

Growing New Leaders Today for Tomorrow



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The Promise of Community Action

*Community Action changes people's lives,
embodies the spirit of hope,
improves communities, and
makes America a better place to live.*

*We care about the entire community and
we are dedicated to helping people
help themselves and each other.*

If we are in it to win it...

- What skills do the leaders of tomorrow need?
- Balancing Management vs. Leadership
- Developing local, state, national leaders
- Internal Development vs. External Recruitment



“Rise Up”: A Community Action Leadership Project



- We must prepare and challenge our leaders, give opportunities to develop and practice skills, support learning and engagement, alleviate fear and encourage risk taking, and assist all leaders to ***embrace the public voice of Community Action.***
- Discussions on poverty, race, and policy cannot be secondary in these gatherings; but rather come first and have the highest priority.
- At the local, state, regional and national level, the Community Action network ***must prepare and engage a new generation of CAA leaders in “opportunities that transform”.***

Rise up: If ever a time for leadership was needed, it is now.

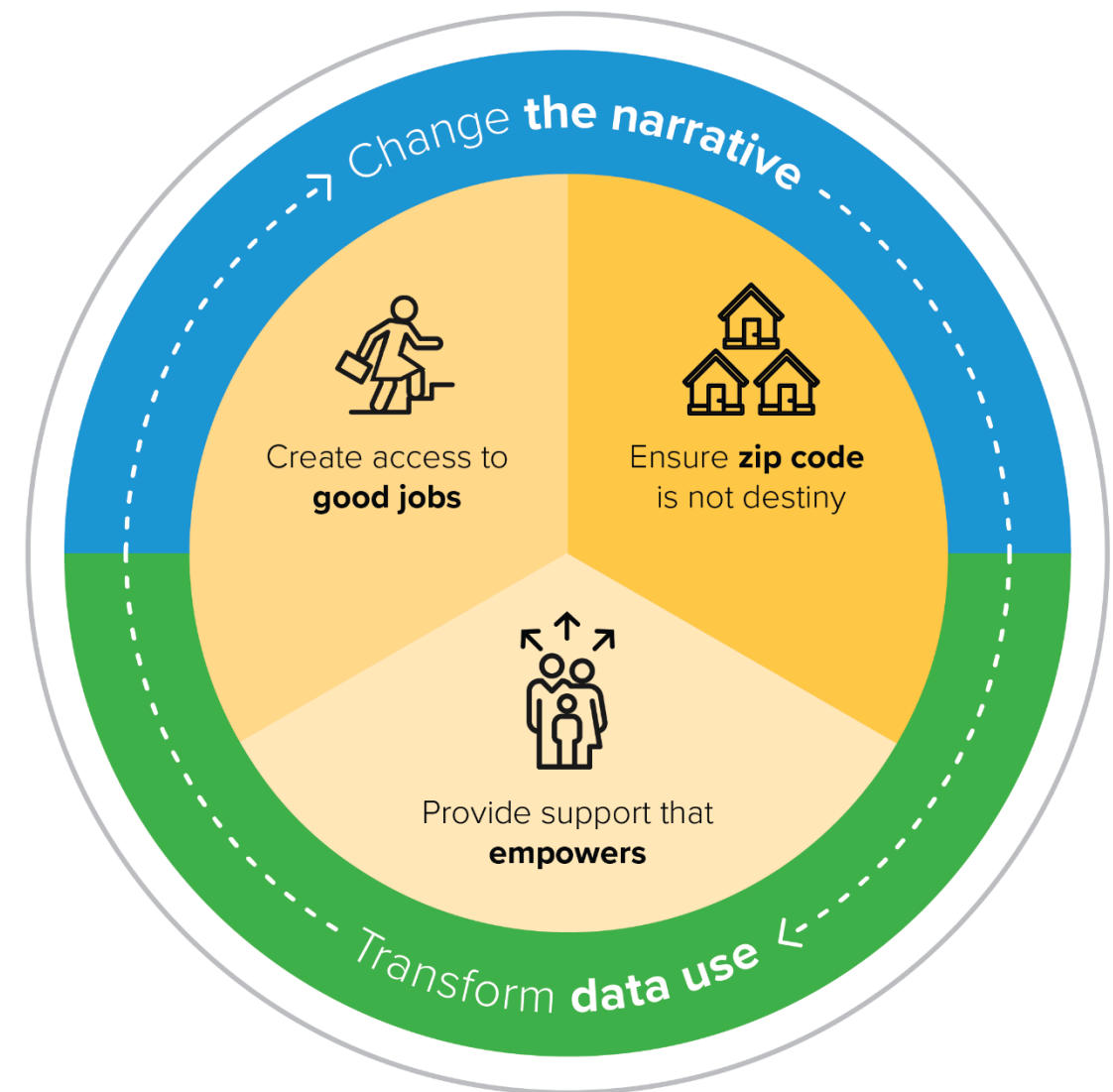
- **Leadership Development must be core** to the work of Community Action going forward.
- Network leaders on the local, state and regional levels must **understand and be fluent** in the range of issues that can be the toughest to discuss-poverty, the impact of racial and gender inequity, and what needs to be done to provide families and communities the opportunity to thrive at both the policy and program levels.
- The **skill of using data** to frame issues and elevate through story telling is critical.

Rise up: If ever a time for leadership was needed, it is now.

- Leadership development is needed **across all positions**
- **Specific efforts** must focus on ED/CEOs at local agencies, state associations, and the national partners.
- The network of state association and national events as well as online adult learning provide opportunities that cannot slip by and these must be strengthened.
- ***This is our time...***

Leadership Knowledge and Comfort Level

- Public Affairs
- Root Causes of Poverty
- Racial and Gender Inequity
- Public Speaking Ability
- Advocacy and Lobbying
- Writing
- Technology
- Courage
- Governance



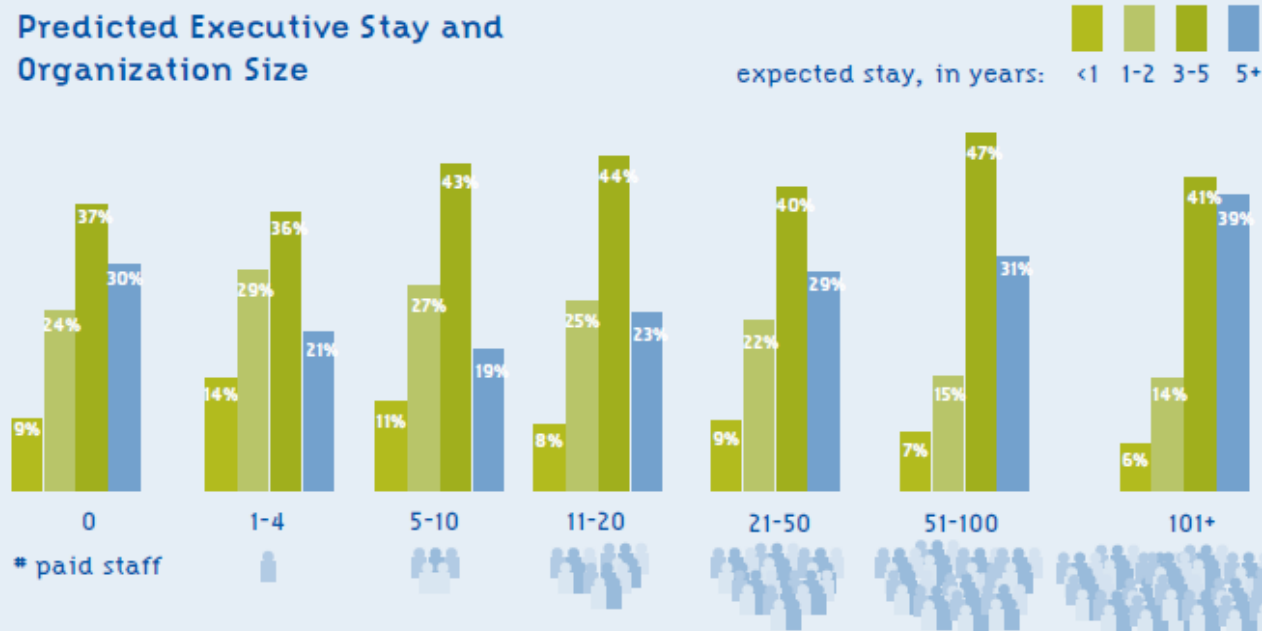
Management Knowledge and Comfort Level

- Finance
- HR/Personnel
- Governance
- Technology
- Data
- Planning
- Project Coordination
- Risk Mitigation
- CSBG
- WAP
- Head Start
- OMB
- Meeting Facilitation
- Follow Through

2006 Reports Focused on Pending Leadership Challenges for Nonprofits

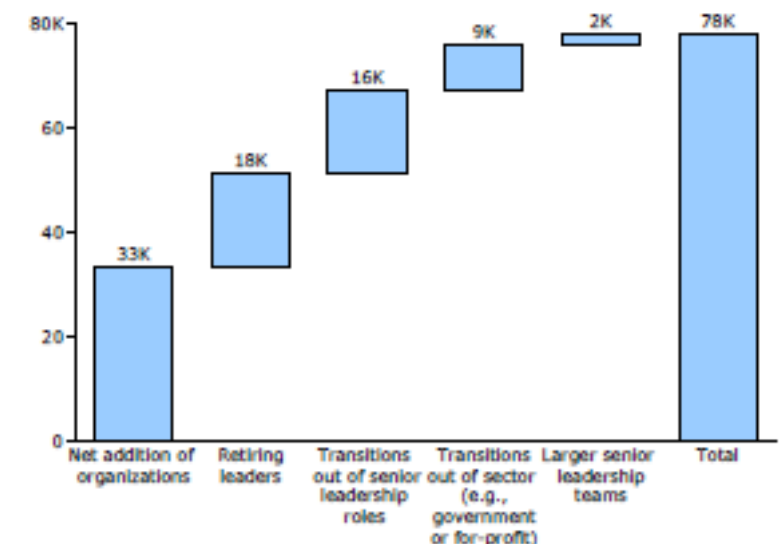


Predicted Executive Stay and Organization Size



The nonprofit sector will likely need nearly 80K new leaders in 2016

Number of new senior managers needed (2016)



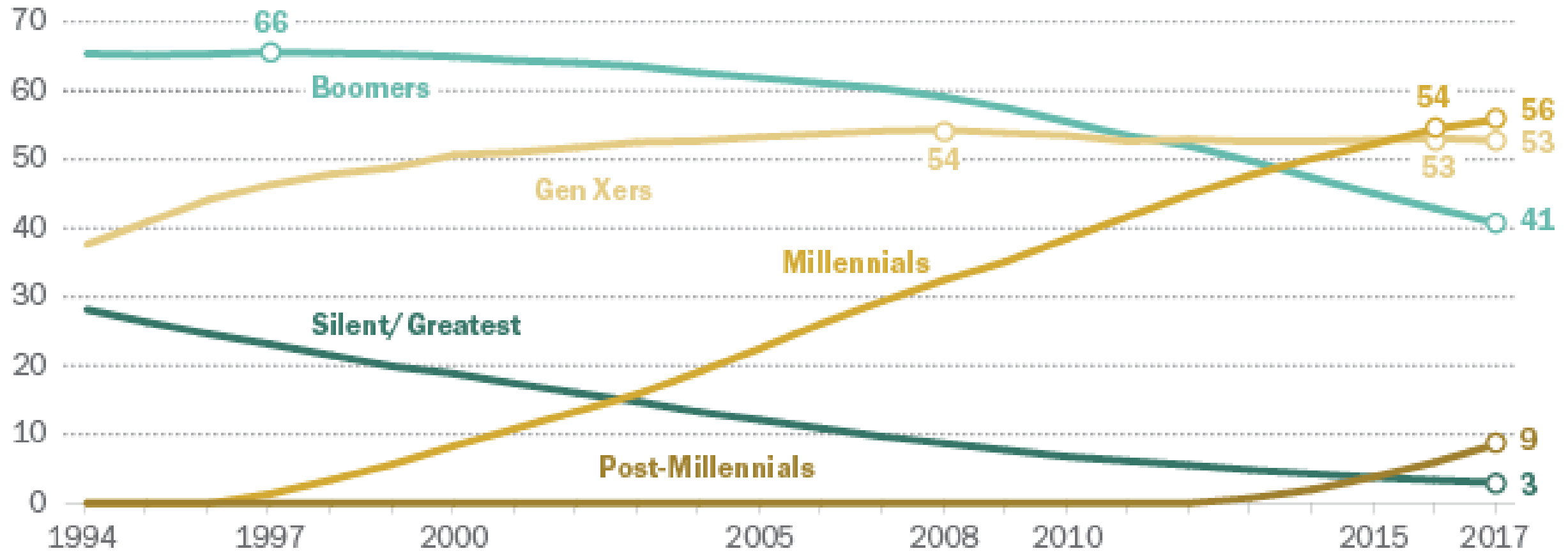
Note: Transitions out of senior management positions include CEOs and senior managers that have left their current position to become a consultant or to take an unpaid volunteer or board governance role. Transitions out of the sector include CEOs and senior managers that have left their current position for a job in the government or for-profit sector. Senior management is defined as the most senior tier of management that could include the CEO, CFO, COO, Head of Human Resources, Head of Marketing, Head of Programs.

Source: National Center for Charitable Statistics data; Bridgespan analysis

Today's Environment

Millennials became the largest generation in the labor force in 2016

U.S. labor force, in millions



Note: Labor force includes those ages 16 and older who are working or looking for work. Annual averages shown.

Source: Pew Research Center analysis of monthly 1994-2017 Current Population Survey (IPUMS).

PEW RESEARCH CENTER

Today's Environment The Bridgespan Group

Leadership Turnover by the Numbers

Percent of total C-suite positions filled in the past two years, by reason position was vacant

- 13% of positions were new roles
- 25% of existing C-suite leaders left their organizations
 - 6% retirement
 - 7% asked to leave
 - 10% left for another nonprofit organization
 - 2% left the nonprofit sector
- 5% positions were open due to other reasons

Percent of positions filled by where new hires came from

- 44% from other nonprofits
- 29% from internal promotion
- 20% from for-profits
- 5% from government
- 2% other

Number of years survey respondents expect to remain in their roles

- 11% less than 1 year
- 21% 1-2 years
- 36% 3-5 years
- 31% more than 6 years



The Bridgespan Group

“Our research finds that demand for effective nonprofit leaders today is as high as ever. Survey respondents had to fill 43 percent of C-suite roles in the past two years. Some of this was due to growth—13 percent of these positions were new in the past two years.

Much of it, however, was because senior staff left the organization. In the past two years, one in four C-suite leaders left her position, and nearly as many told us that they planned to do so in the next two years.”



The Bridgespan Group

“Indeed, a major cause of leadership turnover—nonprofits' failure to cultivate homegrown talent, which drives senior staff to leave for growth opportunities elsewhere—appears addressable. But our research and experience indicate that the solution requires the skill and will on the part of senior leaders, boards, and funders to build processes for leadership development within organizations.”

Leadership

“One does not ‘manage’ people. The task is to lead people. And the goal is to make productive the specific strengths and knowledge of every individual.”

-Peter Drucker



Leadership...

“Leadership defines what the future should look like, aligns people with that vision, and inspires them to make it happen, despite the obstacles.”

John Kotter, Leading Change

Succession Planning and Leadership Development

Succession Planning and leadership development are natural allies because they share a vital and fundamental goal: getting the right skills in the right place (Conger and Fulmer)

- Succession planning **coupled** with leadership development gives you:
 - Attention to the skills required for senior management positions
 - Educational systems that supports managers to develop their skills
 - Proactive means to cultivate talent through planned development activities

*Succession Planning + Leadership Development
= Building Your Leadership Bench*

Why Develop Internal Leadership?

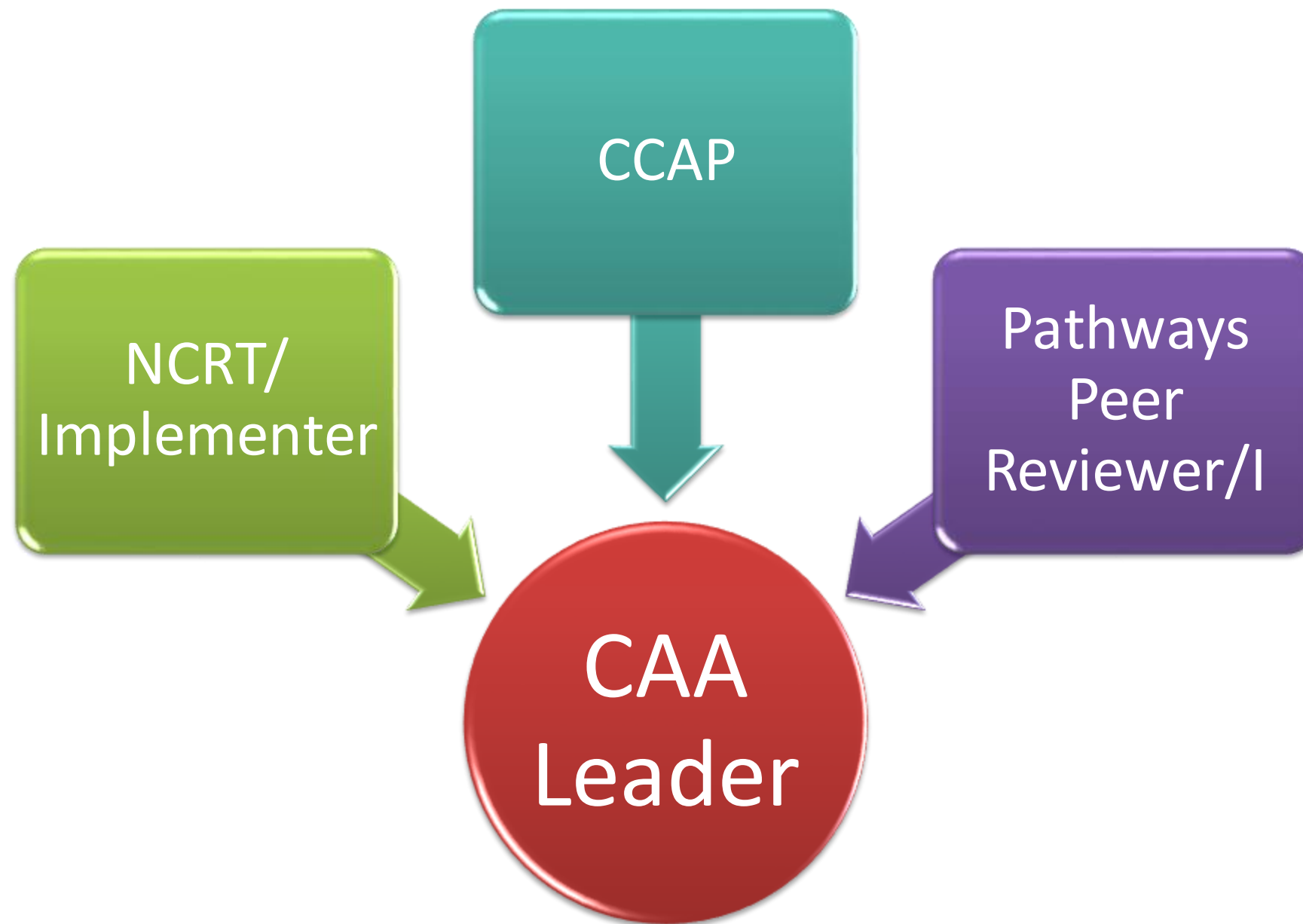
Succession Planning, when coupled with a comprehensive Leadership Development program, can prepare an agency for any unexpected departure of key staff, while also increasing the capacity of the organization to adapt to change and meet the challenges of the future.

Why Develop Internal Leadership?

- Build agency capacity AND build employee capacity
- Strengthen human resources
- Tap the intellectual capital in the organization
- Help employees realize their career plans within the organization
- Improve employee morale by giving them a way to better themselves and be challenged
- Allow the organization to respond to changing environmental demands



Trifecta of Community Action Leadership Development





Why?

CCAP

History

Experience

Leadership &
Management

NCRT/I

Outcomes

Data and
Analysis

ROMA Cycle

Peer Reviewer/I

Organizational
Development

Agency
Performance

Systems
Thinking



CCAP's 25th Anniversary



CCAP:

- Gives you the recognition you deserve for your accomplishments in the field.
- Tells others, you have achieved a nationally recognized standard for professionalism in Community Action.
- Enhances the credentials of Community Action staff at the agency.
- Can provide an edge in competing for public and private grant funds, especially when whole leadership team is certified.
- Improves your professional marketability when competing for higher positions in your own agency or another CA



Community Action

Training/Networking Opportunities

- CAPLAW
 - June Conference-Rotates location
- NCAF
 - March Conference-Washington, DC
- Partnership
 - January Conference-Rotates location (2019-New Orleans)
 - August Convention-Rotates location (2019-Chicago)
- NASCSP
 - March Conference-Washington, DC
 - September Conference-Rotates Location (2019-Little Rock)



Other Events for Community Action Leadership Development

- Independent Sector-October/November
- Association of Fundraising Professionals
- Prosperity Bi-Annual-DC Area
- Nonprofit Risk Management Center-September
- OPRE/RECS-Bi-Annual-DC
- SHRM
- BoardSource

Opportunities for Growth and Leadership

- State and Regional Associations
 - Board of Directors
 - Committees
 - Task Forces
 - Special Projects
- National Partners- Partnership, CAPLAW, NCAF
 - Board of Directors
 - Regional Representatives
 - Officers
 - Committees
 - Task Forces
 - Special Projects
 - Conference/Webinar Presentations



Developing an Internal Leadership Development Program

Leadership Development Checklist

- ✓ Commit to a leadership development program
- ✓ Assess the agency's present work and people needs
- ✓ Assess the agency's future work and people needs
- ✓ Establish a Leadership Development program
 - Identify and develop individual talent
- ✓ Evaluate individuals and the program

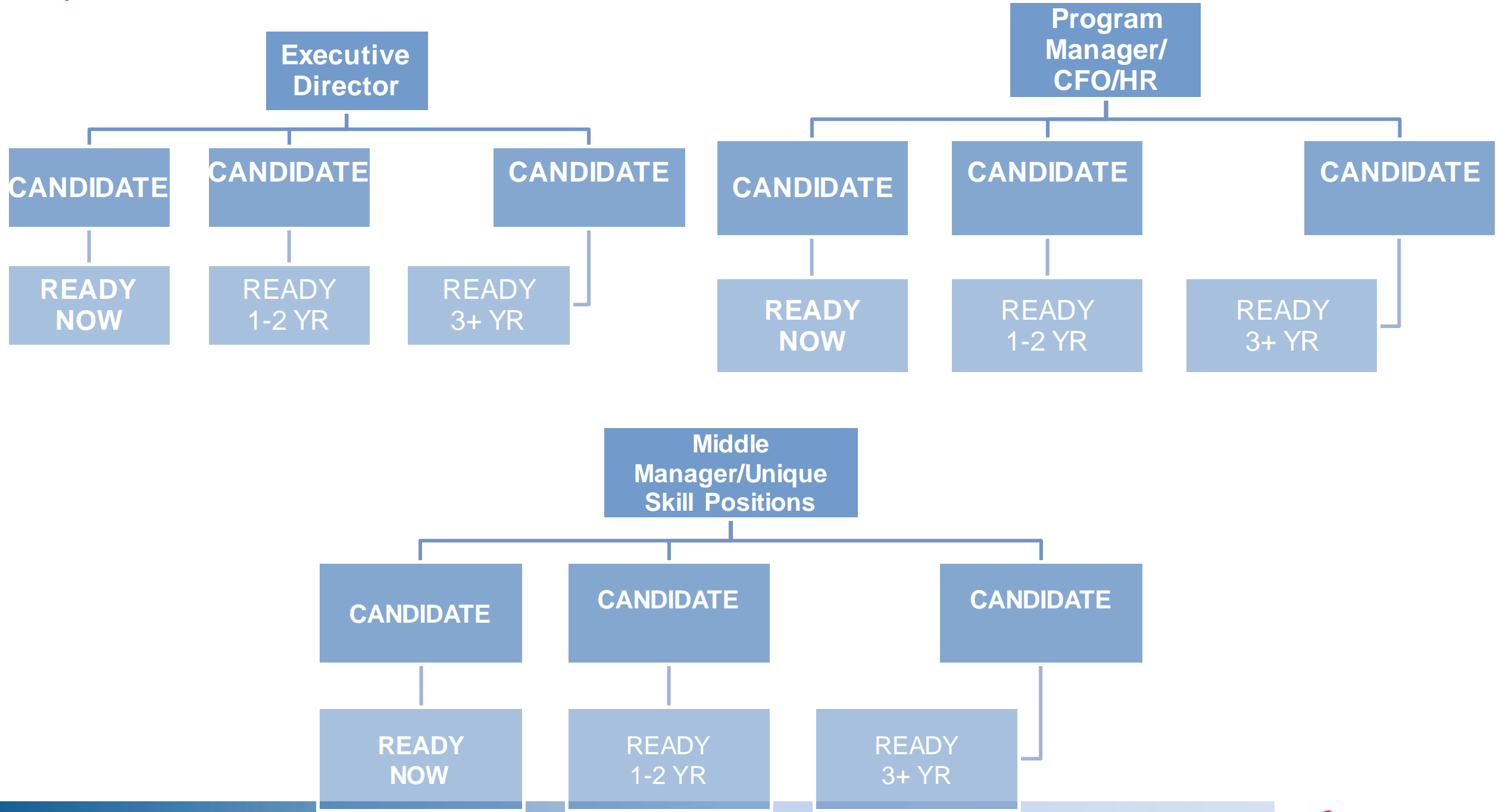
Commit to a Leadership Development Program

- Who Needs to Commit?
 - Executive Director/CEO
 - Board of Directors
 - Leadership Team
 - Financial Planning Team
- Formal Adoption and Implementation
- What Questions Need to be Answered?
 - What basic philosophical principles should guide the leadership development program?
 - What should be the program's purpose?
 - What should be the program's goals?

Assess Bench Strength By Organization



Batter Up! Developing Your Leadership Bench



Determine the Agency's Leadership Development Needs

Assess future Work and People Needs. *Requirements and competencies to need align with the agency's strategic direction*

- A. Where do we want the agency to be in 5 years?
- B. What skills and talents will we need to get us there?
- C. What skills and talents will we need when we get there?

Succession Planning Versus Leadership Development

- Succession planning is a form of risk management
 - What is the agency's current 'bench strength?'
- Succession/Leadership Development is proactive
 - It is about “cultivating talent” in the agency through planned development activities
- Establish Leadership Development Program

Traits of High-Potential Leaders

- Strong track record of performance
 - Proven results
 - Success in past or current roles
 - Able to influence across the organization
- Strong interpersonal skills
 - Empathy
 - Active listener
- Strong communication skills
 - Excellent verbal and written communication skills



Traits of High-Potential Leaders

- Drive, initiative, or an ambition to increase level of responsibility or willingness to readily accept new challenges
 - Desire to learn, grow, and develop
- Ability to create and articulate agency vision and strategy
 - Set direction
 - Execute objectives
 - Understand the total business
- Individual strengths and talents and how they match to the strategic direction of the agency

Levels of Leadership

- Organizational: **Business**
 - Communication (verbal and written)
 - Budgeting (developing, managing, and adjusting)
 - Making Decisions
 - Managing Projects Effectively
 - Representing the Organization Effectively
 - Staffing the Department

Levels of Leadership

- Organizational: **Vision**
 - Able to communicate a vision
 - Have a clear vision of program/agency should be run
 - Understand the dynamics of the agency
 - Anticipate the future and potential responses
 - Supervisees understand their role in the agency

Levels of Leadership

- **Group Level: Team Building**
 - Able to help people see how their work contributes to the program/agency
 - Work through disagreements in an open and productive manner
 - Able to create a trusting work environment
 - Initiate and support celebrations of success in the program/agency
 - Include others in planning

Levels of Leadership

- Interpersonal Level: **Mentoring**
 - Able to motivate people
 - Make sure people are recognized for their contributions
 - Show respect for others regardless of position
 - Think about each employee as an individual and support their professional development
 - Give feedback that is constructive

Levels of Leadership

- Personal Level: **Self-Knowledge**
 - Not afraid to make and admit mistakes
 - Know what I am good at and what I need to improve
 - Seek out challenging opportunities that test my skills and abilities
 - Have confidence in my ability and judgment in my role as a leader
 - Seek suggestions and feedback for improvement

Levels of Leadership

- **Thriving Within: Change**
 - Adapt well to change
 - Anticipate and plan for change
 - Open to suggestions to try new things
 - Willing to take risks
 - Willing to compromise on a decision

Developing Your Bench

- Stretch assignments
- Coaching
- Formal training programs such Leadership Programs and Action learning
- Individual development plans
- Job rotation

Developing Your Bench

- Internal education
- Internal networks
- Exposure to peers, EDs, board members, decision makers
- Increased responsibilities
- External education

Leadership Development Research

- 70-20-10 Model:
 - 70% of development on-the-job learning
 - Supported by 20% coaching and mentoring
 - 10% classroom training

Pioneered by the Center for Creative Leadership

Individual Development Plans

- Tool that helps facilitate employee development
- A two-way commitment between an employee and their manager on what they are going to do to grow
- Visible, tangible evidence that leadership development is taking place
- Can be monitored and tracked as a measure of progress
- Used as a way to drive accountability for development.

Training, Mentoring, Coaching: All Part of an IDP

- Training: Develop new skills, sharing knowledge
- Mentoring: Grooming by teaching and modeling
- Coaching: Ongoing support and encouraging decision making

Spotting Difficulty

- Lack of communication or engagement
- Personal issues and outside stressors
- Lack of follow-through
- Maturity issues

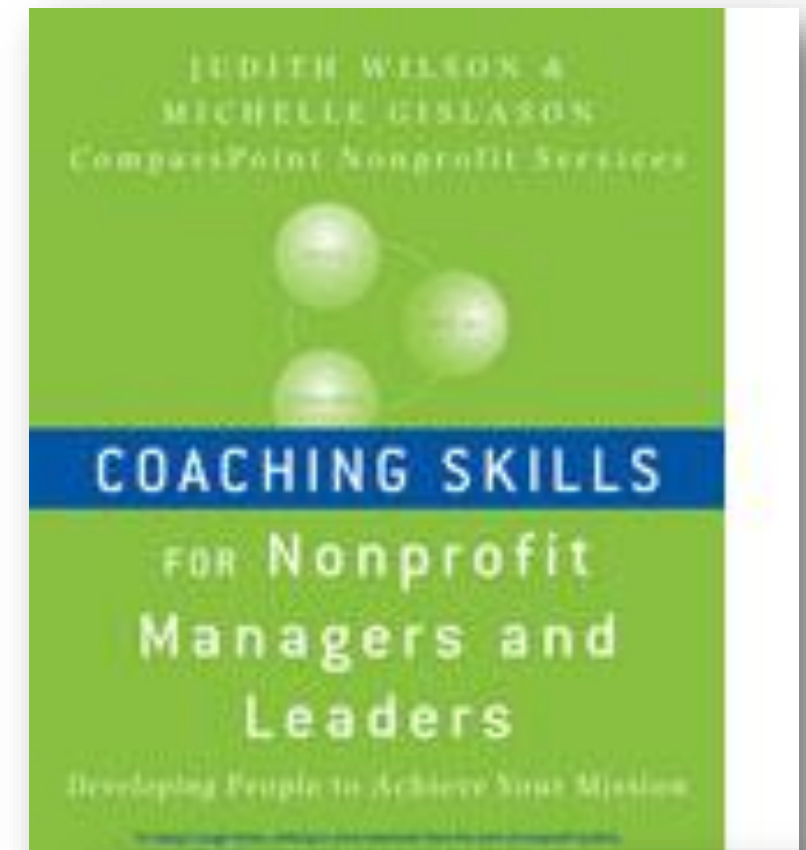
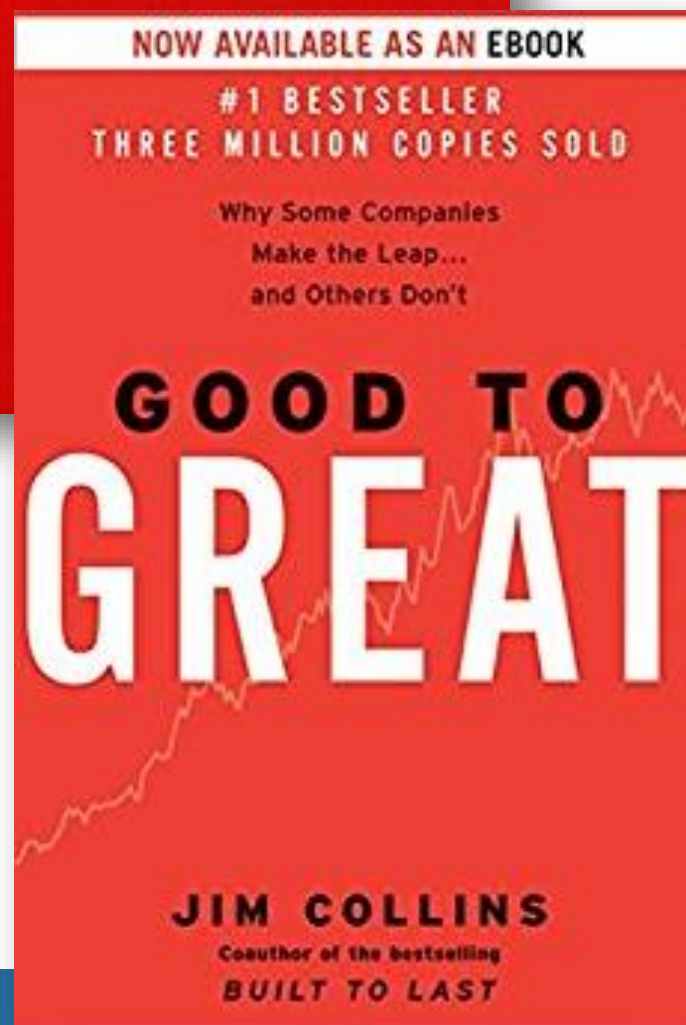
Preventing Derailment

- Increase feedback and communication
- Develop an action plan
- Provide coaching and/or mentoring
- Provide new opportunities or challenges

How to get from here to there...

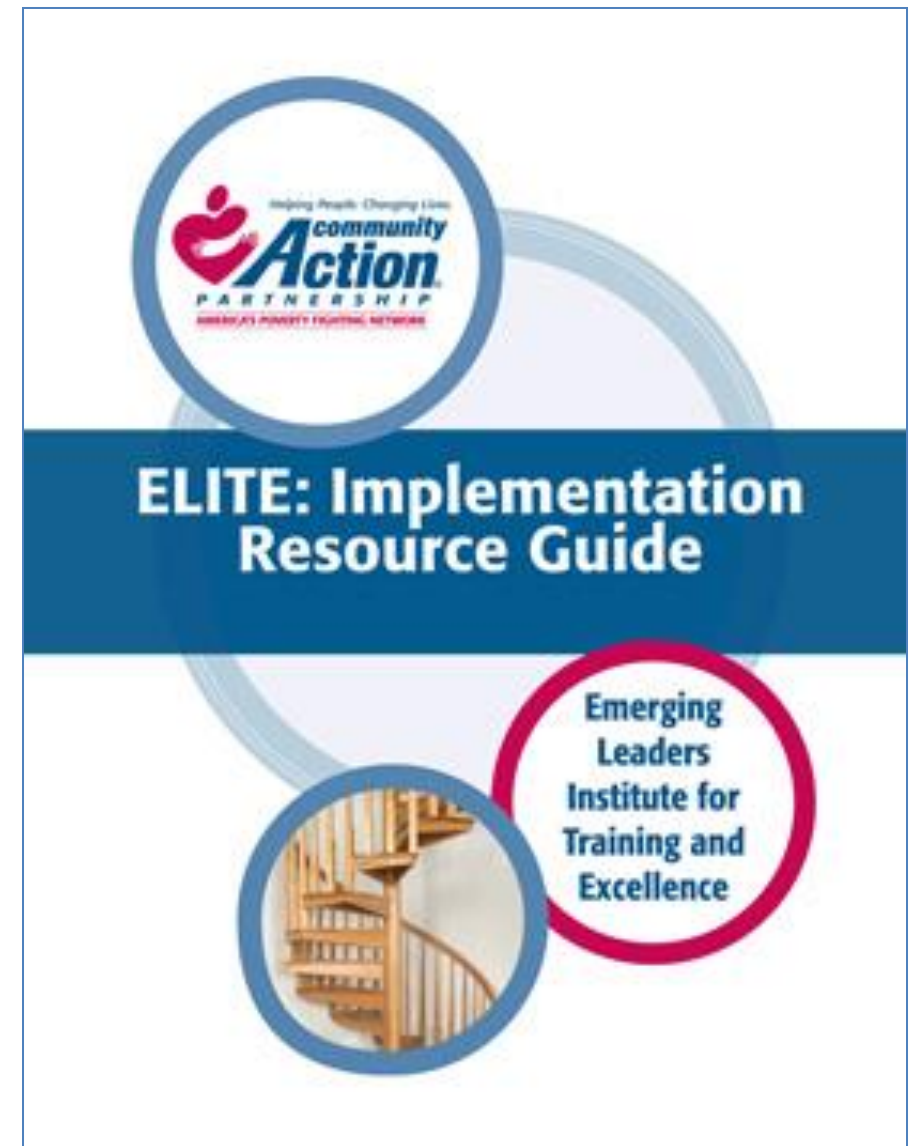
- Think continuous success rather than annual succession planning
- Move from a short-term replacement strategy to a long-term development and retention strategy
- Move from an emphasis on whom the agency has to what the agency needs
- Move from position blockage to appropriate turnover in key positions
- Reward capable managers of people rather than emphasizing technical over managerial skills

Resources



A Tool for Staff Development

- Online-Download
- Free
- Video Modules
- Can be run through a State Association or individual CAA
- Tools for additional activities and instruction
- Piloted in 2012-2014



These publication were created by the National Association of Community Action Agencies – Community Action Partnership, in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services Grant Number 90ET0428 and 90EQ0231. Any opinion, findings, and conclusions, or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the U.S. Department of Health and Human Services, Administration for Children and Families

Toolkit: Emerging Leaders Institute for Training and Excellence (ELITE)

- **Section 1: Program Guide**
 - Chapter 1 – ELITE Overview
 - Chapter 2 – Potential Implementation Models
 - Chapter 3 – Tools for Implementation
- **Section 2: Training Modules**
 - Chapter 4 – An Emerging Leaders' Introduction to Leadership Styles and Professional Development
 - Chapter 5 – Public Administration Basics
 - Chapter 6 – Financial Management: A Critical Leadership Skill
 - Chapter 7 – Human Resource Management Overview

ELITE Toolkit

- **Section 2: Training Modules**
 - Chapter 8 – Strategic Planning: Basic Building Blocks
 - Chapter 9 – Advocacy: A Leader's Role in Impacting Public Policy
 - Chapter 10 – Cultural Competency Basics
 - Chapter 11 – Managing and Measuring Organizational Performance
- **Section 3: Additional Information**
 - Chapter 12 – Additional Resources
 - Chapter 13 – Lessons Learned
 - Chapter 14 – Pathways to CCAP

Sample of Chapter Contents

Chapter 6 - Financial Management: A Critical Leadership Skill

- About the Module
- Pre Test
- Reading Suggestions
- Presentation in PowerPoint
- Presentation Handouts
- Potential Activities
- Post Test
- Test Answer Key

Sample of Reading Suggestions

Financial Management: A Critical Leadership Skill – Reading Suggestions



An Executive's Guide to Financial Leadership

Barr, Kate & Bell, Jeanne

Compasspoint

NonProfit Quarterly

<http://www.compasspoint.org/sites/default/files/documents/Financial%20Leadership.pdf>

Audit Essentials: What Every Board Member Needs to Know

Community Action Partnership & Myren, Kevin

Toolkit and webinar

http://www.communityactionpartnership.com/index.php?option=com_content&task=view&id=98

Bookkeeping for Nonprofits: A Step by Step Guide to Nonprofit Accounting

Dropkin, Murray & Halpin, James

Book

Jossey-Bass

Building Financial and Management Capacity Across a CAA

Community Action Partnership and CAPLAW

Online Training Module

http://www.communityactionpartnership.com/index.php?option=com_content&task=view&id=110

Sample of Potential Activities

- Watch the webinar: *Audit Essentials: What Every Board Member Needs to Know* with Kevin Myren. While designed toward boards, it is also a valuable resource for emerging leaders to have an understanding of what the agency audit does and does not tell a reader. Each ELITE participant could obtain a copy of their CAA's annual audit and use it during the webinar for reference.
- Have each participant obtain their CAA's most recent balance sheet and identify the key elements as noted in the online module.
- Watch the three part webinar done with CAPLAW, *Building Financial and Management Capacity Across a CAA* and discuss as a group the roles of the fiscal and program staff in the budget development process.
- Have participants read Section 4 of CAPLAW's *Tools for Top-Notch CAAs: A Practical Approach to Governance and Financial Excellence* and have a discussion developing an agency-wide budget at a CAA. Report at www.capl原因.org.
- Bring in a CPA from a local CAA to talk to the cohort about the top things an Executive Director needs to know about financial management. Though participants are likely not executive directors, this is a good chance to begin to think about what they need to know.
- Have each participant download their CAA's IRS Form 990 from www.Guidestar.org and review it. At the online or in person meeting, facilitate a meeting about the story their CAA's 990 tells, and if there are questions that the document raises.
- Read the Jeanne Bell and Kate Bar piece, *An Executive Director's Guide to Financial Leadership* <http://www.compasspoint.org/sites/default/files/documents/Financial%20Leadership.pdf> and discuss during the online meeting for this module.

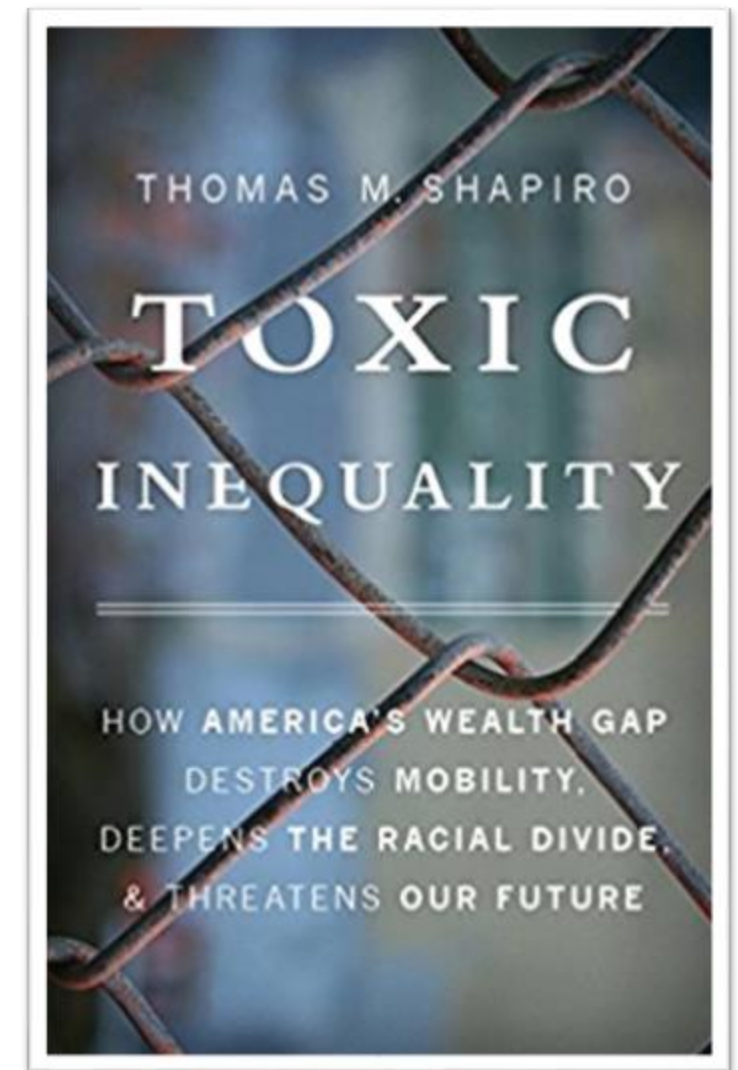
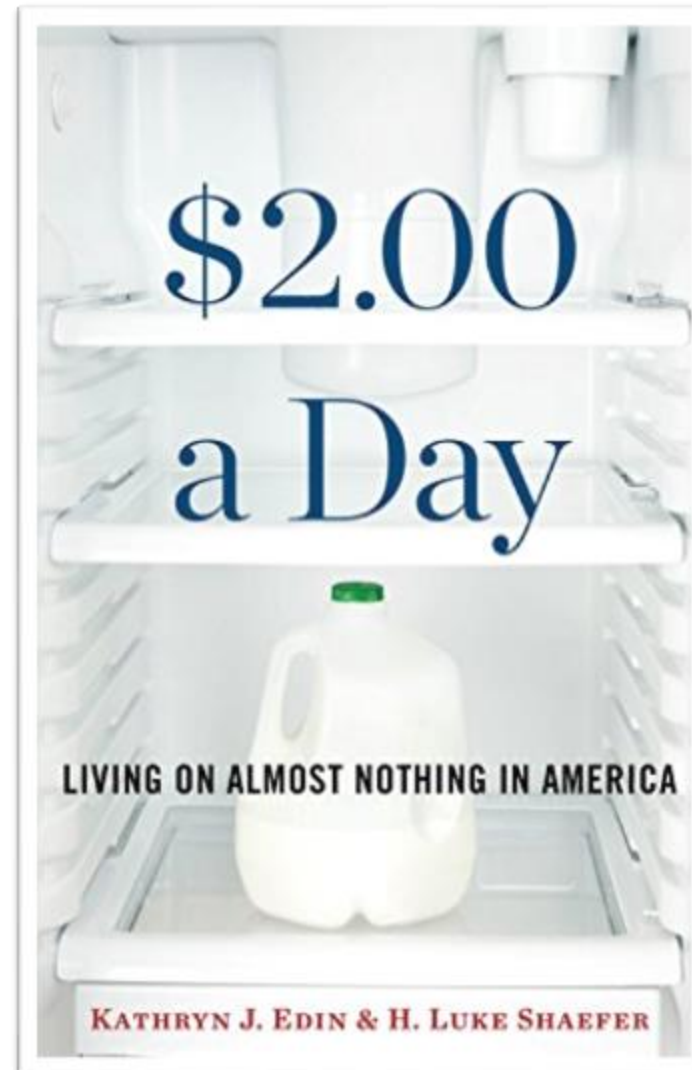
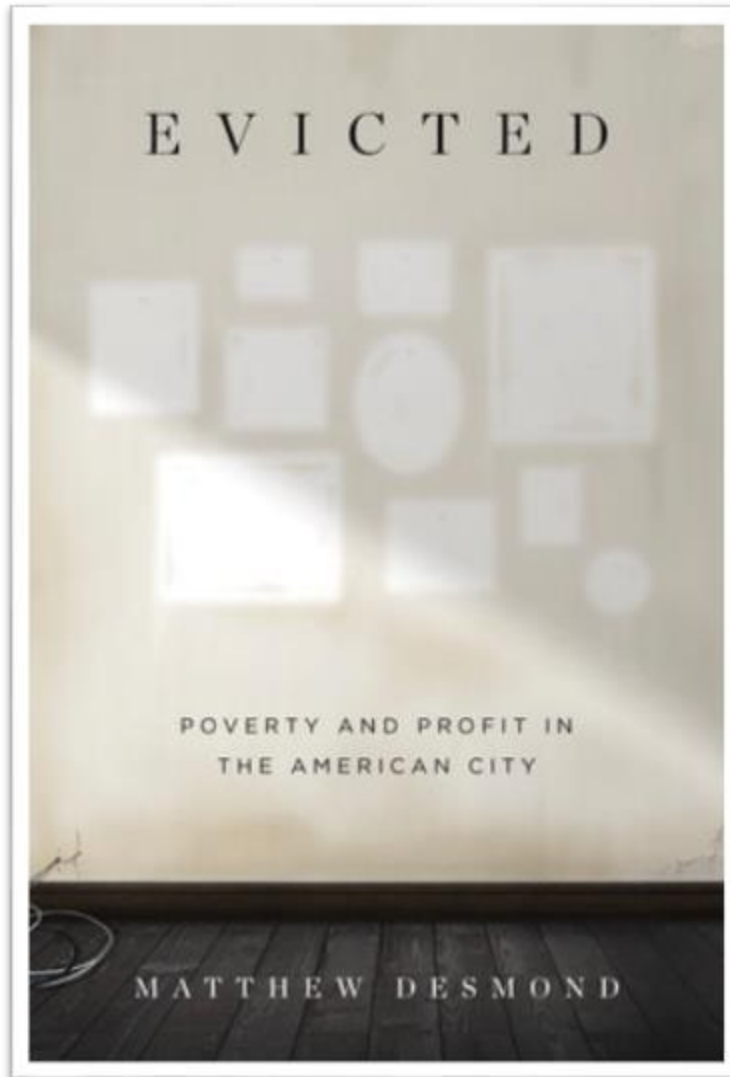
Community Action Leaders: Understanding Poverty Today

- Income Disparities
- Wealth Disparities
- Racial Inequality
- Education Disparities
- Health Disparities
- Affordable Housing
- Aging of America
- Opioid Epidemic



*Source: Equality of
Opportunity Project*

Books Reflecting Today's Poverty



WEBINAR WEDNESDAYS

With the Learning Communities Resource Center

Join us on **Wednesdays at 2 PM ET** for
the continuation of the National Webinar
Series on **Webinar Wednesdays!**

Tune in to participate in free expert-led
presentations on various promising anti-
poverty practices.



www.communityactionpartnership.com

The screenshot shows the homepage of the Community Action Partnership website. At the top, there is a navigation bar with links for "Home", "About Us", and "Membership". Below this is a large hero section with a background image of hands clasped together over a laptop. The text "Partnership Webinars" is prominently displayed, followed by the subtext "Every Wednesday, the Partnership holds Webinars on different topics. Register today!" and a "Click here" button. Below the hero section, there are three main content blocks, each with an icon and a brief description:

- Fighting Poverty**: The US Census Bureau estimates that 16% of the population lives in poverty. We work to end poverty across the country.
- Community Action Network**: We have over a thousand agencies in local communities, as well as state associations and national partners.
- Tools and Resources**: Find all of our Training and Technical Assistance webinars, toolkits, useful information and other resources.

Below these blocks is a "LATEST NEWS" section, which features a horizontal carousel of five news items, each with a thumbnail image and a title:

- A young boy looking at something in his hands.
- fresh finds** (Learning Community).
- CSBG** (Community Action Statement of Support).
- A large pink heart icon with hands inside.
- A woman wearing a hat looking out a window.

2019 Management and Leadership Training Conference

January 16-18, 2019
New Orleans, LA



August 27-30, 2019
Chicago, IL

Save the
Date!

2019 Community Action Partnership Annual Convention

www.communityactionpartnership.com

Questions?

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