

## Shared Leadership-inspired "Learning Opportunity Plan"

This tool is designed to help ensure a balanced human rights framework for "support & accountability" in the context of personnel management. In a **conventional "Human Resources Management" based process**, a typical supervisory and disciplinary process would include the following steps:

1) warning; 2) written warning; 3) probation; 4) disciplinary action

**A Shared Leadership Model recognizes the interdependence of individual and collective responsibility and a "Human Rights Management" framework promotes a more thoughtful and mutually supportive process with the following steps:**

1) deliberation in framing the issues; 2) ALL parties implicated identify and take steps as part of mutually accountable action plan; 3) evaluation of the corrective measures; 4) warning & re-deliberation of issues and accountability of ALL parties implicated; 5) progressive discipline procedures (multiple steps prior to "disciplinary action").

**NOTE:** The Learning Opportunity Plan is NOT a part of the progressive discipline procedure. Progressive Discipline is (or may be) triggered as an extension of this process ONLY when a final check-in review meeting is concluded upon completion of the Learning Plan implementation, and the result is confirmed to be below satisfactory for fulfillment of the goals laid out in the Plan.

This is a structured way aimed at creating space within the organization to be able to field issues that lead to constructive engagement and staff-level as well as organization-level support for improvement and resolution. Ideally, this Learning Opportunity procedure would be free of punitive implications, but rather encouraged as an accessible tool to resolve issues and improve performance with active participation by colleagues that we closely work with, and contribute to shared sense of supporting each other's performance, and taking for granted that we ALL have areas of improvement...and that's okay. Any tension, problem or conflict provides opportunities for improvement under this procedure.

### **Keywords to successful and satisfactory functioning of this Procedure:**

- Change our perspective from one of failure or defensiveness to focus on the **value** of peer-to-peer support in naming 'areas of improvement' – criticism is not punitive in itself!
- Watch the **language** to reflect the values we're trying to encourage – individual and collective responsibility, honest dialogue about privilege, oppression and internalized oppression, support for learning and accountability to the work.
- **Openness** – no secrecy correlates with no (or minimized) vulnerability or sense of threat or jeopardy
- **Accessible** – no one wants to go to a dark, angry place but is place to go to get healthy. Easy to use. Seen as useful TOOL, not a WEAPON.

- The Learning Opportunity Plan is an actively used document, a **LIVING model** that should reflect learnings and additional action steps. Go there and come back, reflect on insights, ask for help, share obstacles, make commitments, go there again and come back, etc.

#### **Roles - ACRONYMS:**

- **HRWG** – human resources working group
- **PRI** – person raising the issue (reject use of “accuser”)
- **PHIR** – person having issue raised (reject use of “accused”)

#### **Process**

As with any interpersonal conflict, the most important step is to broach the issue with the person or people involved. This is a necessary first step, and should be done promptly and with sensitivity. In many cases, a sensitive but honest conversation can resolve a problem or set the tone for such problems to not be repeated.

When the conversation needs to go deeper and a series of action steps may be needed, the learning opportunity plan is a structure to come to an action plan and come to clarity about ways the person raising the issue (PRI) and the person having issue raised (PHIR) can be mutually supportive and accountable.

The role of the Human Resources working group is to create a positive tone and safe space for honest dialogue and to help ensure organization-wide accountability to the values, process and goals of the organization.

- 1) Thoughtful deliberation in framing the issues
- 2) ALL parties identify how they contribute to and can assist in solving the issue
- 3) ALL parties agree to action steps as part of mutually accountable action plan
- 3) There is a group evaluation of progress on the action plan.

Only if these steps do not result in satisfactory outcomes, would a disciplinary process be triggered. At that point, the steps would include:

- 4) Warning & re-deliberation of issues and accountability of ALL parties implicated
- 5) Progressive discipline procedures (multiple steps prior to “disciplinary action”).

A sample “learning opportunity plan” is attached.

**Learning Opportunity Plan of Action**

25 october, 2006

*The purpose of this plan of action is to address organizational dynamics that disempower Staff Member X and to end Staff Member X 's unplanned absences.*

Summary

The Coordinating Council relied on the DC Personnel Handbook as well as the Learning Opportunity Plan mechanism to develop the appropriate organizational response. Coordinating Council members (Staff members a,b, and c) and Staff Member X jointly created this plan.

Coordinating Council takes responsibility for its role in this action as a continuation of its interim responsibility to work with Staff Member X through her "crisis" and because the current state of interpersonal dynamics in the Support Services Committee make it an inappropriate venue to carry out this responsibility.

Context

The Learning Opportunity Plan of Action is a program/Support Services related support mechanism adopted by DataCenter staff in March 2006 as an alternative model to punitive personnel discipline procedures, while also clearly rejecting the conventional "conflict resolution" model assumption that there are always equal parties @ the table. Importantly, the Learning Opportunity takes into account that there ARE unnamed dynamics, and that both/all implicated parties are accountable and responsible and that there is also a HUMAN dimension, and existing relationships with existing dynamics. While the impetus for the progressive discipline process focuses on unsatisfactory job performance of an employee, plan creators recognize that the root cause of Staff Member X 's unplanned absence is in part a reaction to feeling disempowered by DataCenter culture, and that both the organization and the individual have a role to play in being accountable and learning.

We recognize that if DataCenter is gonna hire from constituency, under-educated in formal setting, from working class etc., and those hires are suddenly put into a position of 100% personal power and discretion, then, we ARE setting that person up for failure. We must recognize that. DC should NOT assume that all people have that kind of personal power coming in. It's a struggle for lots of constituency folk particularly to be able to develop that sort of control & power, and those people DESERVE the support.

Goals

1. The DataCenter establishes positive organizational dynamics and practices that effectively support Staff Member X as a working class person to work here.
2. Staff Member X develops healthy practices for dealing with challenges on the job, and plans and reports absences according to organizational procedures.

Plan - Objectives

- **Organizational Culture/Capacity Building** work with consultant PO will create and implement a process and practice for addressing class dynamics in the organization, and coordinate organizational letting go rituals where appropriate (i.e. decisionmaking, power, etc.)
- **Fundraising Working Group** will restructure to improve its functionality and to address its class/race structural dynamics. Restructure will reduce size of FWG, increase each member's engagement in fundraising, and balance class and race, in particular

ensuring that no more than one middle class white person sits on fundraising, and create space for additional people to volunteer in fundraising tasks without having to attend meetings. Proposed restructure: 2-3 members including Fundraising Coordinator, at least one person of color, at least one working class person, and at most one middle class white person.

- **Staff Member X** will meet with lead staff **AB** each Monday to review her workplan and set her schedule for the week, including if working on- or off-site.
- **Staff Member X** will notify lead staff if she will be away from work.
- **Staff Member X** will call lead AB (**staff member BC** is back-up) if crisis is imminent, and lead AB (**staff member BC** back-up) will provide support or intervention to ensure situation is addressed in healthy and accountable manner.
- Beginning Nov 1, **Staff Member X** will turn in timesheet to Ops and will resume benefits accruals. Staff Member X will be out of the office Nov 1-Nov 8<sup>th</sup> to (4 floating holidays and 1 dependent sick day). **Coordinating Council** will inform **Operations Working Group** of the change in **Staff Member X's** reporting status.
- **Coordinating Council** will coordinate with **Organizational Culture/Capacity Building, Fundraising Working Group, Staff Member X** and other bodies as needed to implement this plan.
- **Coordinating Council** will maintain clear communication with staff and appropriate bodies.
- **All staff** will participate in organizational activities to confront, name and transform systems of oppression, including class, at play in the organization.
- **All staff** will participate in a letting go of tensions ceremony.

#### Plan monitoring

**Coordinating Council** will monitor implementation of the plan through 1) monthly check-ins and 2) quarterly assessment with **Staff Member X**, reviewing areas of improvement and change.

If at any point the plan is not working, **Coordinating Council** and **Staff Member X** will meet to address the problem.

Timeline: in 6 months, April 2007, **Coordinating Council** and **Staff Member X** will revisit this plan.

Agreed on October 25, 2006 by:

---

Signed by Coordinating Council staff

---

Staff Member X

