Career Pathways Toolkit

|  |
| --- |
| About This Resource This toolkit includes a **step-by-step approach** to defining competencies for each job across a range of positions that—taken together—represent a pathway for career advancement. It can be used by executive leaders to define job classifications organization-wide, or by department leaders to define competencies for various roles on their team.  Here’s what’s included:   * [6 Steps to Build Your Career Pathways Tool](#_ndp4kmdvu0uj) * [Career Pathways Tool Template](#_qucmhcuhfwrs) * [Example 1. Career Pathways for Campaign Organizers](#_g281vj2tbkwj) * [Example 2. Career Pathways for Staff Attorneys](#_yslijxof4do8)   *See also:* [**Benefits of a Career Pathways Tool**](https://www.managementcenter.org/article/how-to-build-career-pathways-at-your-organization/)for staff, managers, and the organization. |

# Before you begin…

Consider how your organization’s core values inform your approach to staff advancement and development. Why is career management important for your organization? A good career pathways tool will make the implicit explicit about your **career management philosophy** (which your leadership team should be aligned on) and **operationalize your commitment to equity and inclusion**.

At TMC, we believe the most effective career pathways, or “competency models,” use the following guideposts:

1. **Prevent inequitable outcomes in hiring and promotion decisions**. Bring transparency to the process, set guardrails for managers to use, and inform rubrics to mitigate bias.
2. **Ensure career progression doesn’t always look like a ladder**. Define “lateral” paths for building experience, give equal value to “destination” roles and “stepping stone” roles, and offer “next level” opportunities based on deepening expertise not only becoming a manager of people.
3. **Help staff reach their career goals**. Support staff to develop leadership and explore opportunities inside as well as outside the organization.

# 6 Steps to Build Your Career Pathways Tool

**A career pathways tool defines and delineates competencies for each position across a range of roles.** Sometimes called a “competency model,” each role has its own [must-haves](https://www.managementcenter.org/resources/must-haves-starter-kit/)—the required skills, knowledge, or mindsets to succeed in the role—while the career pathways tool goes a little further by naming each level and showing the distinct (often growing) responsibilities.

Every step of the process includes [choice points](https://www.managementcenter.org/article/using-choice-points-to-advance-racial-equity-and-inclusion/). So pause, reflect, and mitigate bias in each decision you make as you develop your pathways.

## Step 1. Identify your team and MOCHA

Whether it’s you or someone else, ensure the project “owner” (in [MOCHA](https://www.managementcenter.org/resources/assigning-responsibilities/) terms) is a senior leader with a track record of managing and developing people. The project owner needs racial equity and inclusion competency (spots disparities or opportunity gaps) and relationship-building skills (proactively engages staff members and managers for input).

Your goal is to develop a tool that is broadly understood, trusted, and actively used to inform decisions. Regardless of who owns the project, set aside time to seek input from staff at all levels during the process. In fact, a Career Pathways Tool can be a great time to outline a cascading MOCHA (see example below) to engage stakeholders on areas they have the greatest insight.

|  |  |
| --- | --- |
| **Career Pathways Project MOCHA – Example** | |
| **Overall MOCHA for Organizational Career Pathways** | |
| **Manager/Approver:** | Executive Director |
| **Owner:** | Deputy Director |
| **Consulted:** | Department Directors, HR lawyer, Employee Union, Board |
| **Helpers:** | Operations Director (Operations department pathway), Executive Assistant (salary research), Staff (input via surveys and focus groups) |
| **Cascading MOCHA for Operations Department Pathway** | |
| **Manager/Approver:** | Deputy (manager); ED (approver) |
| **Owner:** | Operations Director |
| **Consulted:** | HR lawyer, other Senior Team Directors |
| **Helpers:** | * Operations Manager (admin and HR team input) * Finance Manager (finance team input) * Executive Assistant (salary research) |

*Note:* if you manage a team and don't have the authority to initiate a career pathways project at the organizational level, you can always start by defining competencies for your team or department.

## Step 2. Select roles with pathway potential

If you’re doing this for the first time, start with pathways for just one or two roles. Ask yourself:

* Do we have 1-2 role types that are prevalent in the organization? (e.g., organizers, teachers, attorneys)
* Do we have or envision distinct competencies in those roles on a path toward advancement?
* Will a defined career path help us retain or develop staff for bigger and greater things?

This is another important choice point. If you don’t envision a pathway inside the organization for your canvassers or after-school program managers, pause and consider how you support these staff members to advance their careers and check for bias inherent in the roles you include in your pathways tool.

*Using TMC as an example: the two largest roles are “Coaches” and “Trainers,” so we started with those roles—and later developed pathways for admin roles and our communications team.*

## Step 3. Define competencies

For the chosen role(s), list the competencies and define them. Draw from the must-have competencies you outlined in job descriptions for hiring, role expectations, or past performance evaluations. For each competency, provide examples for how it shows up in the context of that role. For example, what does it mean for a Fundraiser to have relationship-building skills (as opposed to, say, a Campaign Manager)?

*Example: at TMC both Coaches and Trainers need “relationship-building” skills. For Trainers, it manifests as “owning a room” and “gaining the participants’ trust” for the duration of the training. For Coaches, it means building deep, ongoing trust over a long period of time through consistently helpful advice.*

## Step 4. Delineate what changes level by level

Next, look at the different job titles people carry in that role—especially where responsibility increases or something else differs. For example, a fundraising team might include an Assistant, an Associate, a Manager, and a Director. Consider what changes from level to level, including:

* **scope** of what they’re responsible for
* **complexity** of activities, partnerships, or campaigns they handle
* **volume** of work or level of **efficiency** needed
* ability to **drive the work** in their area or for the organization
* **positional power and influence** inside/outside the organization

Now, pause... This is a major [choice point](https://www.managementcenter.org/article/using-choice-points-to-advance-racial-equity-and-inclusion/) for your organization. Reflect on any assumptions that may influence the skills, ability, and knowledge you give lesser or greater weight to. Research shows that implicit bias shapes who gets seen as a leader—and workplace bias often shows up as well-intentioned favoritism (we root for people we like). Just as you should interrogate the [must-have versus nice-to-have](https://www.managementcenter.org/resources/figuring-role-sample-worksheet/) skills you look for when hiring, you should do a bias check here. Ask yourself:

* Who could be held back or excluded—and who could benefit—from the way we define this level?
* What input should I gather to check my assumptions—and from who?
* How will the pathway we create explicitly interrupt racial bias and other workplace inequities?

The following chart illustrates how an organization might start to differentiate levels with these questions in mind:

|  |  |  |  |
| --- | --- | --- | --- |
| **What Changes Between Levels – Examples** | | | |
|  | **Associate or Coordinator Level** | **Manager or Director Level** | **Choice Points** |
| **Scope** | * coordinates staff schedule * manages 6 events/year | * manages entire department * manages 12 events/year | For each distinguishing factor, ask:  1. Who could be excluded and who could benefit?  2. What input should I gather to check my assumptions—and from whom?  3. How will the pathway we create explicitly interrupt racial bias and other workplace inequities? |
| **Complexity** | * manages common clients/cases * recognizes ways that race and other identities impact students success | * manages complex clients/cases * develops district’s educational equity goals with student/family/teacher input |
| **Volume or Efficiency** | * writes weekly blogs and social media posts | * writes daily policy briefs and fields all media requests |
| **Driving the Work** | * owns grant calendar and meets individual goals * develops campaign plans with manager support | * drives fundraising work to meet organizational goals * owns campaign strategy, and breaks long-term goals into short-term actions |
| **Positional Power and Influence** | * develops member leaders and builds trust across lines of difference * provides well-researched talking points to ED for media interviews | * develops campaigns to interrupt systemic inequities impacting the communities we serve * is our “go-to” expert on X issue and first port of call for media interviews |

## Step 5. Look for roadblocks and build intersections

Use the career pathways tool process to look for gaps in your leadership pipeline. Here’s a litmus test to help you figure out if your career pathways pass muster.

*When a staff member reads the competency model for their role, can they…*

* Articulate why they’re at their current level?
* Identify two to three competencies they need to get better at to get to the next level?
* Access, propose, or ask for opportunities that develop those competencies?

Where you see gaps, **remove the roadblocks**. Think about new ways staff members can gain required experience or training that gets them to the next level—whether it’s in-house or external. For instance, you might adopt formal organizational policies on scholarship opportunities, external training or coaching, and benefits like sabbaticals. Always build in checks to ensure equitable access to these benefits.

If your organization has job roles that are broadly equivalent across teams or departments, **mark the intersections**. Look for ways to standardize levels to establish peer roles. This can increase staff connection and belonging, while outlining pathways for staff who want to make lateral moves where they have the necessary competencies.

*Example: one of our clients has a Policy team and a Research team. Because staff tend to move between these two teams, the organization decided to keep both teams to three levels (Analyst, Manager, and Director) to establish equivalent roles across the teams and support staff to develop cross-competencies and paths for advancement.*

**A note on salary transparency:** Speaking of pipelines, we also recommend you define **salary ranges or compensation bands** for each level with some overlap. Bringing transparency to salary ranges ensures greater equity in compensation decisions, while giving you flexibility to remain competitive as you seek candidates that bring the must-have skills for the role.

## Step 6. Put your career pathways tool to work

The rubber meets the road when you start using career pathways as a reference point for hiring rubrics, promotions, and performance evaluations. Here are a few ways you can put the pathways tool to work:

* **Check-ins and stepbacks.** Discuss the tool with the people you manage: “When you think about your trajectory here, where do you see yourself? What can I do to support your next step?
* **Hiring and promotions.** Discuss it with the managers you manage: “How did the staff member/candidate do against the competencies we’ve articulated for this role?”
* **Performance evaluations.** Reference it when you summarize strengths and areas for improvement: “When it comes to Problem Solving, you did great on project X and stumbled a bit on project Y. This is a competency needed to level-up to a Senior Manager (“tackle the most complex topics and develop breakthrough solutions”), and it’s a role I think you could stretch toward.”

(Use our sample [check-in agenda](https://www.managementcenter.org/resources/check-meetings-sample-agenda/), [performance evaluation form template](https://www.managementcenter.org/resources/sample-performance-evaluation-form/) and [hiring rubric starter kit](https://www.managementcenter.org/resources/hiring-rubric-starter-kit/).)

# Career Pathways Tool Template

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Title** | **Level 1** | **Level 2** | **Level 3** | **Level 4** |
| **Primary Responsibilities** |  |  |  |  |
| **Salary Range** |  |  |  |  |
| **Competency A** |  |  |  |  |
| **Competency B** |  |  |  |  |
| **Competency C** |  |  |  |  |
| **Competency D** |  |  |  |  |
| **>>>>>>>>>> Increasing scope, complexity, efficiency, ownership, and positional power>>>>>>>>>>** | | | | |

# 

# Career Pathways Tool Examples

## Example 1. Career Pathways for Campaign Organizers

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Title** | **Organizer** | **Lead Organizer** | **Regional Organizing Director** | **National Organizing Director** |
| **Primary Responsibilities** | Implements campaigns; recruits and engages members | Leads issue area campaigns; and organizer and member leadership development | Builds coalitions across multiple campaigns; manages team of 6-10 lead organizers | Serves on Senior Team; manages 5 regional directors; leads cross-sector initiatives |
| **Salary Range** | **XX-XX** | **XX-XX** | **XX-XX** | **XX-XX** |
| **Relationship-**  **Building** | * Enthusiasm for engaging with communities we serve and can build trust across lines of difference | *All from left plus:*   * Builds authentic relationships with staff, members, and coalition partners especially across lines of difference * Can hold own with targets | *All from left plus:*   * Is empathetic and uses their knowledge of organizer role to build deep trust and followership with team | *All from left plus:*   * Effectively collaborates with ED and senior team on organizational strategy * Builds rapport and influence with other senior leaders, funders, etc. |
| **Inclusive Leadership Development** | * Takes initiative to meet goals and inspires members to take action * Develops members’ through training and role modeling | * Develops organizers’ through training, coaching, and feedback * Designs leadership development opportunities, including tactical training and REI competency | * Recruits, develops, and retains a diverse team where all staff can thrive * Brings a clear vision, seeks divergent perspectives, and holds the bigger picture while managing the details | *All from left plus:*   * Builds a leadership bench for the organization and sector * Considers long-term impacts of decisions to ensure equity, sustainability, and results |
| **Racial Equity and Inclusion (REI) competency** | * Understands present-day implications of historical inequities * Seeks, reflects, and acts on feedback; owns missteps | *All from left plus:*   * Able to see and address complex dynamics re: identity and equity, support organizers to navigate, and develop more inclusive campaigns | *All from left plus:*   * Devises strategic campaigns to interrupt systemic inequities impacting the communities we serve | *All from left plus:*   * Identifies policies and practices with disparate impacts and initiates changes to operationalize equity in consultation with Senior Team |

## Example 2. Career Pathways for Staff Attorneys

Our second example shows a more complex career pathway with **multiple tracks** for the role of “Senior Staff Attorney.” Level 2A is an individual contributor while 2B is a manager. These are peer roles, but responsibilities and advancement opportunities differ. If your organization is defining “tracks” like this, clearly show which roles are considered equivalent. This helps prevent staff from wondering, “Am I taking a step back by moving to this other role?” Consider including a chart and statement making the implicit explicit.

## Career Advancement at XYZ Organization

At XYZ, we recognize that some attorneys would like to move into management roles (i.e., change in scope) as you progress in your career, while others would like to progress by deepening expertise and taking on more complex cases. Both types of leadership are equally valued and needed to best serve our clients. Though most Level 3 managers come from Level 2B roles, we will consider Level 2A staff for Level 3 if you meet the competencies through prior experience managing teams in a legal, policy advocacy, or governmental setting.

***Level 1:***

**Staff Attorney**

***Level 2A:***

**Senior Staff Attorney (Expert Track)**

***Level 2B:***

**Senior Staff Attorney (Management Track)**

***Level 3:***

**Managing Attorney**

*Prior management*

*experience in equivalent setting*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Title** | **Level 1:  Staff Attorney** | **Level 2A: (Expert Track) Senior Attorney** | **Level 2B: (Management Track) Senior Attorney** | **Level 3:  Managing Attorney** |
| **Primary Responsibilities** | Advisor to 6 individual clients; authors briefs in a given practice area | Advisor to clients on complex or high-profile cases; strategy leader in practice area | Manages up to 10 Staff Attorneys; is the point person for clients to escalate issues | Sets legal services strategy; manages Senior Attorneys; informs firm direction with ED |
| **Salary Range** | **XX-XX** | **XX-XX** | **XX-XX** | **XX-XX** |
| **Legal and Policy Expertise** | * Demonstrates deep knowledge of practice area, and uses that to devise client strategies | *From left and:*   * Has mastery over subject matter and can “see over the horizon” to forecast trends that impact area | *From Level 1 and:*   * Helps new team members hone their policy skills through coaching and feedback | *From left and:*   * Can ”see over the horizon” to forecast trends that impact firm and field * Strategically positions firm and team for success |
| **Client Advisory & Communication Skills** | * Is an empathetic listener and wise counselor * Effectively articulates point of view during internal and external meetings * Writing is clear, concise, and effective | *From Level 1 and:*   * Excellent communicator; can serve as face of organization to outside world (media interviews); and authors articles to further our policy positions | *From Level 1 and:*   * Listens well and can see all sides to help staff navigate tricky situations * Proactively communicates on organizational strategy and personnel matters | *From left and:*   * Leads “big picture” communications strategy across practice areas * Occasionally authors articles to further our policy positions |
| **Racial Equity and Inclusion Competency** | * Builds trust and authentic relationships with clients, colleagues, and partners across lines of power/difference * Recognizes ways that race and other identities intersect and play out in the work and impact our clients * Understands the historical context for racial inequity and its present-day (legal and other) implications * Demonstrates self-awareness and consistently able to hear, reflect, and act on feedback re: identity and equity | | *From left and:*   * Uses deep knowledge of structural inequity to guide others on tricky cases * Seeks feedback from direct reports and works diligently to ensure marginalized staff can thrive | *From left and:*   * Leads progress toward organizational REI goals by operationalizing equity within legal services strategy, hiring, staff development, and client satisfaction |
| **Inclusive Leadership and Management** | * Is self-driven and effectively manages time to accomplish activities required to drive client results | * Work with staff attorneys and outside counsel on specific projects and initiatives to deliver results | *From left and:*   * Builds and retains diverse, high-impact team (through coaching, training, and feedback) | *From left and:*   * Sets long-term vision and can translate it into short-term goals and initiatives |