People Pathways

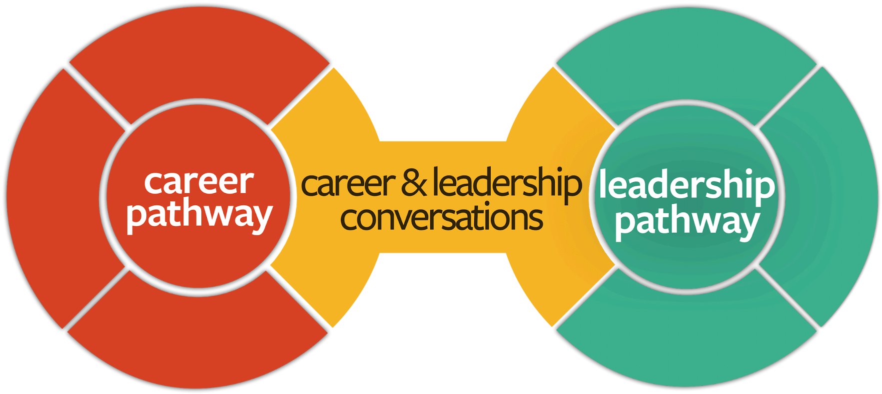
Facilitator Guide

Contents

This document particularly focused implementation of People Pathways with the structure of Campus Crusade for Christ International, so some adaptation will be required to 'fit' with organizational cultures and structures outside of CCCI.

NOTE: In CCCI our people functions primarily come under Leadership Development & Human Resources (referred to as LDHR in this document.

***LDHR** stands for Leadership Development & Human Resources, and is the primary facilitator of this process within CCCI*



People Pathways

(Introduction)

People Pathways includes two distinct yet related pathways that help us match the career path of our staff with the leadership needs of the organization. These two pathways are: **Career Pathways** and **Leadership Pathways:**

- The focus of **Career Pathways** is helping ensure the best fit and maximum fulfillment for the individual staff member (the career path of the individual).

- **Leadership Pathways** focuses on filling the current and future leadership needs of the organization with the right person in the right role at the right time (including potential leaders with leadership needs).

The facilitator (LDHR* for CCCI) plays an important role in helping facilitate, resource and monitor both of these pathways.

This User Guide is a resource for the facilitator of these processes. It contains detailed information and suggestions for implementing the processes that are not intended to be prescriptive, but a resource you can turn to for guidance if you get stuck in the implementation of the pathway or nedd further information.

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Career Pathways

Career Pathway Planning is the process used by an individual to chart a course within the organization for his or her career development. It helps ensure that the individual is able to identify potential good 'fits' for them in the organization and initiate developmental steps to be equipped for those roles.

The Career Path Planning process is centered around the **Career Pathway Map**, which is designed as a tool to help a person **KNOW** their God-given design and desires, **DISCERN** their best contribution and **PLAN** their growth and development for greater fruitfulness in both their current and future roles.

KNOW: Gain a clear understanding of how God has made you and the burdens He has put on your heart (including gifts, strengths, abilities, personality type, passions, burdens and God's calling/leading).

DISCERN: Evaluate and identify what you believe would be your best contribution as you seek to serve Him (including clarity on your personal mission, a description of your ideal role, and exploring the available options).

PLAN: Plan action steps for further areas of development for greater fruitfulness in your current role and/or equipping you for a future role.

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Facilitator’s Role

Provide staff with necessary resources and assist the staff member gather, assess, interpret and apply relevant feedback from others, incorporate the feedback into their Career Pathway Map and plan effective developmental steps.

Though the Career Pathway Map is designed to be easily used by an individual to help plot their potential career path, the facilitator can play an important role in helping gather information and guide them through the process.

The facilitator’s role includes…

- Assist the staff member with the gathering of feedback.
- Help objectively assess and summarize the input from the Peer feedback Sheets.
- Help them summarize God’s design and desired for them.
- If needed, help suggest possible ministry options for them to consider
- Help coach them in creating developmental action steps.
- Brief and resource the person who will be coaching.

Implementation Suggestions

Some countries have begun implementing a Career Pathway Process as a system provided ans monitored by LDHR* . Specific implementation of the process varies slightly depending on need, circumstances and the developmental stage of the country, but following are some implementation suggestions for a Career Pathway Process for you to consider.

Scope of the Career Pathway Process:

Different countries target different groups of people to enter the process. Here are three models that are being used:

- Staff who are seeking clarity for their future direction and may be considering a change (staff who are wanting a new challenge or may be feeling a little stagnant in their current role) are encouraged to connect with the Career Pathway Process Facilitator and enter the process. In this model, entry into the process is on a volunteer basis (usually with the individual staff

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member initiating the process - though perhaps with the encouragement or prompting of their leader/friends).
- In some countries, the process is mandatory for all staff who have been serving for a determined number of years (e.g. 7 years). This is normally set at a period where the friends show a high number of people transitioning out of the organization or to different roles within the organization,
- In some cases, the process is mandatory for all staff who are known to be considering a change or who are considered to be potential leaders by the organizational leadership.

Implementation of the Career Pathway Process:

These are general guidelines for implementing the process:

- The facilitator provides the Career Pathway Map to the staff member who is entering the process and instructs them to prayerfully complete all three sections.
    - If the process is on a voluntary basis (model 1 above), the Career Pathway Map is distributed upon request.
    - However if models 2 or 3 are used, the facilitator will need to have an information tracking system in place to know who to initiate the process with ans when to do it.
    - A letter should be prepared introducing the process, welcoming them to join it and providing clear instructions on how to proceed.
- The individual provides a list of people they would like to receive feedback from (people who they respect and who know them well) along with their contact information - you may want to require a specific number or category of people giving feedback. The facilitator then connects with each person and gather their feedback.
    - Each person is sent a message explaining the process and inviting them to give feedback for their friend using the Career Feedback Sheet.
    - The should be instructed how and when to return the completed Career Feedback Sheet.
    - If the feedback is not submitted by the stated deadline, the facilitator will need to proactively chase it down.
- The facilitator compiles a summary of the feedback (noting clear patterns and other helpful insights).
- An appointment is set up with the individual who is going through the process (preferably face-to-face, but it can be done virtually if needed).
    - The individual needs to have completed their Career Pathway Map and (if required) sent it to the facilitator before the appointment if personality assessments or gift inventories will be used, they should also have been completed.
    - During the appointment, the individual shares their completed Career Path Map with with the facilitator and the facilitator share the summary of the Career

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Feedback Sheets with them. Valuable feedback from the feedback sheets can be added to the person's Career Pathway Map.
    - The facilitator helps them summarize God's design and desires for them and. If needed, helps them refine their personal mission statement. The facilitator also helps suggest possible ministry options chart.
    - Finally the facilitator coaches them in creating developmental action steps that are specific, measurable, attainable, realistic and timely (SMART), and instructs them to share with their team leader/coach to assist them in the implementation.
- The facilitator Briefs and resources the person who will be coaching them through the successful completion of their development plans (their team leader will, in most cases, be directly involved in coaching them in the implementation of their action steps).

Follow-through of the Career Pathway Process:

The facilitator keeps a copy of the finalized Career Pathway Map and coordinates/tracks the action step progress with the individual's team leader. A good reporting and database sgtructure will need to be set up to help facilitate this.

Tools and Resources

The main tool for Career Pathways is the Career Pathway Map. An effective archiving system and Human Resource information System is also helpful for implementing the Career Pathway Process. Here are specific tools you can use for each section in the Career Pathway Map:

KNOW:

- Tools/Resources:
    - Career Pathway Map
    - Bringing Clarity to Calling document
    - Peer Feedback Sheet
    - Career Path Flowchart - one country's model

DISCERN:

- Tool/Resources:
    - List of job options provided by the organization

PLAN:

- Tool/Resources:
    - SMART Goals

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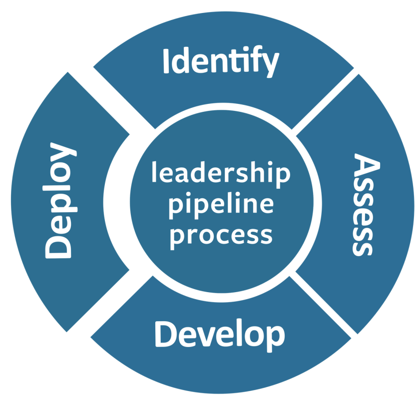
Leadership Pathways

The Leadership Pathway Process seeks to ensure the adequate flow of the quantity and quality of leaders needed for the increasing needs of the organization (matching and equipping potential leaders for leadership needs). It makes up the first three steps of the Leadership Pipeline Process (see diagram below).

Note: *The fourth step of the Leadership Pipeline Process is to* ***deploy*** *qualified leaders into the leadership role. This step marks a distinct shift from regular annual cycles that broadly identify, assess and develop potential leaders; to, as the need arises, selecting/deploying a specific leader and ensuring they can enjoy a fruitful transition to their new role. This step is covered separately in the Leader Transitions Toolkit. (see leadertransitions.org)*



The Leadership Pathway involves a regular cycle of two annual meetings (Leadership Strategy Meeting and People Meeting) and a developmental process (Staff Development Cycle) , which help ensure a continual flow of leaders to meet leadership needs. The three steps in this pathway are: **IDENTIFY** what leaders we need, **ASSESS** what potential leaders we have and **DEVELOP** them to effectively fill the leadership needs.

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IDENTIFY: Prepare for and conduct an annual Leadership Strategy Meeting (in conjunction with the annual Strategic Planning Cycle) to think strategically about leadership, and gather accurate information about current and future leadership needs. It seeks to answer the question, “What leaders do we need?”

ASSESS: Gather and prepare information needed for the annual People Meeting implementing the meeting and ensure good follow-through of the meeting. This step seeks to answer the question, “What potential leaders do we have?”

DEVELOP: Suggestions for needed developmental action steps from the People Meeting need to be communicated, finalized and implemented with the assistance of a coach, and the progress must be tracked and monitored.This seeks to answer the question, “What equipping does the potential leader need?”

Facilitator’s Role

Facilitate the strategic identification of leadership needs, assist in gathering and summarizing data needed for the People Meeting, facilitating the meeting (if required), and tracking the completion of developmental action steps.

Leadership Pathway consists of three distinct steps which help ensure a continual flow of leaders to meet the leadership needs of the organization. We will look at the facilitator’s role in each step:

IDENTIFY:

- Gather relevant leader need information in preparation for the annual Leadership Strategy Meeting.
- Facilitate the Leadership Strategy Meeting (if required).

ASSESS:

- Compile a list of potential leaders to be reviewed during the People Meeting.
- Gather a completed Leader Profile for each person to be reviewed.
- Distribute relevant information to the People Meeting team members.
- If requested, act as facilitator of the People Meeting.
- Be prep[ared to provide additional information during the Meeting if needed.
- Ensure that the meeting results and action steps are accurately recorded and archived.

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- Ensure that responsibility for completion of action steps is clearly assigned/delegated.

DEVELOP:

- Communicate the People Meeting results and developmental action step suggestions to the potential leader
- Encourage and resource the person's team leader rto help coach them.
- Track and record action step progress to completion.

Implementation Suggestions

Specific implementation of the process may vary depending on need and circumstances, bu the following are suggestions for implementing Leadership Pathways. LDHR* monitors and helps facilitate the process.

IDENTIFY

Desired outcome *- engage the leadership team in assessing and generating a concise list of strategic leadership needs (both current nad future) which includes both the number (quantity) of leaders needed by their specific roles as well as the non-negotiable skills/mindsets (quality) necessary for each needed leadership role.*

The main venue for accomplishing this is the annual Leadership Strategy Meeting:

- Set aside at least one National Leadership Meeting a year as a Leadership Strategy Meeting to think strategically about and identify leadership needs.
    - Leadership needs will ideally be clearly identified during the annual Strategic Planning Process, however, even if that process is incomplete, you can use a simpler, less detailed process during the Leadership Strategy meeting.
    - Use the Leader Need Worksheet to identify current and future (3-5 years) leadership needs.
        - Work through the leader needs (use the strategic questions to help stimulate strategic thinking. There are at least three categories to consider:
            - Current Leaders needed: key leadership positions that are currently vacant and for which no replacement plan is already being implemented.
            - Leaders needed because of succession: list leaders you know of who will be stepping out of their leadership role because of promotion, retirement, resignation, termination or change of assignment (e.g. transfering to

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    Seminary Staff, international mission, etc.)
    - Leaders needed for expansion plans: this information will often be available through the National or MCC Strategic Plans (e.g. if SLM plans to open up to 10 new staff campuses in the next 2 years, then 10 new team leaders may need to be selected and equipped to meet that need)
- For each leadership position needed, include 3 or 4 unique skills/mindsets which are necessary for a leader to be successful in that specific role
    - These should be unique skills/mindsets required for the specific role, not generic leadership qualities that we expect every leader to demonstrate
    - The more specific, clearly defined and measurable these competencies are, the easier it will be to determine the best fit/match
- Make a prioritized list of the top 10 leadership position needs along with the key skills/mindsets needed and the desired date for filling each position.
- Brainstorm possible people that may be ready now or have potential to fill these needs in the future.

Timeline: An annual Leadership Strategy Meeting should be conducted as part of the Strategic Planning Process (generally at the end of a ministry year for the next ministry year, and preferable several months before the annual People Meeting). 2-3 hours should be scheduled for the Leadership Strategy Meeting at least once per year.

Key Tools & Resources:

- Leader Needs Worksheet
- Using Job Descriptions

ASSESS

Desired outcome *- engage the senior leaders in assessing potential leaders to finalize a list of potential leaders, their best potential leadership role fits, suggested steps for development and a proposed timeline for them to enter the leadership selection process.*

Preparing for the People Meeting:

- Review our leader needs and the 3 or 4 unique skills/mindsets which are necessary for a leader to be successful in the specific role (from the identify step - Leader Needs Worksheet)
- Determine who have the "might be ready now" or have high potential to fill these leadership needs
    - Filter potential leaders based on their current readiness or potential, and select the ones to be evaluated during the People Meeting

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        - The information needed to help determine which staff might be ready or have potential for higher leadership may come from:
            - The annual Leadership Strategy Meeting - brainstorming by the National Leadership Team members to produce a list of people they feel may be ready for greater leadership now and those they feel have potential to meet leadership needs
            - Regular information communicated from the team leaders through existing processes (e.g. the Staff Development Cycle)
            - A specific or annual request to team leaders and/or ministry heads to provide a list of team members whom they feel are ready for greater leadership and those they feel have potential to lead 1-2 levels above their current role within the next 2 years.
    - Ensure that the final list of potential leaders to be evaluated during the People Meeting is limited to 5 - 8 people so adequate time can be given to discuss and evaluate each one. You are looking for people who:
        - demonstrate very good or exceptional performance in their current role and…
        - have high potential to lead at a higher level (e.g. 1-2 levels above their current role within the next 2 years). Indicators of potential include:
            - their degree of alignment with our organizational values and desired culture
            - their growth in and demonstration of our leadership competencies (Heart, Relationships, Roles, Responsibilities and Results of a leader)
            - their desire and willingness to serve st s higher level of leadership
            - their sense of calling and long term commitment to our mission
            - other issues or circumstances that might affect their ability to take on a higher leadership role
    - Gather relevant information on each potential leader to be evaluated in the People Meeting
        - Two months before the People Meeting ask the team leaders of those who will be evaluated to fill up the Leader Profile
        - Ensure they return the completed sheet to you by a determined date
    - Distribute the Leader Profiles and the Leader Needs Summary (from identify step) to Leadership Team members before the meeting and instruct them to do a preliminary assessment of those being reviewed before the meeting

Conducting the People Meeting:

- Set the stage for the People Meeting purpose, guiding principles and flow (15 min)
    - The purpose of the People Meeting is to help us achieve our ministry goals and fulfill our mission by:
        - Identifying staff with high readiness or potential to fill our leadership needs for

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movements everywhere
        - Assessing the best possible role fits to ensure we have the right person in the right role at the right time
        - Initiating an action step to help ensure the potential leaders are equipped for leadership
    - Guiding principles for the People Meeting could include:
        - Each Leadership Team member in the meeting needs rto fully and enthusiastically engage in the discussion
        - Honestly discuss each person's strengths and areas of concern - the team will consider things shared as confidential and not to be shared outside the room
        - Thoroughly and objectively discuss each person, but do not over complicate it
        - Suggestion: begin with the person on the list who the team feels is the most ready or has the highest potential - this will help establish a benchmark by which other potential leaders can be compared
    - Communicate the flow of the meeting and general timeline
    - Pray for God's wisdom and guidance
- Discuss each person being reviewed (30 - 40 minutes per person)
    - Use an assessment tool (e.g. the Leader Profile or more detailed 9 box Performance/Potential Matrix) to help determine readiness/potential (15 min)
        - Just assessing a person based on performance in their current role is not enough and can result in the "Peter Principle" (promoting a person to the level of incompetence)
        - We need to also assess a person's potential for success at the next level
        - This includes looking both at their faithfulness/fruitfulness in their current role as well as their potential to succeed at the next level.
        - *Note: the Leader Profile information can be discussed and it includes a column for leaders to fill up during the People Meeting*
    - For those who are ready oer have high potential, suggest best potential leadership fits (5 min)
    - Identify developmental needs and recommend key developmental assignments (10 min) - areas to consider for development may come from:
        - Skills/mindsets needed for the leadership role) Leader Need Worksheet Summary) - are their strengths, interests and skills in line with the required skills/mindsets for the position they may be considered for?
        - Leadership characteristics assessment (Leader Profile) - do they demonstrate growth and a degree of effectiveness in the leadership characteristics valued by our organization.
        - Leadership turns mindset/ skillset shifts (Leadership Turns Overview) - each level, so are they able to make necessary adjustments to successfully complete the next "turn"?

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    - Suggest a proposed timeline
- Determine a follow up plan for action steps from the People Meeting (15 min)
    - Record and archive the People Meeting Action Steps
    - Appoint a facilitator to be responsible for the tracking of the action steps progress

NOTE: The People Meeting is not a "placement" meeting and therefore should not undermine your existing placement process. While potential leadership roles may be discussed as a future consideration for a person being evaluated, the primary role in mind or not.

Follow through of the People Meeting (much of the follow through will relate directly to the Develop step), but here are some general areas of implementation.

- Make sure the results of the meeting and meeting action steps are accurately recorded and archived
- Assign/delegate responsibility for completion of action steps
- Track and report the progress

Timeline: Begin to gather and sort the information at least two months before the People Meeting. A minimum of 3-4 hours should be scheduled for the People Meeting (depending on the number of people to be reviewed) at least once per year.

Key Tools & Resources:

- Leader Profile
- People Meeting Summary Sheet
- Leadership Turns Overview Chart

DEVELOP

Desired outcome *- developmental action steps suggested in the People Meeting are effectively communicated, personalized, refined, followed through and tracked to completion.*

- Track Progress using the People Meeting Summary Sheet or a People Meeting Action Step Tracking Spreadsheet
    - If a spreadsheet is used, complete the spreadsheet in or shortly after the meeting (within 24-48 hours) using the Summary Sheet/notes from the meeting
    - Set up a racking/reporting structure

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- Design a communication plan to encourage and/or give feedback to individuals
  - Communicate the relevant outcomes of the meeting and suggested development action steps to those potential leaders who were reviewed in the People Meeting
  - Communicate with the team leaders and/or others who will be coaching the potential leader and helping them complete a targeted development plan. The team leader/coach needs to:
    - Ensure the developmental plan are personalized, refined and included in the person's Position Focus as a key developmental assignment or personal development plan
    - Coach the person in developing and implementing plans with SMART goals
    - Track and report progress
- Set up a reporting process for tracking development progress and make mid-course corrections as necessary
- Make regular progress reports to the Leadership Team as required
- Note: if all (or many) of the potential leaders have similar developmental needs, you may want to gear your regular leadership development processes to meet those needs, or design a special developmental process (e.g. Emerging Leader Training)

Timeline: Beginning immediately after the meeting and ending at a predetermined time and/or the satisfactory accomplishment of the action steps (generally within a one year period).

Key Tools & Resource:

- Position Focus - Key Developmental Assignment
- People Meeting Action Step Tracking Spreadsheet

Advanced Tools and Resources

The Implementation Suggestions section above includes basic tools for you to use for the Leadership Pathways Process. The tools and resources there are designed to be as simple and user friendly as possible, and they represent the minimum requirement for implementing the process. If you find these resources are too simple or do not meet your needs, in the section we will introduce some more advanced tools and resources that provide more depth and detail, and could help provide greater effectiveness in the process. We will briefly present the advanced resources here (you may want to download the referenced documents for a more detailed explanation).

Identify Step:

The Strategic Planning Process is designed for developing a holistic National or Ministry strategic plan. Many principles can also be used to help provide a framework for a Leadership Need

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Strategic Plan

- Tools & Resources:
  - Strategic Planning Process template and guidelines (Appendix 12)

Assess Step:

A tool that is widely used and found helpful by many companies during their People Meeting to often referred to as the 9 Box Performance/Potential Matrix.

- Tools & Resources:
  - 9 Box Performance/Potential Matrix template
  - 9 Box Performance/Potential Matrix explanation
  - 9 Box Performance/Potential Matrix Powerpoint (Appendix 15)

Leadership Pipeline Process:

A longer, more focused time in a retreat setting may be helpful to train the leadership team in the process and create/support a new assessment culture. Some have found a two or three day model very helpful.

- Tools & Resources:
  - Leadership Pipeline Process Guidebook (Appendix 16)

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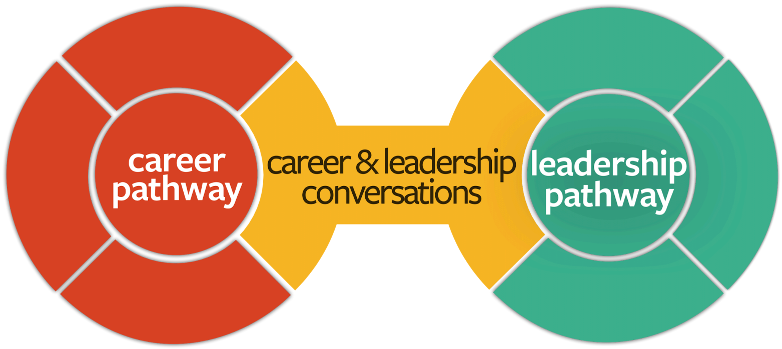

Career and Leadership Conversations

The bridge between Career Pathways and Leadership Pathways are career and leadership conversations that occur primarily between the individuals and their team leader. The team leader engages the staff member in intentional conversations about their ministry and developmental focus their current performance and their future career path. These conversations can be done in conjunction with the Staff Development Cycle which provides for these focused conversations each year to review the team member's performance, development and leadership potential.

The team leader and/or facilitator also represents the national ministry in helping communicate ministry/leadership opportunities to the team member (including follow through of the People Meeting).

Facilitator's role

Resource, motivate, equip and track the team leaders for career and leadership conversations, and communicate ministry/leadership opportunities to staff seeking a possible move.

Though Career & Leadership Conversations occur primarily between the individuals and their team leader, the facilitator can play an important role.

The Facilitator's role includes…

- Resource, motivate and equip team leaders in effective conversations:
    - Provide resources and motivation for the Staff Development Cycle

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    - Set up an annual cycle/timeline for everyone to complete the Staff Development Cycle. The facilitator tracks and monitors the process.
    - If necessary, the facilitator can provide basic conversation/coaches training for the team leaders
    - Collect relevant information from these conversations (Staff Development Cycle Review Conversation Summary Sheet)
- Archive the Review Conversation Summary sheets and ensure relevant information is uploaded into your LDHR Database/Human Resources Information System (HRIS)
- Request for other necessary information as needed (e.g. Leader Profile Information)
- Set up and maintain a communication system to inform staff of current and future ministry/leadership needs and opportunities.

Tools and Resources

The main tools and resources for the Career and Leadership Conversations are resources from the Staff Development Cycle as well as good interpersonal relationship and communication skills.

- Tools & Resources:
    - Staff Development Cycle resources
    - Basic Coaches Training
    - LDHR Communication system
    - LDHR Database/Human Resources Information System (HRIS)

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