


Managing Up and Sideways

Management Center

Welcome!

Please update your Zoom nametag to reflect name / pronouns / organization.




1

Agenda

| | |
|---------------------|---------------------------|
| 11:00 am – 11:20 am | Welcome and Introductions |
| 11:20 am – 12:25 am | Managing Up |
| 12:40 am – 1:15 pm | Managing Sideways |
| 1:15 pm – 1:40 pm | Feedback Sideways |
| 1:40 pm – 2:00 pm | Takeaways and Evaluation |

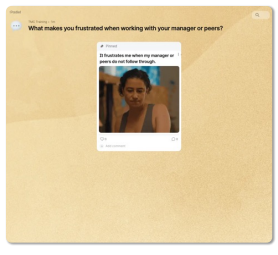
2



Padlet #1

What makes you frustrated when working with your manager or peers? Share a frustration on the Padlet.

Time 4 mins




7

Managing Up

Key Idea


Managing up (with your boss or your boss's boss) and managing sideways (with a peer, inside or outside your organization) are essential because we are all required to get work done with other people.



8

Sphere of Control

What's in my **sphere of control**? Focus time and energy on the things we can control, claiming power and agency.



9

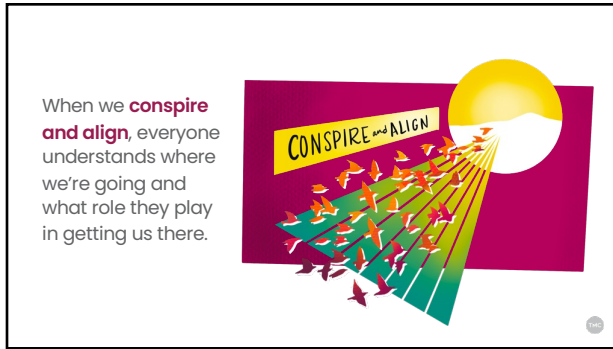
 **Practice Activity #1**

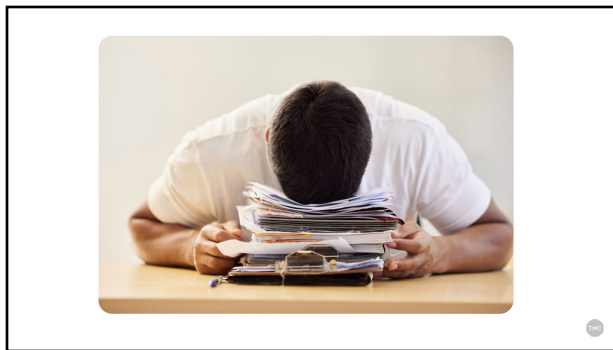
Sphere of Control

Time 5 min

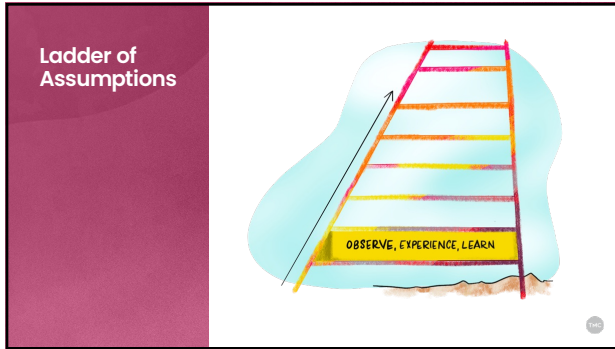


10

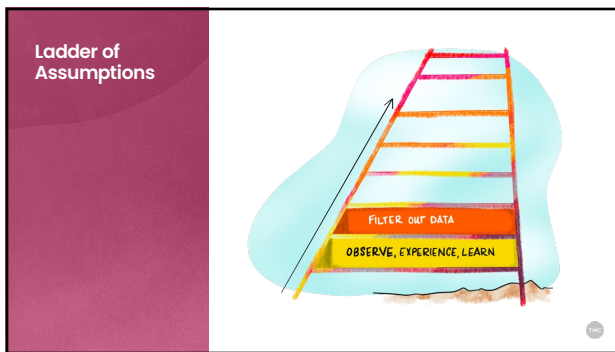




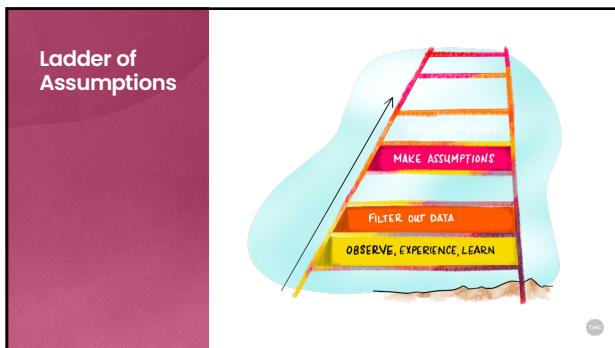




14




15




16

Ladder of Assumptions




17




Practice Activity
#2

Ladder of Assumptions

Time 3 min



18



Breakout
#1

Challenges

Group Size 3-4

Time 8 mins

Instructions

First

Introductions
(Share name, pronouns, org, role)

Then

Share your reflections: Which managing up strategy do you feel challenged by?

Last

Strategize: What steps can you take to build your confidence? What support might you need?

19

Making Proposals

Offer a suggestion

Based on the feedback we got, I think our aim should be to X.

I don't think the contractor is capable of meeting our standards. Given the timeline, I'd like to end the contract early and bring the work in-house.

I started a draft list of requirements based on last year's results.

Ask to learn & confirm


Does that align with your vision for this event?

Do you have any concerns about that approach?

Is there anything you think is missing?

20


Making Proposals Scenario



Your organization uses an IT vendor who made several comments that staff found offensive over the past few months. It's clear this vendor is **not aligned with your organization's values**, but it would be a ton of work and expense to switch now.

21

Imagine Habib's Response



From: Tania, Program Manager
To: Habib, Director of Programs
Subject: Grant report issue

Hi, Habib.

Quick issue here: the Caporian Foundation just sent over the link for the mid-grant report that's due next week, and it's WAY more involved than we expected. I don't think we can get it done on time. What should we do?

Tania

23

Imagine Habib's Response

From: Tania, Program Manager
To: Habib, Director of Programs
Subject: <Response needed EOD> Complicated Grant Report

Hj Habib,

TL, DB: Can we pull Miguel off the Board meeting prep for 3 days to get our Caporian grant report in on time?

While we've known the mid-grant report deadline was coming, we just got the submission form and it's a lot more complicated than we've dealt with before. Since they're a new funder, I don't think we should ask for an extension. I talked to the team, and we have the information we need, but not the capacity to get it done. Can we delay Board meeting prep to help here? It will mean we'd send the board materials out two days later, but still 2 weeks before the meeting. Let me know if you have concerns about this plan, please.

24

One-Minute Email

Write a message that helps you get the answers or advice you need, rather than transferring the problem.

- ✓ Clear and descriptive subject line
- ✓ Keep questions multiple choice
- ✓ Make a recommendation
- ✓ Provide context, if needed
- ✓ Lead with what you need

25

We're taking a break

Time Remaining 15:00

We've covered

- Sphere of Control
- Ladder of Assumptions
- Making Proposals

After the break


Managing Sideways

26


Managing Sideways

Key Idea

We all need to manage without authority sometimes – and we can practice strategies to make that easier.



27


Situation

How confident do you feel managing sideways?

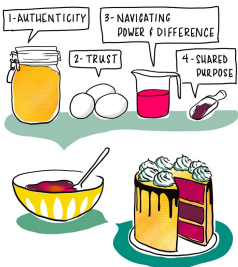
zoom
Poll

- A. Very confident
- B. Somewhat confident
- C. Not confident

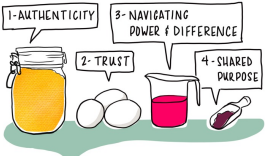
28

Building Relationships

Relationships are the foundation for getting work done with other people.



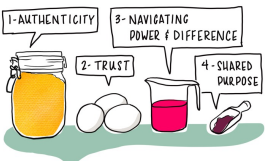
29



Practicing and Encouraging Authenticity

- Using correct pronouns
- Checking in about preferences and access needs
- Setting and respecting boundaries
- See, appreciate, and value teammates

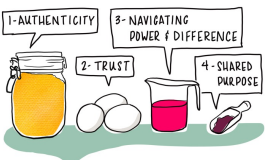
30



Cultivating Trust

- Do what you say you'll do
- Seek perspective when making decisions
- When you miss the mark, own up to it and do better next time.
- Give credit to others
- Give and seek honest feedback

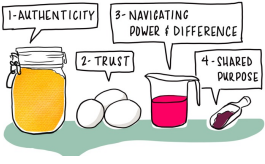
31



Navigating Power and Difference

- Name identities, power, and potential biases
- Use your power to remove barriers and support others
- Acknowledge and celebrate differences
- Make space for different perspectives

32



Aligning on Shared Purpose

- Share the context and strategy
- Be clear about roles and expectations
- Debrief projects
- Celebrate progress

33



Practice Activity
#3

Relationships
Reflection

Time 3 min



34

Remember to
Align on
Expectations

WHAT? What does success look like?

WHEN? When does it need to be completed?


WHERE? Where can you go for resources?

WHY? Why is this important? Why now?


WHO? Who should be involved?

35

Passive Asks




It'd be great to see a draft around mid-month.




I'd love your help engaging volunteers.

36

Strong Asks



The final report needs to go to print by the end of the month, and we need 10 days for editing. **Can you get me** your section by the 15th?



We've learned communications impacts volunteer engagement, so we want to be mindful of messages and timing. **Can we touch base** on your draft before you send it?

37

Tips for Strong Asks


Write a message that helps you get the answers or advice you need, rather than transferring the problem.

✓ Clear about the need and the why

✓ Considerate of what else the receiver may have on their plate

✓ Direct about what is needed and when

38



Breakout #2

From Passive to
Strong Asks

Group Size **4-5**

Time **5 mins**

Instructions

First

Introductions
(share name,
pronouns, org,
role)

Then


Work together to
craft strong asks
to the prompts,
and post on the
Padlet

After

Whole group
share and
discussion

39

Feedback Matters



It gives recipients the investment, direction, guidance, and support they need and deserve.

It helps the giver communicate their needs and requests, which improves alignment and yields results.

It's necessary for trust and relationship-building.

40

Sample situations for sideways feedback:


The Work:

- When someone you're collaborating with misses agreed-upon deadlines.
- When someone you're working with didn't follow through on something they were supposed to do.
- When you have praise for someone's work or they surpassed your expectations.

The Approach:

- When someone you're working with has behaved in a way that contradicts group agreements or values.
- When someone has really embodied your team's values or set a model for how others could collaborate well.


41



Practice Activity
#4

Sideways Feedback
Reflection and Plan

Time 4 mins



42

Tips for Inviting Feedback

Invite feedback when you need **clarity** about expectations, your role, or the approach

Invite feedback when a **project wraps up**: reflect on what went well and what could be better

Be clear about what work or activity you're looking for feedback about

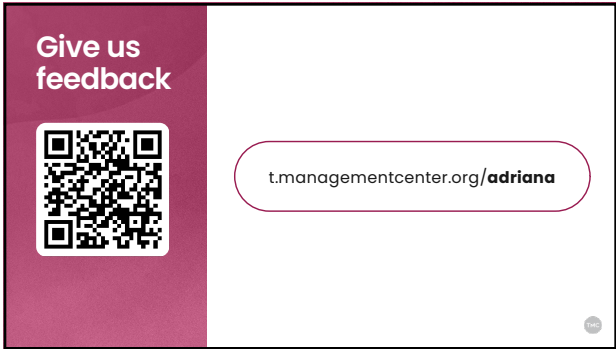
44

Final Reflection

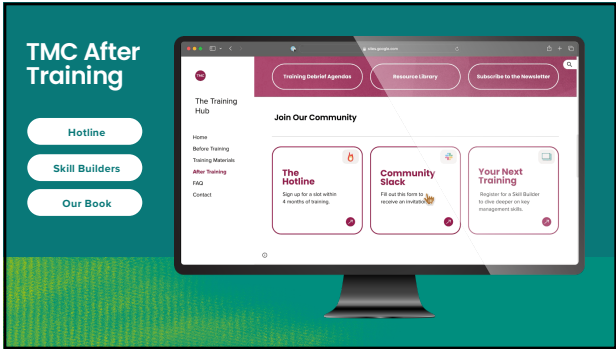
zoom
chat

Thinking of our initial reflection statement "It frustrates me when _____", within the context of what you have learned today, share in the chat 1-2 tools you have learned that you can use to address this frustration.

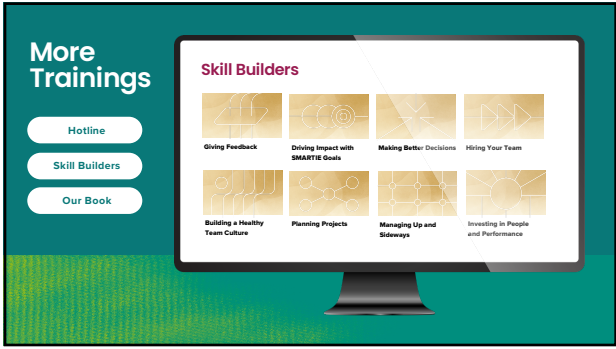
45



46



47



48
