A Unified Theory of People Management

Hello!

What to expect:

◎ Structures and frames for approaching problems → keep the ones that spark new insights for you!

◎ Joint knowledge building → we are the experts together

◎ Prioritization → there are lots of things you **could** do. What will have the most impact?

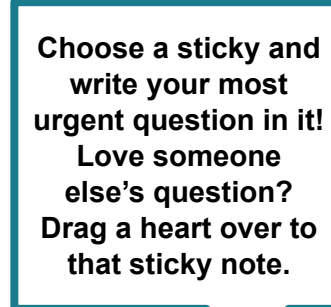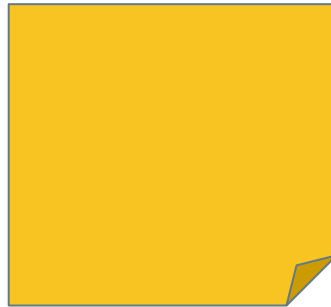# Warm ups! How much collective management experience do we have?

Click on one of the circles below; drag it to the place on the timeline that matches the # years management experience you have

5 years

15 years

10 years

3

What is your most urgent question today?
(There are three slides if there's no more room on this one!)

How can I make this most useful for **you** today??

Choose a sticky and write your most urgent question in it! Love someone else's question? Drag a heart over to that sticky note.
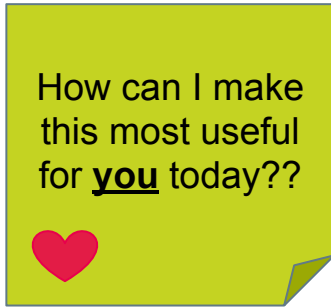
What is your most urgent question today?
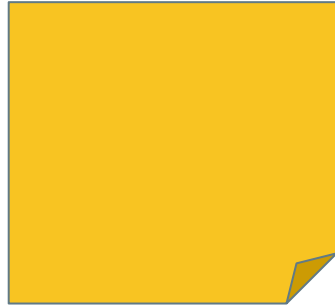
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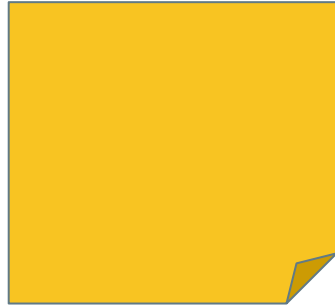
1

Getting Set Up
Action Priority Matrix

Learning this tool -- studying for a big exam!

Quick Wins

- examples

Major Projects

- examples

Fill Ins

- examples

Hard Slogs

- examples

impact

effort

Our sample goal: Close and end of year budget gap of $10,000 by Dec 31

impact

Quick Wins

- examples

Major Projects

- examples

Fill Ins

- examples

Hard Slogs

- examples

effort

By the end of the session, you should ID 2-3 quick wins and 1-2 major projects

impact →

Quick Wins

- What 2-3 quick actions will you take to improve things immediately?

Major Projects

- What 1-2 major projects will you undertake, knowing they will be a lot of work but will be worth it?

Fill Ins

- What will you stop doing (procrastination tasks, things that aren't a good use of time?)

Hard Slogs

- What will you stop doing that is not strategic?

effort →

2

Our Framework
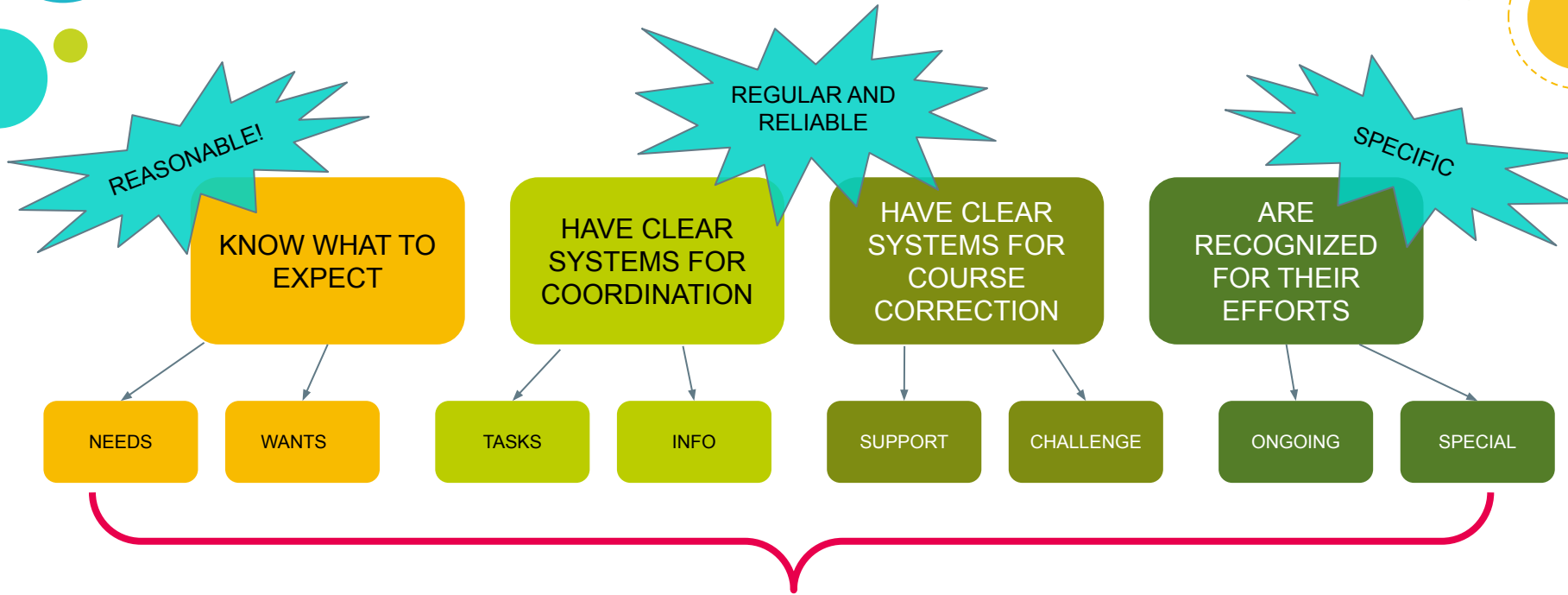
A Unified Theory of People Management

Humans flourish in working relationships (whether paid or unpaid) when certain **conditions** are met:

1. when we know what to expect and what's expected of us,
2. have clear systems for coordinating our efforts,
3. have processes for course correction when things aren't working, and
4. are recognized for our efforts.

(Framework by Ariel Brooks)

REASONABLE!

KNOW WHAT TO EXPECT

- NEEDS
- WANTS

REGULAR AND RELIABLE

HAVE CLEAR SYSTEMS FOR COORDINATION

- TASKS
- INFO

HAVE CLEAR SYSTEMS FOR COURSE CORRECTION

- SUPPORT
- CHALLENGE

SPECIFIC

ARE RECOGNIZED FOR THEIR EFFORTS

- ONGOING
- SPECIAL

Management and supervision - whether of paid staff or volunteers needs to include all of these parts!

Visual framework & content by Ariel Brooks

What does that look like?
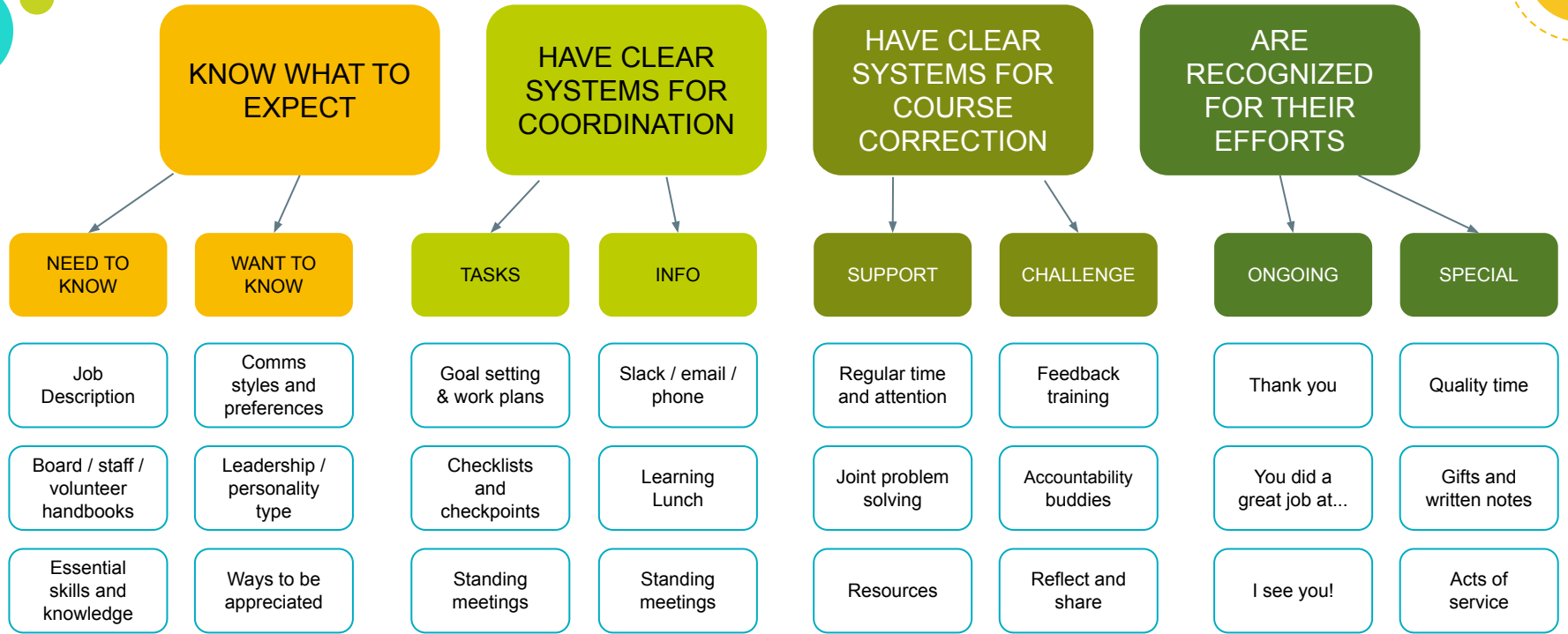
KNOW WHAT TO EXPECT		HAVE CLEAR SYSTEMS FOR COORDINATION		HAVE CLEAR SYSTEMS FOR COURSE CORRECTION		ARE RECOGNIZED FOR THEIR EFFORTS	
NEED TO KNOW	WANT TO KNOW	TASKS	INFO	SUPPORT	CHALLENGE	ONGOING	SPECIAL
Job Description	Comms styles and preferences	Goal setting & work plans	Slack / email / phone	Regular time and attention	Feedback training	Thank you	Quality time
Board / staff / volunteer handbooks	Leadership / personality type	Checklists and checkpoints	Learning Lunch	Joint problem solving	Accountability buddies	You did a great job at...	Gifts and written notes
Essential skills and knowledge	Ways to be appreciated	Standing meetings	Standing meetings	Resources	Reflect and share	I see you!	Acts of service

Visual framework & content by Ariel Brooks

Where we'll go from here:

◎ Quick break (5 min bio break)

◎ Review and practice tools for expectations & coordination

◎ Longer break (25 min)

◎ Review and practice tools for course correction and appreciation

◎ Synthesize and identify your quick wins and major projects

◎ Close

3

Know What to Expect

Tools and Practice!

KNOW WHAT TO EXPECT - *NEEDS!*

Baseline Checklist (for staff, board, volunteers)
- ❏ Step 1: Screening & Placement
    - ❏ Application and/or Interview
    - ❏ Background and Reference Checks (if necessary)

- ❏ Step 2: Orientation
    - ❏ Introductions and Team Building
    - ❏ Share Mission, Vision and Goals
    - ❏ Contract / Job Description Agreement (expectations!)
    - ❏ Logistics
        - ❏ Calendar
        - ❏ Location / Zoom Directions
        - ❏ Meeting Schedule & Contact Information
        - ❏ Policies & Procedures
        - ❏ Safety & Boundaries
    - ❏ Structured Community / Constituent Orientation

- ❏ Step 3: Skill and Knowledge Training
    - ❏ Necessary Skills and Context
   - ❏ Tips and Tricks

- ❏ What else?

KNOW WHAT TO EXPECT - *NEEDS!*

Clear Communication Worksheet

- I prefer to communicate (e.g. In person, if you're in the office, otherwise email -- I check regularly throughout the day):

- The quickest way to reach me in an emergency is (e.g. call my cell – I don't have a smart phone and don't see emails if I'm not at my desk):

- My pet peeves around communication are (e.g. don't text me after 5pm unless it's an emergency!!)

- Reminders or not? (e.g. YES! If I'm working on a project for you and haven't gotten you something when you need it, send a reminder.)

- One way I like to be appreciated (e.g. Cookies):

- One question I have for other team members

Leadership Compass

KNOW WHAT TO EXPECT - *WANTS!*

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W ←——————→ E

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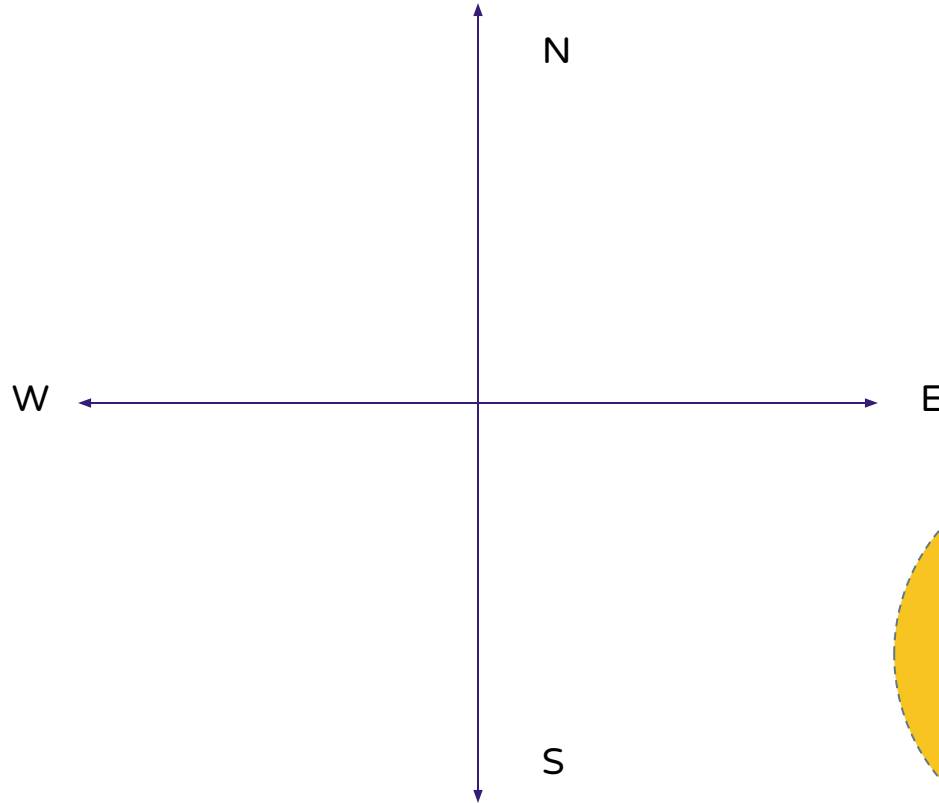
In Breakout Groups (7min): What's good about this style? What's hard about it? What's good and hard about working with other styles?

More details here (pages 12-15) - discuss first, then look for additional ideas!

4

Have Clear Systems for Communication

Tools and Practice!

CLEAR SYSTEMS FOR COORD.

Basic Standing Meeting Agenda

- Personal Check-in: How is everyone doing?

- Successes: Members of the team have the chance to share good news and positive updates on recent projects

- Surface Challenges: Team members share challenges they are facing that they wish to problem solve around

- Group problem solving and planning to address challenges

- Quality Standards: Opportunity for manager / supervisor to check in about things supervisor might need

- Agree on Next Steps

WorkPLANing [Template](#)

PLAN Project Management

Project Lead: Has overall responsibility for the success of the project. Ensures that all the work gets done (directly or with helpers) and that others are involved appropriately. Leads project workflow including necessary monitoring and adjustments of PLAN.

Lieutenants: Help drive the work forward, with coordination from the Project Lead. May hold responsibility for individual deliverables within the project workflow. Accountable to the Project Lead for this PLAN. Proactively work with manager to balance workload for this and other projects.

Approver(s): Must sign off on PLAN assignments, overall project workflow, and major decisions. Makes suggestions, asks hard questions, reviews progress, serves as a resource, and intervenes if the work is off-track. Might be the Project Lead's manager; could also be a board member, leadership circle, oversight committee, etc.

North Star(s): Must be given opportunities for input at key points. Might include community members, board members, outside experts, other staff members not directly involved in project workflow. Input type varies by project, but likely includes strategic guidance, ensuring decisions align with community desires and values, and opportunities to build stakeholder buy-in.

Assumptions:
- The intent is to provide an opportunity for discussion and clarity about roles and decision making prior to the launch of, and throughout major projects.
- It is helpful to have a single Project Lead for a given project for purposes of coordination and accountability.
- Roles are determined on a per-project basis, and may align with organizational hierarchy, but need not. PLAN assignments should be agreed at the start of each project. Explicit consideration should be given to distribution of power and responsibility across different projects in a given timeframe.
- Successful leadership of a project plan includes both achieving the desired outcome AND involving others appropriately according to the agreed PLAN.

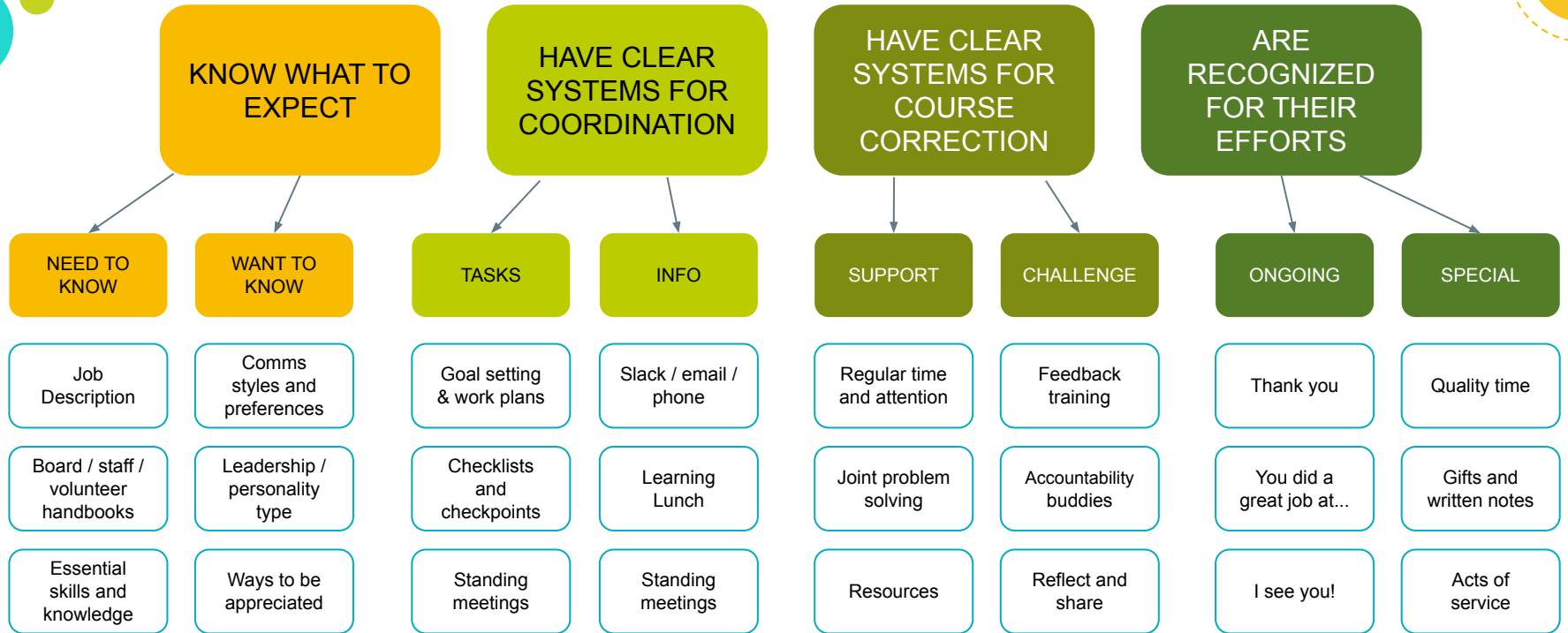22   Visual framework & content by Ariel Brooks

Pair Share

KNOW WHAT TO EXPECT - *NEEDS & WANTS!*

10 min!

CLEAR SYSTEMS FOR COORD.

What are you / your org doing and not doing in these two areas? What ideas and questions do you have?

WELCOME BACK!

KNOW WHAT TO EXPECT		HAVE CLEAR SYSTEMS FOR COORDINATION		HAVE CLEAR SYSTEMS FOR COURSE CORRECTION		ARE RECOGNIZED FOR THEIR EFFORTS	
NEED TO KNOW	WANT TO KNOW	TASKS	INFO	SUPPORT	CHALLENGE	ONGOING	SPECIAL
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Visual framework & content by Ariel Brooks

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Have Clear Systems for Course Correction

**Tools and Practice!**

What is course correction?

Surface and address issues while they are still small, to reduce the time & energy necessary to correct.
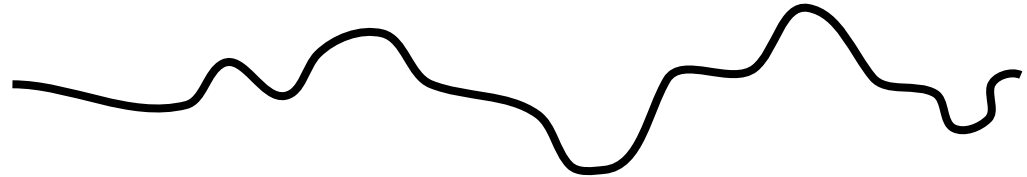
Practicing Radical Candor

Individual reflection (3 min):

1) What is your natural inclination (when you're stressed or tired?)
2) What is a situation in your life where you need to give some "radical candor"? Who do you need to give the feedback to? What is the problem? What do you need to ask for?
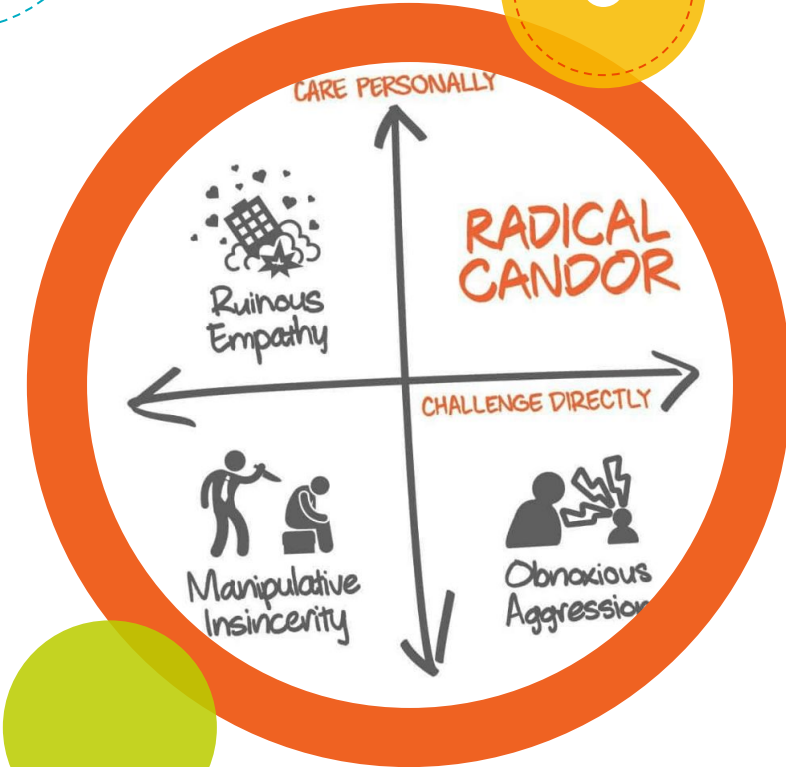
Breakout Room Practice (10 min)

Choose who will be the first feedback giver

Feedback Giver:
- Assign your partner a character
- Give them some radically candid feedback!

Partner:
- Play your role as well as you can :)
- After the roleplay is over, share one or two things the feedback giver did well, and one or two things they could have done better.
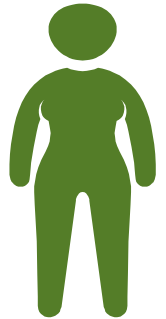
Feedback Giver:
- Try it again, taking your partner's input into account.

THEN SWITCH!

HOW WAS IT?
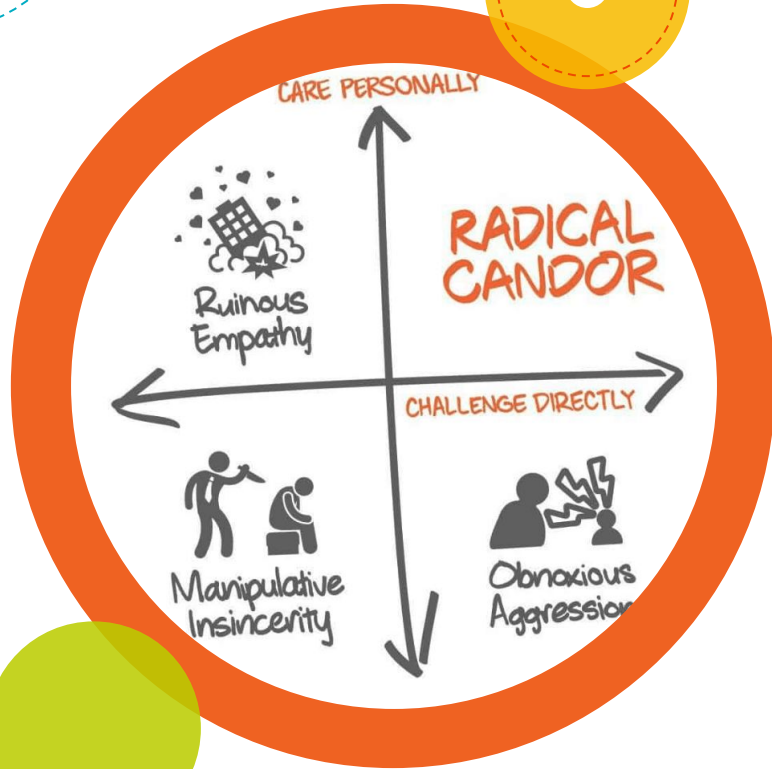
6

Be Recognized for Your Efforts

Tools and Practice!

This can be pretty simple :)

Private chat a <3 to anyone you have really loved getting to know during the NPC

Private chat a ++ to anyone who has really helped you learn and grow during the NPC

Private chat a !! to anyone who has really impressed you during the NPC

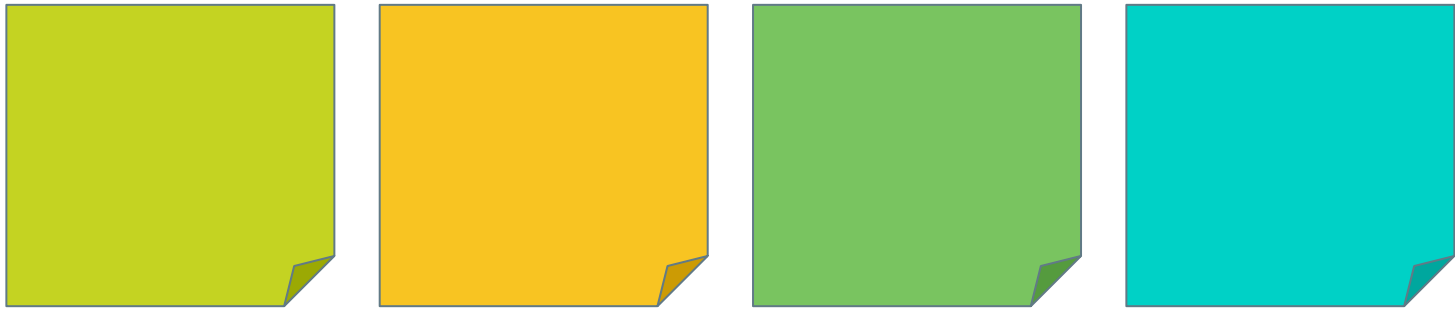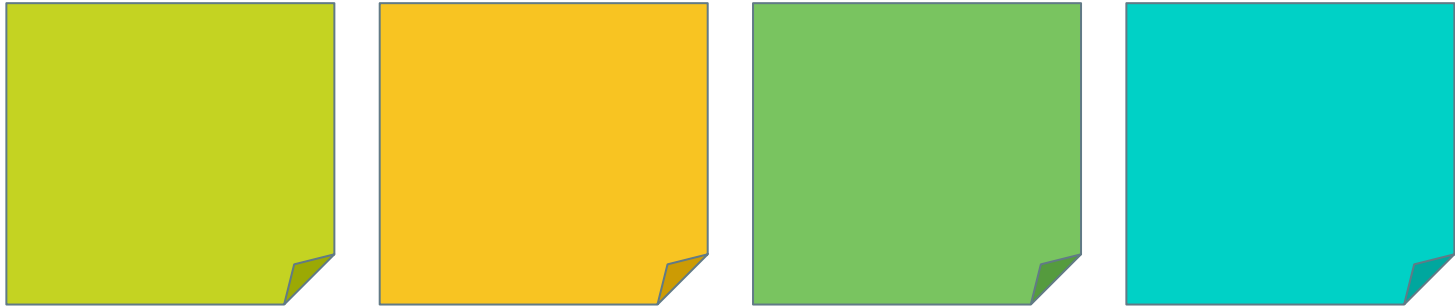# Or more elaborate! On a sticky, write the best appreciation you've ever received.

Once when I left an organization, my boss collected quotes from all the people I had worked with and put them in a memory box
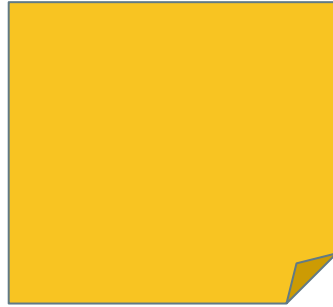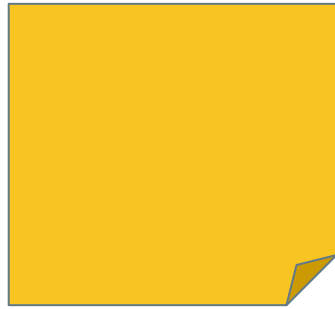
Choose a sticky and write the the best way you've ever been appreciated. Love another idea? Drag a heart over to that sticky note.

Or more elaborate! On a sticky, write the best appreciation you've ever received.

Or more elaborate! On a sticky, write the best appreciation you've ever received.

Closing synthesis

Reflection

What ideas have resonated most strongly with yout today? What quick wins and major projects might you take on to solve some of the issues in your current situation?

Pair Share

In breakout rooms, share some of your reflections and action priorities. If either of you are struggling, troubleshoot with one another to come up with ideas, or weigh different priorities.

Final Popcorn!

When we return, drop your "next actions" into the chat - so we can see all of the great work that is to come, and get inspired by one another's ideas.

Thanks!

☺

Any questions?

You can find me at ariel.b.brooks@gmail.com

Credits

Special thanks to all the people who made and released these awesome resources for free:

◎ Presentation template by SlidesCarnival

◎ Photographs by Unsplash