment. That's just like a bandaid approach to fixing the environment. So when we're talking about retention and culture, what would you say would be a real zero dollar leadership behavior that could make a stressed out admin say, "Oh, I think I'm going to stay or I'm going to try to become a leader or step up or take on more roles and responsibilities"? What would you say?

Gloria Greene: I would say trust. That's the foundation of the culture right there. Do I want to stay? Do I trust the individual that's leading me? I think it's more important. When trust is strong, your collaboration within your teams increases. You want to grow. Individuals don't have a problem with growing. They want to stay with that team. I think that is so important. They're more willing to work together and solve problems. This is the one thing that I've learned over the many, many years that I've been working. I started working when I was nine, Robert, just in case you... But anyway-

Kania Greer: Me too. Me too.

Gloria Greene: Okay. They pay more attention to what you do than they do to what you say. And so if I'm hearing you say one thing and watching you do something else, then that trust that I may have of you is going to erode. So I think what's important is that we communicate honestly, we listen respectfully. We don't have all the answers. We don't know everything. We can learn. We can be taught. Even at this stage, we need to recognize contributions and admit mistakes. As long as we are treating people fairly, I think you're going to maintain your staff. You're not going to have people running for the door or the hills or trying to get out and just take anything to get away from you.

Stefanie Keto: Yeah.

Dr. Robert Nobles: That's fair. Just really quick, I'll say there has to be an expression of value and I'll explain what that means.

When I have my performance review cycle with my team, the individual one-on-one activities, the one thing that I do is they come into the room and say, "I am giving you the opportunity to assess how this institution has supported you over the last year and give me a recommendation on how I could be a better leader to support your professional growth and impact in the office." And so I spend the first part of the meeting giving them the opportunity to assess the institution and myself in supporting them before we talk anything related to the performance criteria of my assessment of them. And that becomes important because I am then putting value on understanding where they're trying to go and making a commitment early or telling them, "No, that doesn't make sense to me."

I give them the first opportunity to say what's on their mind and it also reduces the stress of the conversation that one has to have, because when we walk into performance reviews, we're automatically thinking we're about to be judged. They're about to tell me what they think about us for the year. And I tell them upfront, "No, you're going to tell me how I'm doing and you're going to tell me how this institution is doing and what better we could do to support you." So I transition the empowerment back to them. And then I'll also fill out the forms. I let them do the self-assessment for the form.

So I think the one thing, Stefanie, when I said value is I think on a routine basis, we need to sit down and ask the individual what are their career aspirations and how we can, in my role, help you achieve them? What can I do to help you achieve what you want to achieve professionally? Some people say, "Hey, I'm fine exactly what I'm doing. You're doing everything possible right now." And some people will say, "Well, actually, I need to go to a conference. I want to give more exposure. I want to present. I want to do this. I want to help more in the office. You can lean on me. This, this, this, this, this, this."

And I say, I think we should just give our team members, and I don't call employees employees, I call them team members. We should give our team members voice an opportunity of expression that's free, open, and valued. And when we do that, then you're cultivating the team.

Stefanie Keto: And it sounds to me like when you're saying that you want to help your employees and you're like, "What can we do to help you grow?" I think a lot of people get a little worried when they hear a manager like, "Oh, are you trying to push me out? " Going back to the, "Oh, you got the one, two, three years. A third year you're trying to kick them out." But sometimes it's not that you're trying to push the employee out, you're actually really trying to help them develop. So I think that's where Gloria was saying that you got to be transparent, you got to be clear. Say, "I'm not trying to push you out. I'm just trying to help you grow."

Dr. Robert Nobles: I mean, unless you're pushing them out. And then I would say-

Stefanie Keto: Well, true.

Dr. Robert Nobles: Listen, listen. Then I'll be like, "Look."

Gloria Greene: Sometimes they got to go. You try to find another job for them.

Dr. Robert Nobles: I would tell somebody, "I think you're miscasted in your role. I think you're really good at something and I don't think we found it yet in this role that you're fulfilling right now. So let's work together where you should be casted more effectively." I'll tell them. I said, "Because if I'm judging you, and I've just transitioned to a new institution, if I'm judging you based on what you should be doing on paper, you would be failing right now." And I said, "But I see value in what you're doing. It's just not what the job is. I see value in it. I see value in it. It's just that's not the job. So if you're going to be successful, you either need to do what it says you should be doing, or we need to find another job for you."

I'm just openly honest with folks and not in an authoritarian type of way, but just in a compassionate way of relating to professionals and respecting what their contributions are. And if it aligns with where we're trying to go or if it doesn't, I think we need to be honest with individuals about that and not wait until the performance review.

Gloria Greene: I think that is so important, that old favorite line is you can't handle the truth. I think a lot of us can, and I think a lot of us would prefer to hear that than for it to be for... I'm trying to think of a word that is not going to get blurred out, beeped out of here, stuff like that. But anyway, we want to make sure that we are being openly honest. The individual-

Dr. Robert Nobles: So it's not a secret coup, right? We're not trying to get rid of them and vote them off like survivor.

Gloria Greene: Exactly. And then the other thing, Robert, is that one of the things that in my training for managers, leadership trainings that I try to encourage them to do maybe quarterly performance reviews because in all honesty, I am not going to remember what I did wrong a year from now. I get a performance review and you're going to tell me I need to improve and this, this and this where all the while for a whole year, I've been doing it this way and no one has came and said anything. So when we're looking at retention, succession planning, is that individual ready? Are they the right fit for this organization doing this type of work? We need to rethink this performance, this whole annual performance review process and maybe break it down into small pieces. Let's not try to eat the whole elephant one big bite every year, but break it in small pieces because now you're giving me an opportunity to improve, to progress. You're giving that. And so I know what I need to work on. I'm not guessing or having to guess or assuming that I'm doing everything perfect because no one said anything to me.

Stefanie Keto: Well, I think that sounds like another podcast episode. So maybe we'll have you both back so we can talk about the performance plan, how to revamp it for the future. But I do want to say Dr. Nobles, Gloria, thank you for coming and sitting with us. Kania, thank you for helping co-host this episode. This has been a great conversation regarding succession and a lot of information on what you can do as an employee who's trying to look up or for a manager, looking for that next person. Yeah. So thanks both.

Kania Greer: Thank you all so much.

Stefanie Keto: Yeah.

Dr. Robert Nobles: Absolutely. It was a pleasure. And Gloria, it was a pleasure working with you. Kania and Stephanie. It was awesome. Thank y'all.

Gloria Greene: You too. I got one plug. For succession leadership planning, there's a great book out there called Who Comes Next? The author is Mary Kelly and Meredith Powell. So if you want a quick read, it's really nice. It's Who Come Next? And it helps with Succession Planning. It's called Succession Planning Made Easy, or in other words, Succession Plannings for Dummy.

Stefanie Keto: All right. Well, thank you for that. I'll have to check it out.

Gloria Greene: All right. Thank you guys so much.

Kania Greer: Have a great one.

Dr. Robert Nobles: All right. Appreciate it, y'all.

Kania Greer: This brings us to the end of today's episode. Thank you for listening to the SRAI Shop Talk. Additionally, we'd like to thank our guests, Dr. Robert Nobles and Gloria Greene for their insights on the importance of succession planning in terms of leadership development, education, and capacity building. We hope this conversation provided some key understandings on the importance of planning ahead and how leaders can engage, encourage, and excite the leaders of tomorrow through programs like SRAI, Senior Research Administrator Leadership Program. It's happening in Honolulu, Hawaii this October. This cohort-based program combines a two-day workshop with ongoing mentorship and a dedicated peer community to deliver a sustained leadership experience. Registration closes July 31st. Learn more about the program, as well as our other professional development opportunities and resources, at www.srainternational.org.

Stefanie Keto: A huge thank you as always to our wonderful podcast team and everyone who continually contributes to enhancing this podcast. We are proud that this platform brings together people, ideas, and new opportunities in research administration. The conversation doesn't stop here. We would love to hear from you. Please submit your suggestions for future episodes of SRAI Shop Talk to shoptalk@srai.org.

Thank you again for listening to this episode. Don't forget to subscribe and help grow our community by sharing. I'm Stefanie Keto, and I'll catch you on the next episode.