*This resource contains a* [*template*](#_c2flklxuphaq) *and two sample role expectation sheets (one for an* [*executive assistant*](#kix.x7nxy9cmyyf4) *and one for a* [*senior program director*](#kix.u9ko306jt09e)*).*

Role Expectations Template & Samples

# Template

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| **Name:** | **Job Title:** |
| **Overall Headline** - *Summarize what the staff person is bottom-line responsible for.* | |
| **I’m the CEO of…** | |
| **Areas of Responsibility** - *Focus on broad categories (don’t get caught up in capturing all tasks).* | |
| **Area #1:**        **Area #2:**        **Area #3:**        **Area #4:** | |
| **The Approach *-*** *Write the* [*habits of work, mindsets, and approaches*](https://www.managementcenter.org/article/how-to-set-expectations-about-how-staff-members-approach-their-work/) *that are keys to success in the role.* | |
|  | |
| **Annual Goals *-*** *List 3-5 main goals for this year. Use the* [*goal setting sheet*](https://www.managementcenter.org/resources/success-sheet-setting-goals/) *to add detail, timing, and metrics.* | |
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# Sample: Executive Assistant

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| **Name:** | **Job Title: Executive Assistant** |
| **Overall Headline** - *Summarize what the staff person is bottom-line responsible for.* | |
| **I’m the CEO of… making sure everything runs smoothly!** | |
| **Areas of Responsibility** - *Focus on broad categories (don’t get caught up in capturing all tasks).* | |
| **Administration/Operations:** Office space is functional and everyone has what they need to do their jobs well.   * Own all general/maintenance—everything should be working well * Ensure we have appropriate space, layout, furniture, and supplies to do our best work * Ensure all systems are working effectively (phones, internet, mail, etc.) * Support additional administrative needs of the office (faxing, mailing, PDFs, etc.)   **Calendar and internal meetings:** Manage calendars and implement internal meeting structure.   * Manage staff calendars to priorities (surfacing questions, getting aligned on tradeoffs, ensuring enough space/travel time between things, etc.) * Implement internal meeting schedule (check-ins, monthly and quarterly step-backs, team step-backs)   **Tech and systems:** Technology is appropriate to meet the needs of a growing team and we have the systems in place and working to gather, share, track, and secure information.   * Ensure that all staff have the hardware and software they need for their areas of work * Manage email vendor and ensure we have capacity to handle email demands * Ensure we have an appropriate data back-up system and that it’s working effectively * Spot opportunities to better track and maintain information   **Events and special projects:** Own and help on other events and projects as needed. | |
| **The Approach *-*** *Write the* [*habits of work, mindsets, and approaches*](https://www.managementcenter.org/article/how-to-set-expectations-about-how-staff-members-approach-their-work/) *that are keys to success in the role.* | |
| * **Manages a high volume of work with efficiency:** Has, or can create, a system for keeping tasks from slipping through the cracks. Able to juggle competing demands and prioritize without sacrificing quality. Plans backwards to make deadlines. * **Entrepreneurial and resourceful:** Consistently overcomes challenges and leverages resources to creatively solve problems. Proposes solutions to issues without much guidance (but isn’t afraid to ask questions). Proactively asks for help, anticipates problems, and course-corrects where needed. * **Attention to detail:** Notices and fixes errors that others might overlook. Acknowledges mistakes and turns them into learning opportunities. Has a track record of leaving things better than they found them. * **Strong sense of ownership and resilience:** Plans ahead and finds alternative paths, when needed, to get to the finish line. Bounces back from setbacks and rejections. Holds a high bar even when things are hectic. * **Trustworthiness and realness:** Comes across as genuine. Says what they mean. Builds authentic relationships across lines of difference, such as race, ethnicity, sexual orientation, class, ability, gender identity, citizenship status, or other identities. Follows through on commitments. | |
| **Annual Goals *-*** *List 3-5 main goals for this year. Use our* [*goal-setting sheet*](https://www.managementcenter.org/resources/success-sheet-setting-goals/) *to add detail, timing, and metrics.* | |
| * Manage office move in Q3 for less than $X and with no more than one day of staff downtime. * On a scale from 1 to 5, staff surveys average 4.5 when asked “I have the office space, materials, and administrative information I need in order to do my job,” and my manager averages 4.5 when asked if their calendar reflects their highest priorities each week. * All meetings requested are scheduled within 48 hours. | |

# Sample: Senior Programs Director

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| **Name:** | **Job Title: Senior Programs Director** |
| **Overall Headline** - *Summarize what the staff person is bottom-line responsible for.* | |
| **I’m the CEO of… making sure our programs have the biggest possible impact, are fully funded, and set up for success in the future.** | |
| **Areas of Responsibility** - *Focus on broad categories (don’t get caught up in capturing all tasks).* | |
| **Recruit, train, and mentor staff:**   * Ensure that managers are effectively recruiting and managing staff on their teams * Ensure there are no gaps in development opportunities by race or gender   **Fundraising:**   * Own all program fundraising from individuals * Make sure we’re on the same page with stakeholders * Provide testimony and meet with legislators * Own key individual relationships myself, and set up staff to own others   **Equity & Inclusion:**   * Monitor program results by race and gender to spot gaps and disparities * Make sure all staff (especially those on the margins) have the support they need to thrive * Engage and support staff to identify ways to improve on REI efforts within programs and events   **Compliance:**   * Ensure that all reporting is correct and done on time * Make sure partner organizations understand their roles in this and have the tools to deliver   **Leadership team**   * Give input on strategic decisions and collaborate on other issues as needed * Be a thought partner to the ED on key questions * Ensure that all organizational decisions are translated to and through the program teams | |
| **The Approach *-*** *Write the* [*habits of work, mindsets, and approaches*](https://www.managementcenter.org/article/how-to-set-expectations-about-how-staff-members-approach-their-work/) *that are keys to success in the role.* | |
| * **Inclusive leadership and management:** Brings a clear vision and recognizes the value of divergent perspectives. Approaches leadership with a mindset of “power with” rather than “power over” and regularly includes others in planning and decision-making. Able to make and communicate difficult decisions in the best interest of the organization. * **Attentive, empathetic leadership:** Enthusiasm for meeting and engaging with people. Empathizes with the communities we serve. Able to put people at ease, especially when there are lines of difference. Listens closely to understand needs or concerns and takes steps based on that input. Gets back to people in a timely manner. Takes pride in providing clear, helpful information. * **Proactive problem solving:** Proactively develop solutions to challenges, including by constantly looking at big-picture progress on the programs team, and by flagging any potential upcoming challenges in the organization overall. * **Flexibility:** Ready to take advantage of unexpected opportunities; adapts quickly as things change. * **Applies best practices in equitable management:** Translates equity and inclusion into plans for staff development, retention, strategy, and improving culture. | |
| **Annual Goals *-*** *List 3-5 main goals for this year. Use the* [*goal setting sheet*](https://www.managementcenter.org/resources/success-sheet-setting-goals/) *to add detail, timing, and metrics.* | |
| * Lead an initiative to develop a learning culture. By Q4 100% of staff report increased access to/ participation in learning opportunities with no disparities on basis of race or gender. * Produce annual racial equity impact report highlighting with 80% response rate from partners in BIPOC-led organizations. * Raise $X by Y to cover this year’s program budget by Q2 with added 20% toward operating reserve. | |