

Role generation and review

An Exercise, A practice

Roles and scopes are created by a clear definitions of the work of that role or scope (scopes or teams typically have more than one role filled by different people). The creation of a role or scope confers the autonomy and accountability for delivering on the work. This means that an individual filling a role explicitly has the right to get that work done in whatever way they feel is best, and report back regularly on their progress to their scope, with the option always open to 1) evolve the role accountabilities and 2) elect a new person to the role if needed through a participatory team process.

Role generation and review is an opportunity to rapidly articulate all the Roles and Accountabilities for every person on a scope/team. Clarifying Roles and their specific Accountabilities can alleviate much conflict, confusion, missed opportunities, and mistakes. Once Roles with their Accountabilities are clear, then each Role can be filled either by delegation, election, or volunteering.

Here are the steps for this project:

1. Copy the chart below to a mutually accessible location. If you have access to the Master Governance Doc, use the role generation and review tab.
2. Reflecting on your experience working in your organization identify what you are personally responsible for and write it down using the following format in the table below, add more rows as needed. Have each individual participating in this process do the same. In other words, if at all possible, let the individuals filling the roles provide the detail as opposed to one manager or leader doing this.
3. **Create Role names: make these colorful and specific, steer clear of generic terms like** Executive Director and Human Resource Manager that imply large responsibility with little specificity.
4. Create Accountabilities: these are the specific arena of responsibility; the syntax is an active verb ending in 'ing' followed by the relevant descriptors; you may have as many accountabilities as needed per role. Examples of Role titles with Accountabilities:
 - a. Tech Master: providing assistance with IT needs as requested
 - b. Google Doccer: designing, implementing, educating users, and maintaining the collections structure in Google Docs
 - c. Office Supplier:
 - i. maintaining a basic stock of office supplies
 - ii. answering phones
 - iii. returning phone calls in a timely manner
 - d. For more complex roles, please see additional examples below.
5. Once the list is complete, facilitate a structured conversation with your teammates to identify any areas of confusion, overlap, or any holes. Make amendments as needed. Since Roles are a shared pattern level agreement, it is highly recommended that you use a collaborative decision

making process like Integrative Consent to agree to this current version of the Roles. Further iterations and amendment of the Roles will occur in the Standard Meeting Process as needed.

6. The difference between roles, job positions and employment contracts:
 - a. Typically job positions contain more than one role, and the roles one holds evolve over time, so they are not static expectations, but are negotiated through the team process.
 - b. Job positions are the details of what is advertised and include specifics like number of hours, pay rate, job title and starting expectations for the roles that pertain to that position. Employment contracts contain some of those details plus other key organizational expectations like participating in regular performance reviews and non-compete and non-disclosure clauses.
 - c. Roles should evolve over time and be kept current with reality through the meeting process. Positions also evolve over time but typically at a somewhat slower pace.
 - d. Core roles are different from other roles in a scope in that they exist in every scope and people are typically elected with a term. The expectation is that all individuals in a scope will be able and be trained to hold the core roles. Other roles besides the core roles are typically elected or appointed for an indefinite period of time with changes to that election or appointment based on performance or some other really good reason to change, like an individual leaving the organization or moving up to another position.

Role Title	Specific Accountabilities	Individual Filling this Role

Additional Role and Accountability Examples:

Personnel Wrangler:

- Conducting effective staff performance reviews
- Managing all personnel paperwork
- Managing payroll
- Training staff
- Analyzing, planning and delivering individual and organizational development activities
- Managing staff transitions
- Researching and assessing background check policy
- Conducting background checks
- Liaising with outside human resource trainers

Leprechaun

- diversifying portfolio of revenue streams
- building and maintaining strong relationships with private donors

- training in fundraising skills according to needs
- developing & maintaining a master fundraising development plan for the whole org.
- coordinating the fundraising across the org.
- submitting proposals for grants
- coordinating efforts with the marketing & communications initiatives
- creating & maintaining a CRM and ensuring the use of the tool for donors
- proposing an annual budget for fundraising to the Fundraising Scope

Finance Lead

- establishing and maintaining a receipt collection system
- tracking all expenses and income
- maintaining a 3-6 month cash flow projection
- establishing tracking procedures for subcontractor deliverables against contract
- paying bills in a timely manner
- maintaining accurate monthly budget
- producing P&L and updated cash flow projections for the first meeting of the month
- generating useful metrics that link sales projections and cash flow
- preparing and submitting taxes
- fulfilling partner point person accountabilities with any accountant or tax consultant
- preparing annual w9 electronically and sending to all partners
- projecting and tracking the business model