



DEI LAB #4:

ADVANCING BLACK AND MINORITY TALENT

DECEMBER 2023

COLUMBUS
PARTNERSHIP

LAB PARTICIPANTS



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PURPOSE OF DEI LAB #4: ADVANCING BLACK AND MINORITY TALENT

It is important to advance Black and minority talent to reflect the rich diversity of the community and to address wealth gaps. Black and minority talent is defined as current employees of an organization that self-identify as being of African or African American descent and individuals of color. Lab participants will define what “advancing” means, understand their companies’ biggest challenges related to advancing Black and minority talent and at what levels to focus on for consideration of advancement. They will also identify and collaborate with organizations to gain insight and resources and define measurable outcomes.

At the conclusion of the lab, participants will create a deliverable that can be implemented and shared both within their organizations and externally.



ADVANCING BLACK AND MINORITY TALENT

Moving Black and minority talent from being viewed as capable to being promotable.

From:

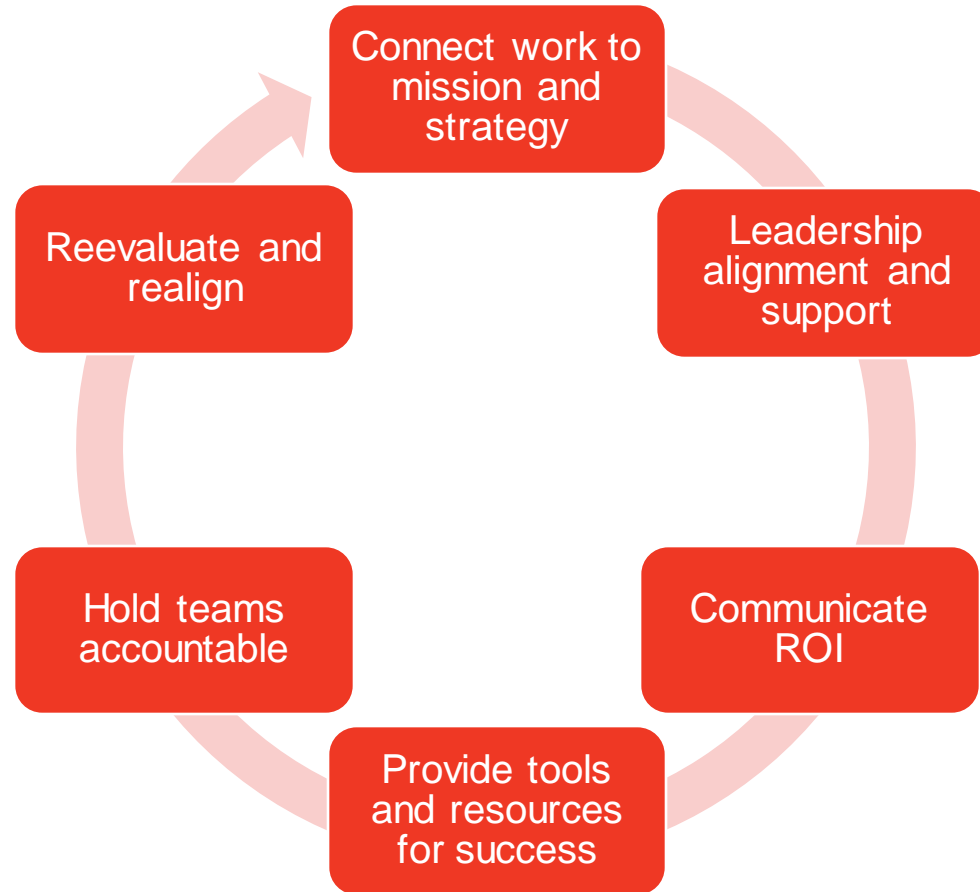
- Investing in Black and minority talent development and not taking action to promote developed talent.
- Promoting employer value propositions that centralize the majority.
- Fostering a feeling of separation between the organization and Black and minority communities.
- Seeking external opinions to better understand Black and minority community impacts.
- Contributing to the racial wealth gap.

To:

- Taking action to promote Black and minority talent to leadership roles in their current organizations.
- Enhancing the employee value proposition with the understanding that one size does not fit all.
- Strengthening the organization's relationship and reputation with Black and minorities communities.
- Gaining access to information and innovation through Black and minority leaders.
- Increasing opportunities to narrow the wealth gap.

ADVANCING BLACK AND MINORITY TALENT

Changing the narrative to change behaviors.



ADVANCING BLACK AND MINORITY TALENT

Alignment of Black and Minority Talent to Business Strategy

- Requires linkage to the business strategy with an emphasis on importance to the organizations' sustainability
- Sustainability requires inclusion of diverse perspectives at all levels in the organization
- Requires clear and consistent communication throughout the organization and society
- Requires a commitment from senior leadership with clear accountability
- Requires a long-term strategy with metrics to measure progress
- Requires commitment to inclusive training and development programs to ensure equity
 - Training and Development (establish cultural norms)
 - Succession planning
 - Mentorship
 - Sponsorship
 - Training and development (establish cultural norms)
 - Advancing business (employee) resource groups – career readiness focus (source of talent)

ADVANCING BLACK AND MINORITY TALENT

Identifying Black and minority talent for advancement opportunities.

1. **Tying advancing Black and minority talent to business and people strategies**
2. Checklist: Evaluating current teams and processes
3. Bias interrupters



Worksheet:
Tying the advancement of Black and minority talent to business strategy

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ADVANCING BLACK AND MINORITY TALENT

Worksheet: Aligning Advancement of Black and Minority Talent to Business Strategy

- Complete the worksheet annually, prior to talent/performance management work.
- Engage organizational leadership, Human Resources, Talent Acquisition, and Communications in the completion of the form, assignment of accountability and development of communication strategy.
 - The CEO must be involved and aligned.

WORKSHEET: ADVANCING BLACK AND MINORITY TALENT TO BUSINESS STRATEGY

Business mission and strategy

What components of our strategic mission are directly impacted by the presence or lack of diversity in key roles?

In what ways does increasing the diversity of our leadership team impact organizational sustainability?

ADVANCING BLACK AND MINORITY TALENT

Identifying Black and minority talent for advancement opportunities.

1. Tying advancing Black and minority talent to business and people strategies
2. **Checklist: Evaluating current teams and processes**
3. Bias interrupters

Diversity Audit Data Collection

Statistical Summary	
Total number of questions	
Total questions requiring a numerical response	
Total questions requesting a document/% response:	
Total questions to be answered "Yes" or "No"	
Total "Yes" responses	
Total "No" responses	
Total "Yes" and "No" responses	
Total "DK/Don't know" responses	
Total "NR/No Response" questions	
Total Yes and DK responses	
Total Yes, No and DK responses	

Answer each question with "yes" or "no"

#	Audit Area/Item	Information Requested	Yes/No
I.	Onboarding and Acculturation	1. Are buddies/peer mentors assigned to new hires to assist with navigating the organizational culture?	
I.	Onboarding and Acculturation	2. Are "meet and greets" scheduled for new hires with a diverse group of employees? (Gender, ethnicity, race, etc.)	

ADVANCING BLACK AND MINORITY TALENT

Identifying Black and minority talent for advancement opportunities.

1. Tying advancing Black and minority talent to business and people strategies
2. Checklist: Evaluating current teams and processes
- 3. Bias interrupters**

3. Bias Interrupters

For an organization to retain and advance minority talent, it is recommended that the organization employ tools to understand their minority talent pool. This toolkit will define how talent calibrations and post exit interviews can support an organization in their journey to retain and advance minority talent.

Talent Calibrations

What is a Talent Calibration meeting? A Talent Calibration session is a process for assessing the overall health of the talent pool in an organization. In many settings, this is a meeting among managers to discuss, assess, validate, and agree upon talent decisions for each of their direct reports.

Why have Talent Calibration sessions? Talent Calibration meetings provide managers with a chance to understand the perspective of other managers regarding the performance and potential of classified talent. This process provides managers with the opportunity to discuss talent, ask questions, and adjust or validate talent decisions. Its goal is to ensure managers apply common standards for all classified talent. Talent Calibrations also provide managers with the opportunity to gain insight on the attributes, impact, and development needs of their direct reports.

ADVANCING BLACK AND MINORITY TALENT

Taking action to promote and support the success of Black and minority leaders.



SUCCESSION
PLANNING TOOLS
AND RESOURCES



TOOLS FOR NEW
MANAGERS AND
EXPERIENCED
LEADERS BUILDING
NEW SKILLS

- Embed DEI principles, goals and intended outcomes into people strategy and organizational health and sustainability.
- Preparing teams for more inclusive succession planning.
- Establishing and communicating best practices.
- Holding leaders and organization accountable.
- Providing tools, resources, support and opportunities to take risks with Black and minority leaders.

DEI LAB #4: ADVANCING BLACK AND MINORITY TALENT TOOLKIT

Changing the Narrative and Changing Behaviors: Moving Black and minority talent from being capable to being promotable.

For an organization to be considered healthy, viable and sustainable, it must maintain a human capital strategy that is intentional and prescriptive around advancing Black and minority talent. The creators of this resource define the advancement of Black and minority talent as work-focused and investments made to move Black and minority talent into leadership roles with increased visibility and opportunities to influence their current organization with the following intended outcomes:

- Mitigate the risk of top talent leaving the organization to seek advancement elsewhere.
- Improve employee value proposition and employer reputation within impacted communities.
- Strengthen the organization's relationship with communities in and around Columbus.
- Provide access to information and opportunities to innovate that the leadership team would not otherwise have.
- Realize a greater return on investment (ROI) for development dollars.
- Increase opportunities to narrow the wealth gap.

The toolkit that follows provides resources and best practice information for leaders, teams, and organizations to tie advancing Black and minority talent to the mission and strategy of the organization, identify and communicate the ROI of this work, and change the narrative to change behaviors.

Section I: Identifying Black and Minority Talent for Advancement Opportunities

1. Tying advancing Black and minority talent to business strategy
2. Checklist: Evaluating current teams and processes
3. Bias interrupters

Section II: Taking Action to Advance Black and Minority Talent

1. Succession Planning Tools and Resources
 - a. Succession Planning DEI - integrating foundational DEI principles into succession planning work.
 - b. Preparing for Succession Planning - aligning DEI goals and the organization's people strategy.
 - c. Succession Planning Best Practices - key components of inclusive succession planning to keep top-of-mind.
 - d. Succession Planning Policy Template - a tool for teams to customize a more inclusive succession planning policy to suit the needs of your organization.
2. Tools for Black and Minority Leaders

- a. Learning Opportunities - find ways your organization can support managers who are working to build/strengthen leadership competencies.
 - b. Mentorship and Sponsorship - outline for improving the efficacy of mentorship and sponsorship.
 - i. Mentors and Networking - ways to support emerging leaders as they develop and leverage their professional networks.
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DEI Lab participants that contributed to this toolkit:

- Shayne Downton, Director of DEI, Mount Carmel Health System
- Yvette Hunsicker, Vice President – Corporate Social Responsibility, Inclusion and Diversity, American Honda Motor Company, Inc.
- Elon Simms, VP, Community Impact, Crane Group
- Almar Walter, Vice President | Chief Diversity Officer, Columbus State Community College
- Carman Wirtz, SVP of HR, Security and Safety, Columbus Zoo and Aquarium
- Storm Woods, VP, Diversity, Equity & Inclusion, Battelle

SECTION I: IDENTIFYING BLACK AND MINORITY TALENT FOR ADVANCEMENT OPPORTUNITIES

1. Tying Advancing Black and Minority Talent to Business Strategy

As business and talent needs change, it is recommended that the attached *Tying Advancing Black and Minority Talent to Business Strategy* worksheet be completed annually as part of the talent/performance management cycle. The worksheet is designed to help leaders and teams navigate the below as key components of a successful program.

- Requires linkage to the business strategy with an emphasis on the importance to the organization's sustainability.
- Sustainability requires the inclusion of diverse perspectives at all levels in the organization.
- Requires clear and consistent communication throughout the organization and society.
- Requires a commitment from senior leadership with clear accountability.
- Requires a long-term strategy with metrics to measure progress.
- Requires commitment to inclusive training and development programs to ensure equity
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2. Checklist: Evaluating Current Teams and Processes

Identifying Black and minority talent for advancement opportunities necessitates a comprehensive approach that involves the use of targeted tools and measurements to ensure an equitable pathway.

Workforce Analytics

Workforce analytics can provide valuable insights into representation at various levels, identifying potential gaps and areas for improvement. HR analytics can further analyze performance metrics, talent development, and career progression, helping organizations track the advancement trajectories of Black and minority employees.

Formal and Informal Assessments

Employee surveys and feedback mechanisms can be valuable tools for capturing lived and perceived experiences, shedding light on workplace culture, and identifying any systemic barriers that may hinder advancement opportunities. Additionally, more formal climate assessments can be utilized to better understand workplace dynamics. The data generated from such assessment could be used to develop specific strategies that help advance underrepresented talent. (See Diversity Audit on pages 5-6 for example.)

Mentorship and Sponsorship

Mentorship and sponsorship programs serve as impactful tools for identifying and nurturing Black and minority talent. Establishing formal mentorship initiatives that pair experienced leaders with emerging talent can provide valuable guidance and networking opportunities. Sponsorship programs, where influential leaders actively advocate for the career advancement of Black and minority employees, can significantly contribute to breaking down systemic barriers and creating pathways for professional growth.

These tools, when used collectively and strategically, can help organizations recognize, nurture, and advance the diverse talent that contributes to a more inclusive and thriving workplace.

This audit can be a useful tool to establish a baseline understanding or more granular insights regarding your current efforts to advancement diverse talent.

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I.	Onboarding and Acculturation	3. Is there a formal onboarding process that is used across the organization?	
I.	Onboarding and Acculturation	4. Are frequent check-ins held during the first 30 days to ensure the new hires are on track and receiving the necessary support?	
II.	Retention	5. Are there any affinity groups that have been established to address the needs of any particular population of employees?	
II.	Retention	6. Does the organization actively approach a diverse range of employees to find ways to stimulate their success or career development?	
II.	Retention	7. Are there representation targets for diverse groups in high-potential talent pools and programs?	
II.	Retention	8. Are leaders encouraged to include candidate diversity as a priority in pipeline planning?	
III.	Policies and Procedures	9. Does the organization have a diversity and inclusion policy?	

III.	Policies and Procedures	10. Does the organization have a gender equality policy?	
III.	Policies and Procedures	11. Does the organization have an equal pay policy?	
III.	Policies and Procedures	12. Does the organization have an inclusive dress code policy?	
IV.	Representation	13. Are there organization-wide goals for diversity?	
IV.	Representation	14. Is there a comprehensive diversity plan for the organization, with a defined mission, vision, goals, objectives, strategies, and tactics?	
IV.	Representation	15. Does the senior leadership diversity percent match the organization-wide goals?	
IV.	Representation	16. Does the board member diversity match the organization-wide goals?	
IV.	Representation	17. Is a specific individual tasked with managing/directing the diversity initiatives across the organization?	
IV.	Representation	18. Is the organization able to provide retention rates by race, ethnicity, and gender?	
IV.	Representation	19. Is there a diversity scorecard for the organization?	
IV.	Representation	20. List other diversity reports that are regularly generated and reviewed	
IV.	Representation	21. Do top leaders speak regularly about the importance of advancing underrepresented talent?	
IV.	Representation	22. Does your exit interview data enable you to better understand why diverse talent leaves the organization?	

3. Bias Interrupters

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Who's involved in Talent Calibration sessions?

- The manager (and perhaps their peers)
- The manager's leader
- The HR Business Partner
- *DEI Lab #4 recommendation:* Also include a diverse leader/defined diverse sponsor in this discussion as well.

Best practices for facilitating effective Talent Calibration sessions

- Before the session, understand the diverse talent pool.
 - *This includes knowledge of all individuals/groups an organization would define as their diverse talent pool.*
- Schedule face-to-face meetings
- Review adequate standards criteria for performance and potential. (See [9 Box Toolkit](#) pages 4 – 7 for example criteria.)
- As part of the process, managers should:
 - Share talent decisions for each of their diverse direct reports identified in talent pools.
 - Identify potential diverse successors to leadership roles.
 - Identify development opportunities for diverse top and emerging talent.
 - Once calibrations are complete, listen, ask questions, share perspectives, and adjust/validate talent decisions.

How should leaders prepare for Talent Calibration sessions?

Leaders must be knowledgeable about each of their direct reports and be prepared to summarize the following about colleagues in their talent pool:

- Performance
- Potential
- Readiness to advance
- Potential successor to an executive role
- Development activities necessary to advance
- Mobility
- Flight/retention risk

The output of Diverse Talent Calibration sessions is a refined list of diverse successors validated by organizational leadership.

Tool adapted from: [Talent Calibration Session – Trinity Health](#)

Stay Interviews

Stay interviews are another useful tool to learn what is working, and what should be repeated and built upon. Often, Black and minority talent are left out of these useful calibration meetings and the organization misses out on gaining valuable insights and retaining incredible talent.

Stay Interview Example

Introduction:

Thank you for joining us for this stay interview. We greatly value your contributions and want to ensure your experience within our organization is positive and fulfilling. Today, we'll be discussing various aspects of your role, job satisfaction, and specifically, your thoughts on diversity and inclusion. Your feedback is crucial as we continue to build an inclusive workplace where everyone feels welcome and supported.

1. Employee Background:

Start by discussing the employee's background, role, and tenure within the organization and express gratitude for their dedication and contributions.

2. Overall Job Satisfaction:

- *On a scale from 1 to 10, how satisfied are you with your current role and responsibilities?*

Begin with a broad question to gauge overall satisfaction.

- *Can you share specific aspects of your job that you find most satisfying or fulfilling?*

3. Diversity and Inclusion:

- *How would you describe the level of diversity and inclusion within our organization?*
- *Have you personally experienced or witnessed situations that positively contributed to diversity and inclusion here?*

- *Conversely, are there areas where you believe we can improve in terms of diversity and inclusion?*
- *How do you feel our organization supports diversity and inclusion in day-to-day operations?*
- *In your opinion, what additional steps can we take to foster a more inclusive work environment?*

4. Work Environment

- *How would you describe the work environment and culture within our team/department?*
- *Are there any changes to the work environment that would positively impact your job satisfaction?*

5. Recognition and Feedback:

- *How do you feel about the recognition and feedback you receive for your contributions?*
- *Is there a specific type of recognition or feedback that is most meaningful to you?*

6. Career Development:

- *Where do you see your career progressing within our organization?*
- *Are there specific skills or areas of professional development you would like to focus on in the coming year?*

7. Communication and Feedback:

- *How would you rate the communication within our team/department?*
- *Is there a preferred method or frequency of communication that works best for you?*

8. Job Challenges:

- *Are there any challenges or obstacles you currently face in your role that we should address?*
- *Is there additional support or resources you believe would help you overcome these challenges?*

Closing:

Thank you for sharing your insights and thoughts during this stay interview. Your feedback is invaluable as we work towards creating an environment where you can thrive both personally and professionally. We are committed to addressing any concerns and enhancing your overall experience within our organization. If there are any further thoughts or ideas you'd like to share, please feel free to do so.

SECTION II: TAKING ACTION TO ADVANCE BLACK AND MINORITY TALENT

1a. Succession Planning and DEI

Diversity, Equity, and Inclusion (DEI) are crucial considerations in succession planning to ensure a well-rounded and fair process. Here's how you can integrate DEI principles into your succession planning toolbox:

1. **Actively seek diversity:** Ensure that your talent identification process considers individuals from diverse backgrounds, including different ethnicities, genders, ages, and cultural perspectives.
2. **Mitigate biases:** Implement measures to minimize unconscious biases in talent identification, such as diverse interview panels.

Inclusive Development Programs:

1. **Customized development plans:** Consider the need to tailor development plans to address the unique needs and challenges faced by employees from underrepresented groups.
2. **Inclusive leadership training:** Offer training programs that emphasize inclusive leadership skills, fostering a culture that values and leverages diversity.

Equitable Opportunities:

1. **Equal access to opportunities:** Ensure that all employees have equal access to high-profile projects, stretch assignments, and career development opportunities.
2. **Mentorship and sponsorship:** Implement mentorship and sponsorship programs that support the career growth of individuals from underrepresented groups. (See Section 2b.)
3. **Networking opportunities:** Create opportunities for team members by inviting them into their leaders' networks. (Refer to Section 2c.)

DEI Metrics:

1. **Establish diversity metrics:** Integrate diversity metrics into your succession planning process to track the representation of underrepresented groups at different levels of the organization.
2. **Regularly assess and report on the progress of DEI initiatives within succession planning to hold the organization accountable.**

By incorporating DEI principles into your succession planning toolbox, you not only promote fairness and equity but also create a more innovative and resilient organization that can thrive in a diverse and dynamic global landscape.

1b. Preparing for Succession Planning

Succession planning is a critical aspect of organizational management that involves identifying and developing individuals to fill key roles within the company as they become vacant.

Preparing for succession planning discussions involves careful consideration, strategic thinking, and a commitment to the long-term success of the organization. Here's a step-by-step guide to help you prepare for these discussions:

1. Understand the Organization's Strategic Goals:

- Familiarize yourself with the organization's mission, vision, and strategic objectives.
- Identify key roles critical to achieving these goals.

2. Identify Critical Positions:

- Determine which roles are most crucial to the organization's success.
- Focus on positions with significant impact on operations, strategy, and leadership.
- Gather feedback from key stakeholders, including current leaders and potential successors.

3. Assess Current Talent:

- Evaluate the current talent pool within the organization.
- Identify individuals with high potential and a strong track record of performance.

4. Develop Leadership Competency Models:

- Clearly define the competencies and skills required for key leadership positions.
- Use these models to assess potential candidates and determine development needs.

5. Consider Individual Development Plans:

- Work with potential successors to create personalized development plans.
- Identify training, mentorship, and experiential opportunities to enhance their skills.
- Pair potential successors with experienced mentors or coaches.
- Facilitate knowledge transfer and skill development through these relationships.

6. Assess Leadership Potential:

- Integrate succession planning with the performance management system.
- Ensure that high performers are recognized, and development opportunities are aligned with succession goals.
- Evaluate not only current performance but also leadership potential.
- Consider factors such as adaptability, strategic thinking, and interpersonal skills.

7. Diversify the Succession Pipeline:

- Ensure diversity and inclusion in the succession planning process. If no minority candidates are represented, understand why, determine root cause or barriers. Don't be afraid to ask the questions that need to be asked.
- Highlight the importance of identifying and nurturing talent from various backgrounds and experiences.

8. Communicate Transparently:

- Communicate the importance of succession planning to the entire organization.
- Be transparent about the criteria and processes involved.

9. Monitor and Adjust:

- Regularly review and adjust succession plans based on organizational changes and evolving business needs.
- Ensure flexibility to adapt to unforeseen circumstances.

10. Legal and Ethical Considerations:

- Be mindful of legal and ethical considerations when making succession decisions.
- Ensure fairness and compliance with relevant employment laws.

11. Document Succession Plans:

- Formalize the final document, including identified successors, development plans, and timelines.
- Share relevant information with key stakeholders.

Conclusion:

Succession planning discussions require a comprehensive and forward-thinking approach. By understanding the organization's goals, identifying key positions, developing talent, and maintaining flexibility, you can contribute to the long-term success and sustainability of the organization. Remember that diversity of talent offers companies a competitive advantage, decreased employee turnover, and better employee morale. Regularly review and update your succession plans to align with the dynamic nature of the business environment and to ensure a smooth transition of leadership when needed.

1c. Succession Planning Best Practices

Succession planning is a critical process for organizations to ensure the smooth transition of key roles and responsibilities when key employees leave or retire. This process can also help an organization determine future training programs and development opportunities.

At a high level, succession planning best practices include:

1. Executive Buy-in

- Gain support from top leadership to emphasize the importance of succession planning.
- Communicate the benefits, such as risk mitigation, talent development, organizational resilience and intentionality given to promote diversity in leadership.
- Create a succession planning policy. (See Section 1d.)

2. Needs Assessment

- Identify critical roles: Determine key positions critical to the organization's success.
- Skill and competency mapping: Clearly define the skills and competencies required for each critical role.

3. Talent Identification

- Identify high-potential employees: Assess and identify individuals with the potential to fill key roles in the future.
- Develop a talent pool: Establish a pipeline of potential successors for critical positions.

4. Training and Development

- Individual development plans: Create personalized plans for high-potential employees to address skill gaps and career development.

5. Leadership development programs:

- Implement programs that focus on building leadership skills and preparing individuals for higher-level roles.

6. Performance Management

- Conduct regular performance assessments to evaluate employee capabilities and track progress.
- Align individual and team goals with organizational objectives to ensure everyone is working towards common goals.

7. Communication Strategy

- Transparent communication: Clearly communicate the purpose and benefits of succession planning to employees at all levels.

Other considerations:

1. Regularly review and update plans: Adapt succession plans to changes in business strategy, employee performance, and market conditions.
2. Ensure fairness: Base succession decisions on merit and performance to maintain fairness and avoid legal issues. Evaluate your succession planning processes through a DEI lens, identifying areas where improvement is needed.
3. Compliance: Stay informed about relevant employment laws and regulations to ensure compliance.
4. Develop contingency plans: Identify interim solutions in case of sudden departures or unexpected events.
5. Cross-training: Ensure that multiple employees are familiar with the responsibilities of critical roles to handle emergencies.
6. Iterative approach: Treat succession planning as an ongoing process, making continuous adjustments based on feedback and evolving organizational needs.

1d. Succession Planning Policy Template

Please note that this is a template, and you should tailor it to the specific characteristics and requirements of your organization. Additionally, legal and HR professionals should review and approve any policy to ensure compliance with applicable laws and regulations.

1. Purpose:

The purpose of this Succession Planning Policy is to ensure the effective identification, development, and retention of key talent within [Your Organization's Name]. This policy aims to create a structured approach to leadership development and talent management to facilitate the seamless transition of key roles in the event of planned or unplanned vacancies.

2. Scope:

This policy applies to all employees of [Your Organization's Name], including executives, managers, and high-potential individuals identified for future leadership roles.

3. Principles:

- **Fairness and Inclusion:** Succession planning at [Your Organization's Name] will be conducted in a fair, transparent, and inclusive manner, with a commitment to diversity, equity, and inclusion.
- **Leadership Development:** The organization provides ongoing opportunities for leadership development, training, and mentorship to nurture a pool of qualified internal candidates for key roles.
- **Data-Driven Decision-Making:** Succession planning decisions will be informed by data, including performance evaluations, skills assessments, and other relevant metrics.

4. Succession Planning Process:

1. Identification of Key Roles:

- a. Critical roles will be identified based on their impact on the organization's strategic objectives.
- b. These roles will be categorized by level of importance and urgency in succession planning efforts.

2. Talent Identification:

- a. High-potential employees will be identified through a combination of performance reviews, skills assessments, leadership potential evaluations, and strategic planning priority. (See sample succession plan template, Appendix A.)
- b. Efforts will be made to ensure diversity and inclusion in the identification process.

3. Development Plans:

- a. Individualized development plans will be created for high-potential employees to address skill gaps and prepare them for future leadership roles.
- b. Regular reviews and updates to development plans will be conducted to adapt to changing organizational needs.

4. Emergency Succession Planning:

- a. Contingency plans will be established to address sudden vacancies in key roles.
- b. Cross-training and knowledge transfer initiatives will be implemented to ensure readiness for unforeseen circumstances.

5. Communication:

- Employees will be informed of the organization's succession planning efforts, emphasizing the commitment to fair and inclusive practices.
- Clear communication will be maintained throughout the process to address concerns and promote transparency.

6. Monitoring and Evaluation:

- Regular reviews of the succession planning process will be conducted to assess its effectiveness.
- Key performance indicators related to diversity, leadership development, and succession planning success will be established and monitored.

7. Review and Revision:

This Succession Planning Policy will be periodically reviewed and revised as needed to ensure alignment with organizational goals and evolving best practices.

8. Compliance:

[Your Organization's Name] will adhere to all relevant employment laws and regulations in the implementation of this succession planning policy.

2a. Learning Opportunities

Supporting new managers is crucial for their success and for the overall health of the organization. Here are various ways companies can help new managers:

1. Comprehensive Onboarding:

- Provide a thorough onboarding process for new managers that includes an overview of company culture, policies, and procedures.
- Introduce them to key team members and stakeholders.

2. Leadership Training:

- Offer leadership training programs that cover essential skills such as communication, decision-making, conflict resolution, and team building.
- Support ongoing professional development through workshops, conferences, and relevant courses.

3. Mentorship and Coaching:

- Pair new managers with experienced mentors or coaches who can provide guidance and support. (See next section.)
- Facilitate regular check-ins between mentors and mentees.

4. Clear Expectations:

- Communicate expectations for the new manager's role and responsibilities.
- Provide a detailed job description and performance metrics.

5. Regular Feedback:

- Establish a culture of regular feedback, both formal and informal.
- Conduct performance reviews and offer constructive feedback to help new managers improve.

6. Set Realistic Goals:

- Collaboratively set achievable short-term and long-term goals for new managers.
- Align individual goals with the overall objectives of the team and organization.

7. Networking:

- Teach new managers the importance of networking for their long-term success.
- Provide opportunities to invite new managers into existing mentor networks. (See next section)

2b. Mentoring and Sponsorship

Being an effective mentor or sponsor for an emerging leader is a rewarding and impactful role that requires a combination of leadership skills, empathy, and a commitment to personal and professional development. For the purposes of this document, a *mentor* is someone who shares knowledge and provides guidance. A *sponsor* is someone who actively promotes growth, provides access to opportunities at work, and/or advocates for career advancement. Here are some key principles and tips to help you be the best mentor or sponsor for an emerging leader:

1. Build a Strong Relationship:

- Establish open and honest communication from the beginning.
- Get to know the individual on a personal and professional level to understand their goals, strengths, and areas for improvement.
- Foster a sense of trust and mutual respect.

2. Set Clear Expectations:

- Define the purpose and goals of the mentorship or sponsorship.
- Establish a schedule for regular meetings and check-ins.
- Communicate the roles and responsibilities of both parties.

3. Provide Guidance, Not Solutions:

- Encourage critical thinking and problem-solving skills by guiding rather than providing all the answers.
- Share your experiences and insights but allow the emerging leader to make decisions and learn from them.

4. Offer Constructive Feedback:

- Provide timely and specific feedback on both strengths and areas for improvement.
- Frame feedback constructively and positively to promote growth.
- Encourage a growth mindset and the willingness to learn from mistakes.

5. Support Goal Setting:

- Help the emerging leader set realistic and achievable short-term and long-term goals.
- Assist in creating a development plan to work towards these goals.
- Celebrate milestones and achievements along the way.

6. Create Learning Opportunities:

- Facilitate exposure to new experiences and challenges.
- Encourage participation in relevant training programs, conferences, and networking events.
- Provide resources and recommend books, articles, or courses to enhance their knowledge and skills.

7. Advocate for Their Success (Sponsorship):

- Act as a sponsor by advocating for the emerging leader within the organization.
- Introduce them to key stakeholders and decision-makers.
- Provide opportunities for visibility and recognition.

8. Encourage Networking:

- Help the emerging leader build a professional network.
- Introduce them to industry professionals and colleagues.
- Encourage participation in industry events and networking groups.

9. Lead by Example:

- Demonstrate the values and behaviors you expect from them.
- Share your personal leadership journey, including challenges and successes.
- Model effective communication and interpersonal skills.

10. Be Flexible and Adaptable:

- Recognize that each person is unique, and mentoring approaches may need to be tailored to individual needs.
- Be open to adjusting your approach based on feedback and evolving circumstances.

11. Promote Diversity and Inclusion:

- Foster an inclusive environment that values diversity of thought and backgrounds.
- Advocate for opportunities that promote diversity and inclusion within the organization.

12. Measure Progress:

- Regularly assess the emerging leader's progress against their goals.
- Adjust the mentorship or sponsorship approach as needed.
- Celebrate achievements and acknowledge areas of improvement.

Being an effective mentor or sponsor requires a genuine commitment to the development and success of the emerging leader. By building a strong relationship, providing guidance, and creating opportunities for growth, you can play a pivotal role in shaping the next generation of leaders. Remember that mentorship is a dynamic process, and staying adaptable and responsive to the emerging leader's needs is key to a successful mentorship or sponsorship relationship.

2c. Mentors and Networking

Mentors can play a crucial role in helping emerging leaders develop and strengthen their networking skills. Networking is not only about making connections but also about building meaningful relationships and leveraging them for personal and professional growth. Here are ways mentors can assist emerging leaders in the realm of networking:

1. Introduce to Key Contacts:

- Mentors can facilitate introductions to their own professional network.
- Provide guidance on how to approach and connect with new contacts.
- Share insights about the people they are introducing, helping the emerging leader understand their background and interests.

2. Networking Events and Opportunities:

- Inform emerging leaders about relevant networking events, conferences, and industry gatherings.
- Offer guidance on how to navigate these events, including strategies for initiating conversations and following up afterward.

3. Model Effective Networking:

- Demonstrate effective networking skills during mentor-mentee interactions.
- Share personal experiences, including success stories and lessons learned from networking situations.

4. Provide Networking Strategies:

- Offer advice on building a personal brand and communicating effectively.
- Guide emerging leaders on how to articulate their goals and value propositions when networking.

5. Online Networking:

- Encourage the use of professional networking platforms like LinkedIn.
- Help craft a compelling LinkedIn profile and guide them on effective online networking etiquette.

6. Mentorship Within the Organization:

- Introduce the emerging leader to influential colleagues within the organization.
- Help navigate the internal dynamics and politics of the workplace.

7. Attend Networking Events Together:

- Invite the emerging leader to join you at networking events, providing a supportive environment for them to practice their skills.
- Offer guidance on how to approach various networking situations.

8. Build Confidence:

- Help boost the emerging leader's confidence in networking situations.
- Share stories of overcoming challenges and building connections over time.

9. Networking Skill Development:

- Provide constructive feedback on the emerging leader's networking skills.
- Offer tips for improvement and celebrate successes in networking efforts.

10. Teach Relationship Building:

- Emphasize the importance of building genuine, long-term relationships rather than focusing solely on transactional connections.
- Guide them on how to follow up with contacts, express gratitude, and nurture professional relationships.

11. Encourage Informational Interviews:

- Suggest conducting informational interviews with professionals in the industry.
- Help prepare questions and discuss strategies for making these interactions valuable for both parties.

12. Expand Their Circle:

- Encourage the emerging leader to diversify their network by connecting with individuals from different industries, backgrounds, and experiences.

Networking is an ongoing process, and mentors can provide ongoing support and guidance as emerging leaders continue to expand their networks throughout their careers. By sharing insights, offering opportunities, and providing constructive feedback, mentors contribute significantly to the professional growth and success of their mentees in the realm of networking.



DEI LAB #4: ADVANCING BLACK AND MINORITY TALENT

WORKSHEET: Tying The Advancement of Black and Minority

Talent To Business Strategy

WORKSHEET: TYING THE ADVANCEMENT OF BLACK AND MINORITY TALENT TO BUSINESS STRATEGY

Business mission and strategy

What components of our strategic mission are directly impacted by the presence or lack of diversity in key roles?

In what ways does increasing the diversity of our leadership team impact organizational sustainability?

WORKSHEET: TYING THE ADVANCEMENT OF BLACK AND MINORITY TALENT TO BUSINESS STRATEGY

Identifying needed perspectives

What perspectives are currently missing from our leadership team?

From where and when is the absence most notable?

WORKSHEET: TYING THE ADVANCEMENT OF BLACK AND MINORITY TALENT TO BUSINESS STRATEGY

Tools and resources needed for success.

What tools, resources and development programs are necessary for success? Which resources are available in-house? How will they be funded?

How will information about the programs be shared?

WORKSHEET: TYING THE ADVANCEMENT OF BLACK AND MINORITY TALENT TO BUSINESS STRATEGY

Accountabilities

What measures and metrics will be used to determine the success of our actions?

Who is accountable for results?

Succession Planning 2024

VP/SVP: _____

Position ¹	Emp. Currently Holding Position	Department	Potential Internal Incumbant ²	Comments on Development Needs	Leadership Skill Level [*]	Readiness Level ^{**}	Reason for your vote of confidence ^{***}

NOTES:

¹ = director level and above

² = If no internal incumbent at this time, write "external"

*Incumbant's current leadership skill level

1 = Little or no leadership experience

2 = Experience but could benefit from development

3 = Demonstrated Leader

**Incumbant's readiness level:

1 = Newly promoted or could assume role within 12 months if necessary/available

2 = Future Succession Plan = 1+ years of mentoring needed

3 = High Potential for Future - Important to retain

*** Participant in internal development or mentorship program

**** Ties to Which Strategic Goal?