



Introduction:

As an important offshoot of CEO Succession Planning and Readiness Committee, co-chaired by Melanie Delgado and Sara Hyzer, SAY San Diego's CEO and a diverse taskforce of staff leaders, spent the past 18 months assessing and planning for an executive leadership opportunities strategy. Steps taken included:

- Consulting with Lakeya Cherry, PhD, a leadership development consultant.
- Conducting and analyzing a staff survey.
- Convening a taskforce, diverse in roles and social identities, to develop a plan with a specific focus on professional development opportunities for nonprofit-sector executive management positions in and outside of SAY San Diego.

Please note we are calling for new investments in Professional Development with additional, dedicated staffing and budget capacity. Right now, leadership development is largely *ad hoc* and organized by a committee of employees with other full-time duties. While the work of the committee is appreciated, the taskforce found that it does not have sufficient time or resources to implement a true professional development program and/or executive-level leadership program. Therefore, a new job function and an action plan were recommended but could not be yet included in the FY 24-25 operating budget due to revenue constraints. It is our intention to move these budget items forward as SAY San Diego's finances allow. Taskforce members are listed in App. 1.

The plan contains:

- Philosophy of executive leadership development at SAY San Diego.
- Defining executive leadership and where it sits on a continuum of professional development opportunities now available at SAY San Diego.
- Summary of the survey conducted with 89 staff who manage programs and/or staff.
- Recommendations for ongoing, sustainable capacity to support an executive-level development program.

Our Plan:

I. Philosophy of executive leadership at SAY San Diego.

Next generation leadership is a continual focus at SAY San Diego. We set goals for cross training, shadowing and skill development for all managers, directors and the executive team. All take on challenges such as program development and innovation, budget development and management, hiring and supervision, fund raising, and external relations. Professional development goals are built into performance management (recently revised and refreshed, summer 2024). Distributed leadership, e.g., "leading where you are," is an ongoing, championed core value.



SAY as a whole and more specifically HR have successfully reduced and mitigated hiring and promotional biases by breaking with an historic practice where top managers and the CEO identified heirs apparent, awarded favorites and lined-up certain staff for promotions. By eliminating this practice years ago, we see that internal top talent has competed and won promotions and we have assured our larger team of an equitable and inclusive process. In situations where employees were told in the past “this job is *not* for you,” they do not receive such signals and have competed and won promotions along with everyone else. “Peter Principle” situations where employees were ill-prepared for a promotion, have been avoided.

Dr. Lakeya Cherry, a consultant who worked with the Succession Committee, and an expert in diverse nonprofit executive leadership development, cautioned us against using a “tag them forward” approach because research demonstrates that diverse BIPOC talent, quieter leaders and women may be overlooked in such an approach. Instead, she suggested setting up a broad-based professional development program that provides opportunities for learning based on the assessed interests and goals of managers. We adopted her recommended approach to allow for more overall growth of talent.

Our initiative, described here, is keyed to the aspirations and goals of management staff and aims to allow them to explore new roles and skills. We saw in practice and in research that to be tagged (or not) is so powerful that it will often override or short-cut an individual’s own goal-setting and professional development. Conversely, when a prospective leader is not tagged they may leave and drain talent from the organization.

A separate, but related, process to develop a formal talent strategy would be helpful to ensure executive bench strength for the organization’s long-term sustainability. The taskforce convened for executive leadership development recommended that a talent strategy not be limiting, but rather be centered on retention and robust enough to provide professional development and executive leadership opportunities for *all* who aspire to lead (vs. citing heirs apparent/near-term successors). We ask that the following questions be explored in a thoughtful process between the CEO/executive team and a board committee:

- How can SAY San Diego’s executive talent strategy be practiced in an equitable, inclusive and transparent way, in keeping with SAY’s values for EDI?
- What staff levels, below the executive team (CFO, VPs, AVPs), might be included in the strategy?
- How are gender, age, BIPOC/social identities represented in the strategy?
- What is on the list of identified future needs and capabilities for which we are preparing leaders?
- How can we create an ongoing, financially stable and consistent way to implement talent strategy given tight resources? How can we better use the resources we have, e.g., ADP talent profiles?
- Given the staff manages personnel and operations, and the board handles governance, what are best practices for each role? What is role of the board in reviewing the results of the strategy; what are benchmarks and impact measures of the strategy the board seeks to understand?



II. Defining executive leadership and where it sits on a continuum of professional development at SAY San Diego.

The following is our working definition: Executive leadership opportunities are designed to support SAY San Diego employees who wish to prepare for, or who aspire to be, operating at the executive level of a nonprofit organization. An executive leader would be at the helm beyond the level of a single program or function, and ultimately responsible for:

1. deciding and guiding where an organization (or major organizational unit) is headed and why, and
2. creating financial, personnel and operational conditions to enable when and how the organization will meet its goals.

The taskforce mapped out the current continuum of professional development at SAY San Diego and made recommendations for rounding it out.

SAY San Diego's Continuum of Professional Development—Current Status



One major recommendation was that training and committee opportunities explicitly support our EDI goals with inclusive leadership processes. One specific recommendation was for long-serving leaders of training and committees to make room and prepare others to take the lead. It was noted that some of these functions have been led by the same person for many years running. Raising awareness of this static pattern and advancing a strategy to make room for diverse new leadership will change the pattern.



With the taskforce charge to map-out executive leadership opportunities, we focused on a key question, “How can one prepare to be a nonprofit CEO/Executive?” We drew on resources such as Board Source, Lead SD, RISE, USD Nonprofit Management Institute, Nonprofit Solutions, Fieldstone Leadership, and others, to inform the key content areas.

Preparing to become a nonprofit CEO or executive team member often involves a combination of gaining relevant experience, acquiring necessary skills, building a strong professional resource network, and demonstrating a commitment to core ideals of the nonprofit sector including equity, inclusion, diversity, and benevolence.

We identified the following six key areas for career development and made detailed recommendations for resources and approaches in each area, which are contained in a separate file:

1. Knowledge of the nonprofit sector: Comprehensive understanding of how the nonprofit sector operates is beneficial since nonprofit executives must navigate complex legal and regulatory environments and uphold standards of governance, compliance and ethics. Executives often support the governance activities of a board of directors.
2. Ethics, EDI, workplace culture, inclusive decision-making: Nonprofit leadership is shown in research to require competence, integrity and benevolence, as well as flexibility, adaptability and resilience in the face of change and uncertainty. Executives who work in the service of others use their influence and decision-making power to advance internal and external equity, diversity and inclusion and to build trust. Executives set an ethical tone and a values base for organizations.
3. Organizational planning and advancement: Nonprofit executives are responsible to ensure needed organizational capacities, policies and structures, to inspire and motivate teams, set organizational direction, manage change and improvement, and advance strategic plans to ensure the organization’s sustainable future. In most nonprofits human resources management is a critical function for executives where being cognizant of trends, changing needs and best practices are essential.
4. Business acumen: Nonprofit executives run complex businesses and need solid understanding of business principles, including budgeting and financial management, to ensure sustainability and growth. Understanding cash flow, working capital and how to build a reserve fund are also beneficial.
5. Fundraising and resource development: Securing revenue is a crucial aspect of nonprofit executive leadership. It is important to be confident with different fundraising techniques, donor stewardship practices, and ways to stay current in designing proposals for private and public grants and contracts.
6. External relations and partnership development: Executives build their organization beyond acting as individual contributors and team members. They need to be visible, relevant and keep abreast of opportunities, challenges, funding changes, social policies and best practices that affect the nonprofit sector. It is essential to effectively communicate how one’s organization meets critical societal, and community, needs and goals.



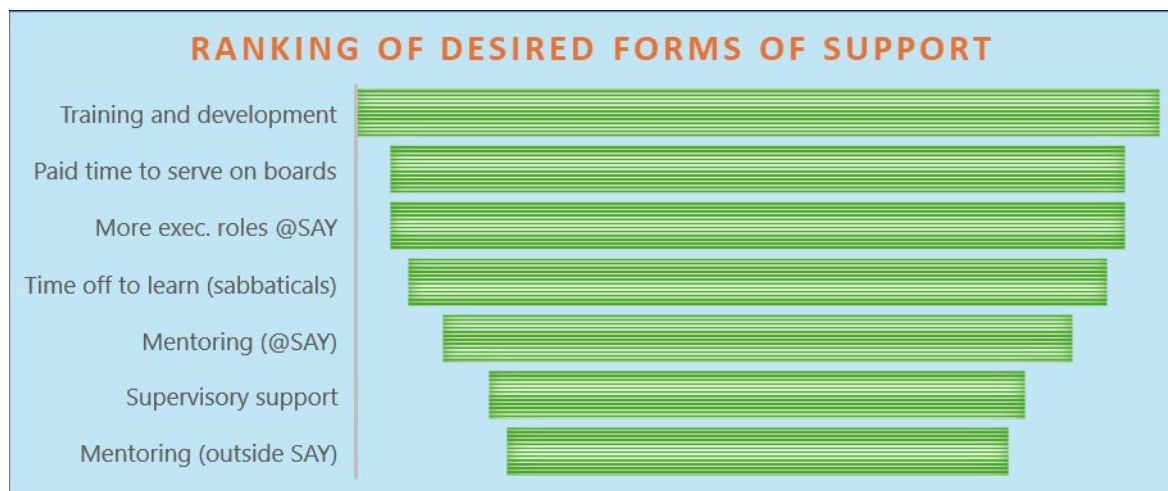
III. What we learned from the survey conducted with all staff who manage programs and or staff. A full data read-out is in Appendix 2.

Given our objective to develop a professional development and executive-level opportunities strategy based on the assessed aspirations and goals of our current leadership cohort, we invited all staff who are responsible for supervision of people and major programs to participate in a confidential survey. The survey was delivered to 89 management team members (of 400+ person workforce) and 36 responded.

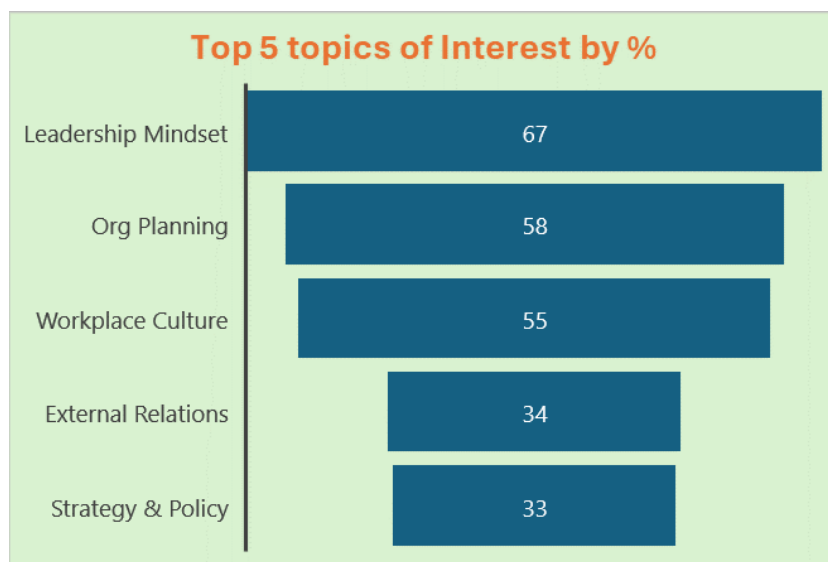
Their top 5 executive-level roles of interest included, as ranked:

- 1) Vice President/Executive Vice President/Associate Vice President
- 2) Chief Programs Officer
- 3) Executive Director/CEO
- 4) Chief Operations Officer
- 5) Chief of Human Resources/Chief of Workplace Culture

The elements of SAY San Diego’s Executive Leadership Opportunities program could include:



Interest in executive leadership subject matter, as ranked, included:





IV. Recommendations for ongoing, sustainable capacity to conduct a program of executive leadership development at SAY San Diego and with partners.

In both the survey data and taskforce discussions consensus quickly formed about the need to have a “home” for professional development at SAY San Diego. Because activities and programs now underway are housed in several places and/or committee led, there is inconsistent communication and clarity about the purpose of training, committees and opportunities.

The taskforce highly recommends that SAY San Diego invest in a Professional Development Office/Function inclusive of and informed by EDI and closely coordinated with HR. Please see Appendix 3 for preliminary drafts initially included in the FY24-25 budget but deferred due to revenue constraints and questions about sustainability. Annual cost at today’s rates is approximately \$125k on top of current positions working on professional development.

Although the initial audience for the executive leadership opportunities inquiry was supervisors, managers and directors, it was also recommended by the taskforce that the learning and skill building opportunities be opened at more levels for greater growth. It was noted that some non-managerial employees have left SAY and become executive directors/CEOs or executive leaders in smaller organizations in the local nonprofit sector.

Another general recommendation to overcome limitations of point in time training was to create ways to support application and increase sharing of experiences and expertise, including ongoing affinity groups/employee resource groups; peer mentoring; informal peer time/meetups; use Teams, Slack, SharePoint and other asynchronous ways to develop communities of practice.

Appendices follow.

Appendix 1: List of Taskforce Contributors for the Executive Learning Opportunities Taskforce

1. Chasm Bone, Site Supervisor, Child and Youth Development
2. Lisa Bridges, AVP, People and Workplace Culture
3. Joe Buehrle, VP, Strategy and Development
4. Branka Duknic, Director, Grants Management, Strategy and Development
5. Nancy Gannon Hornberger, President and CEO
6. Martín Huici, Director, Business Management, Child and Youth Development
7. Chris Jewell, VP, Child and Youth Development
8. Lini Koria, Senior Director, Child and Youth Development
9. Oscar Licon, Manager, Dads Corps Alumni, Youth, Adult and Family Wellness
10. Jessica Rathbun, Senior Director, First 5 First Steps, Community Engagement
11. Andre Roberts, Senior Manager, Equity, Diversity and Inclusion, Strategy and Development
12. Iriz Stone, Senior Director, Child and Youth Development
13. Nicholas Velasco, Site Supervisor, Child and Youth Development
14. Hope Wolfe, Program Support Specialist, Child and Youth Development



SUMMARY OF SURVEY RE: EXECUTIVE LEADERSHIP LEARNING OPPORTUNITIES

January 2024

Intro:

Why the survey? SAY San Diego seeks to support managers, supervisors, senior managers, directors, senior directors, associate vice presidents, vice presidents and management team members who may wish to explore or prepare for an advanced executive position in the nonprofit sector (at SAY or elsewhere in the sector). Our key question is: *how can SAY San Diego invest in you as an executive leader as you move forward in your career?*

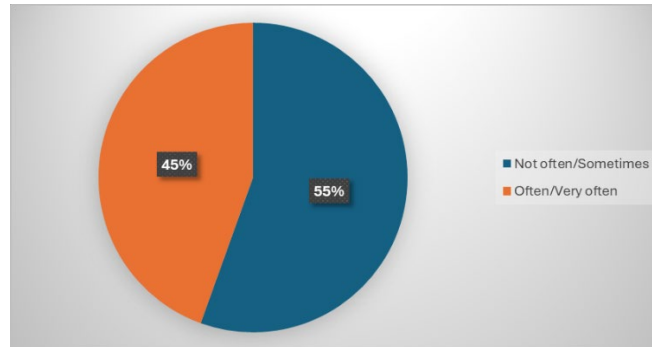
Goal? To gain input about how to organize and sustainably support equitable access to leadership development for our diverse, seasoned, esteemed leaders who may wish to serve as nonprofit executives.

How was the survey conducted and with whom? In October and November 2023, a confidential survey about executive leadership opportunities was sent to 89 SAY San Diego employees who supervise staff and/or major organization-wide functions to invite their ideas and inputs. It was implemented on Survey Monkey.

Response? 36 people (40%) of the group defined above responded, and all of them completed the entire survey.

Summary of results (raw data can be shared upon request to nancy@saysandiego.org):

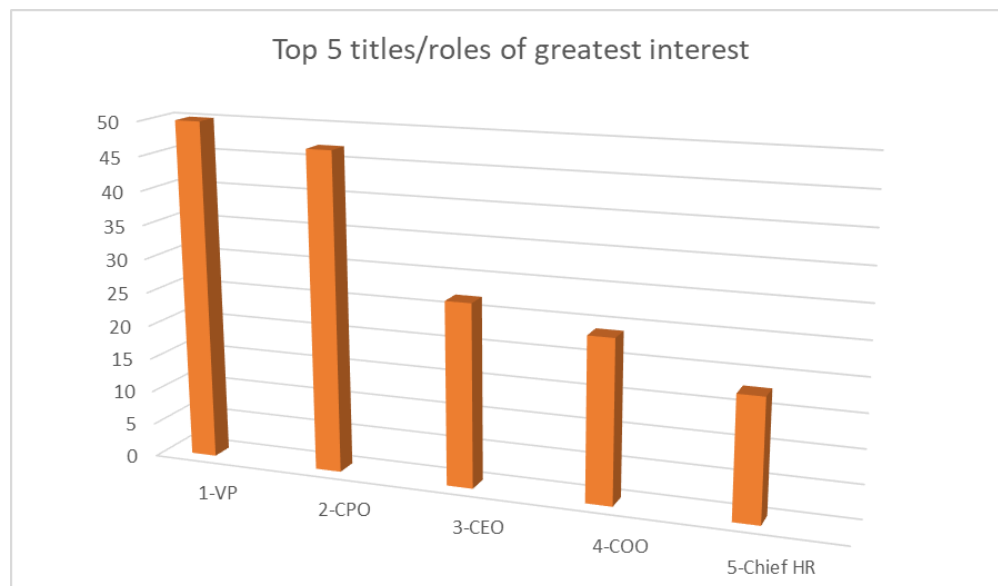
- 1) On a scale of 1-4 from not often to very often, how often do you think about advancing to a nonprofit executive role?



- 2) Is there a particular type of executive role you are interested in? Pick any or all that interest you:

TOP 5

- 1) Vice President/Executive Vice President/Associate Vice President
- 2) Chief Programs Officer
- 3) Executive Director/CEO
- 4) Chief Operations Officer
- 5) Chief of Human Resources/Chief of Workplace Culture



Possibilities listed:

- VP: Vice President/Executive Vice President/Associate Vice President
- COO: Chief Operations Officer
- CDO: Chief Development/Philanthropy Officer
- CPO: Chief Programs Officer

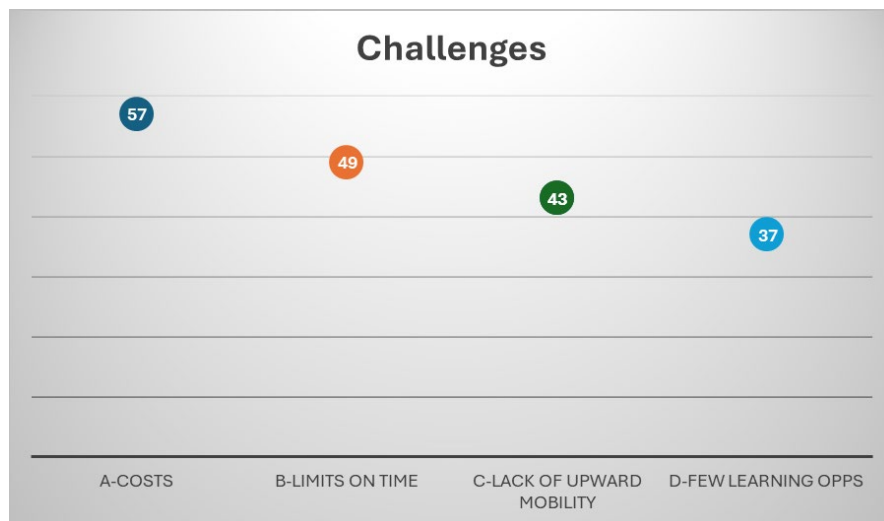
- CDO: Chief Diversity Officer
- CHR: Chief of Human Resources/Chief of Workplace Culture
- CFO: Chief Financial Officer
- CRO: Chief Research Officer
- Executive Director/CEO

Other titles/roles listed by respondents: Clinical Services, Education, Compliance, Research and Data, Acquisitions, CYD Director

Other notes:

- SAY San Diego's options for promotion into executive leadership are limited.
- Some will look outside of SAY due to specific career goals/interests.

3) What do you see as the biggest challenges to achieving your leadership development goals?



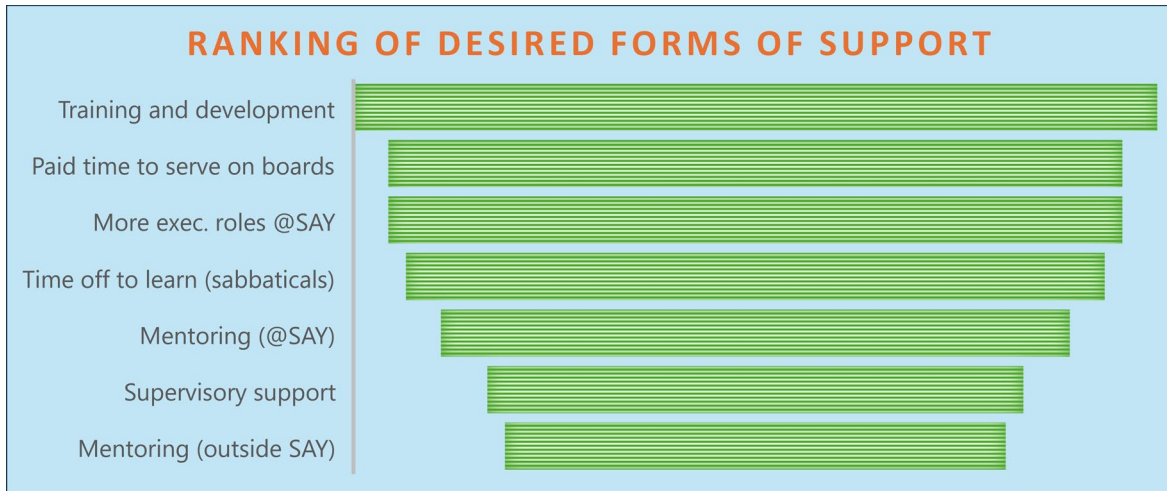
Ranked:

- Costs for professional development, such as tuition, fees, travel, time off.
- Lack of time to pull away from current responsibilities.
- Limited mobility at SAY San Diego.
- Few learning/skill building opportunities

Other notes:

- No challenges; satisfied.
- Need to know skills/qualifications needed for executive roles.
- “Insufficient networks” and/or “lack of personal confidence/belief” were ranked far lower.

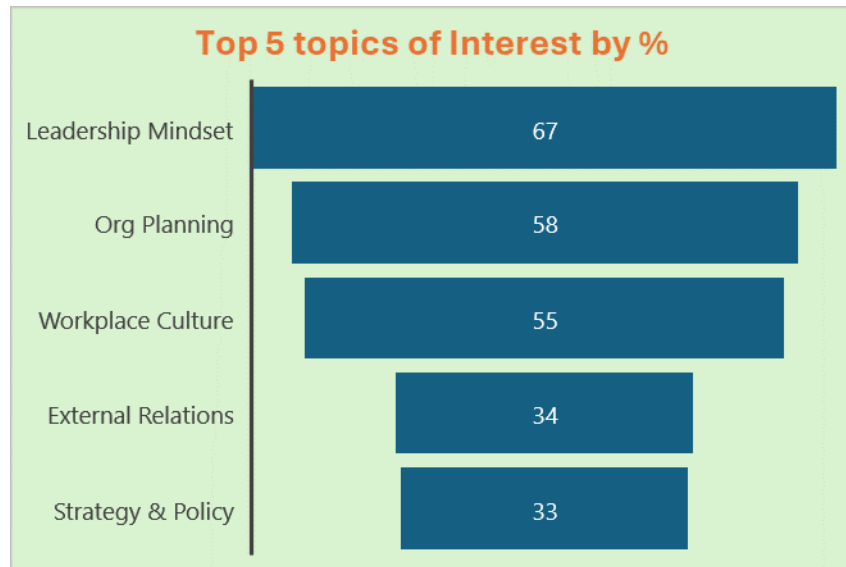
4) Please cite ways that SAY San Diego can better support the development of its supervisors, directors, and managers.



Other notes:

- Career pathways and road maps within SAY San Diego.
- More leadership roles and opportunities for forward growth.
- Open board seats to staff.

5) What executive leadership topics most interest you?



All possibilities listed and ranked by percentage:

Leadership Mindset	67
Org Planning	58
Workplace Culture	55
External Relations	34
Strategy & Policy	33
Working with a Board	30
Business/Partnership Dev.	28
Ethics & Discretion	25
Government Relations	25
Financial Management	22
Fund Raising and Res Dev.	19

Other topics: Executive Communications, Appealing to Different Learning Styles, Child and Youth Development

6) What has been the greatest support to your career growth so far (in or outside of SAY)?

Many great thoughts were shared. Most often mentioned were:

- Direct supervisor's encouragement; coaching and goal setting
- Peer and team support; peer mentors within SAY
- Learning about fund raising and funders
- Having advanced education/advanced degree
- Turning to other more experienced managers for advice
- Serving on committees and leadership groups within SAY

Also mentioned:

- SAY as an org; positive learning culture; diverse and inclusive culture
- Right opportunity at the right time.
- Senior leadership support; approachable
- Taking on extra duties; freedom to be creative
- Mentors outside of SAY, both informal and organized; outside CEO mentors
- Professional development training and opportunities in my chosen field
- Specific leadership development opportunities
- Supervisory training and courses
- Ability to be in rooms where decisions are being made and discussed
- Shadowing a role before taking it on
- Opening up more opportunities for management/supervisor roles
- Spouse/family support
- Personal dedication and conscientiousness

7) Additional recommendations?

Many great recommendations were contributed and are included here largely verbatim. These are not ranked, and just listed in random order:

Budget this.

- Invest financially in leadership development; put our money where our mouth is and organize a budgeted program.
- Provide paid professional development opportunities (conferences, webinars)
- Pay for certifications (leadership, fiscal management, etc.).
- Offer paid training and additional ways to grow outside of the agency; provide onsite/paid time learning opportunities; Make sure that we are inclusive and all know how to participate.

Define what we mean by executive leadership.

- Share resources that touch on what executive leadership is and is not.
- Set-up more conversations about how we can find ways to grow management skillsets and responsibilities into executive skillsets and responsibilities.
- Create/provide a core curriculum for advancing executive leadership skills – where to start and where to go next, etc.

Support managers and supervisors.

- Current leadership needs some updated training in leadership.
- Allow employees sufficient time to attend professional development opportunities.
- Train supervisors across all programs together. We need to connect more and learn from each other's experiences. Training all SAY supervisors will help align us all with SAY's standards of excellence and give us a congruent message of expectations of us as supervisors. This will also prepare us for growth opportunities as when we are more united, we will have a better understanding of each other, the different programs and SAY as a whole.
- Training on supervision techniques and strategies, along with conflict management strategies and intervention.

Create more roles for management.

- Need more available roles even on a lower level, under supervisors (for example team/program lead); create more positions for supervisors to grow into. Staff will appreciate this as well because they will, in turn, have supervisor positions to fill.
- Need to develop more roles for growth and to expand existing executive leadership roles.
- Opportunities for promotions are currently very limited.

Offer time and support for peer networks, shadowing, coaching, and mentoring.

- Simply have a network of leadership development opportunities/organizations for those who are interested in moving forward.
- Offer executive shadowing.
- Hold leadership book clubs and discussions.
- Offer an ongoing opportunity for those interested in high level leadership, similar to Emerging Leaders, but maybe more along the lines of coaching and mentoring.

- Support opportunities to be mentored or paired internally or externally with those already in positions we would like to be in.
- Those in leadership to reach out to people below as well for mentoring if they see something in someone in which they feel can grow or blossom as a leader with guidance and support.
- More opportunities, more training, more diversity in styles of teaching and communication, and neurodiversity understanding.

Other ideas:

- Continue good work; SAY already provides many opportunities to move upward, and I am always impressed and thankful that people within the agency are supported when it comes to those moves.
- I'm not sure. I have not worked for an agency with such an initiative before, and I appreciate the intention behind this.
- Offer 1-2 board positions to staff members.
- Allow higher ups to evaluate staff and to recommend them for higher positions.

Appendix 3: Professional Development Office - DRAFT

Professional development office – draft description. Functions to be coordinated with HR, and principally managed by HR, are in blue. It is envisioned that the PDO would be EDI driven and informed by the work of the EDI Senior Manager and EDI Committee, as well.

A nonprofit professional development office or function plays a crucial role in enhancing the skills, knowledge, and effectiveness of employees within the organization and ensuring that a wide range and diversity of employees are involved in career development.

Here's a description of what such an office or function might entail:

Onboarding and Orientation: The office supports HR in with an onboarding process for new hires, ensuring they receive comprehensive orientation and training to familiarize them with the organization's mission, values, policies, and procedures. This may include providing resources, conducting orientation sessions, and assigning mentors to guide new employees through their initial days. Each program or unit will also engage in onboarding for specific job responsibilities.

Performance Management: The office supports HR and department heads, if needed, to augment performance management by providing opportunities for employee growth and development. This includes setting clear performance expectations, providing constructive feedback, identifying areas for improvement, and offering support and resources for skill enhancement.

Training and Workshops: The office designs, coordinates, and facilitates various training sessions, workshops, and seminars tailored to the specific needs of different departments and staff members. These sessions cover a wide range of topics, including leadership development/executive leadership development, project development and management, fundraising strategies, communication skills, equity, diversity and inclusion, and compliance with relevant regulations. Coordinates external training opportunities as well.

Mentorship and Coaching: The office facilitates mentorship and coaching programs that pair experienced staff members with those seeking guidance and career development opportunities. This mentorship helps employees navigate their career paths, develop new skills, and overcome challenges by tapping into the knowledge and expertise of more seasoned colleagues. This may be coordinated with a board authorized talent strategy and metrics for executive leadership development.

E-Learning and Online Resources: The office leverages technology to provide e-learning modules, online courses, and other digital resources accessible to staff members at their convenience. These resources cover a wide range of topics and allow employees to engage in self-paced learning to further their professional development.

Evaluation and Feedback: The office regularly evaluates the effectiveness of its programs and initiatives through surveys, assessments, and feedback mechanisms. This information is used to continuously improve and refine the professional development offerings to better meet the evolving needs of the organization and its employees.

Overall, a nonprofit professional development office plays a vital role in nurturing a skilled, motivated, and empowered workforce that is equipped to drive the organization's mission forward.

Job Title: Professional Development Officer [DRAFT](#)

Organization: Nonprofit Organization

Position Summary: The Professional Development Officer will play a pivotal role in the growth and development of our team members. This position is responsible for designing, implementing, and overseeing professional development programs that align with the organization's mission, values, and strategic objectives. The primary goal of this role is to empower our staff to excel in their roles, foster a culture of continuous learning and improvement, develop bench strength for the future, and ultimately contribute to the overall success of our organization's mission.

Key Responsibilities:

Needs Assessment: Conduct comprehensive assessments of staff training and development needs through surveys, interviews, and feedback mechanisms.

Program Design and Implementation: Develop and implement tailored professional development programs, workshops, and training sessions to address identified needs. These programs may cover areas such as leadership development, technical skills training, equity, diversity and inclusion, communication skills, and other relevant topics.

Curriculum Development: Create and maintain a curriculum of training materials, resources, and tools to support ongoing professional growth and skill development across various departments and job functions.

Training Delivery: Facilitate training sessions and workshops for staff members, utilizing a variety of delivery methods including in-person sessions, online modules, and webinars.

Collaboration: Collaborate with internal stakeholders, including department heads and senior leadership, to ensure alignment of professional development initiatives with organizational goals and priorities.

Evaluation and Feedback: Monitor and evaluate the effectiveness of professional development programs through assessment tools, participant feedback, and performance metrics. Use data-driven insights to continuously improve program offerings.

External Partnerships: Cultivate relationships with external training providers, educational institutions, and professional organizations to access resources and opportunities for staff development.

Budget Management: Develop and manage the professional development budget, ensuring efficient allocation of resources to maximize impact and ROI.

Compliance: Stay informed about relevant laws, regulations, and best practices related to staff training and development, ensuring compliance with legal and ethical standards.

Qualifications:

Bachelor's degree in Human Resources, Organizational Development, Education, Business Administration, or related field. Master's degree preferred.

Proven experience in designing, delivering, and evaluating professional development programs, preferably within the nonprofit sector.

Strong understanding of adult learning principles, instructional design methodologies, and training delivery techniques.

Excellent communication and interpersonal skills, with the ability to effectively engage and inspire diverse audiences.

Demonstrated project management skills, with the ability to prioritize tasks, manage timelines, and meet deadlines.

Proficiency in Microsoft Office Suite and learning management systems (LMS) or other training platforms.

Commitment to the mission and values of the nonprofit sector, with a passion for supporting the professional growth and development of staff members.

This job description is intended to convey information essential to understanding the scope of the position and is not an exhaustive list of skills, efforts, duties, responsibilities, or working conditions associated with it. Responsibilities may change over time to accommodate changing organizational needs.