

# SUCCESSION PLANNING IS OUTDATED

## A NEW APPROACH TO MANAGING LEADERSHIP TRANSITION

GUEST FACULTY: Miecha Ranea Forbes, Koya Leadership Partners



# SESSION LOGISTICS

- Slides and recording will be sent to all registrants in 2-3 business days
- Please use the hashtag #NPQPathways on social media
- Please use the Q&A box to enter questions and comments
- Please complete the evaluation that will pop up immediately after the session

This is a **LEADING EDGE MEMBERSHIP** program. **Join us!**

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# GUEST FACULTY

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# TODAY'S DISCUSSION



1. Why are we saying succession planning is outdated?
2. What do we mean by pathway planning? And, building the capacity to support pathway planning.
3. Rethinking your use of search.
4. Concrete steps to take now.

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# SUCCESSION PLANNING IS OUTDATED

Part One

# SUCCESSION PLANNING IS OUTDATED

1. Expanding the focus to all critical positions – not just one role
2. Moving from an “event” orientation to a “transitions are normal” orientation
3. Acknowledging that all transitions are different
4. Operating context matters a lot – the organization’s, the field/movement’s, etc.
5. Traditional succession planning is hyper-focused on a “job” done the way an exiting leader has done it

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# PATHWAY PLANNING

## Part Two



# ELEMENTS OF PATHWAY PLANNING

## Individual

- *How do I express my aspirations?*
- *How do I keep learning on the job?*
- *How are my strengths assessed?*

## Organizational

- *Ongoing assessment of how people are doing---where they are shining.*
- *Connecting the dots between staff development and organizational change.*





# NOT ALL PATHS LEAD TO THE “TOP”



- Requires regular and candid conversations about where the person and the organization are heading.
- Can't hide behind annual performance reviews or titles. We have to be in real and constant dialogue.
- People may change the job they are in as they grow rather than moving “up,” per se.

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# BUILDING THE CAPACITY FOR PATHWAYS

- First, **STOP** saying you are too small or too under-resourced.
- Make it someone's responsibility to focus on learning and development at your organization.
- Use subject matter experts on staff, board, and in your networks for professional development.
- Innovate your systems. Consider scrapping annual reviews for monthly or quarterly check-ins.
- Address culture *and* process.
- Adopt a curious and creative stance.  
*How can we be a place that actively develops talent in everyone who works here?*

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# UNDERSTANDING TALENT NEEDS/GAPS

- Utilize various tools to understand the talent you have internally
- Developing internal talent can be a powerful retention strategy
- Individual development plans can be an effective and no-cost way to assess talent in individuals
- Assessments such as StrengthsFinder™ can help to uncover talent within teams
- Development does not have to be one size fits all – customization is critical

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# PATHWAYS & EQUITY

- Developing internal pathways can help to diversify the levels throughout your organization
- Go beyond mentoring and consider the role of sponsors within your organization
- Create targeted development programs for emerging leaders
- Equity and inclusion should always be considered when considering promotions
- Be inclusive in the way staff can access your development opportunities
- Build in opportunities to “grow where you are”

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# RETHINKING SEARCH

## Part Three

# PRIORITIZE INTERNAL HIRES

The greatest risk in hiring a senior staff person or executive is hiring someone who does not really understand the organization's work, the culture or the nature of the key jobs inside the organization.

“When you bring in a high-level leader, you want that person to have a major impact within 100 days, but it can take an outsider about 1,000 days to fit in.”

“Your Succession Plan is a Bust”  
-Gallup

This risk is mitigated with an internal hire.

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# USE SEARCH WISELY

## YES

- Address a critical skills gap
- Increase diversity
- Add new types of positions as you grow

## NO

- To demonstrate rigor to your constituents
  - To appease a board of directors
- To avoid dealing with needed shifts to a position or department

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# FIVE CONCRETE STEPS

Part Four

# STEPS YOU CAN TAKE NOW

1. Take stock of your recent track record on developing staff and hiring from within.
2. Ask/survey your staff about developmental priorities.
3. Assign/refine the role with accountability for pathway planning in your organization.
4. Have a task force craft a working list of skills and diversity gaps/needs. Share with staff and board for feedback.
5. Dedicate an upcoming staff retreat to this topic.



# PLEASE COMPLETE EVALUATION

Thank you for being here!

