

ALIGNING PEOPLE TO PURPOSE

Recommendation to Staff

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OVERVIEW OF PROCESS

The purpose of CompassPoint’s new *Aligning People to Purpose* process, the values that undergird the purpose, and the structures to support us are inspired by equity, and the vision of *Managing is Caring in Action*ⁱ

PURPOSE

Our fight for social justice is held back by systemic, structural, and interpersonal oppression. And within social justice organizations, systems and structures can either support oppressive practices OR support dismantling them. Our purpose is to create structures of wholeness, support, love, reflection, and accountability. The structures formerly known as “managing and supervision” will instead be structures designed to implement the demands of justice and equity, while giving us the individual and collective power to correct everything that stands against love. It is an ongoing process of diligence and tenderness.

Power without love is reckless and abusive, and love without power is sentimental and anemic. Power at its best is love implementing the demands of justice, and justice at its best is power correcting everything that stands against love.

- Martin Luther King, Jr.

In doing away with coercive “command and control” philosophies which are designed to manage performance, we are pivoting towards structures that enable consent, personal agency, and liberation in alignment with organizational purpose.

CORE VALUES

Equity – Ensuring that resources and power are shared in ways for all people to realize our full potential, and contribute to thriving, sustainable communities.

Love – We value one another as whole people with histories, triumphs, and tragedies.

Growth and Learning – Growing from core, we all have opportunities and capabilities for personal evolution. This requires us all to support each other as we learn and unlearn.

Accountability – What love looks like in action: feedback, coaching, and ally-ship through advocacy. Supporting people to align to personal and organizational purpose.

Community – our health and well-being in the system is a community responsibility with personal touch points.

RELATIONSHIPS

The following relationships are key in ensuring that all staff are seen as whole people, are supported, held accountable, cared for, heard and loved.

Practice Partner: Tending to Souls

This is a new role in the employment relationship circle. All staff will have a designated practice partner. Fully explained in the Practice Partner Role attached.

Lead Links: Tending to Roles

The existing Lead Link roles play an important part in the process by providing clear direction to those energizing roles in their circles. This existing aspect of Holacracy will be explicitly integrated into the new process. Lead links provide clear direction through the development and ongoing refinement of:

- strategies
- circle projects
- checklists and metrics
- work prioritization within the circle
- ongoing and regular feedback to circle members

STRUCTURES AND PROCESSES

As implied by Martin Luther King Jr.'s words above, intention without structure is insufficient. The following structures and processes—some existing and some new—work together to ensure equity and that people are thriving. Key structural elements:

A. Roles: Holacracy roles.

B. Accountabilities: Here we mean specific *role accountabilities* as compared to *being accountable generally*—to the organization and to one another.

C. Clear direction: Through the circles' purposes, strategies, and role accountabilities.


D. Employment Relationship Circle: The Practice Partner role will be in this circle. The checklists and metrics will be tools to support an equitable process.

E. Community of Practice for Practice Partners: This is a sub-circle of the Employment Relationship circle and will work much like a peer coaching group or affinity group. It will be comprised of all staff that are energizing the role of Practice Partner. The purpose of the sub-circle is to:

- Share experiences of how the practice partner role is working and identify where adjustments might be proposed.
- Discuss how the Practice Partner accountabilities are being carried out so that staff experience the role equitably and consistently.
- Provide support to one another.
- Provide feedback to the Employment Relationships Lead Link for ongoing adaptation of roles, strategies, checklists and metrics, etc.

F. Critical Reflection: Practice Partners will create space for staff and support them in regular critical reflection conversations.

G. Practice Partner Investment and Support: As we transition to this new process we anticipate that Practice Partners will need support as we unlearn ingrained and often unconscious traditional management processes and expectations that are based on oppression, control, and coercion. We need to lift-up and value the level of emotional labor and the significant shifts in mindset and in behavior that this new process calls for. Organizational investment (e.g. training, time, funds) and support is critical for success.

| FROM |  | TO |
|---|---|--|
| Holding someone accountable | | Supporting others to hold themselves accountable |
| Performance management | | Aligning people to purpose |
| Responsibility as fear of punishment | | Responsibility for contribution to shared goals |
| Personal and professional boundaries | | Bringing whole selves to work |
| Controlling/tamping down emotions | | Healthy practices for dealing with feelings emotionally charged situations |
| Supervision/oversight/coercion | | Consent. Creating conditions to “invite” (e.g. yes, no, counter-offer) |
| Transactional relationships and experiences | | Transformational relationships and experiences |
| Hours/trackable time | | Emotional capacity/energy management |
| Expected to endure | | Expected to thrive |

PRACTICE PARTNER ROLE

Purpose: Employees' have the space to reflect, plan for growth, and feel supported in their efforts to fulfill their personal and organizational purpose.

Accountabilities:

- Meeting one on one with designated employee at least monthly.
- Co-creating growth, learning, and opportunity GLO plans with employee.
- Giving feedback to employee.
- Reviewing employee's overall efforts in all their roles and accountabilities.
- Holding space for annual reflection process.
- Coaching employee.
- Recommending de-energizing of roles and/or employment.
- Supporting other Practice Partners via the Community of Practice sub-circle.
- Providing feedback to the Lead Link of the Employee Relationship circle.
- Advocating, when requested, on behalf of the employee to Lead Links and other roles to navigate priorities and workload.
- Advocating for employees in regards to compensation, HR related policies, and GLO (growth, learning and opportunities) within the Employee Relationship circle.

TBD: Influencing promotions/raises (depends on how promotions, titles, and salary increases are structured in the new compensation process)

ADD: to Employee Accountability: Keep @Deployment Diva up to date with GLO goals, plans and capacity.

Practice Partner Matching Process:

- Employees select someone in the practice that they would like to have as their designated Practice Partner.
- The person requested can say no if they prefer not to energize a Practice Partner role or if they are already serving in this capacity for other employees and are at capacity. There is no limit to how many employees a person can be a Practice Partner to.
- There is a 1 year commitment when energizing the Practice Partner role. After the year, there is an annual "open enrollment" process to continue for another year if both people desire.
- Practice Partners join the Community of Practice sub-circle for peer support, learning, and coaching.

Practice Partner Core Competencies

- *The following list is not comprehensive; they are meant to provide clarity regarding what set of competencies are likely to set a Practice Partner up for success.*
- *There is not an expectation that a person would necessarily be strong in all/most of these as they come into the role.*
- *This can be used as a guide to support focused development in these areas as well as in assessing personal interest in energizing the role.*

| Competency | How it Contributes to Success in Practice Partner Role |
|--|--|
| Coaching Skills: Inquiry, Feedback, Listening, Naming/Observing | Ability to apply these skills within the Practice Partner relationship and in the Community of sub-circle. These skills contribute to success by providing support, facilitating problem solving, challenging the process when needed, and ensuring growth and learning. |
| Empathy | Have a deep appreciation for another person, their needs, struggles, desires, joys, and points of view. |
| Organizational Understanding | Ability to understand and communicate CompassPoint’s theory of change and high level goals so as to align and support individual’s needs and growth and learning goals. Ability to see and make connections across circles and areas of the organization to support and advocate for partners. |
| Growth, Learning and Opportunities (GLO) Planning | Ability to support your partner as they navigate opportunities at CompassPoint. Can facilitate discussions to develop GLO goals as a Partner identifies a desired path forward in the organization. Able to use the 70/20/10 framework, coach the partner to create a plan that includes specific activities within the 70, 20, and 10 areas. |
| Holacracy | Knowledge of Holacracy in general and in particular the purpose and accountabilities of the Employment Circle, the Practice Partner role, the Lead Link, and the Community of Practice for Practice Partners sub-circle. |
| Race, Power and Privilege Analysis | Awareness of oppression and systemic racism within the context of our organizational systems and practices. A willingness to “name elephants” in the system to bring inequity to light. A commitment to dismantle oppressive structures and work to create structures that support equity. |
| Ally (adapted from Racial Equity Tools glossary) | Commitment and effort to recognize our privilege (based on our gender, class, race, sexual identity) within the organization as we work for justice. Understanding that it is in our own interest to end all forms of oppression, even those from which we may benefit in concrete ways. Commitment to reducing our own complicity or collusion in oppression of marginalized groups and invest in strengthening our knowledge and awareness of oppression. Willingness and ability to have conversations about inequity and injustice related within the organization. |

ALIGNING PEOPLE TO PURPOSE



CLEAR DIRECTION Circle Specific & Lead Links

- Specific projects; deadlines
- Strategies and priorities
- Feedback, coach/support to specific role
- Assign/de-energize roles
- Creating new roles/accountabilities

ORGANIZATIONAL SUPPORT Employee Relationship Circle & Community of Practice

- Orienting new staff
- Practice Partner Community of Practice
 - supporting and investing in Practice Partners
- Establishing budgets and process for GLO goals and plans
- Developing the annual reflections tool/process.
- Creating and executing procedures regarding recruitment and hiring
- Updating employee policies and procedures manual

INDIVIDUAL SUPPORT Practice Partner

- Developing individual GLO goals and plans
- Supporting process of identifying and resolving problems
- Creating space for critical reflection
- Supporting review of overall workload and capacity (help with forecasting)
- Caring, compassion, personal support and guidance

IMPORTANT TO NOTE

ISSUES RELATED TO THIS RECOMMENDATION THAT ARE NOT HANDLED HERE:

Annual Performance Review: We are not recommending an annual review process. If the Employment Relationship circle creates this process we expect that there will be accountabilities assigned to the Employee and the Practice Partner roles.

Promotions and titles: address within the Employment Relationship circle

Compensation being proposed by other working group

Recruiting and hiring decisions not handled within this recommendation

Employee termination process: address within the Employment Relationship circle

Orientation of new staff: address within the Employment Relationship circle

Deciding process and budgets for GLO: address within the Employment Relationship circle

Practice Partners' Support Plan: address within the Employment Relationship circle

ELIMINATE – NO LONGER NEEDED:

1. Annual goal setting and work planning for individuals (replaced by role accountabilities and GLO goals)
2. PTO requests. Individuals self-manage their time off, can get support through practice partner around being out of the office if they need to.
3. Career Cartographer role is no longer needed.

¹ Sandra Kim of Everyday Feminism and Compassionate Activism