



**Harvard** John A. Paulson  
**School of Engineering**  
and Applied Sciences

# SEAS Manager Retreat

Friday, May 8, 2026

# Agenda

Topic	Time	Facilitator(s)
Welcome	9:00am-9:30am	Elizabeth Lennox
Objectives for Today	9:30am-9:35am	Kim Harris
A Challenge, a Win, and a Wonder (Exercise)	9:35am-10:35am	SEAS HR Team
<u>Break</u>	10:35am-10:50am	
Effective Communication: Meaningful Conversations, Feedback, and Effective Documentation	10:50am-11:50am	David Crowley, Marybeth Wilcox, and Riley Morin
<u>Lunch</u>	11:50am-12:30pm	
Moving Forward Together: Steady Leadership in Unsteady Times	12:30pm-1:30pm	Joan Balaban, Harvard's Center for Workplace Development (CWD)
Employee Assistance Program: Manager Consultations and Program Overview	1:30pm-2:30pm	Betsy Pratt and Kristin Matthews, KGA – Harvard's Employee Assistance Program (EAP)
Next Steps	2:30pm-2:40pm	Kim Harris
Closing	2:40pm-2:50pm	David Hwang
Survey	2:50pm-3:00pm	





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WHERE  
SCIENCE  
AND  
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CONVERGE

# Welcome

Elizabeth Lennox

# SEAS Mission

***Through teaching and collaborative research, SEAS discovers, designs, and creates novel technologies and approaches to societal challenges—in service to the world, the nation, and our community.***

***We bridge disciplines, both within engineering and the applied sciences and beyond, to prepare broadly trained leaders, to advance foundational science, and to achieve translational impact.***

***Where does our mission show up in your day-to-day work, and where does it feel hardest to translate into action?***





# Today's Objectives

1. **Connection:** Connect, reflect, and support and utilize each other as a community of practice.
2. **Growth:** Enhance practical manager and leadership skills to lead consistently and effectively.
3. **Insights:** Surface common challenges, share insights, and reinforce consistent management approaches.

# SEAS Manager and Staff Statistics\*

- **206** core (union and non-union) staff.
- **64** managers, of which **48** are administrative staff and **16** are faculty.
- **16** faculty supervise a total of **29** staff members, which is **14%** of staff.
- Approximately **31%** of our staff population (**64 of 206**) are managers who lead, influence, and impact our larger staff community daily.

*Our goal is to equip managers with the knowledge, skills, and resources to be as effective in their roles as possible.*

\*As of April 27, 2026



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# Summer and Fall Manager Lunch and Learn Series Topics

- Career Development
- Enhancing the Employee Experience
- Hiring Contingent Staff
- Leaves of Absence and Workplace Accommodations
- Peer to Peer Coaching





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# **Effective Communication:**

## **Meaningful Conversations, Feedback, and Effective Documentation**

# Meaningful Conversations

- Help move things **forward**, not just tasks.
- Advance **understanding, trust, or clarity**.
- Go **beyond surface-level** updates (e.g., “did you finish that?”) and get into **why things matter, how people are doing, and what could be better**.
- Usually involve some level of **honesty** or **vulnerability**.
- **Connect work to purpose**.
- **Open doors to better ideas**.



# Meaningful Conversations (Benefits and Impact)

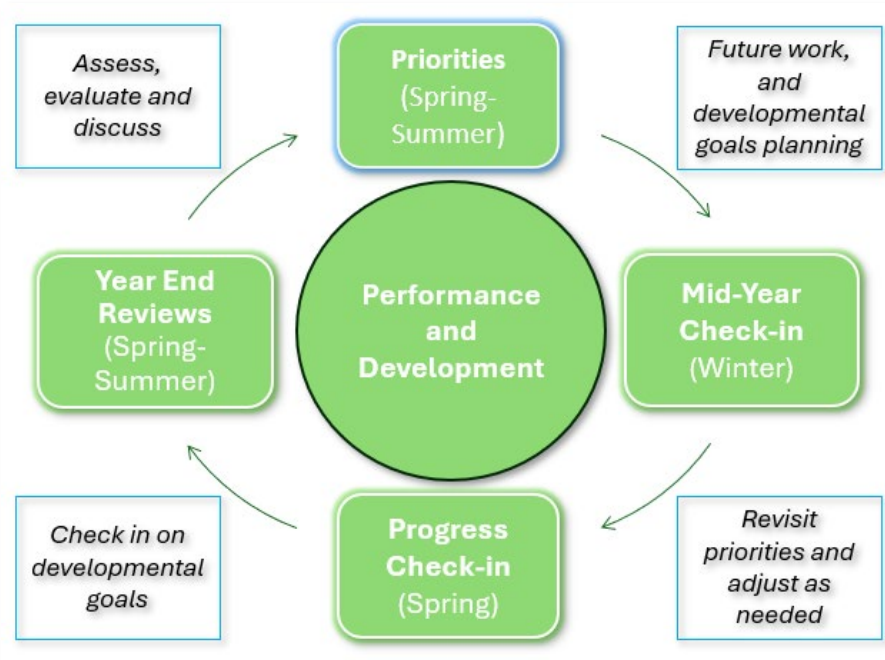
## These Conversations can...

- Build **trust** and boost **engagement** and **satisfaction**.
- Clarify **expectations** and strengthen **accountability**.
- Foster **collaboration, alignment,** and a **positive work culture**.
- Improve **performance, productivity,** and **decision-making**.
- Support **growth, development,** and **talent retention**.



# Meaningful Conversations: Framework

## Performance Management Conversations



Additional Meaningful Conversations with Directs		
Conversation	Frequency	Focus
1 on 1	Weekly or Bi-weekly	Day to day tasks, tactical guidance
Ad-Hoc	As Needed	Problem solving, time sensitive issues
Career	Annually	Long-term interests, view, options
Coaching	As Needed	Guidance, skills, growth, open-ended questions
Feedback	Frequently	Achievements, growth, development, improvement
Professional Development	Quarterly or As Needed	Stretch assignments, opportunities, training
Stay Interview	Annually	Employee satisfaction and aspirations

# Feedback

## Can...

- Be **positive, constructive, or difficult**.
- Be in **private** or in a **group setting**.
- Be **planned** and **intentional**, or “**in the moment**”.

## Should...

- Occur **regularly** and be **timely, specific, and factual** and be delivered with **respect** and **empathy**.
- Focus on areas for **growth, development, change (where needed)** and **ways forward**.
- Be **positive** (when possible) and **constructive** (when warranted).
  - **Positive** feedback **acknowledges success** and **behaviors** that lead to **positive impact**.
  - **Constructive** feedback **acknowledges a “less than ideal” impact** and **focuses** on **desired, different, or new behaviors moving forward**.

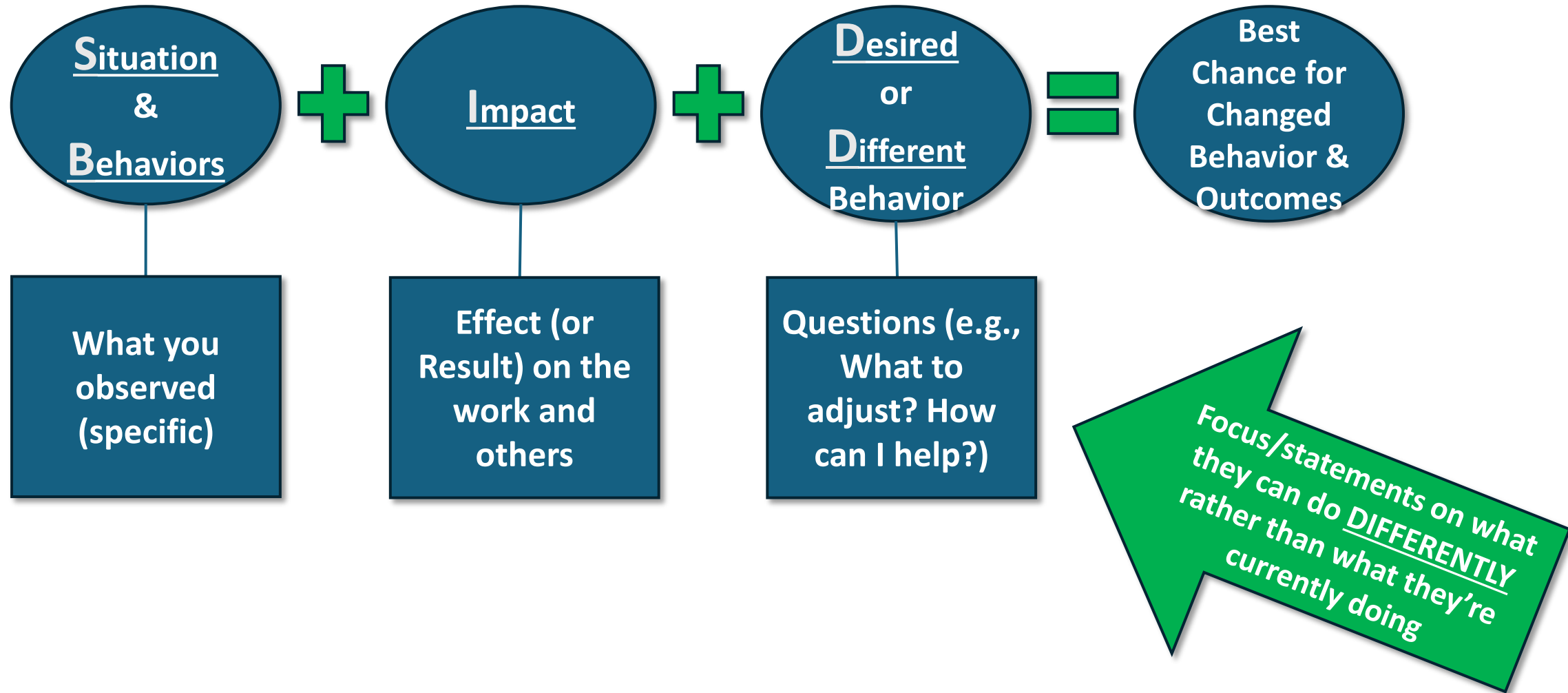


# Feedback (Benefits and impact)

- Builds **trust**.
- Strengthens **relationships**.
- Clarifies **expectations** and drives **accountability**.
- **Connects** individual **work** to broader **goals** and **impact**.
- Sparks **ideas** and improves **decision-making**.
- Reinforces **positive behaviors**.
- Drives **continuous improvement**.
- Produces better **performance, results** and **outcomes**.



# Giving and Receiving Feedback Formula: Constructive (SBID)



# Constructive Feedback Exercise

**Scenario:** Think of a time when you delivered constructive feedback and it didn't go as well as you would have liked. Using the feedback formula what would you do differently?

**Instructions (10 minutes total; swap roles 5 minutes through):**

1. Pair up at your tables.
2. One person describes their situation, why it didn't go well, and how they would communicate differently using the model.
3. The partner provides feedback on their application of the model, how it landed, and anything else they would suggest.
4. Swap roles and repeat the exercise.



**Duration: 15 minutes**

**Reconvene Full Group (5 minutes):** How'd it go?



# Effective Documentation To Recap a Performance Conversation

## What:

- The events, behaviors, and outcomes that led to the conversation.
- Relevant examples.
- Description of the impact on the work and on others.
- Relevant dates and timeline.
- Desired changes needed for success.
- Any follow up meetings, deliverables, and trainings for the employee to attend.

## How:

- Be concise and specific.
- Use clear, neutral, professional language and tone.
- Avoid acronyms or jargon, casual phrasing, filler language, and irrelevant or overly detailed information.



# Effective Documentation To Recap a Performance Conversation

## When:

- Within a reasonable timeframe after the conversation.

## Why:

- Provides clear expectations.
- Creates a reference point for future conversations and performance assessment.
- Demonstrates the manager's effort to address and correct issues.
- Helps recognize patterns of poor performance.
- Protects the organization.



# Effective Documentation Exercise

## Tables (15 minutes)

- Read the documentation example provided.
- Make notes and discuss what works well and what needs improvement.

## Full Group (15 minutes)

- Facilitated discussion about your observations.



**Duration: 30 minutes**



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# Effective Documentation Exercise

## Before

Dear [Employee],

I am writing to summarize our conversation. As we discussed, your performance with meeting deadlines and responding to requests requires immediate and sustained improvement.

Your monthly financial reports for March and April were submitted late.

## After

Dear [Employee],

I am writing to summarize our conversation **on May 8th**. As we discussed, your performance with meeting deadlines and responding to requests requires immediate and sustained improvement.

Your monthly financial reports for March and April were submitted late **by 5 days and 9 days respectively, resulting in late fees for the department.**



# Effective Documentation Exercise

## Before

Regarding responsiveness, I received feedback from the Smith Group that they emailed you on April 15<sup>th</sup> and did not receive a response for a while. Timely communication is a key part of your role, and delays strain our relationships with the groups we support.

As previously communicated and consistent with team standards, inquiries should receive a timely response. If you do not have the answer, acknowledge the message and let the sender know you are working on it.

## After

Regarding responsiveness, I received feedback from the Smith Group that they emailed you on April 15<sup>th</sup> and did not receive a response for **until a week later, on April 22<sup>nd</sup>**. Timely communication is a key part of your role, and delays strain our relationships with the groups we support.

As previously communicated and consistent with team standards, inquiries should receive a response **within 24 business hours**. If you do not have the answer, acknowledge the message and let the sender know you are working on it.



# Effective Documentation Exercise

## Before

When we met today, you mentioned there are times when you need assistance and see that my calendar is full. In those instances, please give me a shout and I will make time to meet with you.

## After

When we met today, you mentioned there are times when you need assistance and see that my calendar is full. In those instances, please **send me an email or Teams message** and I will make time to meet with you.



# Effective Documentation Exercise

## Before

As we discussed, we are shifting to weekly check-in meetings on Wednesdays at 10:00am. I really think this is a good idea and I'm looking forward to working with you and figuring this out. In these meetings, we will discuss your progress, any challenges you are facing, and next steps moving forward.

Please come prepared to provide a status update on your pending items. In the meantime, please let me know if you have any questions.



# Effective Documentation Exercise

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# Moving Forward Together: Steady Leadership in Unsteady Times

Joan Balaban, Senior Organizational Consultant/Executive Coach  
Center for Workplace Development



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# Workshop Agreements

- Be curious.
- Engage fully.
- Listen for understanding and withhold judgment.
- What is said in here stays. What is learned can leave.
- All viewpoints are welcome.
- Others?

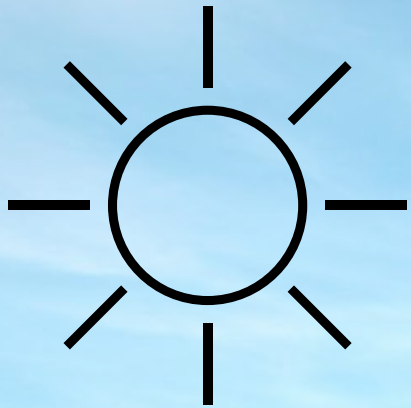


# Agenda

- Mindset, Perspectives and Climate
- Leadership Capabilities for Unsteady Times
- Strategies for Moving Forward



# Weather Forecast: Describe the last few months?



# Examples: Employee Experience

**Adjusting to layoffs**

**Worried, Stressed  
about Job Security**

**Angry, Frustrated,  
Distracted**

**Balancing  
additional work**

**Loss in Productivity,  
Less Engagement**



# Perspective Shift

**“What if this isn’t the storm—what if it’s the climate?”**



# Perspective Shift

**“[Leading] isn’t about waiting for the storm to pass.  
It’s learning to dance in the rain.”**



# Leadership Capabilities for Perpetual Uncertainty

- Building and Sustaining Trust
- Demonstrating Strong Leadership Presence
- Communicating Clearly and Transparently
- Developing Others in Adversity



# Building and Sustaining Trust

- Be approachable.
- Show empathy and compassion.
- Create an environment where people feel comfortable acknowledging when a mistake was made.
- Maintain confidentiality.
- Be consistent in how you interact and treat your team members.





# Demonstrating Strong Leadership Presence

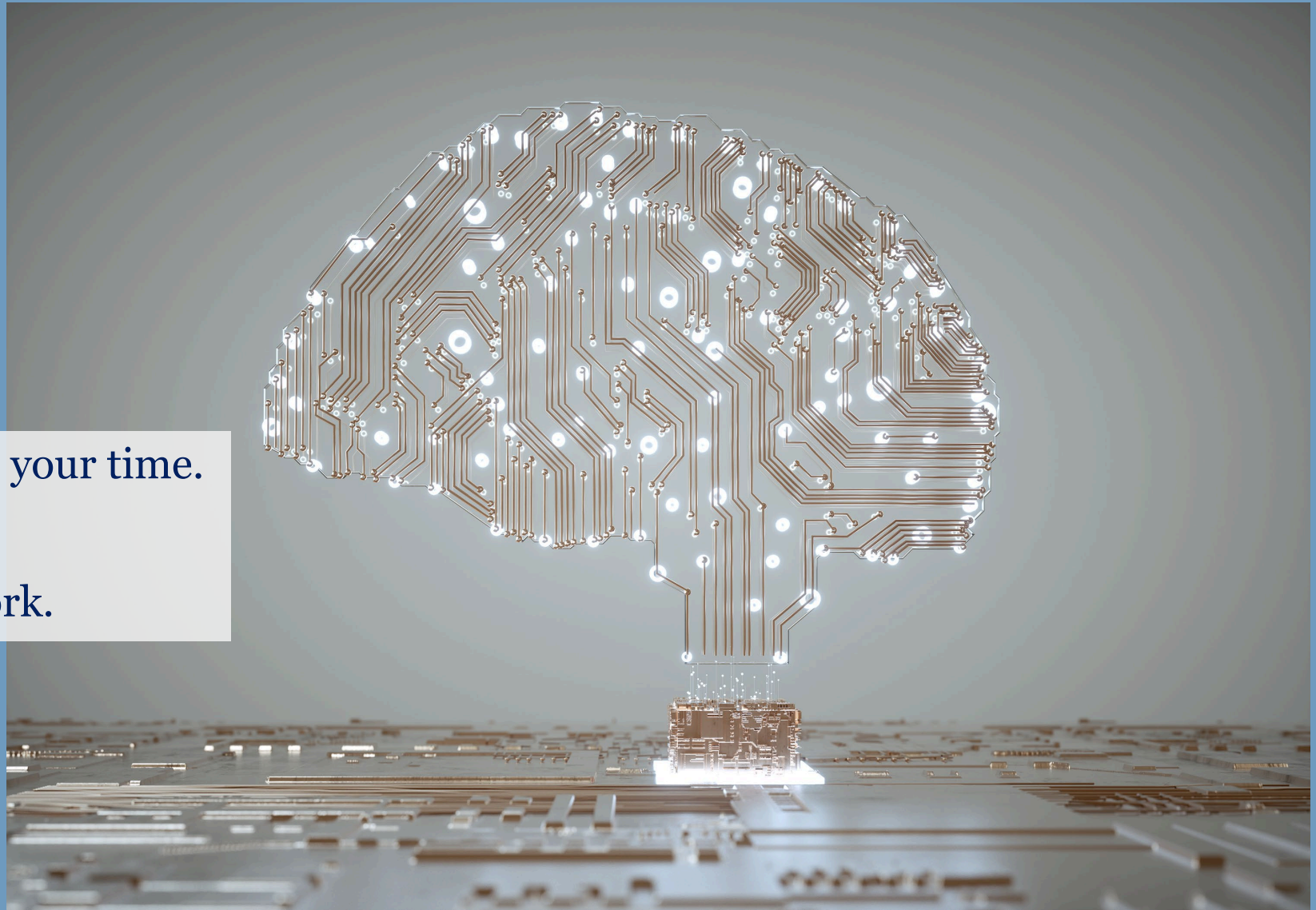
- Project calmness and stay composed in high stress situations.
- Be willing to be vulnerable appropriately.
- Be visible.
- Inspire confidence.
- Take care of yourself.

*Resiliency is key to our ability to do these well.*



# Strengthen Resilience Through Caring for Yourself

- Manage your energy more than your time.
- Reduce cognitive overload.
- Psychologically detach from work.



# Small Group Discussion

What do you do to strengthen resilience,  
take care of yourself?

- What energizes you?
- What are you doing when you are at your best?
- What activities give you "flow"?



# Communicating Clearly and Transparently

- Explain the “why” behind decisions so people understand the reasoning.
- Share what you can: updates and information.
- Acknowledge what you cannot share and/or if there is no new information.
- Create opportunities for two-way dialogue.
  - ✓ Ask questions of your employees.
  - ✓ Encourage them to ask you questions.
- Share observations.



# Developing Others in Adversity

- On the job opportunities:
  - ✓ Invite staff to present at a meeting they do not ordinarily attend
  - ✓ Delegate stretch projects
  - ✓ Networking
- Encourage creative problem solving.
- Empower employees to make decisions.
- Provide clear, actionable feedback.
- Celebrate small wins and meaningful progress.
- Provide access to training/development available.



# Personal Commitments

1. What is one action you will commit to, that will better help yourself as a leader during these times?
2. What is one action you will commit to, to move yourself and your team forward?



THANK YOU!



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# Employee Assistance Program Overview For Managers

May 8, 2026

Betsy Pratt, Senior Account Manager  
Kristin Matthews, Chief Clinical Officer

## Services provided by your employer

- Emotional/Mental Health
- Family, Home & Work
- Support for Managers & Supervisors

## Basics

- Employee & adult household members
- Confidentiality
- Available 24/7
- Live and digital access
- No cost to you





## Blended Emotional & Mental Health Solutions

Counseling & Coaching

In the moment support (24/7)

6 sessions per issue

We assess need – next steps

Make the match – align to you

**No searching  
for availability.**

It's **normal** when someone is unsure how to describe what they are feeling.

We will help you figure it out.



## Blended Emotional & Mental Health Solutions

Counseling & Coaching

Peer Support

**Virtual Access**

**12 Sessions**

**Topics change over time**

**Schedule from KGA Platform**

### Expert Led

#### Examples:

1. Addiction Recovery
2. ADHD Support
3. Bipolar Support
4. Depression support
5. Divorce Support
6. Healing after loss (grief)
7. Parent and Caregiver Support
8. Postpartum Mood & Anxiety Support
9. Stress & anxiety support



## Blended Emotional & Mental Health Solutions

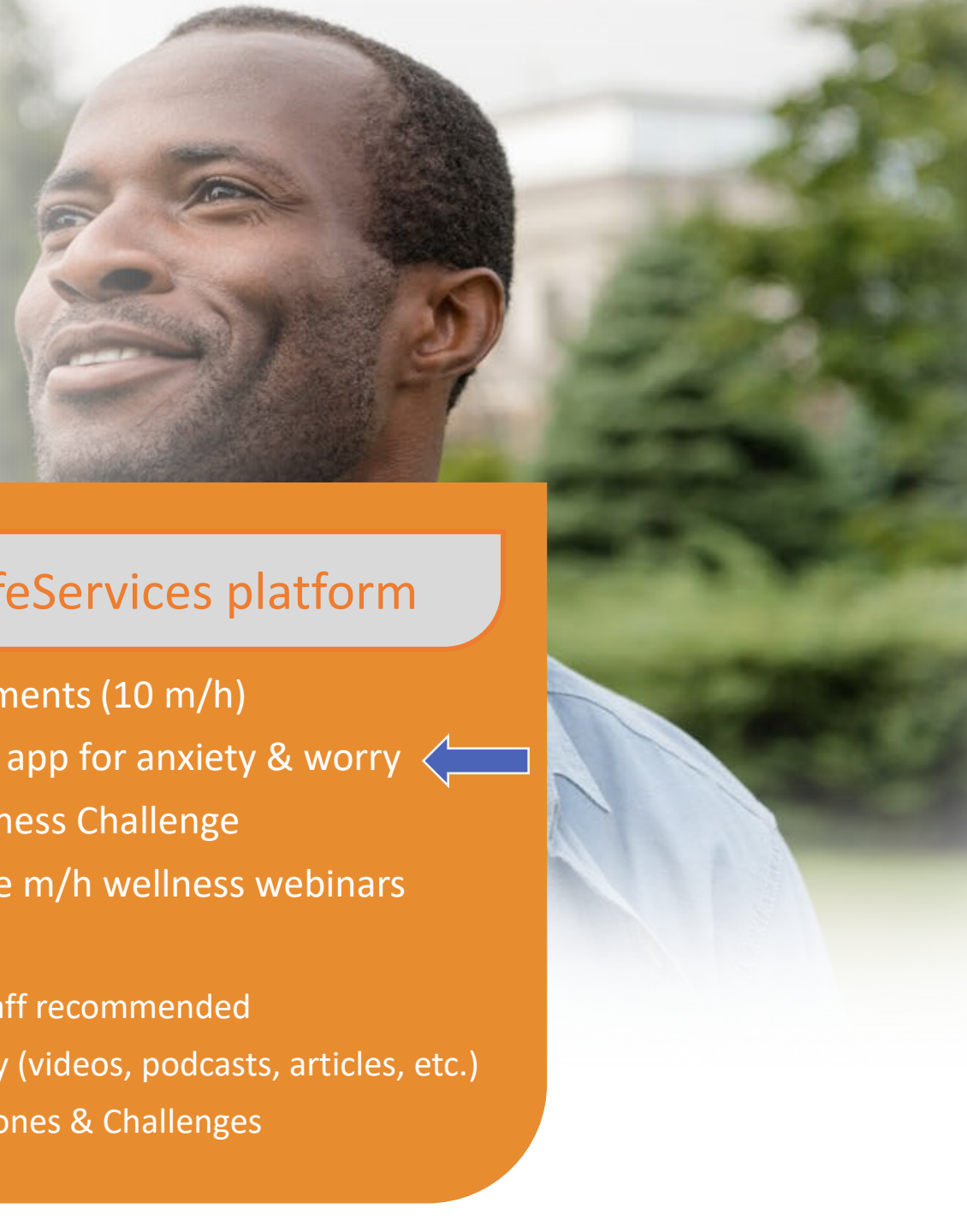
Counseling & Coaching

Peer Support

Digital Self Directed

### KGA LifeServices platform

- Self Assessments (10 m/h)
- MindTide – app for anxiety & worry ←
- MyMindfulness Challenge
- Events – live m/h wellness webinars
- Learning:
  - Books – staff recommended
  - M/H library (videos, podcasts, articles, etc.)
  - Life Milestones & Challenges





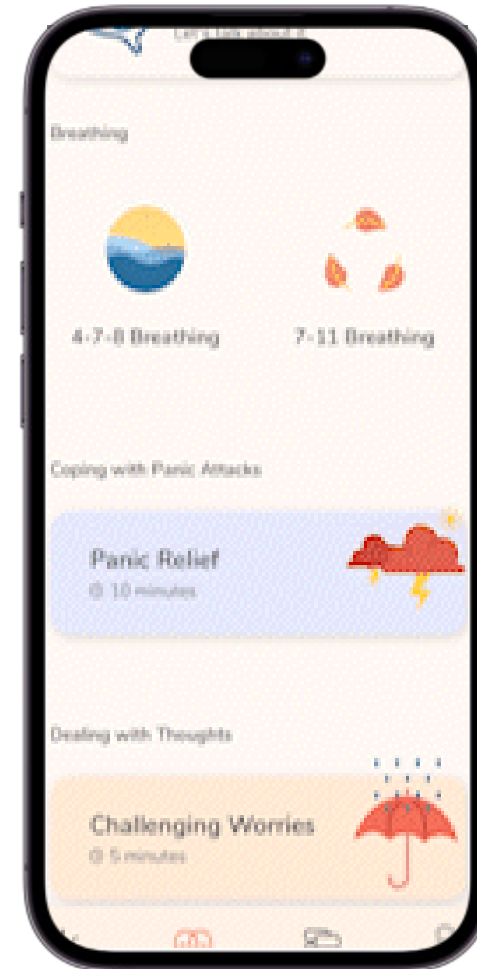
Anytime, anywhere mental health support.

Easy-to-use **exercises, courses, and audio tools:**

- ✓ Handle stress, worries, & anxiety
- ✓ Fight negative thinking
- ✓ Find calm



Your needs  
Your pace  
Your control



# Family, Home & Work Solutions



- Subject matter experts
- 30-minute consultations (per issue)
- Customized research for you
- Referrals (vetted)

## Assistance with:

### Parenting & childcare

- Early Education Consultant
- Parent Coach
- Special Education Consultant
- Fertility Coach
- Lactation Consultant

### Eldercare

### Legal issues

### Financial issues

- Certified Financial Planner
- Financial Coach
- Certified Public Accountant

### Work

- Career Coach

### Daily convenience

### Health & nutrition

- Dietitian
- Sleep Coach

# Access Made Easy



Get Started Online

Prefer to talk?

Call now:  
800-648-9557

Schedule an Appointment

Have us call you

### KGA LifeServices Platform

(my.kgalifeservices.com)



### KGA Mobile (app)

Download on the App Store    GET IT ON Google Play

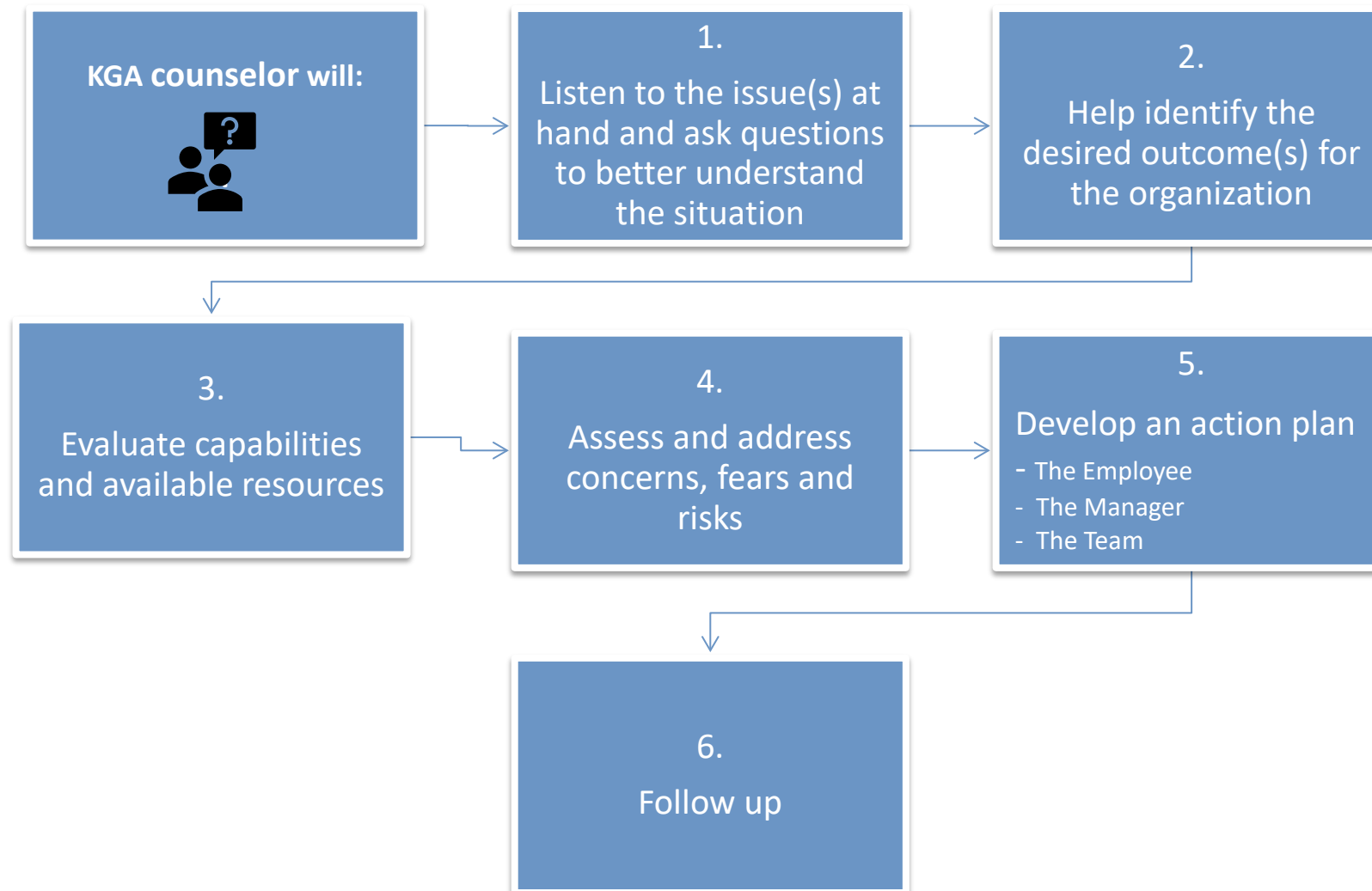




- Consultations
- Manager learning

- Concern for someone's wellbeing
- Behavioral issues
- Return to work support
- Navigating conflict
- **Making a referral to KGA**

# The Benefits of Consultation with KGA



## Case Example: Lin

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Lin is a 42-year-old employee who shared with a co-worker that she and her spouse have separated. She tells her colleague that she is so upset she doesn't want to live anymore and doesn't think anyone would care if she were gone. The co-worker shares what Lin said to the Supervisor.

The **Supervisor and/or HR can** contact KGA to receive:

- Guidance on how to talk with Lin about what they heard from the co-worker
- Coaching on how to get Lin an immediate assessment from a KGA Counselor
- Recommendations for next steps following the assessment to assure Lin's safety and well-being

**Lin's** immediate connection with KGA Life Services will include:

- An assessment of her mental status, risk for suicide/ self harm, and social supports
- A plan for next steps to address her safety and well-being
- Close monitoring and follow-up until crisis is resolved

# Making a Referral: Case Study



Your Research Assistant, Jonas



## Background on Jonas

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- Jonas is a 28-year-old Research Assistant who works a hybrid in-office/remote schedule;
- When he is working remotely, he is rarely on camera and barely contributes to discussion;
- When he comes to campus, he looks tired and disheveled;
- Co-workers report his apartment recently flooded and he had to move out;
- He is falling behind on his project deadlines but tries to assure his manager he will have his work done soon;
- He recently got so angry in the lab that he threw a computer mouse across the room

What behaviors raise a red flag for you?

## Behaviors That Raise a Flag

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- Attendance
- Patterned Absenteeism
- Lower productivity
- Moodiness
- Distracted
- Increased mistakes
- Aggressiveness
- Acting erratically
- Inappropriate behavior
- Change in appearance
- Stirring up trouble
- Blames others
- Not following through
- Slurring words
- Irrational comments

As a manager, what makes it hard to address these behaviors?

# Concerns for Managers



- Maybe there really isn't a problem.
- It will get better with time.
- It's awkward.
- They will get angry. (retaliation)
- I'll say the wrong thing.
- It's not my business.
- Not familiar with the employee assistance program.
- **What should I do?**



## Up front:

- Know policies
- Involve HR
- Ask for help early
- Don't wait

## To be avoided:

- Diagnosing
- Asking what the problem is
- Comparing to own experiences
- Commiserating

## KGA can help you effectively:

- Express concern
- Share observations
- Restate expectations
- Set limits, if necessary
- Plan next steps
  
- Refer to the KGA:
  - Confidential – no risk
  - Professional, experienced help
  - Personable and welcoming
  - Free benefit

# Supportive Conversation Starters



I've noticed \_\_\_\_ and I'm concerned. How are things going?

I understand this is a difficult time for you. Let's talk about options for support.

I'm concerned about you because \_\_\_\_. I'd like to connect with the KGA. Would it be okay if I had a counselor contact you?

Always remind employees that KGA is Confidential!

In your conversation, Jonas reveals:

- He lost most of his belongings in the flood and he doesn't have renter's insurance;
- He is currently staying with friends;
- He is not sleeping well;
- He is more behind on his work than previously reported but promises he can get caught up quickly;
- He claims the mouse "slipped" out of his hand and insists he would never throw something at work

What might make it hard for Jonas to reach out for help?

# Typical Concerns for Employees



- I don't know what you are talking about
- I can handle it myself
- Nothing will help me
- This is not part of my culture
- What will people think of me?
- Is Employee Assistance Program really confidential?
- Where will I find the time?
- ❖ Fear, shame and stigma are the biggest barriers!

## What you typically do not learn:

- Jonas called KGA and received an assessment and support
- KGA counselor also connected Jonas to:
  - A legal consultation
  - Sleep coaching
  - Housing Resources
  - Financial Coaching
  - Peer support group
- Results for Jonas at work:
  - Attending weekly check-ins with his manager
  - He is consistently meeting performance expectations
  - He is regularly participating in online meetings
  - He comes to the lab energized and ready to work

Your outreach was  
a turning point!

# Crisis Response



## Support for:

- Individuals
- Organizations / teams
- Major events

## Consultation and Response:

- Risk Assessment
- Leadership decisions & messaging
- On-site response
- Follow-up activities

## Access Support:

- Immediate support - 877-327-4278
- 24/7 availability
- Team-based response



Questions?  
Thank you!