Learning Uncut Episode 130
Mission Driven L&D: San Diego Zoo – Dustin Lacasse
Hosted by Michelle Ockers

Michelle Ockers:
Welcome to learning uncut, Dustin.

Dustin Lacasse:
Thank you. Much appreciated.

Michelle Ockers:
I'm really delighted to be having this conversation after we met in San Diego back two months ago now. We met in San Diego when I was there for the ATD Conference and we had the very beautiful experience hosted by LinkedIn at the San Diego Park Safari Zoo. Did I get that right?

Dustin Lacasse:
The San Diego Safari Park.

Michelle Ockers:
Safari Park.

Dustin Lacasse:
San Diego Zoo Safari Park.

Michelle Ockers:
Yeah. It was wonderful. And of course, you are from San Diego Zoo, so talk to us a bit about the zoo as an organization.

Dustin Lacasse:
Yeah, so the San Diego Zoo is actually, of course, an international non-profit conservation organization. So we really do a lot with the conservation of species across the world. We have two front doors, one of which you mentioned, which is our San Diego Zoo Safari Park, but also our San Diego Zoo, where our guests can really start interacting with our mission and our purpose as an organization. We really do try to integrate wildlife health and care and science, but also education to develop those sustainable solutions within the communities we work with, as well as our hubs across the world in which we really do a lot of our conservation efforts around particularly key species. So really, the San Diego Zoo is just a leader in the conservation space and does such great work in trying to ensure that all life thrives across the world.

Michelle Ockers:
Yeah, I hadn't realized how strong the conservation mission of the zoo was, and that global outreach, as you say. And of course, I was delighted as an Australian to see some Australian animals there and to know that you have relationships with, I think, Taronga Park Zoo here in Australia.

Dustin Lacasse:
Yeah, so we do a lot within Australia, particularly with some of the species like the koala. We have a huge collection of koalas here, and we're the only organization, zoological organization in the United States that also has Platypuses, which is, of course, native to Australia. So we do a lot in Australia to help with those key species.

Michelle Ockers:
Yeah. So tell me a bit more about the workforce who works at the zoo. Is it all volunteers? Is it a mix of paid and volunteers? What does it look like? What kind of roles are people in?

Dustin Lacasse:
Yeah, so it's going to be very similar to other non-profits. Right? We do have a demographic of paid team members who work within our organization, as well as a very large volunteer support system. So we leverage our volunteers to really help work with our guests, to provide them really critical information as they are working through the two front doors of our organization. But we also have a large demographic of team members, and our team members really span the gamut. So we of course have guest service and retail, some really traditional corporate type of roles like marketing and finance and HR, of course, but also some really specific roles that really help ensure that we can do the work that is necessary in order to really provide that conservation efforts. And those would be some of our wildlife care team members, our scientists, our researchers, our veterinarians, vet techs, all working together simultaneously to really do the critical work that is necessary in order to be successful within this particular space.

Michelle Ockers:
Hey, and one of the comments you made to me when we were talking about what it's like being the L&D lead at the zoo and what the organization is like you said, it's a bit like a city internally. What did you mean by that?

Dustin Lacasse:
Yeah, because there's just so many different roles, right? We have technicians, we have construction team members, we have individuals who are in architecture, signage. We have, of course, what we consider garage staff who work on our vehicles. So really, it's almost like a little city in the background, which you don't really get to see as a guest, but as a team member, you are really kind of wowed by right? Because there's just so many people who have passion for this type of work, who have come into this organization and leverage that passion on a day to day basis in order to really drive their essential functions forward. And really providing those opportunities not only for themselves, but of course, making sure that our organization is successful as we continue to work through some of those conservation solutions.

Michelle Ockers:
I'm getting this really strong feel around people with passion that a sense of connection to the purpose of the organization. This is not your first role in a not for profit, is it?

Dustin Lacasse:
No, I actually started in not for profits with the YMCA, so I did start in for profit organizations and then migrated over to non-profits because of that passion. I think a lot of people migrate into a non-profit kind of space when they have a deep connection to an organization and they recognize and value the mission and the purpose for that organization and really gravitate towards that space. So I moved into the non-profit world with the YMCA because they really did value their commitment to the communities in which they served. Right? Child development being one of those bigger pieces, healthy living, social responsibility were kind of the bedrocks of the YMCA. And then I moved over to the San Diego Zoo because I also believed in the mission and the purpose and vision of the organization and found it to be a really great fit for myself.

Michelle Ockers:

And let's talk a little bit about your role and what it encompasses and at the time, as you do that for us, perhaps if you can talk to us a little bit about that contrast between working in a for profit and I believe it was financial services that you spent most of your corporate life in. What's different about being in kind of an L&D role in a not for profit versus your experience of being in an L&D role in the corporate sector.

Dustin Lacasse:

Yeah, when I think about the corporate sector in an L&D, there's usually resources dedicated to the L&D function where people normally play a particular role underneath that umbrella. They normally don't stray from that role. They have a particular accountability. They work through those accountabilities, and that really normally lives with them in that position. The difference from a non-profit standpoint is the resources are not always going to be what they are for a for-profit organization, so as an L&D professional, you get to wear many hats that you may not normally wear within a corporate type of environment, which is really great, it really is a huge catalyst for learning and growth from an L&D standpoint, allowing you an opportunity to get your hands in the mix of things that may not always even fall under an L&D umbrella in a larger organization that has those resources to really dedicate to things like performance evaluations or succession planning and things of that nature, where you're in a non-profit, those all kind of get wrapped up under one type of role because really there's not the ability to hire multiple individuals in order to complete those functions. And so I really think of a non-profit and working in a non-profit to be really valuable, but also so rewarding in a sense, because you do get to work with dedicated and passionate individuals who know when they come into a non-profit that it's going to be a little different.

You're not gonna make the money that you would make in a corporate world as you would in a non-profit. But because really a lot of those funds are going back into the mission and the purpose of the organization versus being something that maybe is there from a shareholder value standpoint. But you also get a wonderful opportunity to work on projects that are still fulfilling in a lot of sense, the things that you really are passionate about, you really have those opportunities and that flexibility to really interject your passion and your enthusiasm for different tasks underneath your umbrella of influence, which normally are not always the case when it comes to a corporate type of mentality. Usually a corporate world is a lot more structured, a lot more rigorous, but within a non-profit sector, it really does provide you an opportunity really to stretch your wings and really get into areas that you may find more passion around versus maybe a particular subject that you're kind of pigeon-holed into when you work in a corporate setting.

Michelle Ockers:

So has that been your personal experience moving into this role? Do you feel like you personally have a bigger umbrella or a bigger area of influence than if you were working in a more well-resourced corporate setting, and if so, what is that bigger sphere of influence or that bigger umbrella that you find you have compared to your corporate experience.

Dustin Lacasse:

Yeah, so when I think about my corporate experience, that's where I kind of moved up that chain. I started as a Senior facilitator, so I was really pigeon-holed into, Here are the lines of business that you are gonna help support, and here are the resources and tools that you will leverage and utilize in order to support those lines of businesses, and when I moved into the consultant space, it was also very pigeon-holed, if you will. This is the businesses that you will support as a consultant, these are the pieces or bodies of work that you will work on as it relates to that body of work that you are now aligned to, of course, in a non-profit setting, those barriers are really kind of broken up and you're really allowed to really get into the mix of certain things that you may not have always had purview into, so at least here from a non-profit standpoint, I was able to, within my career in non-profit, move into areas that I didn't always have purview into, and those things would be the measurement and the data collection of learning opportunities that are, of course, are interjected into a particular space, performance and how that connects back to what you are doing from an L&D standpoint, and making sure all of those are connected successfully.

Succession planning, overseeing all these wonderful career development programs, and really having the ability to think critically and really experiment in that type of controlled setting, it's just been such a wonderful opportunity to really be able to provide some really great opportunities to team members because you're not pigeon-holed into doing only specific tasks.

Michelle Ockers:

Yeah, and I think that's a real bonus at a time when increasingly the kind of problems and challenges we're invited to contribute to in organizations or that would really value from our contribution, do require us to work across boundaries and outside, or even within people and cultural HR teams in big organizations, it still can be a challenge for many to figure out how to work right across even just the people and culture teams, let alone other parts of the business to really bring together more integrated, holistic solutions.

Dustin Lacasse:

Absolutely.

Michelle Ockers:

That make a bigger impact on the challenges in the organization. So Dustin, you've been in this role two years. Is that right?

Dustin Lacasse:

Yeah, it's a little over two years now.

Michelle Ockers:

So can you recall as you settled into the role, what your observations were about learning in the organization and the opportunities you saw to create value?

Dustin Lacasse:

Yeah, so it's actually very similar to my other non-profit experience where I was hired into these spaces in order to really build out a learning organization internally to these particular businesses, if you will, from a YMCA standpoint or even a San Diego Zoo standpoint. When I came in, I really had a lot of opportunity to sit back, listen, I actually did a lot of living a day in the life of different individuals and their roles, so I had a better understanding of what their challenges were that they were experiencing, where we could be great partners for those individuals, for them to be successful in the work that they were actually handed and accounted for. What skills those individuals were really grasping for or having really thinking about up-skilling into in order to be even more successful. So it really gave me a great opportunity to kind of step back, Listen, observe, really work, get my hands dirty in the mix to better understand what I needed to do in order to be successful in this role, and of course, the charge that was provided to me within this particular space.

So of course, some of those challenges are not really unique, right. Not only to the San Diego Zoo but from a larger standpoint for non-profits, what you're normally gonna find working in a non-profit is of course, technology is not always going to be up-to-date in certain cases, or you're not gonna have the resources to acquire some of those amazing pieces of technology, since most of the funding is going back into your mission, of course, what you're also going to find through this purpose or this process in some of the other bigger challenges like lack of data, high turnover, limited resources. So how do you do more with less is really the big road block or the mindset that an individual in an L&D space is working underneath, how do you build capacity when you may be the only person doing all that hard labor.

Its work, working to get your department or within the organization up and running to be successful, to be that partner and collaborate successfully, but also the other bigger piece too is sometimes it's difficult to measure impact within a non-profit because of course, a lot of the impact is what we would normally consider that purpose, that mission. What are we looking to achieve? And how do we achieve it? So it becomes a little more challenging in a non-profit setting because you're not looking to create additional value for maybe a stakeholder or increase profitability of an organization, what you're looking to achieve is of course what skills do you need to help your team with in order for them to better meet the mission of an organization and sometimes those things can be a little more challenging to measure.

Michelle Ockers:

Yeah, so constraints can bring creativity, of course, is what I'm hearing, and it's almost like rather than fight it you accept it's part of the landscape when you work in an NFP, I'm curious about... I just want to go back for a moment. You mentioned you did a lot of living a day in the life of, was that literally like shadowing someone for a period of time, talking to them, watching them work. What did that look like?

Dustin Lacasse:

Yeah, so a little of that, but also actually doing the work, so I had the opportunity to work in our garage to help rebuild an engine, which I never thought I would actually ever do in my life. So I thought that was great, offered me an opportunity to have really holistic conversations with the individuals who are working in that space, it became a non-threatening type of environment for those individuals, it becomes a lot more comfortable when you're in their environment, having those conversations versus bringing them out of their environment and putting them into a stagnant kind of situation where you're just in a room between them and you and trying to have those conversations.

It's not always workable, it's not holistic, so I actually threw myself into the mix and I actually got my hands dirty, so whether it was building engines, whether it was working with security on ground and working with them on what they do on a day-to-day basis, or working with our wildlife care teams to help clean habitat, shovelling poop and things of that nature, really just understanding some of those granular aspects of individual roles, so that way I, as an L&D leader could be more credible as we were having these conversations with some of these key leaders around some of the skills, but also some of the areas in which we were trying to divide solutions around in order to overcome challenges that those individuals were actually facing within the day-to-day work that they were provided.

Michelle Ockers:

That's fantastic. I had an episode some time ago, Trish Uhl was one of the people I spoke with, and she talked about this idea of go to Gemba, so you have to get out of the authors, you have to get out from behind screens, you actually just have to go to the workplace, but you've taken it one step further and you've actually put yourself straight in the work and work with, I imagine the relationships you managed to build through doing that, that must have been a really great way to build relationships across the organization as well.

Dustin Lacasse:

Yeah, no, absolutely right? I think kind of going back to what you mentioned when you're just stuck behind a computer when you're just at a desk all day long, people don't always see the value that you bring to an organization when they don't see you, when they don't have visibility into the day-to-day tasks that you're actually doing. So by putting yourself out there by building those relationships, by really getting your name recognition out there, and looked at as a strategic partner within an organization, no matter what organization you're working with, it just lends a lot more credibility, helps your influence as you're of course, working to gain the buy-in and of these larger demographics to change particular processes that are gonna be really valuable for them, it really just provides you that foundation that you really need to work off of in order to ensure that not only are you successful with some of these creative ideas that you're bringing to the table and the reason why you are hired, but it also gives you that opportunity holistically to be more collaborative, to really interject individuals into your work and really find success to that mechanism.

Michelle Ockers:

Yeah, there's a lot of credibility in being able to say to a stakeholder, a lady you're trying to get on board with an idea, here's what I saw, here's what I heard when I tried to do this task, here's the pain points and I experienced it myself, and here's what your people said to me. So I love that idea, and that's certainly one I think we're sharing with everyone in every sector, Dustin. So thanks for that. I want to dive into one or two specific things that you've tackled in the past two years, and the first of those is performance and succession planning, which is probably one of those things that to your point earlier, a lot of L&D people wouldn't necessarily have directly under their control, they would have to work with others, but I think it's an interesting area to pick. Why did you... I mean firstly, actually, let's talk about what do those terms mean? What is performance and succession planning in your world?

Dustin Lacasse:

Yeah, so when I think about performance, it's really that formal and productive procedure that your organization is going to apply that allows for those reviews and measurements of a team member success, the work that is aligned to them and the results that you are looking to see them achieve through some smart goals. It's also a great tool to provide feedback, assess value in the contributions of team members to your mission, to the purpose of your organization, and to really identify those strengths, but also those areas of opportunity. I think it also is really helpful for certain organizations as you start to think about training and advanced needs that are also necessary. So through that kind of formalised process, you get a really great understanding around where your team is really meeting the mark, what they are doing well, but also simultaneously to that you get a purview in a window into those areas of opportunity that may not always be communicated to you as an L&D leader, but through that lens, you get to start to see where are those pieces aligned currently and what you can do more within your space in order to help them be more successful, working through the areas of opportunity that specific role group may be experiencing as it relates to the essential functions that are aligned to those particular condition.

So performance like you mentioned, is there always an area that L&D professionals haven't window into, but it provides such a wealth of data when you actually are within that particular space, as you start to think about the needs of an organization and where individuals may be actually struggling and how you can really help interject within your own department. Some of those tools and resources that can help them achieve success as they continue to work through those mechanisms.

Michelle Ockers:

Yeah, it's great to have that insight, as you say, directly into performance and think how can I link... What are the initiatives that will help lift performance, I guess an individual team and organizational level. What about Succession Planning? What's the link to succession plan, might seem pretty obvious. But let's walk through that.

Dustin Lacasse:

Yeah, so Succession Planning is really that preparation to have the right people ready to fill those roles as roles become vacant. So what are those critical positions within your organization, who are the high potentials that you and the leadership can really identify in order to help really work on acquiring the skills that they will need to be successful in those next level roles. So it's a really great development tool, but it really does go in-hand with performance really well, of course, because life performance management and succession, there are really two of those pieces that are interconnecting in a way. Performance management to really help with succession planning in a lot of ways too. So when you start to think about performance management as a larger whole, it gives you an opportunity to recognize who are those individuals that are really doing well within the organization. Who is really achieving success, who are your outstanding or you're exceeding individuals within their space.

And then how do you take those individuals and start to think about what is the next level for those individuals so we don't lose them. One of the things I mentioned earlier about non-profits in a lot of cases, is that it's a lot more challenging to keep talent because of course, the non-profit cannot always pay and provide the benefits that a for-profit organization can have. But what we can do within a non-profit is to recognize who are those strong individuals are and invested within those individuals, so that way they feel valued as a part of the organization, and they recognize that there is another level for them within the organization that they can achieve. That they can really expire to be within, and I think that's where succession and performance really kind of go hand-in-hand and allow for a development type of model or a tool that can really be used when successfully to work with team members to really get them to that next level to continue to their advancement and that skill set in order for them to really continue to work in an area where they feel there's a lot of passion around.

Michelle Ockers:

So based on that, it sounds like retention was one of the outcomes you were looking to improve, were there other in terms of business need, or there were other things you were trying to achieve that particularly anything that you might be able to look at as a success indicator and actually measure by the time.

Dustin Lacasse:

Yeah, I think my work in the space, even when it comes to the YMCA, it was really important because unfortunately, when you start getting to performance, there's a lot of things within the performance space that can go wrong if you don't do things right. I think the clarity around your performance indicators can have such a huge impact around how individuals rate themselves, how leaders rate their teams. It can create huge variability across an organization if it's not done correctly. So, of course, understanding, providing clear transparency to that particular process can have huge impact as it relates to other things that come down the line. I think also removing some of the biases that individuals may have, that there may be unconscious to, those biases have a huge impact on how individuals are rated through a performance evaluation process, so that can also contribute to some challenges within a particular space. But also how do you impact-fully review an individual and write a review that will allow that individual to not only recognize and connect back to the organization, but see where they may have areas of opportunity so that way you can create development plans and really work to realign them, so that way they continue to have success as they move forward through that mechanism.

So I think performance in general, even without looking at succession, really has a huge impact from a leader standpoint, but also from a team member standpoint. I think the other piece too, that I wanted to work through with the teams as I continue to work through performance is calibration. And I don't know how much calibration actually gets done in other organizations, but for me, calibration is so important because it really makes the process a lot more fair and consistent across leaders and departments and even job levels. It really helps to take a look at what is actually happening for me as a leader. Am I looking at it from the same lens as other leaders across the space, and where do we need to come together to ensure that we are both utilising these performance indicators from a performance evaluation process in the same manner so that we create a lot more fairness within the process, but also provides an opportunity, right? For other individuals to recognize that the organization is consistent and how it is actually leveraging those performance indicators within this larger piece or space.

Michelle Ockers:

So it sounds like in terms of design considerations or considerations around transparency around removing biases about a consistent experience, so the fairness thing comes into it as well. One of the things I didn't ask you before was workforce size in terms of employees and volunteer workforce. Can you give us a feel for that now?

Dustin Lacasse:

Yeah, we fluctuate at least here at the zoo, around 3,000 team members a year, and we have additional to that, a 1,000 plus in volunteers that work within the organization across our spaces. So it does fluctuate from... We are seasonal as a business, so that will definitely take that into consideration, but we do fluctuate at least from a team member stand point around 3,000. And then from a volunteer perspective, we also have a good portion within that space at the same time.

Michelle Ockers:

Okay, so was performances concession planning, is that scheme, process, I'm not sure what label you would give it, but is it for all of your team members, like all your employees, is it for just some roles, does it encompass volunteers as well, what's the scope of it?

Dustin Lacasse:

Yeah, it really just encompasses team members, so volunteers, a little more challenging to do a performance evaluation around, although it is really helpful to continue to have open-ending conversation no matter what demographic you are of course, off facing with to ensure that everybody has that clear understanding of their performance and where they can continue to learn and grow. We all have opportunities to grow within our individual spaces, so we don't definitely want to leave different demographics out, but within at least this space, we do focus, or at least my role focuses on team members, and not our volunteer population.

Michelle Ockers:

Okay, and in terms of succession planning of those 3,000 roles, how many have you honed in on as critical roles you need to be having succession plans in place for?

Dustin Lacasse:

Yeah, so that's going to depend on the department. So from our standpoint, or at least to what I have done with succession planning and my career is really work with those individual department for them to come up with what are your critical role within your department, more specifically. What I may consider to be critical in my department, may not always translate to other areas of the organization. Other leaders may have different lenses on that process. So really, it's more of a holistic conversation. So we normally will come into a space with those senior leaders, usually directors and above is what we keep succession planning at, and what I historically left succession planning at from a role-specific standpoint.

But when you think about it and you work with those leaders, it's really all about, okay, well, who are your critical... What are your critical positions, what are they actually called, and what are the competencies that are so essential for somebody in that critical position to have, to hone in on in order to be successful, at least foundationally moving into that particular space? So we allow our leaders to really come up with what those critical positions are based on their own understanding of the body of work that is aligned to their department, and then we start to think about the next level. So once we have those competencies identified for those critical positions, we start looking at who are our high potentials within the organization and what are their competency sets that they already have acquired? Where are they finding their strengths at this moment?

And then what's the difference between those two? So really it's up to the leader, in this case, working with me as the L&D professional, to think through where our gaps and then how do we build a succession plan around those gaps between the competencies that are necessary and maybe the competencies that are currently needing to be worked through by a high potential in order to be successful as they migrate into that position. So really those are kind of the bigger road blocks that we work through as a collective group as a collaborative process. And then we start transitioning that into our human resource information system, and start thinking about the nine box or talent metrics. How that also has a big role to play in performance, because there's once again, a tie-in there, the senior leaders can really have visibility into who are all these high potentials, how are these team members moving through that talent metrics, and where can we anticipate their performance being during an evaluation process.

Michelle Ockers:

Yeah, so it's interesting, obviously not all roles are critical, otherwise you've just kind of counteracted the word critical there, that's what's kind of the Pareto principle. What's the 20% that are most critical to keep the organization functioning, and you talked about focusing in on roles at a certain level in the organization. I saw an interesting presentation at a conference in Sydney recently about looking at roles that require deep technical expertise and that for certain types of roles and certain types of people, they're like, I don't want a career pathway to require me to move up in leadership roles. That's not what I'm about, and I would imagine some of your areas of deep technical expertise that you need in your organization for your mission. There's not a whole stack of opportunity people to rise up ladders and taking leadership roles, but there are some roles with really critical skill set technically, and there are people who just want to deepen their skill set and grow within that skill set. So how do you approach that situation in terms of career development Succession Planning?

Dustin Lacasse:

Yeah, that's a wonderful question, because you're absolutely correct. There are going to be roles that are more technical-based, not leadership-based, and some of those roles are definitely considered in at least in our space to be critical position. So if that is the case, then we start looking at what are ways in which we can develop staff in certain ways that we're currently doing that. At least within this organization, are some of our career development role program. We launched an enhanced version of our career development program for wildlife care, team members, so that way they can really start learning the foundations first and foremost.

Because we know as an organization that a lot of the entry level team members that may want to work for us have aspirations to do more. And usually that is to work with wildlife, since that is really our main focus when it comes to those two front doors and what our guests are interacting with. And so of course, when we think about those pieces, that's when we start to really pivot and think about how do we create environments where this technical skill set can be acquired without having to go into a university or a college arena, where certain under-represented communities may not have that opportunity. So we are also thinking about how do we break down barriers here within our own organization to allow individuals to have that upward mobility into those other technical positions without having to do all of that, the educational work that may be normally be necessary that people may not have access to. Particularly if you're in a socioeconomic disadvantaged position within society or those resources are just not available for you to take advantage of.

And that's really one of the things that we thought through from our Career Development Program. When we think about wildlife care, those individuals coming in who are part-time individual, how do we keep them, how do we keep inspiring those individuals, and what can we provide to those individuals that will allow them those opportunities that they may not normally have for traditional resources, if you will. And that's where we really start to think about wildlife care from a different standpoint. So at least internally, we created a two-year program where it was more about how do we leverage our subject matter experts internally who have these amazing degrees, who have created these amazing professional careers for themselves or working through all of these different technical jobs to really get to where they are, and how do we download that information in order to then disperse it to other individuals within our organization, so that way they can start to recognize and understand some of those foundational pieces from an educational standpoint that will allow them to be successful.

And then how do we add on top of that, or a layer on top of that, the practical hands-on experience at the same time. So of course, through multiple educational sessions, our team members are going through some of those courses that are really gonna help them be successful and understanding some of that technical knowledge that is necessary, but also then providing them that opportunity to get into the field to leverage that knowledge, to apply that knowledge, so that way that knowledge becomes more ingrained, they understand why that information is important for them to know, but they're also leveraging that information so that way, of course, that information just doesn't go by the wayside. But it continues to be reinforced with follow-up and follow through.

So that way we know we are creating a really great base to leverage in the future. The second year for those people is what we consider our loan program. So then we take those individuals and for a longer periods of time or interject them into that space. So after they go through the education, they go through that practical hands-on component, they now have an opportunity for a whole year to spend months in certain cases with the teams that they eventually would like to work with in order to really shore up that expertise to provide that clarity that is necessary to those leaders around their impact, their ability to be successful within those essential functions, and then allow them opportunities to apply for those roles.

So kind of going back to that technical aspect that you're mentioning, that's how at least here we are working towards ensuring that we have that pool that we can then leverage and utilize to continue to help us with any areas of opportunity as it relates to talent and maybe the challenge is finding good talents within this particular industry.

Michelle Ockers:

And are the people who are taking part in that career development program and being developed, are they employees already? Or are they volunteers? Or is it a mix of both? What does that look like?

Dustin Lacasse:

These are our team member, we do have an internship program that follows a very similar process, but those are for the external individuals that are coming into our organization, we always had a really good internship program, we've continued to enhance it, but what we recognized was, how do we then take what we have done so well and internalize it for people that are actually working for our organization. One of the things we recognized is that team members are so... They crave that information, they crave those opportunities, and they really want organizations, and I think this kind of runs the gamut, but they want their organization to invest in them, so they feel valued and important to whatever mission or purpose that an organization actually is kind of working through. So for us, it was really helpful and important to really start to think about how do we layer on top of what we're already doing and start thinking about how do we transition that information to internal team members, so that way they also have those similar opportunities that external individuals will have when they are applying for some of our programs.

Michelle Ockers:

I want to come back in a moment just to talk more about how you developed the, this kind of... It almost feels like an integrated set of programs or complementary set of initiatives around performance and succession planning and career development programs, but I want to come back to the idea of your SMEs your key technical roles and succession... Well, I guess career, like how do you, what keeps your key technical experts, particularly when you think about your conservation agendas, like some of the skill sets must be very specialized for some of your key roles, so in terms of strategies to both keep them motivated, engaged and look at succession planning and making sure because everybody retires or moves on at some point, succession planning from a, for kind of those key technical experts in your organization, is that an area you've tackled?

Dustin Lacasse:

Yeah, you know that organizational knowledge that we don't want to lose, it's so valuable and important, so how do we download that information to other individuals, so as you're mentioning these individuals as they move into retirement, that institutional knowledge continues to marinate within the organization and is built on top of what we normally would do within that type of space, and what we currently doing, and this is of course runs a gamut for the other organizations I've worked for, but offer various opportunities for education, so whether that is helping with certification and helping pay for the cost of those certifications or conferences that are so valuable and important, but also how do we partner with like-minded organization to share that institutional knowledge and to gain from them what they have also learned, and I think from a Zoological standpoint, that is one of the most magnificent things that we have at our fingertips working with those organizations who are accredited through the same organization that we are, which is of course our Association of zoos and aquariums, there's a world-wide organization that's also a part of that, but how do we leverage and collaborate across the board so that way those individuals who have a technical skill set that needs to continue to be developed, can work with individuals who are also in that same space to acquire that knowledge.

And then to institutionalise that knowledge here through some of our own programs like our wild life care development program, how do we bring that knowledge back and then leverage it to grow other individuals simultaneously. So I think from a non-profit standpoint, we have such a great opportunity normally in the corporate world, right, you're not working... If you're in finance, you're probably not working with another bank, asking them what their best practices are and how they have internalised certain processes, usually that's pretty held pretty close to the chest, if you will, as kind of proprietary information, but when you start working in a non-profit setting, it starts opening up doors that are normally not opened up for you in a corporate setting because people are craving information, they want a partner, they want to advance their mission and cause, and if there are like-minded organizations out there that are doing the same thing, then it becomes a lot easier for those organizations to partner and collaborate and provide that institutional knowledge and transfer that knowledge according to whatever you are working on, making it a lot easier to help develop your team members versus a corporate setting, which is very kind of in a box, if you will.

Michelle Ockers:

It's a lot more opportunity for collaboration across the set, that's a great opportunity to dig into for your people, and so can we come back to your performance and succession planning, we have a sense of feel for that. Can you tell me you were starting from ground zero on this, nothing was in place or was there something already in place as you started working on this?

Dustin Lacasse:

Yeah, from a performance standpoint, there was definitely something in place, but what I recognized when I came in, just like I recognize in other institutions, I had this opportunity, is usually within a performance management setting, there are... Unless it is a very seasoned workforce and they have done a lot around training and developing team members to recognize and understand that process, you really start to see those areas of opportunity magnified in certain cases, when you're working with an organization that may not be as seasoned within a particular process, if you've experienced a lot of change within a particular area, it's hard to solidify behaviors when things are consistently changing. So when I came into this position, I recognized just like I recognized in other areas that I worked in, and these are similar situations, they don't necessarily just impact this one organization, it's really across the board when it comes to performance management, but unless there is the tools and the transparency that is needed, there's a lot of confusion in certain cases around how performance management is actually done within an organization and what is the right way to actually do it. So as I started working with our leaders and started seeing the data.

As we've talked about, I think a lot of L&D professionals talk a lot about the need for data. Getting your hands on that data, or at least for me, getting my hands on that data really opened up a huge area of opportunity around things that really needed to be done maybe a little differently or just tweak in order to see better results within this particular space, and so for me, the first part was.

When I first on-boarded into this particular organization, was to really understand what are those organizational challenges with this process, what data do we currently have that will communicate for me what is currently transpiring within this space, and then what we may need to do differently in order to ensure the success of this initiative as it continues to be rolled out on a yearly basis, I entered this organization in 2021, it was in August, and we deployed evaluations in December of that year, so I really had to quickly... Get up scaled into what that process actually look like and understanding some of those areas of opportunity that might actually be there for our team members, once I was able to get my hands on that data and really recognize what those were...

It was more about bringing people to the table to really have holistic conversations around what we could do differently in order to be successful through that mechanism. There is a really great...

Michelle Ockers:
So can you pause for one moment, Dustin, I love this use of data, were there any, was there any kind of surprises or any key insights when you looked at the data that gave you a clue as to what questions you needed to tackle when you brought people together.

Dustin Lacasse:
Surprises? No, only because I've worked in this space and multiple facets in the past, and they're very similar, but it does provide, like you mentioned, a lot of great opportunities for the questioning aspect.

Michelle Ockers:
Got it.

Dustin Lacasse:
So what we, what I at least recognized was that in the absence of transparency and really great education around this process, team members are more apt to rate themself more, loftily, then maybe what is really a true representation of the body of work in which they were able to perform throughout that cycle. So of course, it was really apparent to me that we needed to do some training, not just within this organization, but like I mentioned in a lot of other organizations, trainings become one of that cornerstone to alleviate the variability within the process itself. So what training do we really need to provide to our team members, how do we do that effectively, and of course, that's a collaborative conversation with key stakeholders across the organization to ensure they're buying into the process that we want to execute on, and then of course, thinking about those what kind of activities can we really create that really help hone somebody's understanding of that particular process and allow them to really put it into play, if you will, through these really structurized kind of training sessions where it becomes a safe space to have those conversations, to really.

Deep dive and digest what is really necessary for them to understand in order to be more successful through that process, so we really leverage that data from that standpoint to really think through, are there unique challenges within this organization, maybe than other organizations as it relates to performance management and how do we meet our team members where they're at to ensure that they are getting what they need in order to feel successful, but also feel confident in themselves as they work through that process.

Michelle Ockers:
Okay, and you've kind of got two audience groups there, right? You've got your leaders and you've got your team members, and some people are in both spots, both roles at different points in time. What was most important for your team members in this process?

Dustin Lacasse:
I think one of the bigger pieces that team members usually have trouble grappling with is how do they communicate their story successfully through that mechanism, what do they

need to provide in order to communicate where they believe they are at with a particular indicator, what do I need to say in order for me to align it consistently exceed expectations, we're not standing versus a re-expectation, so whatever the indicators your organization is leveraging and utilising, but how do I leverage those successfully and what do I need to do to document that successfully? So for us, within this space, that was one of the bigger areas of opportunity that we recognized was everybody was communicating differently, some people may not even communicate at all and just provide an indicator and say, You know that's all I don't need to communicate anything else, and that's definitely a common occurrence within different organizations as well, so for us, at least in this particular space, it was how do we get individuals to understand what we would like to see from them as it relates to their body of work and how do you compartmentalise those bodies of work within a performance evaluation, since there are usually multiple places that individuals kind of recognize that this information could fall under...

I could put it here, I could put it in there, but where should it really go and then how do I communicate that successfully, so that way I am successful in getting what I would like to get from this process, that was really the bigger clutch for our team members on how to write an effective evaluation for yourself to communicate your story successfully.

Michelle Ockers:

Okay so when you think back over how things have changed and where they are today versus when you started two years ago in this performance and succession planning space, particularly it's focusing on this performance management space, because it's an important part of the process that everyone is involved with, what do you think, where do you think you've made the most progress and what's the value of that to the organization?

Dustin Lacasse:

Yeah, we've seen some really wonderful changes with individuals recognizing how to leverage the right indicator successfully, so we really shift that mindset away from, I'm always outstanding, to knowing that meeting expectations. It's a job well done. You did a great job. Not everybody will be outstanding, there are always areas of opportunity for individuals, not everybody is perfect and outstanding usually will signify, particularly within a specific area of a performance evaluation that you really... There's nowhere else that you can really stretch yourself within that particular mechanism, you're outstanding, there's, that's all within that particular space, but getting people to recognize that you know what not everybody's perfect.

The work that you do on a day-to-day basis is valuable and extremely important to the organization, and doing that work that you are hired to do is amazing in and out of itself, you don't always have to go above and beyond in order to make an impact within the space that you are working within, and so how do you really then capture that information and make sure that your communicating that successfully? We've seen a really wonderful shift across the organization with individual starting to really grapple with that, putting that thought process into play and then really kind of alleviating that variability across the organization that may have been there in the past, we're really seeing kind of that variability subside within the organization, which allows for us to have more transparency to the process, but it gives team members also a lot of reprieve when they think that, okay, our leaders are actually doing this in a way that is consistent now.

One person may not be getting something totally outside the norm than somebody else, we are now looking at the process really consistently applying that, trying to alleviate those biases as much as possible, so that way team members can trust in the performance management process and know that we as leaders within the organization, are gonna do whatever we can to ensure that that process continues to be something that they should trust within.

Michelle Ockers:

A lot of these processes are kind of similar from one organization to the next when they're well designed, what do you think... And you've talked about the key shift there in the context of your organization, what do you think has been the most critical success factor or success factors what's really driven the success of the, and generated this shift.

Dustin Lacasse:

Yeah, I think a good recognition of body, the work that people are actually doing have really helped create this great shift when I think about performance, and I look at the... Where people are aligned, normally, you're gonna find that a majority of your staff are going to meet expectations within the organization, that's normally where people usually lie when going through a performance evaluation process, when you start really seeing that curvature shift dramatically from one space to another, that there are more people in the organization who are exceeding expectations, that are meeting expectations or even from a different standpoint, needing improvement, then you know that there's probably something off within the process that has been created, so it's really looking at that data to say, okay, are we meeting the mark here are we really now starting to see what we would normally see as individuals start testing themselves and leaders start testing team members, and that's exactly what we started to recognize and see within this organization at this moment time, is that great shift back to that norm that you normally, would usually experience versus some of these outliers that are usually indicators that people are just not well aware of the process, they don't have really good clear understanding or direction of the process, and I think the win for us has been really that shift.

That now really puts us in alignment with a lot of other organizations as it relates to where people are normally falling within that curve.

Michelle Ockers:

Okay, so what are your tips for others who want to improve their performance management process and get this more realistic and appropriate spread of performance, assessed performance, if you like, across the organization, what would you recommend to others if they want to get the kind of outcomes you've gotten with this process?

Dustin Lacasse:

Yeah, that's a great question. First of all, I would make sure that you have good docmentation. Are they really defined well, do they have clear understanding of how they would leverage that definition as it relates to their own writing of a performance evaluation, can they look at it and say, okay, this information that you're providing to me makes sense. I can honestly see the direct connection between my work and this particular rating, so whatever you can provide from a documentation standpoint, from a resource standpoint, goes a long way, of course, the data, of course, is going to be even another critical component of that, so are you looking at the data consistently, are you working with your stakeholders and your senior leaders as you look at that data to recognize areas of opportunity or strengths within your current program, and then how do you internalize that information successfully, that usually is gonna contribute to the documentation of the resources that you roll out with a process, depending on where you recognize there are areas that need to have a little more, maybe structure around or you need to hone in a little more successfully, so documentation, definitely your key leaders support and buy-in.

I would also look at your performance indicators, because sometimes those performance indicators are so tricky for team members to really grasp on to, that they start leveraging the wrong performance indicator because they just don't have a direct connection to what you are utilising as performance metrics. So can you make slight changes to those for us instead of just saying you need improvement, is there another word choice that you could leverage... When I worked at the lines today, we moved away from needs improvement and we moved towards developing towards standards, that was a huge eye-opener for a lot of team members because they felt a lot more comfortable utilising that indicator versus a need improvement, which can be really hard on team members when they see that, it really kind of changes those conversations, particularly if you're not having conversations throughout the year, and there's clear transparency on where that team member is throughout that cycle, so when you end up in that performance evaluation conversation, if needs improvement becomes the overarching performance indicator, hopefully your team member already knows that's gonna happen because those conversations become even more challenging, but is there slight tweaks that you can make for us here? We went from meet expectations to fully met expectations.

And exceed expectations to consistently exceed expectations, those slight tweaks made a huge improvement, we also added another indicator for New to role team members, we didn't have an indicator when I first came on board that allowed individuals who were new to organization to utilize and identify, you're not always going to meet expectations if you're one month into your role, right.

Michelle Ockers:
Absolutely.

Dustin Lacasse:
You're probably still working towards developing that, that skill sets that you need in order to be successful at those essential functions, so is there another indicator that you could interject into the mix for those types of demographics, so that way those individuals have something they can gravitate towards and utilize and they're not using exceeding expectations or outstanding when you know they've only been in their role for a one month period of time potentially, and then those conversations can also have impact on engagement with team members, so I would also think about your performance indicators that you're leveraging to make sure that they're fit for your organization, but also for the team members that are gonna be leveraging those performance indicators, so those three things would be my best recommended.

Michelle Ockers:
I think that is a brilliant tip around looking at the language you're using to describe your performance indicators, because it as much as we talk about trying to make it removed by societies and emotionally loaded experience both for the people doing the appraisals and the people are receiving the feedback, even with ongoing conversation, because this ties into decisions being made about people's opportunities, career, remuneration and so on. So I really like that tip around the language, not just plain language, but looking at how people interpreting the language to get them on board.

Dustin Lacasse:
I think leaders also gravitate towards easier language, you don't want to always tell your team you need improvement, because like I mentioned that impact engagement, they seem to be softer with that type of language and say, maybe you're developing towards standards, we're still working to getting you there, but we are committed to working with you and together to ensure that you are successful within this organization, that is a lot easier for a

leader to utilize as an indicator versus needs improvement, because those conversations become totally different when you're off facing with a team member and you start to see kind of even their body language change and their non-verbal cues become really defensive when you're having those harder types of conversations, but any time you can soften us and provide an easier, clearer way that a team member can relate to you're gonna have a lot more success in ensuring that those individuals are working with you and you gain their buy-in to continue to work through the improvement that is necessary for them to be successful.

Michelle Ockers:

Yeah, so Dustin I know we've run over our normal recording time, I feel like it's such a big topic, this performance and succession planning and it has tangled into so many things. It is an important area, even if you as a learning development professional, don't have direct control over that, but to really understand that how can we leverage that and how can we improve that because it's... You play into people's career development with the programs and offerings. So thank you so much. I have one question I'm burning to ask you a quick question before we close out, so there's a lot of different animals at the zoo, and you would have had direct experience with a lot of them. Do you have a favorite?

Dustin Lacasse:

Oh gosh, that's the challenge. I feel like I have a favourites, at different locations or different front doors here at the zoo. I love orangutans, they're just so curious, just watching them and their behavior, it's just so fascinating for me, so orangutans here at the zoo, but I love elephants, I will always be an elephant person, just their emotions that they show that they're so smart and really amazing creatures, when you really start to learn more about them, and so when it comes to our Safari park, we have an amazing group of wildlife Specialist that take care of our heard of elephants and I'm just so fascinated, sit there and watch them on a day-to-day basis interact with them, but also to see their, the majestic nature of them as they are going about their own day. So elephants in the Safari park orangutans at the zoo would be definitely my favorites, for sure.

Michelle Ockers:

How lovely to have that as part of your work environment. Thank you so much, Dustin we'll include a link to your LinkedIn profile. If anyone would like to get in touch with you, I'll pop that in the show notes, and we'll share the episode on LinkedIn, if anyone wants to follow up on anything that you discussed, thank you for your willing to share your work and insights with us today.

Dustin Lacasse:

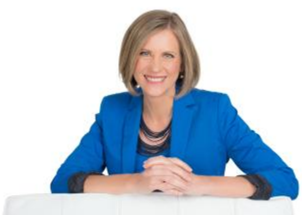
Yeah, absolutely, I appreciate the time, and I appreciate you doing all of this hard work to get that knowledge out to other individuals, because it's just such a wealth of opportunities to continue to grow and learn within this professional space, so I appreciate you as well.

About Learning Uncut

Learning Uncut are learning and development consultants that help Learning and Development leaders and their teams become a strategic enabler so that their businesses can thrive. We work in evidence-informed ways to drive tangible outcomes and business impact and are strong believers in the power of collaboration and community. We specialise in helping to build or refresh organisational learning strategy, update their L&D Operating Model, enable skills development, and conduct learning evaluation. We also offer workshops to shift learning mindset and practices for both L&D teams and the broader workforce – as well as speaking at public and internal events.

Learn more about us [at our website].

About your host, Michelle Ockers



Michelle is the co-founder and Chief Learning Strategy at Learning Uncut. She is an experience, pragmatic organisational learning strategist, L&D capability builder and modern workplace learning practitioner. She also delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events.

Michelle received the following prestigious industry awards in 2019:

- Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D *Professional of the Year – for outstanding contribution to the practice of learning and development*
- *Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning*

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