Effectively Working Across Generations in Investing
For Texas Public Funds Investment Conference

Dr. Rob Konopaske, President
rob@me360.org
www.me360.org
Texas County Treasurer
Chief custodian of county finance and is charged with the safekeeping and investing of county funds.
WHO will be doing your job?

WHAT knowledge will they need?

HOW will they acquire it?
Better hurry…10,000 Americans turn 65 each day

(Pew Research)
Percent of the U.S. Labor Force (2017)

- Greatest: 2
- Boomers: 25 (Born: 1946-64)
- Gen Xers: 33 (Born: 1965-80)
- Millennials: 35 (Born: 1981-96)
- Post-Millennials: 5
Shared experiences *define a generation*
Greatest Gen Attributes:

- Self-reliant
- Work ethic
- Resilient
- Modest
Boomers’ Attributes:

Confident
Achieving
Teamwork
Civic-minded
Gen Xers’ Attributes:

- Practical
- Self-reliant
- Tech savvy
- Lone wolf

Image credit: YouTube
Image credit: Latino Public Radio
Image credit: Thought Catalog
Image credit: CBS News
Millennials’ Attributes:

- Digital natives
- Social media
- Cautious
- Diverse
Post-Millennials’ Attributes:

- Online life
- Pro-technology
- Team-oriented
- Green

Image credit: iGotOffer

Image credit: Debate.org

Image credit: Pacific Standard

Image credit: PewDiePie (YouTube)
Are These Real (or Imagined) Generational Differences?
ECE Recruiting Tips

Meaningful work

Social media

ECEs as recruiters
ECE Onboarding Tips

- Intentional process
- Buddy approach
- Intergenerational team
<table>
<thead>
<tr>
<th>Training Tips</th>
<th>Tailor to different generations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Applied and transferrable</td>
</tr>
<tr>
<td></td>
<td>Reinforce it</td>
</tr>
</tbody>
</table>
Performance Management Tips

- Frequent & less formal
- Constructive feedback
- Multiple sources
<table>
<thead>
<tr>
<th>Motivation Tips</th>
<th>Variety of motivators</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mission matters</td>
</tr>
<tr>
<td></td>
<td>Caring culture</td>
</tr>
</tbody>
</table>
Communication Tips

- F2F, phone, videoconference, e-mail, & texting

- Use multiple channels often

- Nonverbal/body language
Flexible work arrangements

Being at work ("facetime")

Live to work vs. work to live
Teamwork Tips

Bridge gen differences

Transfer knowledge

Effective/efficient meetings
Mentoring Tips

- Reverse mentoring
- Multi-gen project teams
- Capture/share the learning
KNOWLEDGE IS POWER, BUT ONLY WHEN YOU APPLY IT

-KRISTEN POBORSKY
Case Example #1

**Challenge:**
High (and costly) turnover of ECEs

**Outcome:**
Reduced turnover by 50% over 2-year period saving the client $150,000
Case Example #2

**Challenge:**
Department heads not collaborating effectively

**Outcome:**
Increased awareness of workloads & work styles, & enhanced communication
Case Example #3

**Challenge:**
Limited bench strength

**Outcome:**
Cohort of high-potential employees learned & applied leadership behaviors
Case Example #4

**Challenge:**
Announced retirements of senior leaders

**Outcome:**
New mission, strategic plan, & succession plan
WHO will be doing your job?

WHAT knowledge will they need?

HOW will they acquire it?
One size does not fit all…

Be creative & agile when developing solutions for your county!
ANY QUESTIONS?