Hello there! We will start shortly. For best results:

1) Dial in using your phone
2) Turn off your web camera
3) Flag technical problems using the chat box

Succession with Race and Gender at the Center

March 1, 2019
Noon -1pm EST
Welcome! Who’s Here?

Big and Small

What Bring You here?
“...authentically speak to racial equity gaps...intentional succession planning to develop and advance staff of color.”

What Does Succession Look Like for You?

- Most of the group faces some kind of succession challenge.
  - We have not had internal successors for important roles and needed to hire externally (69.2%).
  - We know there will be turnover in key roles and won't have internal candidates ready for them. (69.2%)
- Nearly everyone is using development plans (85%)
- And, development goals are included in annual reviews (70%)
- However, many don’t have managers coaching well enough to leverage those tools, “Our managers are not equipped to coach their direct reports to higher performance and/or increased responsibility (62%).

If succession is a challenge for your organization, what does that challenge look like? (check all that apply)

13 responses

- We have not had internal successors for important roles: 9 (69.2%)
- We don't have an emergency succession plan: 8 (69.2%)
- Our leadership team does not reflect the demographic of our organization: 4 (30.8%)
- Our managers are not equipped to coach and develop new leaders: 8 (61.5%)
Who We Are

Jen Chau Fontan
Senior Affiliate, AchieveMission

Jen has created systems for equitable practices in recruitment, hiring, performance management and staff development at various nonprofits. She has also built healthy and engaging organizational cultures and internal programs around equity and inclusion. In 2000 Jen founded Swirl, a multiracial grassroots community committed to providing space for cross-racial, cross-cultural dialogue about race and identity. She co-founded and co-leads the NYC Diversity, Equity and Inclusion Community of Practice for nonprofit leaders who want to grow equity and inclusion practices in their organizations. Jen's perspectives on race and racism have been featured in The New York Times, USA Today, the San Francisco Chronicle, CNN, NPR, MSNBC, and PBS's Asian America as an expert on topics surrounding diversity, race issues, and mixed race identity.

Mike Markovits
Partner, AchieveMission

Mike is an internationally recognized expert in leadership development, talent management and succession. Mike joined AchieveMission’s board in 2011 after he stepped down from a 25+ year corporate career to focus on bringing his expertise to bear for the nonprofit sector. He joined AchieveMission’s staff in 2012. As Partner, Mike leads consulting and selected coaching engagements, working directly with senior nonprofit and foundation executives to build the leadership and organizational capabilities to scale social impact. Prior to joining the AchieveMission team, Mike was the head of Talent Development at IBM. Earlier, Mike held similar positions at GE, including leading the design and global delivery of GE’s widely-emulated leadership and executive development curriculum at the famed Crotonville center.
Why does centering race and gender in succession matter to you?
What is Succession Management?

A formal organizational process to identify, select and manage talent.

Intersects with other talent processes:

- **Career Development** to help employees achieve their full potential
- **Performance Management** to evaluate and improve the effectiveness of employees in their current role
- **Compensation** to encourage high potential talent to remain with the organization and to incent managers who develop high potential talent
- **Diversity & Inclusion** to assess the diversity of workforce and be intentional about the internal pipeline, growth and development plans
- **Recruiting** to fill positions with the best available talent
Distinguishing Replacement and Succession Planning

• **Replacement** planning *identifies immediate understudies*
  ✓ focuses on suitable replacements for top leaders
  ✓ creates a short list of candidates

• **Succession** planning *develops talent to move forward*
  ✓ Eases filling of vacancies because employees are being developed and empowered
  ✓ builds a large talent pool

Succession planning takes a little more time and effort from leaders, but yields a higher return
Succession Planning Mitigates Risk

**Vacancy Risk**
- Risk of critical leadership positions being left vacant

**Readiness Risk**
- Risk of under-developed or unprepared successors in critical positions

**Transition Risk**
- Risk of poor assimilation of leaders into the organization or into crucial roles

**Deployment Risk**
- Risk of poor deployment of talent to execute strategy

Source: Adapted from Corporate Executive Board, 2009
It’s good to disrupt our confidence that we bring “clear eyes” to Talent Reviews and other processes. We all have biases, hidden even to ourselves, “breathed” in from our experience and cultural messages. They may very well run counter to our stated values, persist despite our intentions and blur our view of people and situations.

Open this conversation and use tools like Kirwan Institute’s DIY Implicit Bias Training (in follow up materials).

Source: We’re All a Little Biased, Even if We Don’t Know It, The Upshot, New York Times; Emily Badger, Oct. 5 2016
Doesn’t Work

...if done only in response to a departure, ignores manager training and assumes bias isn’t at play.

Done Well

...it enables organizations to react quickly, builds manager skills, and opens opportunities.

At its Best

...it merges employees’ aspirations with organization’s needs and there are no disparities by group.

Discuss with Your Team

Given what we know about our organizations and the sector, why should race and gender be attended to in this process? What is the relationship of succession to race and gender equity in this organization?
Tools for Succession Planning with a Talent Review

**Talent Review**
- A two-part process of differentiating talent across a group of teams and identifying key development needs and successor candidates from across an organization.
- Talent Reviews utilize the 9-box and the succession worksheet.

**9-Box**
- 3x3 matrix of performance and potential to evaluate staff.

**Succession Worksheet**
- A tool that captures the manager’s thinking about who can perform which key roles in the future.

**Individual Development Plan**
- Names key development actions, is co-created with the employee, is informed by discussions that occur in the Talent Review.
9-Box: a Picture of the Talent You Have

Potential Assessment

Performance Assessment

Low

Moderate

High

Low

Moderate

High
## 9-Box Descriptors of Performance and Potential

<table>
<thead>
<tr>
<th>Potential Low to High</th>
<th>Performance Low to High</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Performance</td>
<td>New Hire/New to Position</td>
</tr>
<tr>
<td>Low Potential</td>
<td>High Performance Medium Potential</td>
</tr>
<tr>
<td>High Performance</td>
<td>High Performance Medium Potential</td>
</tr>
<tr>
<td>Medium Performance</td>
<td>High Performance Medium Potential</td>
</tr>
<tr>
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<td>High Potential</td>
<td>Low Performance Medium Potential</td>
</tr>
</tbody>
</table>

### Potential Low to High

- **Potential Low to High**
  - Low Performance
  - Medium Performance
  - High Performance

### Performance Low to High

- **Performance Low to High**
  - Low Potential
  - Medium Potential
  - High Potential

---

**Achieve Mission**

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Q: What Is Potential? Are there Indicators?

A: When someone is viewed as likely to succeed in more senior roles or more critical positions at this organization.

- **Agility**
  - Is the willingness and ability to learn new knowledge and skills and then apply them successfully in new or different situations

- **Promotability**
  - Is the willingness and ability to take on roles with more complexity, impact, scope, and scale. Promotable staff have aspirations or ambitions to take on bigger and broader responsibility. May move to different functional or departmental area to advance one’s career.

- **Track Record of Success**
  - Track record of success is about consistently delivering results over time and in changing circumstances.

- **Leadership Competencies**
  - Demonstrated behaviors relative to the organization’s named leadership competencies.

Discuss with Your Team
What are the characteristics of people who get promoted? Does everyone understand that? Is there bias in any of these indicators themselves?
Example: Complete Successor Chart Worksheet

First row - From inside our organization. Note gender and race for each potential successor in parenthesis after the name.

Second row- From outside the org (alumni staff, volunteers, BOD, partners, etc.). Note gender and race for each potential successors in parenthesis after the name.

<table>
<thead>
<tr>
<th>Incumbent</th>
<th>Ready Now</th>
<th>1 Job/Experience Away</th>
<th>2 Jobs/Experiences Away</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tulani, Program Director (BM)</td>
<td>Person X (WF)</td>
<td>Person Y (WM)</td>
<td>Person K (WM)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Person Z (LM)</td>
<td>(alumni)</td>
</tr>
<tr>
<td></td>
<td>Person W (LF)</td>
<td></td>
<td>Person K (WM)</td>
</tr>
<tr>
<td></td>
<td>(alumni)</td>
<td></td>
<td>(BOD)</td>
</tr>
</tbody>
</table>

FOR TOP POTENTIAL SUCCESSORS: GAPS/WORRIES and DEVELOPMENT

<table>
<thead>
<tr>
<th>Person</th>
<th>Comments</th>
<th>Concerns</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person X (WF)</td>
<td>ready now with little if any more development needed</td>
<td>if she can be diplomatic and a little less direct as the situation calls for it.</td>
<td>Tulani finds out if X’s abruptness is common with others too. If so, then give X the feedback.</td>
</tr>
<tr>
<td>Person Y (WM)</td>
<td>comment on gaps here</td>
<td></td>
<td>development planning here (what and by who).</td>
</tr>
<tr>
<td>Person Z (LM)</td>
<td>comment on gaps here</td>
<td></td>
<td>development planning here (what and by who).</td>
</tr>
</tbody>
</table>
CASE STUDY with Race & Gender at the Center

Putting It Into Play
## Case Study: Completed 9-Box

**Performance Low to High**

| Potential Low to High | Becky (WF)  
Mark (WM)  
Sarah (WF)  
Lisa B. (WF)  
Roberto (LM) | Derek (BM)  
Marg (WF)  
Sharon (BF)  
Whitley (BF)  
Chelsey (WF)  
Tamara (BF)  
Amber (WF) | Meghan (WF)  
Rose (WF)  
Camilla (BF)  
Kristen (WF)  
Barbara (BF)  
Caitlin (WF) | Susan (WF)  
Robert (WM)  
Melissa (WF)  
Alison (WF)  
Joemmy (LF)  
Kris (WF)  
Elise (WF) |

| Caleb (WM)  
Lawrence (WM) | Alex (L GNB) | Jonathan (WM) |

(Note the inclusion of race and gender demographics in parenthesis)

- What do you see/observe in the data?
- What questions do you want to surface about this data?
- What actions would you take to address what you have observed about the data?
- What are your hypotheses about what has led to this data?
**Initiating a conversation** among leaders about trends related to race or gender can surface blind spots in our talent development practices and systems.

*Surfacing these blind spots can lead to powerful action* towards retention and inclusion of women and staff of color.

**Questions to start the conversation:**

- What do you notice related to race and gender with this data?
- What questions surface for you as you look at the data/trends?
- What are possible hypothesis for what has led to this data/trend?
- What actions could we take to address the trends we see in this data?
When Presenting During a Talent Review

Sounds like . . .

- I saw this when . . .
- This is evident by . . .
- Here’s why . . .
- (In sum: data, facts, a little story)

Not like . . .

- He’s a good guy.
- I really like her.
- She’s got good energy.
- I like working with him.
Applying a Racial and Gender Equity Lens

**Preparation**
- Train managers on racial and gender equity and implicit bias prior to assessing their direct reports.
- For Example, use the Kirwan Center’s DIY modules on implicit bias.
- Preparing in times of low stress and when one can set aside adequate time will produce results less influenced by implicit bias.

**Talent Review**
- Do this as a group – sharing in a group helps surface bias and incomplete information as well as calibrating group norms.
- Monitor discussion: Are there indications of implicit or explicit bias?
- Review 9-box output
  - Is the distribution of folks assessed random and representative by race and gender?
  - Or, is there clustering of like-folks together in a way that might indicate bias in the assessment and/or the need to take steps to address the talent needs of a particular group?

**Follow Through**
- Is more training needed for managers doing the talent assessments?
- Are there actions to be taken to address a gap among a particular group of employees; e.g., a mentoring program?
- Are there any patterns in the allocation of resources or opportunities to catch which might indicate bias?
Discuss with Your Team

- What’s the risk of not having career and development conversations with everyone?
- How can managers build a sense of belonging with career and development conversations?
- How can this conversation become a practice, not an biannual check-in?
Jen’s View: Reflections from My Experience
Comments, Clarifications, Reflections, Questions!

PLEASE USE THE CHAT BOX

NOTE: We will send out this deck and other resources. If you would like to be in touch with us, please reach out!

(mmarkovits@achievemission.org, ebuhs@achievemission.org)
Final Thoughts

Be a bold observer, facilitator, and guide

- Consistently link your race and gender equity actions to organizational values, goals, and strategy.
- Keep connecting with others to reflect and learn from their experience.
- For succession: Don’t let up during prep, the Talent Review discussion and outputs, and manager follow through with your attention to race and gender.

Give it “teeth”

- Set specific goals: % of key roles with potential successors who are “ready now” OR “1 job away,” OR # of staff with accelerated development plans.
- Move on to targeted development, without it you’re just “taking inventory.”
- Celebrate and reward managers who develop successors.

Create a roadmap to reach more leaders and processes

- Connect focus on gender and race to intersecting talent management processes (recruitment, career development, workforce planning, assignments to cross-functional teams. . .).
- Track leaders and managers as they are brought into the succession work.
- Leverage existing talent management data for Talent Reviews so that you can collect data once and use it multiple times.
BONUS TOOLS

Development Plans
Managing from the 9-Box
Retention Planning
Career & Succession-Driven Development Plans

1. Talent Review by leaders (9-Box + Successor Charts)
2. Leaders name possible future responsibilities
3. Manager finds overlaps with employee’s career aspirations
4. Together identify gaps that limiting ability to take on new responsibilities or successfully compete for new roles
5. Manager & Employee build development plan to close gaps
The 70-20-10 Model of Development

The majority of development happens through **on-the-job** tasks and projects.
# Sample Development Plan

## Individual Development Plan

<table>
<thead>
<tr>
<th>Competency &amp; development goals</th>
<th>Short-term career goals</th>
<th>Long-term career goals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Experience-based assignment (70%)</td>
<td>Mentoring &amp; coaching (20%)</td>
</tr>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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## Managers’ Orientation to 9-Box Status

<table>
<thead>
<tr>
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<th>Potential Assessment</th>
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</thead>
<tbody>
<tr>
<td><strong>Low</strong></td>
<td><strong>Low</strong></td>
</tr>
<tr>
<td><strong>Moderate</strong></td>
<td><strong>Moderate</strong></td>
</tr>
<tr>
<td><strong>High</strong></td>
<td><strong>High</strong></td>
</tr>
</tbody>
</table>

### RETAIN
Strong appreciation and ongoing informal feedback. Develop in current position. Provide opportunities, build on what they do best. Give opportunity to coach and develop others in area of expertise.

### STRETCH or PROMOTE
Quickly prioritize for high-profile leadership opportunities (launching something new, leading a turnaround or overhaul). Provide opportunities for wide exposure. Shadow senior leaders in skill gap areas.

### MANAGE or MOVE
Assess root cause of low performance: motivation, environment, knowledge, skill? Consider moving to another type of role. Develop performance - improvement plan. If other options exhausted/not viable, transition individual out of organization.

### DEVELOP
Lots of feedback. Break work into segments and identify next steps. Strong project support for planning, engaging stakeholders, identifying pitfalls. Strong milestone and end-of-project reviews to adjust work and support learning. Focus on skill training as needed.
Retention Planning

1. **Talent Reviews help identify who is most critical to retain**

   Those who are higher performers and who have more potential tend to be the people most critical to retain

2. **Next, find out what motivates them to stay**

   When you are talking with your staff members about their individual development plans, also talk with the people who are critical to retain about what would most motivate them to stay

3. **In individual development plans, include actions that increase likelihood of retention for those identified as critical to retain**