Expectations for Managers Sample

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| About This Tool This tool originated as an internal resource at The Management Center intended to support managers—particularly middle managers—to succeed.  How you might use this tool:   * If you’re a senior leader at your organization, use this as a tool to make the implicit explicit about your expectations for and commitments to your managers. You can also adapt this as an internal document to share with your team, and incorporate it as part of your orientation for new managers. * If you’re a middle manager, you can use this tool to get aligned with your manager on expectations, policies, and processes that you should be aware of in your role. |

# Introduction

Welcome to the team—you’re now a manager at XYZ organization! This document outlines our expectations of and commitments to you, as well as key information you’ll need now that you’re in a management role.

Managers are the stewards of our greatest resource—our people! We expect you to approach your role as both an art and a science. We count on you to handle the nuts and bolts of management—delegation, goal-setting, performance management, etc.—while embodying and modeling our organizational culture. As a manager, you are tasked with championing, coaching, and supporting your people to reach their greatest potential in a way that delivers excellent results and allows them to be fully seen and heard as whole individuals. We deeply believe in investing in our people, treating each other kindly, and creating space for everyone to be their best selves. We believe that if we can do all of these things, we’ll be able to grow and improve our organization, deliver more and better results over time, and live out the values needed to create a more just and equitable world.

**A note on this document**

We know it’s impossible to capture everything you need to know to succeed as a manager in a document. We’ve done our best to identify the big rocks of the role and, while we’ve tried to be as explicit as possible about processes, decision-making, and existing tools/resources that can guide and support you, we know this doesn’t cover it all. This is a living document, which we’ll continue to revisit and tweak as our systems, processes, and culture grow and evolve. You are always welcome to offer feedback to make this even more useful, and you can direct any questions, comments, or concerns to \_\_\_\_\_\_ and/or your manager.

# Manager Responsibilities

As a manager, you are charged with owning five keys to our success:

## 1. Setting Vision and Meaningful GoalsShare the headline about the area of responsibility, and then get specific about the approach.

**The “What”**

Get your staff and teamaligned about what success looks like and how we’ll know it when we see it.

**The “How” / Approach**

* Establish—with your staff—[SMARTIE goals](http://www.managementcenter.org/resources/smartie-goals-worksheet/) capturing what success looks like for your team and individual staff members, and ensure that plans are in place to meet those goals.
* Draw clear lines from the work and goals of your team and staff members to the priorities of the organization.
* Ensure that goals truly drive the day-to-day work of your team by helping your team prioritize and focus on the big rocks.

Be explicit about decision-making and approval.

**Important Notes on Decision-Making**

* In order to ensure that all individual and team goals cascade appropriately, the goals you set for your staff should be done in consultation with your manager. In most cases, your team head will be the final approver.
* Any mid-year changes to goals should be done with the approval of your team head.

## 2. Managing to Results

**The “What”**

Ensure that staff deliver great results using effective day-to-day management practices.

**The “How” / Approach**If you have specific recommendations or preferences, share them.

* Monitor progress against goals on an ongoing basis, making course corrections as needed.
  + Requirement: regular check-ins, a mid-year review, and a year-end evaluation for each staff.
  + Preference: we aim to do goals step-backs quarterly, but managers have the discretion to do them more/less often.
* “Walk the talk” of our Delegation Cycle: agree on expectations, stay engaged, create accountability and learning, and adapt to fit the context.
* Bring an equity and inclusion lens to ensure everyone on your team can succeed and thrive by proactively: acknowledging lines of difference and power, checking for implicit bias, seeking out and valuing other perspectives, and identifying [choice points](http://www.managementcenter.org/article/using-choice-points-to-advance-racial-equity-and-inclusion/).
  + Recommendations:
    - For acknowledging lines of difference and power: work to understand the identities and experiences that have influenced your staff’s work and communication styles as well as your own; be able to identify and name how the similarities and differences influence your work together.
    - For checking for implicit bias and seeking out and valuing other perspectives: gather input from others who work with your staff (including their direct reports) and your own manager.
    - For identifying choice points: be able to spot decision-making opportunities that might have equity and inclusion impacts; be able to come up with alternatives to your default approach, including by seeking input from others.
* Ensure strong collaboration and coordination with other teams and staff as needed; hold your team accountable to other teams that are depending on them.

**Important Notes on Decision-Making**

Managers are decision-makers for day-to-day stuff that comes up within their realm of responsibility. If there’s a decision to be made that has team-wide implications, it should be flagged for the team head to decide. If there is a decision to be made that impacts another team or has organization-wide implications, those issues should be raised with the relevant folks.

## 3. Developing your People

**The “What”**

Be a coach and champion for your staff and support them to do their best work.

**The “How” / Approach**

* Provide regular, ongoing feedback to staff (outside of mid-year and annual reviews).
  + Requirement: At any given time, people know where they stand and where they have room for growth, and there are no surprises at review time.If you have recommended or required tools, link to them.
  + Preference/recommendation: use TMC’s [check-in doc](http://www.managementcenter.org/resources/check-meetings-sample-agenda/) with 2-way feedback prompt; use [2x2 feedback tool](http://www.managementcenter.org/resources/2x2-feedback-form/) at least twice a year.
* Be aware of their professional development needs and wishes and keep an eye out for growth opportunities for your staff; within reason and where possible, open doors and remove barriers to their development.
* Be mindful of their access to power, especially for your most marginalized staff. Be an advocate when necessary.
* Help your staff feel a sense of belonging by continuously seeking to understand them as whole individuals and creating space for them to express themselves fully (to the extent that they want to).

## 4. Being an Organizational Leader

**The “What”**

Help us get better and stronger as an organization and work to build trust, cohesion, and alignment between your staff/team and the organization’s leadership and overall direction.

**The “How” / Approach**

* Model and drive our core values.
* Raise issues, concerns, observations, questions, and feedback to improve our work and strengthen the organization.
* Maintain the trust and respect of your staff and colleagues through kind, direct, and relationship-driven communication and conflict resolution.
* Be a fair and open decision-maker, meaningfully involving staff in decision-making whenever possible.
* Meaningfully contribute to the stewarding of all-staff spaces through active and healthy engagement and shared leadership/ownership (when needed).
* Balance championing the needs of your staff/team with understanding and advocating for the needs of other teams and the organization as a whole. Wearing your “organizational leader hat,” you should strive to see beyond the interests of your team and put yourself in the shoes of the decision-maker.
* Understand—and help your staff/team understand—the impact of their actions on other teams and the organization as a whole.

## 5. (For managers who lead an entire function or sector) Building an Exceptional Team

**The “What”**Build, manage, and retain a racially diverse\*, high-performing team.

**The “How” / Approach**

* Cultivate a diverse pool of high-quality candidates and when we have openings, lead our searches (or delegate to others as appropriate), and ensure we are able to fill positions.
* Orient, develop, and guide new staff as they apprentice and learn our approach.
* Build a shared sense of team identity, purpose, and belonging by providing and encouraging opportunities for staff to engage, learn, and create together (such as through team meetings, retreats, collaborations, professional development opportunities, etc.).
* Engage team members appropriately on key goals, strategies, and areas of work.
* Retain strong performers and develop or transition out those who don’t meet expectations.
* Determine appropriate roles, reporting lines, and team structure.

\*While racial diversity is our current priority, we also value and seek diversity along other dimensions, including but not limited to: gender identity and representation, sexual orientation, and class.

**Important Notes on Decision-Making**

* In most cases, managers have the authority to make hires, with their manager having veto power.
* Managers have the authority to recommend promotions, which need to be approved by the relevant team head. Generally, promotions are considered on an annual basis during review time.
* Generally, managers should be in ongoing dialogue with their managers about staff performance and development, getting their input and guidance along the way. There should be no surprises when it comes to annual review time.
* Promotion decisions depend not just upon individual performance but also on organizational needs.
* Managers have the authority to coach out or fire their staff, with consultation and bias review with their manager.

# Other Important Stuff To Know

Some highlights on policies that you and your staff should know about! This list is not exhaustive, but includes some of the things that are most important, often forgotten, or are least understood (for reference, the full personnel manual is here):

This section is for sharing important information from your personnel manual that managers may need to pay special attention to. These things might include your policies regarding:

* Sexual and other forms of harassment
* Leave
* Professional development
* Travel
* Reimbursements

# How We’ll Measure Your Success

Your annual review will include assessments of:

* Results (ultimately, you’re accountable for the results of you and your staff/team!)
* Management goals (will depend on who you’re managing and context of your team). Sample management goals:
  + Begin 2020 with at least 6 FTE coaches, with at least 50% identifying as indigenous or people of color.
  + Everyone on the team is performing at “Meets Expectations”-level or above, with no gaps in race or gender identity/expression and you act quickly and fairly to address any performance issues on your team.
  + In end-of-year surveys, team members report improved understanding of and ability to take advantage of opportunities for flexibility in their job to meet personal and professional needs and interests, with no gaps across identities.
* Core competencies
* Core values

# Our Commitment To You

1. **We will invest in you and your development as a manager.** 
   * We believe that the best staff development comes from hands-on management. We’ll provide a clear definition of your role and what success looks like and stay engaged along the way, which means we’ll:
     1. Ask for slices of your management (like emails to/from your team or individual staff members).
     2. Do side-by-side work (like conducting interviews together, shadowing your check-ins or key meetings).
     3. Spend a big portion of check-ins talking about your people and what they need to succeed.
     4. In addition to the above, do some of the techniques listed [here](http://www.managementcenter.org/resources/techniques-for-managing-managers/).
   * We’ll provide professional development funds for you to help you advance your skills. Each year, you’ll talk to your manager about your personal learning goal and if there are external opportunities that will help you on your journey.
2. **We will value your input and ideas.** We’ll consult you on relevant matters that will impact you, your staff/team, and the organization as a whole.
3. **We will bring an equity lens**, with a commitment to continuous learning and improvement to ensure that your success is not determined by identity, background, or culture.
4. **We will strive for “real talk,”** which means direct and candid feedback. You’ll know how you’re doing and where you stand with your manager. No holding back of feedback and no festering. The same applies with managers and leaders across the team. If there’s conflict, we’ll raise it directly, seek to listen and understand each other, and find ways to productively move forward.
5. **We will strive to make space for you to** **be fully seen and heard as a whole individual.**

# Resources

This section is for sharing additional resources that may be helpful to managers, such as your organization’s core values, your organizational chart, or other tools and templates referenced in the document.