LEADING

AND MANAGING

CHAPTER 7:
LEADING AND MANAGING

INTRODUCTION

Your job as Campaign Manager is to win. No matter how small the race, you can't win alone, so that will require engaging other people to carry out the work with you.

From Day 1, your job will be to build an organization that motivates, engages and holds accountable other people, including your candidate, consultants, staff and volunteers. This requires building the right team in the first place, setting clear goals, delegating responsibility for those goals to others, supporting them with the training and coaching it takes to meet those goals, holding them accountable, creating a culture and meeting structures that foster collaboration and communication, and sometimes having to address performance problems and let people go.

There is no back-up for your job. The buck stops with you. If there are strengths in your organization they are yours to celebrate with your team. If there are problems in your organization (and there always will be), it is your responsibility to figure out who can fix them and how.

People are as important a resource to your campaign as money, and taking the time early on to structure your campaign to recruit, develop and deploy leaders will pay dividends when it matters most.

MANAGING THE WORK

ESTABLISH CLEAR ROLES AND RESPONSIBILITIES

The Engagement Campaign structure is one in which responsibility, capacity, and accountability are distributed over many people. Because so many people are involved, it is essential that everyone understand their purpose, both individually and collectively, in the organization. Establishing well-defined roles will help you set up a transparent organizational structure that improvesthe focus and performance of your team, decreases drama, and generally makes for a smoother operation.

Roles should be created based on the work that needs to get done, not based on arbitrary hierarchies. That's easier in campaigns that most organizations, because we have pretty standard roles and responsibilities. These roles may be filled with volunteers, depending on your campaign budget.

ROLE	RESPONSIBILITY
Candidate	
Campaign Manager	
Finance Director	
Finance Assistant	
Communications Director	
Communications Assistant	
Field Director	
Organizer	
New Media Director	
Data Manager	
Political Director	
Scheduler	
Administrative Director	

In an Engagement Campaign, it is especially important to articulate the responsibilities of staff members and volunteers as *outcomes* for which they are expected to achieve, rather than tasks they are expected to perform. If you simply assign tasks your staff and volunteers will continually come back to you with more work. However, if you hand over big chunks of responsibility for the work you can hold your staff accountable for following through on those responsibilities.

DELEGATING

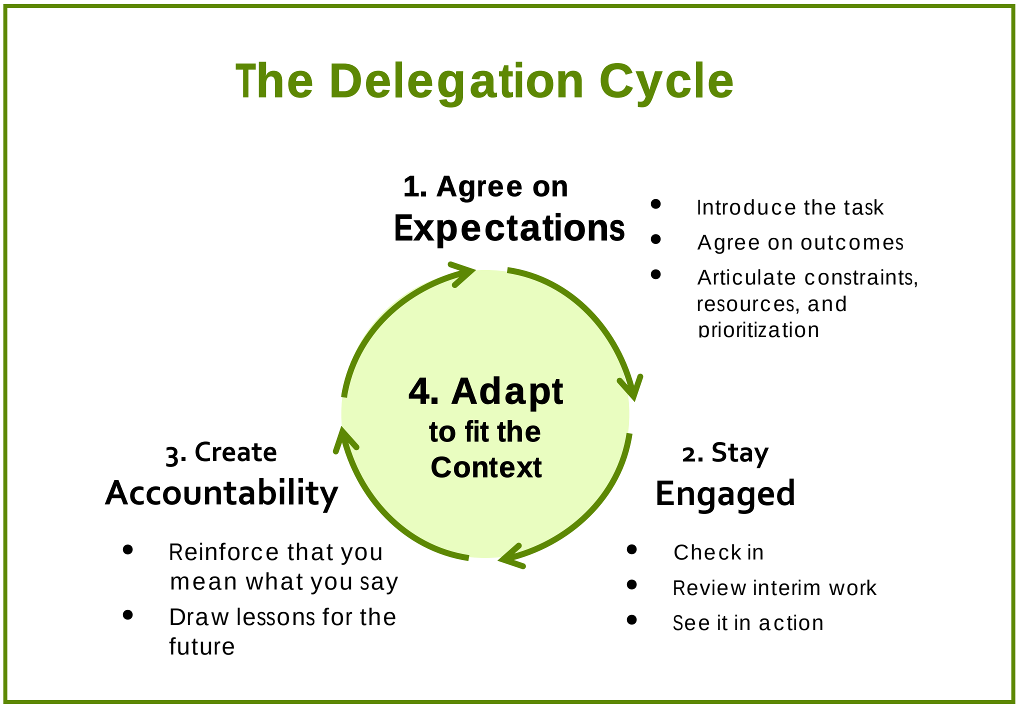
Once you've developed a clear plan with clear goals and clear roles you'll need to delegate significant pieces of the plan and the goals to others.

This will probably not be easy at first. Chances are you're becoming a campaign manager because you love the field work or the finance work or the communications work you've done on past campaigns, and you're probably pretty good at it. However, if you spend time doing that work—because it's more comfortable or because you want it done "right"—your chances of winning diminish significantly.

Your job is to "guide more, do less" as Jerry Hauser puts it. Managing your team of candidate, staff, consultants and key volunteers is a full-time job in itself.

That means in order to motivate others to actually get the work done, you'll need to delegate responsibility for taking on big chunks of the work—not just tasks. That requires delegating the work clearly to your team members, holding them accountable to meeting goals, and supporting them with the training, coaching and learning resources they need to do that work.

Delegating well takes time early on in meetings, but results in more work getting done in the long term. Here's how Jerry Hauser and Alison Green lay out the steps for delegating any responsibility, whether to staff, consultants or volunteers.



From Jerry Hauser and Alison Green, *Managing to Changethe World*

Good delegation requires that you hold others responsible for their part of the work without taking the work back from them.

Hauser and Green provide a clear structure for delegation that many organizations are using today. For every major responsibility (every cell on your fleshed out campaign strategy chart), use the MOCHA template to lay out who is responsible for what.

	Description	Money	Message	Mobilization	Schedule
Manager	Assigns responsibility and holds owner accountable. Makes suggestions, asks hard questions, reviews progress, serves as a resource, and intervenes if things are off-track.	You	You	You	You
Owner	Has overall responsibility for the success or failure of the project. Ensures that all the work gets done (directly or via helpers) and that others are involved appropriately.	Finance Director New Media Director	Communications Director New Media Director	Field Director New Media Director	Scheduler
Consultant	Should be asked for input and/or needs to be brought in to work.	Fundraising Consultant	General Media/Message Consultant New media consultant Pollster	Targeting or mail Consultants	None
Helper	Available to help do part of the work.	Finance Asst. Data Asst.	Communications Asst.	Regional Field Directors Organizers	Candidate's other workplace
Approver	Signs off on decisions before they're final. May be the Owner or Manager.	Campaign Manager & Finance Director	Campaign Manager & Comm. Director	Campaign Manager & Field Director	Campaign Manager

Delegate at all levels

Your senior staff can use the same processes described above for delegating big chunks of responsibility in their work to others, whether it's votes, money or volunteers. The work of the campaign is virtually the same top to bottom in each field, whether it's raising money or turning out votes; it's just that goals are broken down and spread out over many people. (CREATE CHART FOR THIS)

For example, if the Field Director is responsible for turning out 50,000 votes which will require 1,000 volunteers on Election Day, she can delegate a goal of recruiting 25,000 votes and 500 volunteers to each of 2 Regional Field Directors. If they have 5 Organizers each, they can delegate to each Organizer a goal of recruiting 10 volunteer leaders, 100 volunteers to turn out 5000 mobilization and persuasion votes on Election Day. Each volunteer leader can then be delegated responsibility for turning out 500 targeted voters by Election Day, which would mean recruiting 10 other volunteers to turn out 50 voters each.

Suddenly the enormous goals of the campaign become achievable when more people are engaged to take responsibility for achieving those goals.

Engagement Campaign staff should be highly leveraged – meaning that an organizer whose ultimate responsibility is to turnout 5000 votes on Election Day – can't possible meet her goal alone – she must recruit, train and manage a team to accomplish the goal. When assigned the responsibility of turning out 5000 votes, an impulse might be to jump on the phone immediately to start identifying voters NOW but a simple review of the math drives home the need to first develop a team to identify supporters. If the organizer makes 100 phone attempts a day, reaches 25 voters and identifies 25% of those as supporters, she has identified 5 voters as supporters -- a good day on the phone. She'll need only 3 years to meet her campaign responsibilities. However, if she leverages her time by focusing on recruiting volunteers and helping them develop into volunteer leaders, she will dramatically expand her capacity and ability to reach her assigned goal.

Winning the campaign will require that you teach your staff at all levels to delegate leadership and responsibility well, so that together you can build the capacity it takes to raise money and deliver votes.

Repeat Back for Clarity

When you delegate to others, ask them to repeat back what you are asking them to take responsibility for, then work together to put it in writing so that you both have clarity on the work and a reference point for follow up.

CREATING WORK PLANS

Once you have delegated responsibility to others, you can require them to create work plans to demonstrate their strategy for meeting goals. These plans should lay out clearly the measurable goals to be met, the measures of success if goals are met, the milestones along the way, and activities to reach the goals.

These work plans should be a core part of your regular coaching and accountability meetings with staff. Staff can use the same worksheets to hold volunteers accountable to their own goals.

(See Sample Plan at the end of this chapter)

MANAGING THE PEOPLE

MANAGING YOUR CANDIDATE

Your candidate is going to have many demands on her time and attention. In the network of people placing demands on your candidate, you are the only one ultimately responsible for the success of the campaign. That means you'll need to be serious about managing up, which is really not that much different than managing the other staff who work for you.

Establish a solid working relationship

Take time very early in the campaign to meet with your candidate just to get to know each other. You'll need to officially interview your candidate to develop the campaign narrative, but spend time before that just getting to know her as a human being, and letting her get to know you, where you've come from and why you've chosen to work on her campaign.

You'll need to understand deeply what motivates your candidate, because it will often fall back on you to motivate your candidate—to do fundraising call time, to practice for debates, to speak to the press, and so on.

Your relationship to the campaign needs to be based on respect and understanding of your candidate. If you do not respect your candidate, or vice versa, it will quickly become clear to other staff and supporters and undermine your leadership and the success of the campaign.

This relationship is like any other. It will take constant attention and development, so work with your candidate to figure out a regular schedule for checking in.

Establish ground rules for your relationship

Spend some time early on establishing clear ground rules for how you and your candidate work together. What decisions will you make? What decisions require the input of your candidate? How will you both interact with consultants and staff? How will you deal with conflict? What role will the candidate's family have in decision making and on what types of decisions? Raise a few hypothetical situations and discuss how they would be addressed.

Establishing these ground rules early can save you drama and time down the line.

Communicate proactively

Set up frequent and regular check-in times with your candidate, and at least one extended meeting per week. Be proactive in offering your candidate updates on the campaign. Don't be shy or feel like you're pestering your candidate. It is in her direct self interest to know how the campaign is going, to get guidance on the best way her time can be used on the campaign, and to know of any major problems that arise.

Be honest

Your candidate needs straightforward, honest information about the campaign's status. Don't hide challenges or failures. Raise them proactively and be clear about what you're doing, or what the candidate needs to do, to address these problems.

Resolve conflicts in private

It is critical that you and your candidate present a united front to the outside world. Be very careful what you say in public, and be proactive about surfacing and resolving conflict with your candidate immediately.

Find a clear role for the candidate's family and advisors and keep them in the loop

The candidate's family and close advisors will have great influence over her. Be proactive in meeting and building relationships with them early on in the campaign. Build a list of key advisors that you need to keep up to date on a weekly basis.

Be creative in finding a clear role for the candidate's family in the campaign and keep them busy and involved in the day to day work.

MANAGING YOUR STAFF & VOLUNTEERS

Spend time on training now, or waste time later

There are two ways to look at training: as time spent, or as time invested. Many managers claim there isn't enough time to train staff and volunteer leaders, and cut training time short to push people to other activities. However, having campaign-wide trainings such as staff retreats and volunteer conventions, provides unrivalled opportunity to get your whole team on the same timeline, goals, program and message. You can see your team at work and understand who's doing well and who's not, and reinforce a culture of learning, responsibility and accountability.

Trainings also provide opportunity for you to transparently acknowledge and address challenges, and to celebrate progress on your campaign, which is critical to keeping your whole team motivated.

Many managers are tempted to make trainings as short as possible, which usually means spending all the time talking at people in order to get all the information out. The problem is that information delivered in that way doesn't stick, and rarely translates into action.

If your staff and volunteers are not doing what you expect of them after training, it's not because training is inherently bad, it's because you didn't take the time to get crystal clear about the goals and responsibilities you are asking your team to take on, or you didn't take time to give them the opportunity to practice new skills in a supervised setting where they could get instant feedback.

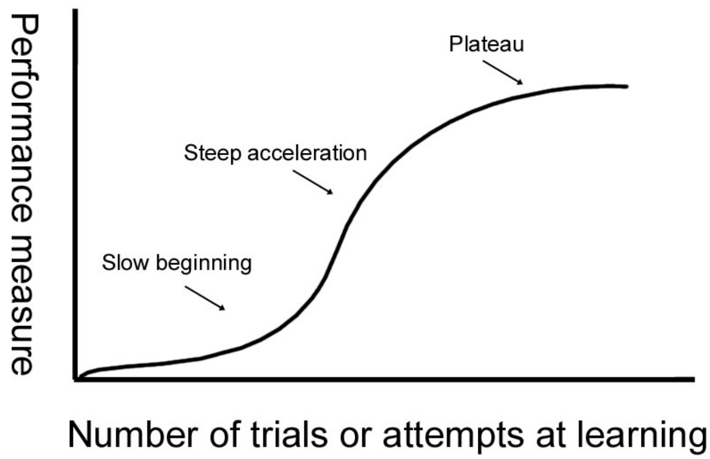
The best trainings for launching a new phase are longer (1-3 days), because they incorporate practice time after every skills session, creating a safe place for staff and volunteers to take risks, learn and get feedback before heading back out to the field.

Expect and plan for early failure as part of long term success

Every skill we learn as human beings require practice, which usually involves failure or mitigated success early on, and requires renewed motivation and recommitment to work through the learning curve until we've mastered the skill.

As a manager this means that if you need your staff and volunteers to be working at top form by a certain date, then you need to schedule in
early training and ongoing coaching to give them time to learn and practice new skills.

This is particularly true during GOTV. A campaign team that has been through two dry runs of Election Day is much more likely to stay focused and disciplined, and weather the unexpected during GOTV.



From: **Psychology: An Introduction** by Russ Dewey,
http://www.psywww.com/intropsych/ch07_cognition/learning_curve.html

Follow up with regular coaching

Coaching is a critical piece of Leadership development—it's the fuel that pushes us through the learning curve more rapidly than if we simply engage in ongoing trial and error.

In order for staff to be successful, and be held accountable to meeting goals, you'll need to ensure that every team member receives frequent, regular, honest and critical feedback from his or her manager. This should be mirrored at all levels of the organization, from the way you coach your Finance Director, Field Director and Communications Director, to the way your staff coaches volunteer leaders.

Supervisors should spend time observing their staff at work, to be able to give accurate feedback and suggestions. Supervisors should also ask subtle but probing questions of volunteers or staff who report to the supervisee, and make sure that any major issues with the staff member are brought to his or her attention. All staff should know who to talk to if they have issues with their supervisor.

Feedback should be positive as well as critical. Constructive criticism should identify the problem and its root causes, and should be solution-oriented overall with commitment to action.

Your role as Manager is to establish a standard schedule for coaching, learning and accountability, so that staff and volunteer leaders get feedback on a daily and weekly basis. (See Sample Coaching Agenda and Sample Schedules at the end of this chapter.)

Address challenges head on

Your staff and volunteer leaders are often the first to feel push back and challenges on the ground. Pretending such challenges don't exist discredits you and your leadership. A critical skill as a manager is learning to interpret challenges and failures in a way that acknowledges them while at the same time reaching out to ask staff and volunteers to take responsibility for overcoming those challenges or setbacks.

Never promise a win

You will never know you've won until Election Day. Learn to master the balance between laying out a pathway to winning while at the same time sketching out clearly the work that path will require.

Hold your team accountable to the values of your campaign

Managing is not just about performance, it's also about supporting your staff, consultants and volunteers in living up to the values of the campaign. Reinforce those values by telling stories of those who are representing the campaign well. Address infractions of your campaign culture immediately and directly.

Celebrate success

We are all motivated by recognition and success. Be sure that a part of every day and every week is dedicated to celebrating the success of individuals and teams in your campaign. During the 2008 primary, the Obama campaign in South Carolina found a direct correlation between the performance of volunteer teams on key outcomes, and the frequency with which they celebrated as a team.

MANAGING CONSULTANTS

Managing consultants is one of the most important things you do as a manager. Consultants generally provide work product that is strategically central to the campaign (all your paid communications, for example), work that consumes the vast majority of your budget.

Consultants are also a major resource for strategic advice and overall coaching for you as a Manager. They can help you lobby your candidate to do more call time, help you draft a press release, act as a sounding board when you're conflicted about how to handle a situation, or just offer general encouragement and perspective throughout the campaign. But, like any other member of your team, you won't get the most out of your consultants unless you manage them well.

Set up clear expectations at the beginning

Just like with other key players, you'll need to take time to build a relationship with your key consultants early on and set up clear expectations for working together. How often will you talk? When? What are key deadlines and goals?

Remember, your consultants work for you

They are different than other staff because they don't work on the campaign full time and you are not their only 'boss'. They are also typically much older than you and have many more cycles of campaign experience. But, like other staff, they are accountable for getting work done within your organization. Your job is to ensure they provide outstanding work product and execute their goals on time just like everyone else.

Make requests specific to your campaign

Consultants are often doing the most skilled work of your campaign, which requires more clarity on delegation and accountability—not less. Every campaign is different, and it's your responsibility to be clear about what your campaign needs so that you don't receive boilerplate materials from past campaigns that aren't consistent with the goals and values of your candidate and campaign.

Ask for help

Leading a team of consultants as a manager doesn't mean having all the answers, knowing more than they do, or being smarter than them. It means having a clear vision for the strategy and timeline of the campaign and how each consultant contributes, having a good handle on your budget so you know what you can afford, and having the maturity to listen to all sides, make good decisions, and get them implemented. In general it means seeing your consultants as resources to help you succeed and demanding the highest possible quality work from them.

Good managers keep their team informed about what's going on in the campaign so they can keep reaching out to their team constantly for help.

Have an agenda and stick to it

Oftentimes, the most challenging part of managing consultants is leading discussions. Many campaigns have weekly conference calls with senior staff and consultants where strategy for the coming week is discussed. When the campaign begins developing television and radio scripts, or mail pieces, you will need to have regular conference calls to critique scripts and copy.

Some managers are intimidated by the discussion, so they don't keep the discussion focused, or do enough to challenge their consultants, or get everyone's input. Others never organize a call at all because they're scared of having to lead it, or threatened by others' input. Both scenarios are recipes for disaster and a quick way to generate bad outcomes and a confused, frustrated team.

Set up regular times for conference calls with your consultants and stick to them. Prepare and circulate an agenda for every call. Think of yourself as a facilitator and ask consultants to debate each other to get to the best decision.

Once a decision is made stick to it, and don't get sucked into having repeat conversations about past debates.

It's your job to lead your team, including consultants, and to keep your campaign running on track.

BEST PRACTICES FOR MANAGING CONSULTANTS

Ask and keep asking. Your consultants are a resource—the more you ask for their help in all parts of the campaign, the more invested they will become in your campaign and the more you will get out of them.

Listen, and keep listening. As the leader of the campaign, you are obligated to listen to input from all members of your team and discern from that advice the best path forward. Be deliberate about asking your consultants good questions so you canmake strong choices with confidence.

Establish regular communication. Set up regular conference calls with your consultants. Your team will be most helpful if you keep them in the loop. Create a distribution list where you can send your entire team press clips,important developments in the campaign, and celebrate accomplishments.

Discuss important decisions with all relevant consultants and staff at once. Getting everyone together to make an important decision in one meeting is more efficient and will often yield a better decision. Don't have such a large group that the discussion is not productive, but avoid making yourself have 10 different one-on-one discussions where people can't challenger each other's points of view.

Push, and keep pushing. Demand the highest quality work from your consultants. Always. And then celebrate their good work.

Set ground rules with your candidate about how you interact with the consultant team so it's clear how decisions are made. Be sure you are on all calls with consultants.

Remember that your consultant is a business person, as well as a strategist. Their recommendations need to be matched back against your strategy and your budget. It's ultimately up to you as to whether you spend money on X or Y.

MANAGING TIME

As a campaign leader, one of your big responsibilities is to manage the clock. It is usually the only asset on a campaign that diminishes and confines strategic optionsas time passes and the election approaches. (Money and people, by contrast, typically increase in the homestretch.)

In addition to keeping an eye on the calendar with a big countdown chart (like 99 days til election) campaign leaders must also manage the daily and weekly calendar.

Staff and volunteers need routines and rhythms to regulate activities. Programs need to be translated into sample daily schedules so organizers and other staff have clear expectations about how to manage their time in order to achieve the objectives of the campaign.

Establishing a predictable routine that is consistent across roles helps strengthen your ability to set the tone, execute a program, and proactively manage your greatest asset – human capital.

PRINCIPLES OF TIME MANAGEMENT

As Jerry Hauser and Alison Green point out in their book, good time management requires that you put the “big rocks” in the campaign schedule first—the big obligations that must be fulfilled in order to build the campaign. This is true for each phase, but just as true for each week and for each day.

Once you’ve put the big rocks in—fundraising, communicating with voters, managing staff—then you can put in the little rocks, like check in meetings and key conference calls.

MANAGING YOUR OWN TIME

Your number one job is to manage the clock

It will be human nature to push back against deadlines and timelines, so you need to hold yourself and your team to them once they’re set. The more negotiable the deadlines become the harder it will be to get traction as a campaign.

You are a manager, so spend your time managing

You are responsible for managing your own time well, so that you can support all members of your team in carrying out their work well. Delegate everything possible to staff, consultants and volunteers. Managing a team well is a full-time job in itself, and you won’t be able to do it well if you’re also trying to do the work yourself.

Take care of yourself

Campaigns are never easy and require very long, hard hours. However, you have to set limits so that you have time to eat and sleep. If you don't take care of yourself your campaign will turn into chaos around you. Others are counting on you for leadership and guidance in their work.

MANAGING YOUR CANDIDATE'S TIME

Your candidate's time is the most important and most limited resource you have. That means you need someone in charge of scheduling. If you can't afford someone early on, then find the best detail-oriented intern you can.

Hold scheduling meetings daily

Hold regular, short scheduling meetings to be sure you and your scheduler are on the same page. To make effective scheduling decisions, it is imperative that the scheduler understands the campaign plan, strategy, message and targeting, so be proactive in keeping him up to date.

Be strategic

Always use your candidate's time where you can get the biggest return of resources for your campaign—to raise money, to motivate supporters, to persuade the largest possible audience of your target voters.

If their time is not well spent bringing in resources, then let them rest so they're prepared for campaign time. Don't spend candidate time just garnering small political favors.

The candidate is not in charge of the schedule

This is one of those ground rules it will be critical to establish with your candidate early on. She will be getting pressure from all sides to spend time in places that are not strategic for the campaign. She needs to be clear that she cannot commit to any meetings without first talking with your scheduler.

If your candidate is already in office your scheduler will need to coordinate with the office scheduler. However, the campaign's needs take priority.

Set priorities

Call time for fundraising is #1 and should be non-negotiable by the candidate or other staff. The campaign will not survive without sufficient fundraising by your candidate. Fundraising events are also key events for the candidate.

Early on during the Engaging Supporters phase, your candidate should be spending time with key supporters—not just the biggest donors, but also the volunteers who are doing the most work and recruiting the most people for the campaign.

During the Engaging Voters phase, the candidate should be talking to voters on a regular basis, through earned and paid media and through personal appearances with persuadable voters.

Be sure to schedule rest breaks and family time – the candidate is a human being too.

Be clear what needs to be on the schedule

Draft a scheduling template with your candidate and scheduler that includes all the information each of you needs: times, locations, phone numbers, etc. Then stick to that template.

Expand your candidate's time: recruit surrogates

The easiest way to stretch your candidate's time is to recruit surrogates who can be trained to deliver the campaign's message to targeted audiences. Surrogates may be members of the candidate's family or circle of advisors, elected officials, community leaders or celebrities. As you recruit surrogates be certain that your Communications Director spends time with them, practicing their message.

Learn to do the politics

With such a limited resource you and your scheduler will frequently have to say no to scheduling requests. Learn to combine requests where possible, or how to make sure someone declined for a schedule request can be recognized by the candidate in some other way.

MANAGING STAFF TIME

Meetings are where the campaign happens

As a campaign leader, you will spend as much as 80% of your time in meetings – staff meetings, donor meetings, decision making meetings, scheduling meetings, and so on. Meetings are where we share strategy, create plans, share experiences, bring problems to solve, review progress, reflect on our experiences, celebrate our success and regroup after failure or disappointments.

In short, meetings are where the campaign happens. As a manager, meetings are the means by which you focus and direct your team and meetings are where you will most directly cultivate a campaign culture of motivation, team work, focus and accountability.

Set explicit norms for how meetings will run

Creating norms for meetings helps you to make the most of everyone's time and energy. Norms are the explicit, stated and agreed upon ground rules for conducting the meeting. We suggest setting them early, rigorously enforcing them and adopting new norms as required.

- Meetings begin & end on time
- All meetings have an agenda with times allocated for each agenda item
- Participants are expected to be present & engaged
    - No iPhones, Blackberries, texting
    - "Lean in" to the conversation
- No side conversations
- Be respectful of your colleagues
    - No interruptions
    - Be relevant
    - Have the meeting in the room, not outside afterwards
- Each meeting has an assigned "action item" scribe who is responsible for noting action items, who is responsible for each item and a date by which the item should be complete

Setting norms is not enough if you don't also set a self-correction. The self-correction for breaking the norms should be fun, not just punishment. For example, a push up for every minute you're late, or $1in the collective celebration bank for every time you check your blackberry.

If you don't set a self correction because "well everyone here is an adult and we don't need to do that," then the first time someone breaks a norm, the new rule is it's ok to make exceptions . . . and the rules go out the window.

Be clear about the purpose of each meeting

Not all meetings are created equal. A functioning campaign has several different types of meetings that occur on a regular basis and a good manager should make a point of distinguishing between different types of meetings and make sure participants understand what meeting they're in.

A manager will need to hold several types of meetings that have different lists of participants, including:

Strategy & Planning Meetings – the purpose is to assess, reflect and plan the next phase or activity of the campaign. Participants include senior staff, key advisors, relevant consultants and sometimes the candidate.

Information Sharing Meetings – the purpose is to broadly share information that team members need to have in order to fulfill their responsibilities. These meetings should be brief and to the point and should include all team members. Examples include: daily staff meeting & nightly check out meetings.

Decision Making Meetings – the purpose is to evaluate options and make decisions. Examples include: scheduling meetings and budget meetings. Participants include campaign leaders and staff with responsibility for implementing decisions.

Coaching and Accountability Meetings—the purpose is to review progress to goals, address challenges and prepare to meet future goals. These may be one-to-one or small team meetings.

A lot of time is wasted in meetings where participants are confused about the purpose. If participants understand that the purpose of a particular meeting is to share information about decisions that have already been made, they are less likely to advocate or debate for an idea, something that is likely to frustrate both you and your staff.

Model how to run good meetings and calls

Your staff and volunteer leaders will all be responsible for running meetings and calls to strategize about their own work, to coach others and to hold them accountable.

The way you run meetings will set the tone for the whole campaign. If you start and end late it sends a signal that you don't respect others' time or campaign time. If you do all the talking it suggests that others aren't needed, except to carry out your commands.

Have an agenda. Go over your agenda at the beginning of the call or meeting and be clear about the purpose of the call and its goals, as well as what decisions need to get made.

Set a time limit to the conversation and stick to it. Nominate a timekeeper to keep you and everyone else on time. Don't try to run a meeting and keep time at the same time.

Lead the discussion. For each section of the agenda, clearly state the question you are trying to get answered and keep the group on topic. Make sure to call on every member of the team to get their input. Keep the team focused—if the discussion gets off topic, it's your job to steer people back to the topic at hand. Ask questions to keep the discussion moving forward and clarify disagreements.

Be clear about action steps. Before ending the call, review what decisions were made and what action items people were assigned. If the decisions were particularly important,

Don't allow "meetings after the meeting" where people have sidebar conversations to re-hash or undermine what took place in the meeting. If anyone has a gripe the place to bring it up is in the meeting with everyone else. When necessary, have one on one discussions with your consultants about raising issues with the group as a whole and not individually, just as you would with staff.

ADDRESSING PERFORMANCE PROBLEMS AND LETTING PEOPLE GO

Being a manager requires that you have respect for the work ***and*** respect for the people doing the work. No one likes to fail, and people rarely do poorly in their jobs without realizing that they are not meeting expectations.

Letting poor performance continue because you're afraid to address it, or "layering" a staff person with someone else shows lack of respect for the work that has to get done, and lack of respect for the person who is not meeting his responsibilities to the campaign.

We recommend the chapter on "Addressing Performance Problems and Letting People Go" in Jerry Hauser and Alison Green's book, *Managing to Change the World* for very detailed advice.

ADDRESS THE PROBLEM DIRECTLY AND IMMEDIATELY

When you become aware of a serious performance issue, do not put it off because you have more important things to do today. In a small campaign with a small staff, one person not performing well can be a significant drain on your campaign's human and financial resources.

Schedule a meeting immediately

Set up a face-to-face meeting with the person involved. Refrain from gossiping about the problem with other staff.

Be direct about the problem at hand

Be clear about exactly what the problem is. Be clear that this is an informal warning and be clear about exactly what needs to improve. The fact that there is a problem is non-negotiable. However, the path to solving the problem needs to be negotiated, with the staffer making clear choices and commitments.

Uncover the root of the problem

What is the root of the problem? Is this staffer getting the coaching and resources he needs? Is the root of the problem something that can be resolved easily with a slight shift in resources? Can the problem be fixed with re-training? Or do these staffer's skills not match the work he's being asked to do? Don't assume you know the cause of the problem without talking to your staffer.

Be serious about the work

Set very clear, measurable goals with clear deadlines and clear check-in points along the way. Be clear about the support and resources that will be offered this staffer to help meet these goals, but be clear what the consequences will be if they are not met.

If performance continues to be a problem, give a written warning

Clearly lay out the problems and the timeline and specific steps it would take to rectify those problems. Meet with the staffer again to lay this out and to be clear that his job and the success of the campaign are at stake.

LETTING PEOPLE GO

Do it early

If you decide that you need to fire a staffer or volunteer, do it early and quickly. Having someone around who's consistently underperforming, or someone who is acting in ways inconsistent with the values of your campaign is demoralizing for other staff. Firing early (when firing is necessary) shows that you take the work seriously and the time of your other staff and volunteers seriously.

Have a third party in the room

This will be a very difficult conversation for you and for the staffer or volunteer involved. You need a third party there to help keep things civil and as a witness, but not as a negotiator. Once you've made the decision to let someone go you need to stick to it.

Be respectful

It's critical that you respect the dignity of the person in front of you. There is never a reason to yell on a campaign, or to gossip about one staff person to another, and that holds in this situation too. The way you treat this staff person or volunteer gives a signal to the rest of the team about what type of leader you are.

Close the loop

Make sure the person being let go knows that this is a final decision. Close his email and phone account immediately, and shut down access to any campaign databases or servers. Be clear about what he should expect in terms of severance pay or continuation of benefits.

Interpret this for other staff

Do not use this as a way to threaten other staff or volunteers. Be clear that these decisions are not taken lightly. Be clear too that if other staff and volunteers meet work expectations and work in a way that is consistent with the values of your campaign that they have nothing to worry about. If you don't interpret what happened for others, then they will make up their own stories, which may quickly undermine your leadership, and will certainly distract others from the work they should be focused on.

CONCLUSION

Learning to manage the work, the people and the clock is the real work of becoming a manager. Managers who are able to set and delegate clear goals, coach and hold people accountable to those goals, and use time effectively are managers who can build the organization and capacity necessary to win.

SAMPLE WORK PLAN
Finance Director

Goals Big-picture, what are you trying to accomplish this month?	**Measures of Success** At the end of the month, how will you know whether you are successful in this area?	**Milestones** How will you know if you are on track along the way?	**Activities** Who will do what by when over the next 30 days?
1. Raise $125,000 from 250 donors 2. Recruit and train 5 new volunteer raisers who have goals of raising $10,000 each	1. By July 31 we have $125,000 more raised and 200 more donors than we do now 2. By July 31 at least 5 new raisers are trained and running their own fundraising events	• 5 volunteer raisers recruited and trained by July 7. • 10 fundraising events with 200 participants and $50,000 raised by July 20. • $25,000 raised online by July 31. • $25,000 raised through call time by July 31.	1. Finance Director does one-to-ones to recruit raisers by July 6 2. Finance Director trains raisers to build and lead house parties by July 7 3. Candidate does nightly call time (Finance assistant researches potential donors each day) 4. Finance assistant enters donor and event data.

*Based on Jerry Hauser and Alison Green, *Managing to Change the World*, p. 68.

SAMPLE WEEKLY COACHING AGENDA

1:00 Check-in

Exchange stories from the last week since your last meeting. Talk about how you're each doing personally, and what factors outside the campaign are affecting your lives. Don't skip this time—understanding each other as human beings is important.

1:10 Evaluation of work plan and progress to goals

Re-articulate expectations and goals and why these goals matter. Check in on progress toward goals: Where have we come from? Where are we going?

Stay committed to meeting the goals and holding this staffer accountable to goals, which are non-negotiable.

1:20 Evaluation and problem solving

Debrief any meetings or activities since your last meeting. Let him or her go first. What worked? What needs to be improved next time? What did s/he learn?Include lots of "why" questions. Why did that go so well? Why did that not work?

Reinforce progress to goals, and specific growth in skills

Use reflective listening: summarize and repeat what you've heard using, reinforcing things that are important and acknowledging challenges

Probe: Rather than telling your staffer or volunteer leader the answers, ask them what they think they can do, help them problem solve and learn to be resourceful

Don't take the work back: leave responsibility for the work with your staffer, and figure out what support they need to fulfill their responsibilities.

1:45 Commitment to action

Go over upcoming activities and benchmarks. Discuss challenges are anticipated, and strategize on how to address those. Summarize key learnings& next steps (prioritize 1-2 key action steps, not 10)

Recommit to your next meeting time and place

Stay positive, acknowledge challenges, focus on solutions

2:00 Close