

LEADERSHIP SUSTAINABILITY AND SUCCESSION PLANNING FOR OUR FUTURE

Sponsored by the Capacity Builders Network

JULY 28, 2016



A CATALYST FOR COMMUNITY HEALTH



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Welcome

Agenda

1. CAN Forum overview
2. Desired results of July CAN Forum
3. Leadership sustainability and succession planning for our future
4. Evaluation – Please complete the evaluation sent via email

Why CAN Forums?



Change starts with an initial, often highly personal, commitment to engage and move forward.

-Dr. Paul Light, Driving Social Change, 2011

CAN Forum

Continual
Learning
-
Self
Motivation

Capacity Builders Network Modeling Working Together

Started in 2013 as a collaborative effort of those who “**fund, run or study**” capacity building in our state.

Our Vision *is to create thriving nonprofits with the capacity to accomplish their mission.*

Our Mission *is to be a catalyst for connecting those who want to support the effectiveness of nonprofits through building their capacity to act and learn.*

Capacity Builders Network

Current Members

- Erin Goodman (Piper Trust)
- Jill Watts (ASU Lodestar Center)
- Lauren Schroeder (TROT)
- Laurie Liles (Arizona Grantmakers Forum)
- Raquel Gutierrez (Vitalyst Health Foundation)
- Sentari Minor (YNPN and Social Venture Partners)
- Sharon Flanagan-Hyde (Flanagan-Hyde Associates)
- Tiffanie Dillard (Avenir Consulting Partners)
- Tom Egan (ONE and Foundation for Senior Living)

Capacity Builders Network

Other events addressing Leadership Sustainability this year include:

- Organization for Nonprofit Executives (ONE) August 17 session *“Leadership Circles: A Fishbowl View”*
- ASU Lodestar Center for Philanthropy & Nonprofit Innovation’s October 20th Sustainability Strategies conference. This year’s theme *“Make it an Inside Job: Unlocking Success by Innovating from Within”*

Specific Desired Results of Today's Session

- Better understand the **current and projected gaps** that exist in our national and local nonprofit leadership cadre
- Articulate **potential impacts for the sector** and the people we serve for not addressing this growing leadership gap
- Identify ways that local **capacity building efforts for nonprofit effectiveness** can be helpful in addressing this very real challenge

Specific Desired Results

- **Generate answers** to our framing questions that can benefit the whole sector
 - *What would it take to have a “ready now” leader available for every nonprofit leadership vacancy?*
 - *What role could partners, funders, others outside the sector play in reaching this aspirational goal?*

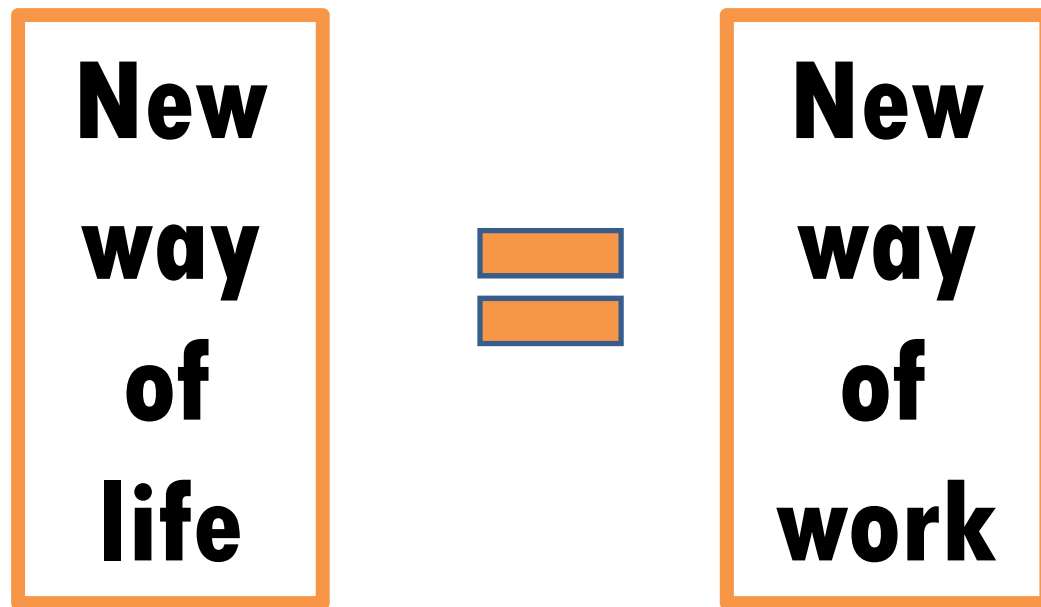
Who Is In the Room?



Today's Conversation

- We are in a “New Normal”
- Our sector has some significant leadership challenges
- What will it take to begin to address these challenges?

“The future ain’t what it used to be...”



Portability



“Instant-cy”

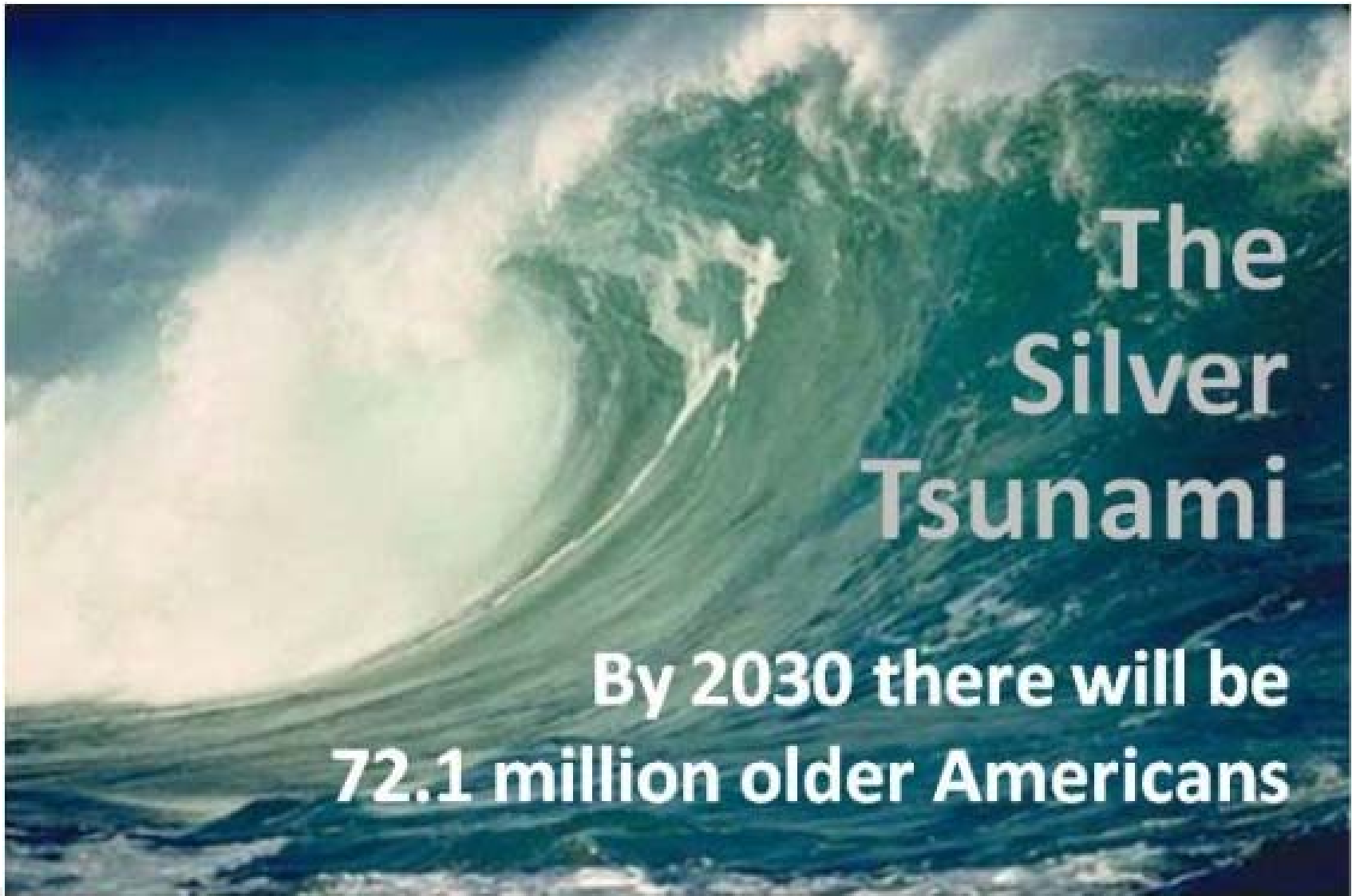
Equalizer

In 2060 Caucasian Americans will be 43% of the US population



For the first time in history...





The Silver Tsunami

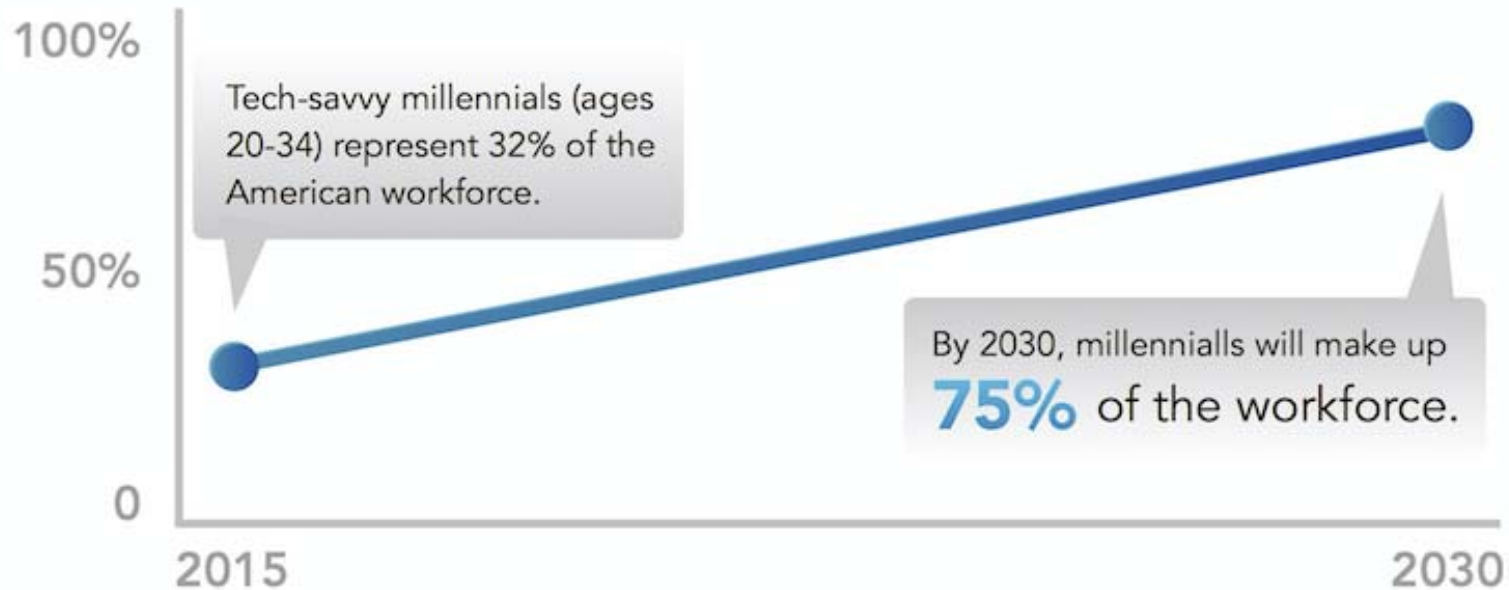
By 2030 there will be
72.1 million older Americans



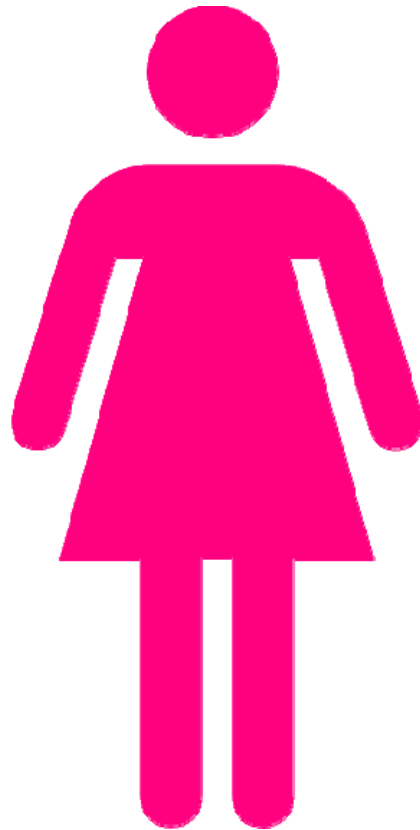
From Baby Boomers to Millennials



Approximately **10,000** Baby Boomers retire each day.



What about gender?



- Our sector is nearly 80% women
- Lean-In vs. Opt-Out
- Power can be different for women

MILLENNIAL WOMEN REDEFINE AMBITION IN THE WORKPLACE



Nearly 50% Say The Sacrifices For Women Leaders Aren't Worth It

A survey of 1,000 Canadian Millennial women revealed that women are charting their own career paths and they don't all involve aspiring to the top ranks.

DIVERSE AMBITION

38% WANT great, rewarding, interesting work but don't care about leading others

18 PERCENT want to be the #1 leader of a large or prominent organization or start-up

Almost **one-in-ten** care about being a creative person working on their own or on a small team of like-minded people

TOP CAREER ROAD BLOCKS



Inability to balance professional goals with being a parent



Lack of self-confidence



Lack of role models or mentors



Lack of skills or education

BALANCING ACT

74% of Millennial women are concerned about achieving the right balance between personal and professional goals



Agree that female leaders have to make more sacrifices than male leaders



Believe they can juggle work and family life over the long haul



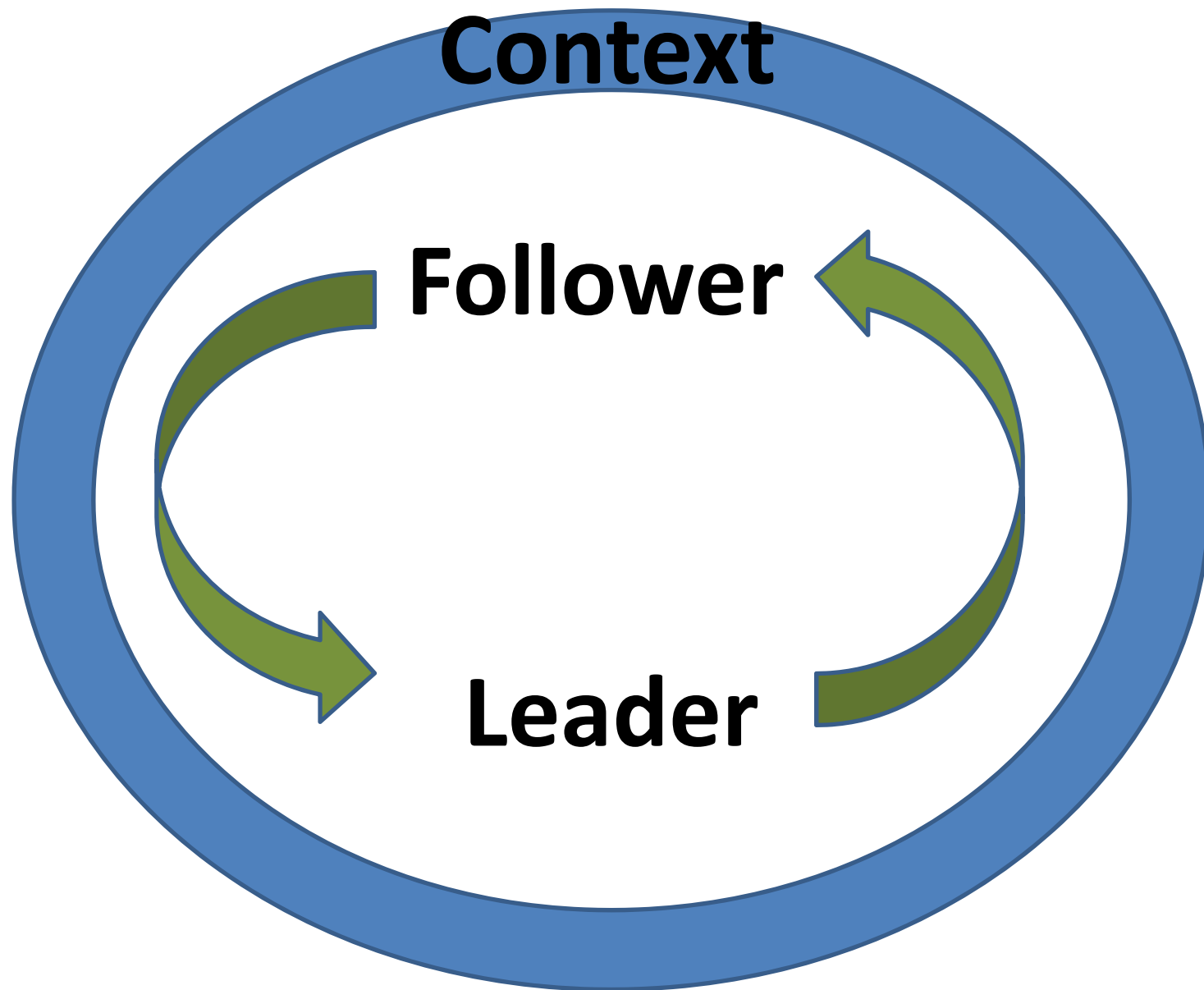
Willing to sacrifice aspects of their personal life to achieve professional goals



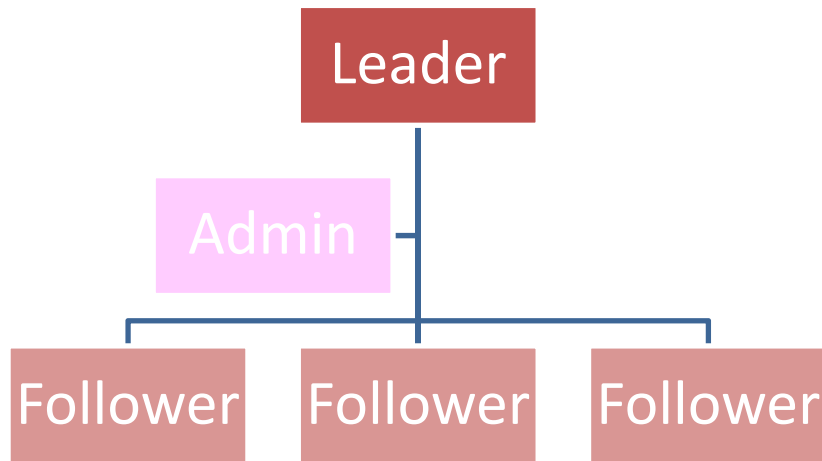
Agree that the sacrifices female leaders have to make aren't worth it

Leader-Centric Models

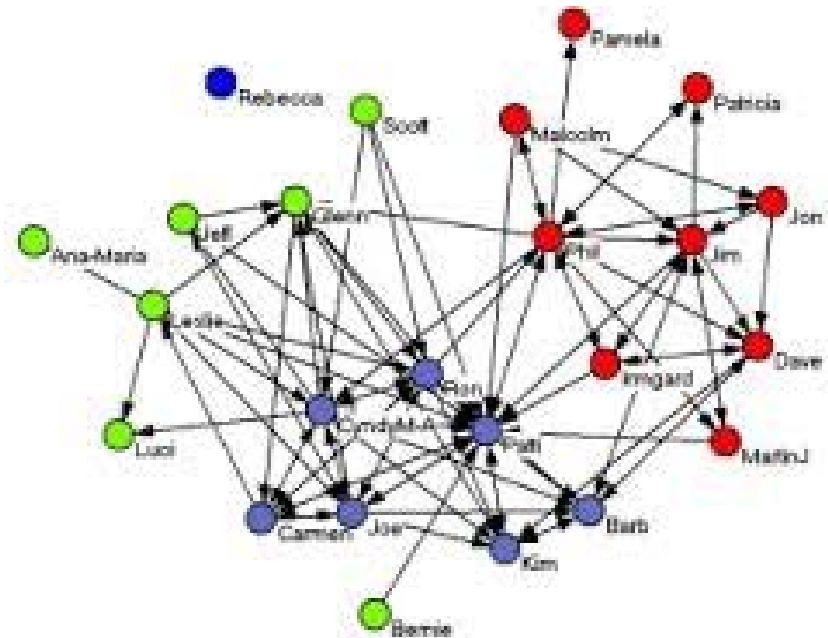
- Our way of living = our way of working
- Leaders *Losing* Power and Influence
- Followers *Gaining* Power and Influence
- What can we learn when we look at Leadership as a *System*



From:

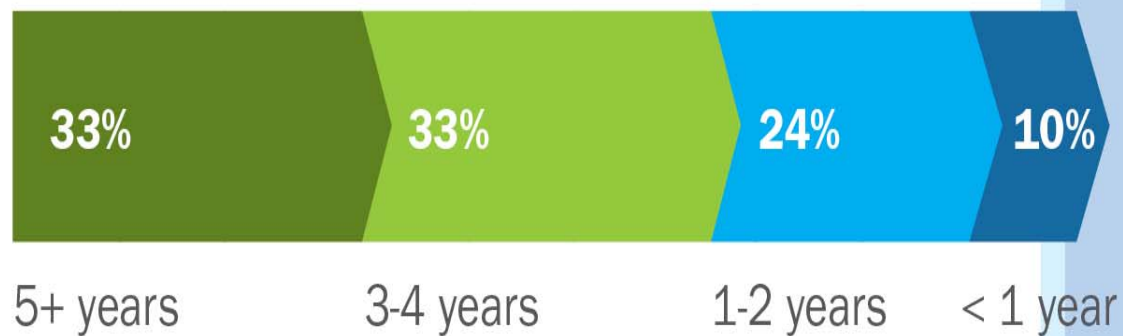


To:



The **gap** in our sector

Anticipated Executive Departure Timing



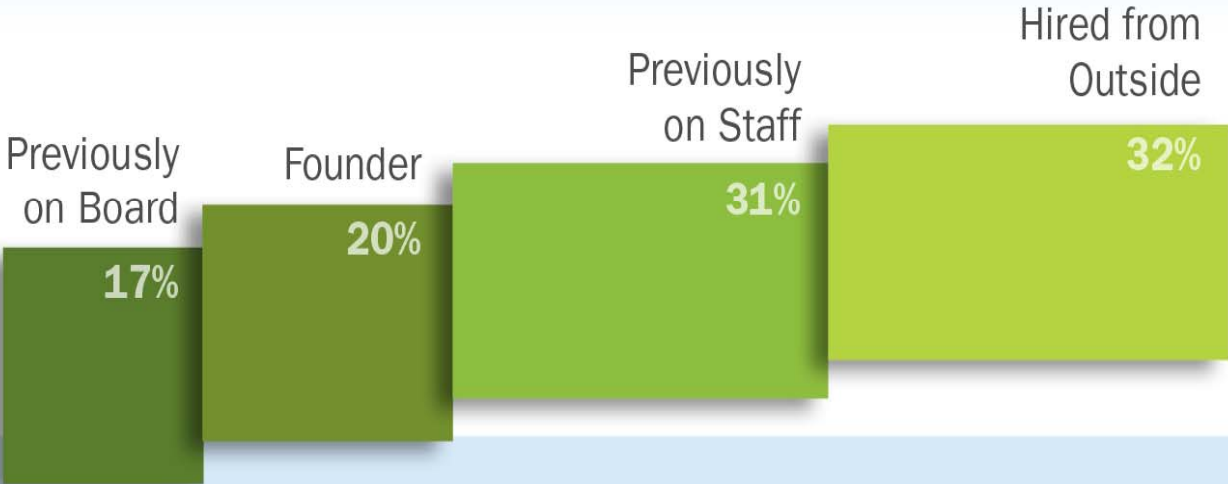
Source: *Daring to Lead 2011: CompassPoint Nonprofit Services & the Meyer Foundation.*

Studies show...

- **Nonprofit sector will need to replace the equivalent of every C-suite position over the next eight years**
- Turnover, not retirement, has been the #1 reason for vacancies
- #1 concern of the majority of Nonprofit Organizations
- Only 30% vacancies are filled with internal candidates

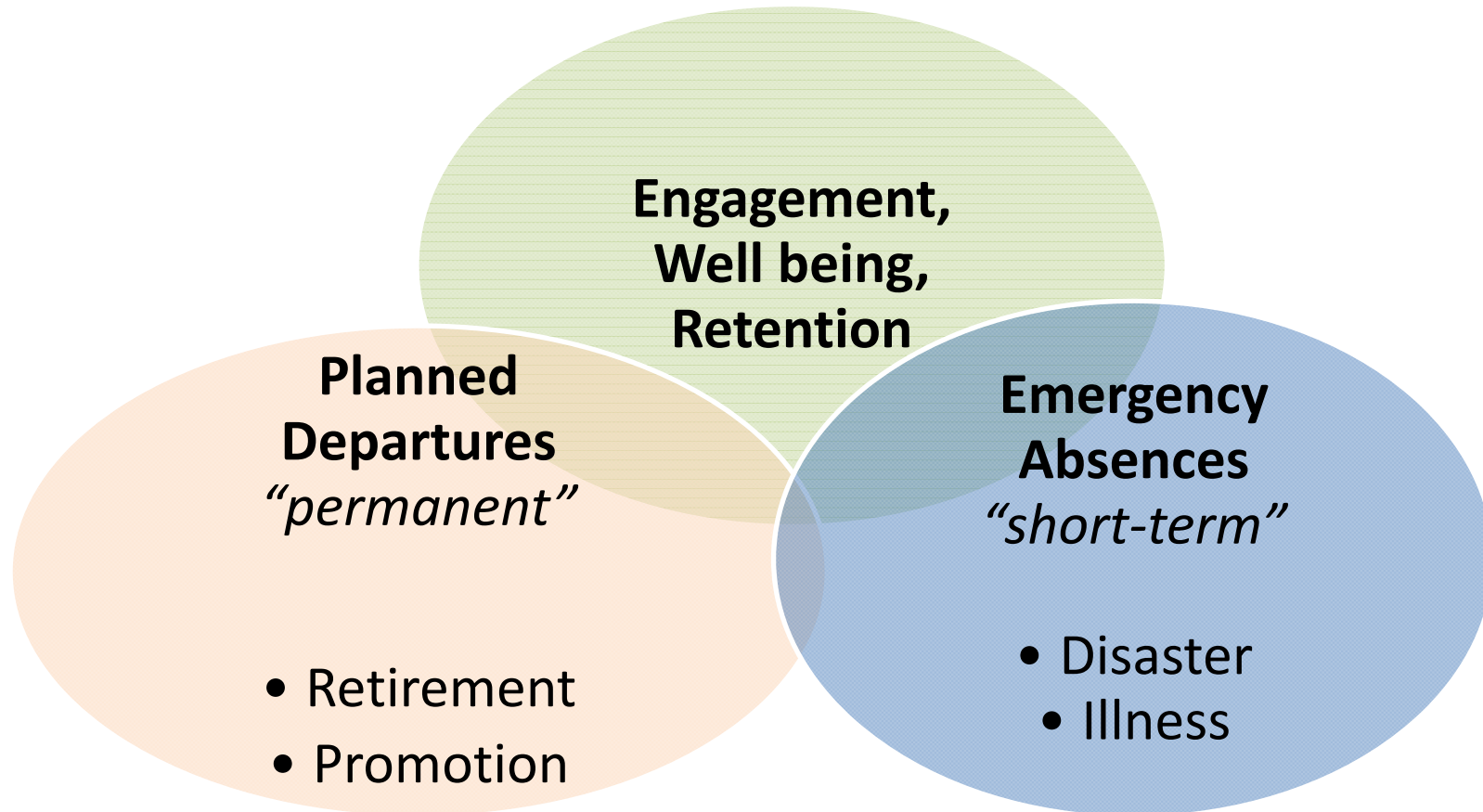
SOURCES: Bridgespan, Compass Point and Waldron

Path to the Executive Director Position



Source: *Daring to Lead 2011: CompassPoint Nonprofit Services and the Meyer Foundation.*


Leadership Sustainability includes:



1. Identify organization's goals



2. Conduct Resource and Talent Review
(what's the gap between what you have
and what you need?)

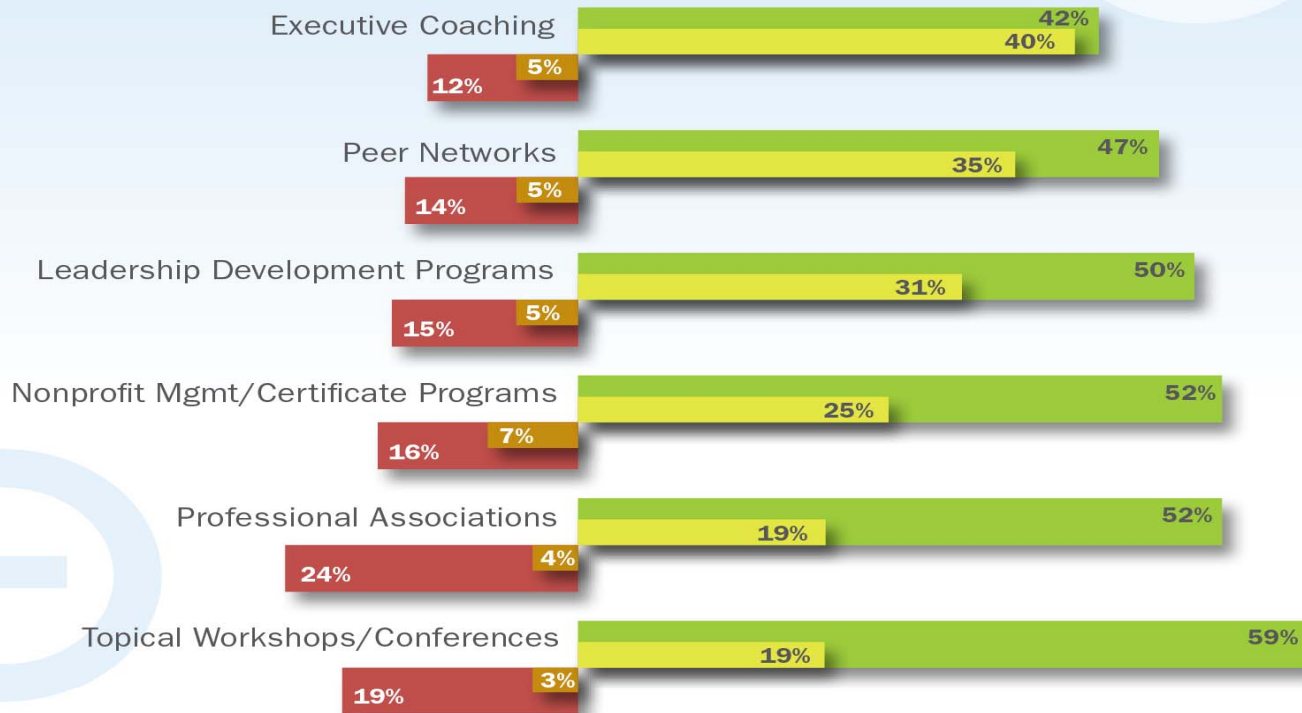


3. Co-create Development Plans



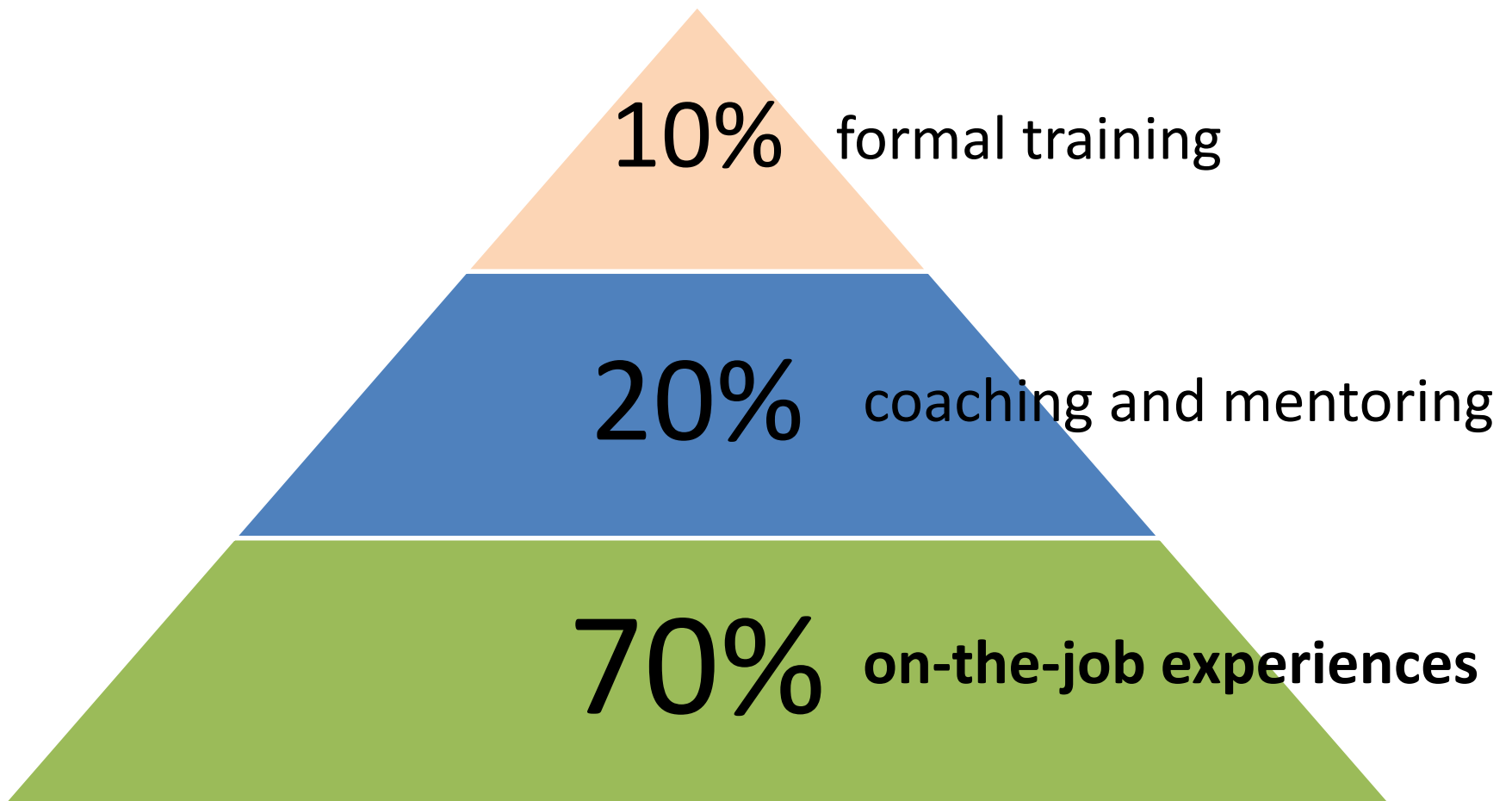
4. Ensure mechanisms to link back to
organization's goals (e.g. performance appraisals)

Effectiveness Ratings of Professional Development Activities Utilized



Very Ineffective
 Somewhat Ineffective
 Effective
 Very Effective

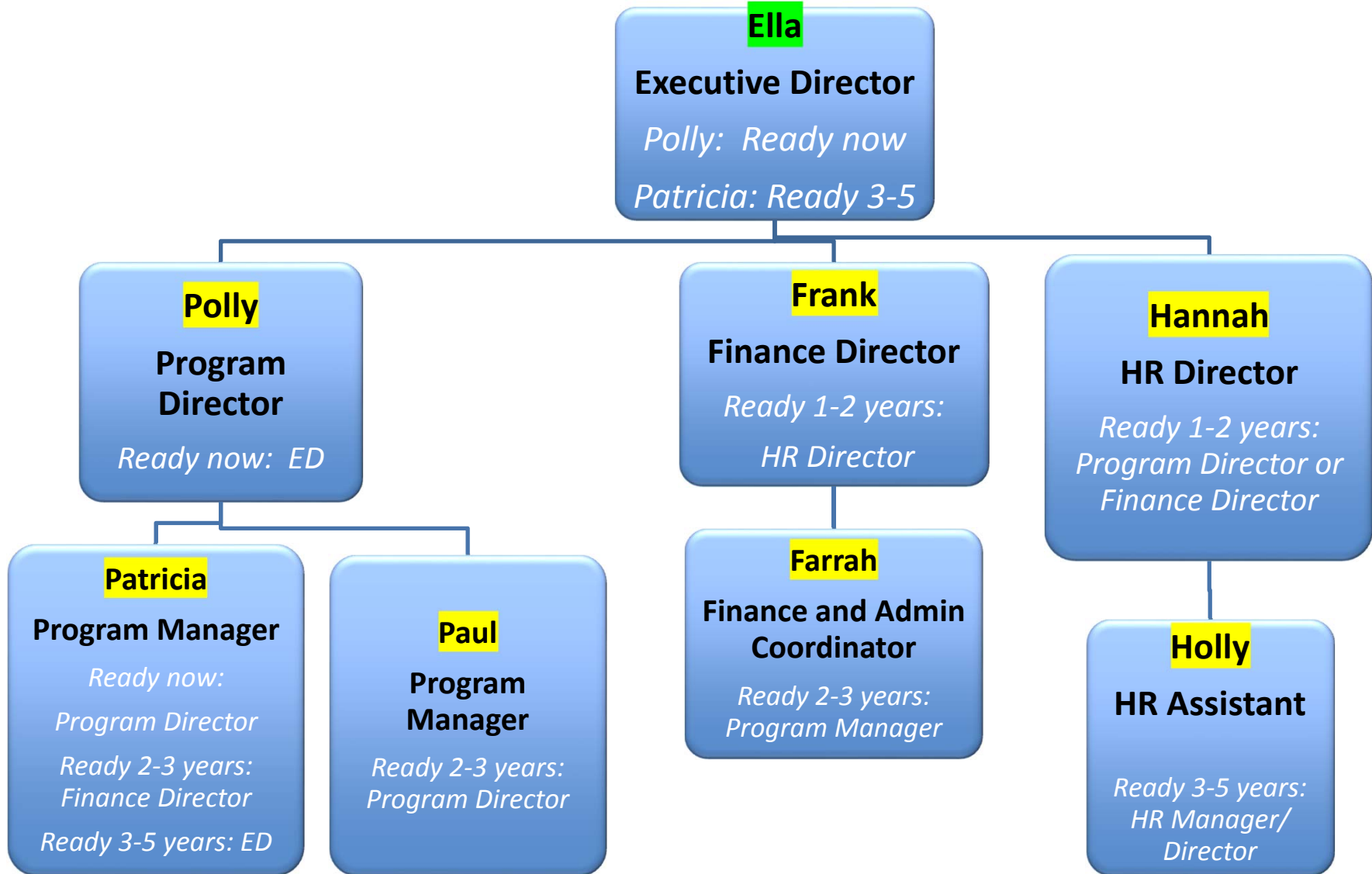
Source: *Daring to Lead 2011: CompassPoint Nonprofit Services and the Meyer Foundation.*



Some Tools: Talent Map

Performance					
		C Performer	B Performer	A Performer	
P o t e n t i a l	High Potential Has what it takes to advance multiple levels or to a position of significant leadership		Mickey Mouse <i>Age, race, gender</i> <i>Current role VP Operations</i> <i>1-2 years COO</i>	Minnie Mouse <i>Age, race, gender</i> <i>Current role COO</i> <i>3-5 years CEO</i>	
	Promotable Is promotable upward or laterally; expresses interest in movement		Daffy Duck <i>Age, race, gender</i> <i>Current role Dev Director</i> <i>1-2 years Director Operations</i> <i>3-5 years COO</i>		
	Steady May be successful in this role or a lateral one, but will probably not take on a role at a higher level at this point in time	Goofy <i>Age, race, gender</i> <i>Current role Manager Administration</i>		Pluto <i>Age, race, gender</i> <i>Current role Program Manager</i> <i>May lead new Program with same scope of responsibilities</i>	

Some Tools: Talent Plan



Some Tools: Development Plan (page 1)

Employee Name:	Current Role:	Potential Future Role:
Date of Hire:	Time in Current Role:	Projected Time for Future Role:
Unique Skills/Background or Training:	Employee Satisfaction with Current Role (1-10):	Employee Interest in Future Role (1-10):
	Performance Rating in Current Role:	Organization Need for Future Role:
Strength Demonstrated:	How Leveraged in Current Role:	How Leveraged in Future Role:
Development Need:	How Impacting Current Role:	How Would Impact Future Role:

Some Tools: Development Plan (page 2)

Actions to be taken (70% - On-the-job training, stretch assignments, new projects, etc.):	
Success Outcomes:	
Start Date:	End Date:
Actions to be taken (20% - Coaching and Mentoring):	
Success Outcomes:	
Start Date:	End Date:
Actions to be taken (10% - Formal Training, Workshops, Webinars, etc.):	
Success Outcomes:	
Start Date:	End Date:

Individual reflection and practice with your own Talent Map

At your tables:

1. Time and Money aside, what would it take to have a ready now leader available for every future nonprofit vacancy?
2. What role could partners, funders, others outside the sector play in reaching this aspirational goal?
3. What is your most innovative idea to share with the group?

A Few Resources:

Succession Planning Tools

- The Bridgespan Group's Nonprofit Leadership Development Toolkit *FREE
- The YMCA Developing Strong Leaders: Cause-Driven Leadership Competency Development Guide, 2013 *FREE
- Talent Matters Series from Stanford Social Innovation Review (http://ssir.org/talent_matters) *FREE

Changing Nature of Leadership:

- Leadership and Networks: New Ways of Developing Leadership in a Highly Connected World; by Meehan and Reinelt of the Leadership Learning Community
- *The Future of Management is Teal* by Laloux
- The Practice of Adaptive Leadership, by Heifetz
- Followership: How Followers are creating Change and Changing Leaders, by Kellerman

Gender in Nonprofit Leadership

- *The Dance of Empowerment: When Women Follow Women* by Dillard
- Beyond the Double Bind: Women and Leadership by Jamieson



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Thank You

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