

Keeping Top Talent on Track

Challenge:

Retain emerging talent within a multiaffiliate national organization

Approach:

Provide promising nonprofit leaders with a clear path and customized training to rise to CEO level

Investment:

\$175,000 over two years, as part of a \$500,000 project

Result:

Fifty-seven graduates to date on track to assume affiliate leadership roles within the organization

Players:

American Express, National Urban League

Adrienne Cochrane knew she was ready to take the helm of a nonprofit—if not with the National Urban League, then somewhere else. But while many nonprofit executives in Cochrane’s position are forced to leave their organizations to find advancement, she became one of the first participants in the League’s new Emerging Leaders Program—and the first in her class to assume the CEO role at one of the League’s 97 affiliates nationwide, the Urban League of Greater Hartford.

“I was in a senior management role at an affiliate in Florida and wanted continuing coaching and growth, but most programs were cost prohibitive,” Cochrane says. “I was looking for growth, for a new spin on old concepts, for someone to update my skills. I was looking to be challenged.”

Fortunately for Cochrane, the Urban League’s Emerging Leaders Program delivered just what she was looking for.

The Emerging Leaders Program originated from an existing four-day executive leadership program that the League developed to help sitting CEOs develop core leadership competencies. The

League’s Board Chair John Hofmeister noted that there were a number of CEO vacancies at affiliates. Many of the affiliate presidents and CEOs were baby boomers, and as they began to retire, their potential replacements were viewing the CEO position through a different lens.

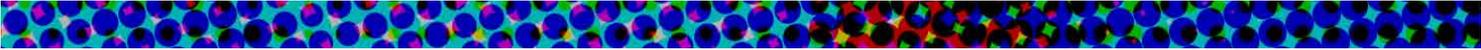
“An affiliate CEO wears lots of hats and bears a great deal of responsibility,” says Wanda Jackson, National Urban League’s senior vice president of human resources. “They forge deep ties with the communities they serve. Some of our potential leaders weren’t prepared for a long-term commitment and had moved on to other sectors. Others, like Adrienne, wanted more skills development. In either case, many of our younger leaders were not seeing the Urban League as an ultimate destination and were not realizing the opportunity there.”

The League worked with Duke University to develop a six-part leadership competency model that has served as the cornerstone for training more than 50 current affiliate CEOs. But what about filling the empty seats? How could the National Urban League help

Why Invest in Talent Retention?

“We are a company that values the work of the nonprofit sector in communities where we operate. If we’re going to heavily invest in organizations that support our markets, it’s critical that we have rising leaders who are going to lead effectively and stay engaged and committed to those organizations. It bolsters our investment in community.”

— Richard Brown, American Express



In Their Words:

"I came to the CEO seat for a purpose, not a position. I really do embrace the mission of the League, and it takes dedicated people who are willing to stay the course."

— **Adrienne Cochrane**
CEO
Urban League of
Greater Hartford

more rising leaders feel prepared and eager to assume top roles at its affiliates?

"The National Urban League is a critical organization in communities, and there is a long history of partnership between the League and American Express," explains Richard Brown, vice president of philanthropy at American Express. "We have made it a corporate commitment to help nonprofit organizations develop their emerging leaders, and therefore we approached the League to determine whether they'd be interested in developing an initiative that would align with our giving theme and support their affiliate network."

"It was easy to make the case for the Emerging Leaders Program to American Express, partly because we'd already done work on a broader leadership initiative with them," says Jackson. "In our conversations, it became obvious that we needed to support and retain the next generation of talent, and that we needed to look to that next level to sustain our affiliate organizations."

In 2010, the League welcomed the inaugural class of 18 rising leaders to the Emerging Leaders Program, with funding support from American Express.

American Express provided guidance and advice in developing the program and establishing metrics for success. The National Urban League marketed the opportunity to rising leaders, their CEOs and to members of the League's Young Professional's group, an auxiliary volunteer group that is considered a precursor to board service at affiliates.

During the 12-month program, participants meet for four sessions that focus on the six sections of the leadership model. They also travel to Washington, D.C., with current CEOs to talk with members of Congress and attend the National Urban

League's annual Legislative Policy Conference, take part in behind-the-scenes fund-raising and marketing aspects of the Equal Opportunity Awards Day Dinner in New York (the League's biggest fund-raiser) and attend the League's annual Whitney M. Young, Jr. Urban Leadership Conference and the League's national conference.

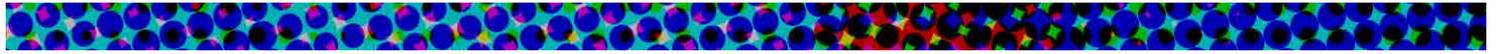
"It's hands-on in every area you would touch as a CEO," explains Cochrane. "We did a number of inventories designed to assess our leadership styles and personality traits. I discovered that how I self-assessed my own leadership attributes was in some cases dramatically different than what the inventories showed. That gave me pause, and I examined what I might do differently as a leader moving into a number-one position."

"In terms of the leadership model, one area of growth for me was in the business and financial area. It certainly boosted my acumen, and I know I can always follow up for more information. I've always been intellectually curious. Now I have a base from which to springboard to other resources and examples."

"I also loved the team building. My favorite part was the pit crew: We actually had a real race car and simulated the arrival in the pit, the tire changes and getting the car back out on the track. We had to identify who was best to do different jobs. It was a great example of seeing natural leadership emerging."

Cochrane says that the team building also helped her gain new perspective on her own leadership style. "It's made me much more aware of what I'm sending out in terms of message and how it's being heard."

The training also included discussion and exercises around such issues as competing priorities, which can be different for NUL employees and the Young Professionals group.



"It's been interesting to figure out how to forge synergy between those who are volunteers and those who are employees," says Jackson. "They are all open to working together, but they have very different perspectives. Sometimes it's hard to figure out how to talk about what's going on so that everyone gets it, but we've worked to develop a curriculum that strengthens them all as leaders and helps them connect the dots."

Learning Beyond Just One Leader

"One thing really good about the Emerging Leaders Program was that it provided an opportunity for me, as a senior manager, to reach back to someone in a mid-level position at my affiliate to help them grow as well," says Cochrane. "Our CEO encouraged both of us to participate with the intention of us both moving up. That person was a director of one program area and is now VP of programs."

Cochrane says that at her affiliate, there was complete transparency about the intention of moving up. "The CEO of an affiliate actually gets the information about the Emerging Leaders Program first, so it's up to

them to promote it. The affiliate has to make the commitment. Our CEO partnered with staff to make this opportunity available."

While the Emerging Leaders Program is a huge stepping stone, it doesn't undermine the quality controls that the National Urban League has put in place to vet CEO candidates. "Just because I went through the program doesn't mean I got the Hartford job, but it hastened it, and it gave me the impetus to seek that position," says Cochrane. "The entire application process is common to all of the NUL affiliates, and there's also a certification process. Each affiliate can only hire CEOs who are certified by the national process."

Standing the Test of Retention

"After I participated in the Emerging Leaders Program, I had an opportunity to go elsewhere, but I stayed with the Urban League," admits Cochrane. "The other opportunity was attractive, but I turned it down because I felt like I wasn't finished with my work at the League. My last chapter hadn't yet been written. I came to the CEO seat for a purpose, not a position. I really do embrace the

mission of the League, and it takes dedicated people who are willing to stay the course. The feel-good is the challenge of creating impact in a way that we can document and that will leave a positive legacy. Eventually, I'll hand off something better to someone else to take to new heights. I'm proud of my career."

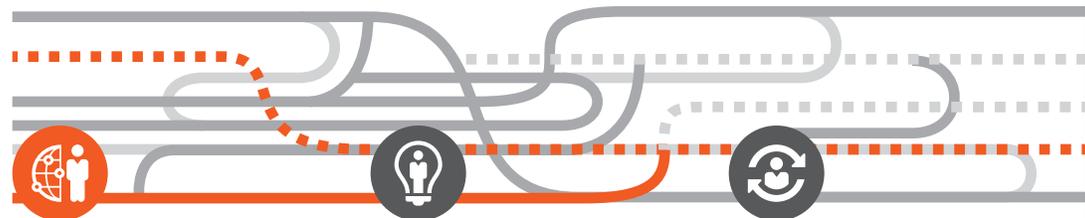
Cochrane was the first of her group to make the CEO spot. By 2011, 50 percent of the cohort had been interviewed or hired for senior positions. A half dozen have been promoted. "It's true that promotions are a good barometer of the talent we have available, but the great thing is that the talent is there even if they haven't been promoted yet," says Jackson. "Our Emerging Leaders graduates have also been expanding their roles within their existing jobs and beyond. One is now a regular leadership blogger. Another has written numerous opinion pieces for local media. Two Young Professionals members are now TV commentators. This program is helping us develop talent at all different levels."

"We're pleased to see how this program has boosted the Urban League's ability to retain its talent,"

The Nonprofit Talent and Leadership Development Pipeline

"Retention" is just one of seven stages in the nonprofit talent and leadership development pipeline identified by Emerging Practitioners in Philanthropy. Each stage of the pipeline offers myriad ways for funders to support the future of the nonprofit sector. Learn more about each stage at:

epip.org/genchange



Filling the leadership pipeline

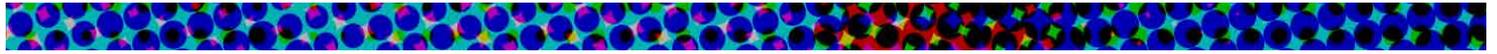
- Recruitment
- Retention

Developing and harnessing leadership talent

- Development
- Realignment
- Renewal

Transitioning and reengaging seasoned leaders

- Succession and transition
- Reengagement



says Brown. “We particularly liked that we could see how an organization of this size and breadth could take advantage of a program like this to provide a pipeline of talented leaders.”

Lessons Learned

- **Retention requires a deliberate approach.** “The National Urban League was very deliberate in using this effort to build their internal pipeline,” says Brown. “They took careful steps to use training to support both individuals and their organizations with opportunities to move up. They recognized that training programs aren’t just important for developing the talent that’s currently in place but also important for developing the pipeline of leaders. They wanted to make sure that as older leaders retire, the next generation has appropriate skills and experiences. Many organizations miss that point.”
- **There is no one-size-fits-all program for retention.** Despite the success of the National Urban League, American Express recognizes that each grantee has different goals and objectives. It’s important, says Brown, to be clear about the reason for leadership training and the end goal.

- **Measure impact six months or more after a retention program ends.** American Express works with a range of leadership development programs and, at a minimum, collects pre- and post-surveys to gauge impact. Even better in their opinion, however, is a follow-up six months or more after a program is completed to assess any changes in work that can be applied directly to program participation. The ultimate goal is to achieve behavioral change, which rarely manifests itself immediately after a program ends. Longer time frames also provide better data on retention.
- **Success requires buy-in from the entire organization.** “We secured buy-in at our board level by including information about our program in the board report, presenting the concept clearly and continuing to share information and statistics,” says Jackson. “But we had to convince those at the CEO level, too. We had some early adopters who had had good experiences in executive training programs themselves. Their word of mouth helped market the program, and we’ve seen growth in applications in terms of both number and variety of affiliates.”

Changing Aspirations

As part of its evaluation, the National Urban League asked Emerging Leaders Program participants about their aspirations, both before and after their ELP experience. Among the most notable responses:

- Those who said that they aspired to be CEO of a NUL affiliate rose from 12 percent to 48 percent.
- Nine percent aspired to become president of the national organization after participating in the Emerging Leaders Program.

Learn More

Find out more about how foundations are supporting retention for nonprofit leaders at:

epip.org/genchange
nul.org

about.americanexpress.com/CSR

This case study is part of **Generating Change**, an initiative designed to illuminate, inspire and activate the funding community to invest in talent and leadership development in grantee organizations, across networks and sector-wide. Generating Change is an initiative of Emerging Practitioners in Philanthropy, a project housed at the Tides Center. Founded in 2001, EPIP builds extraordinary new leaders for foundations and the communities they impact.