

Foundation Strategies for Attracting and Managing Talent

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Discussion Guide

This discussion guide is designed to help you think through the concepts presented in Nadya Shmavonian’s paper, *Foundation Strategies for Attracting and Managing Talent*, and consider how you might apply them in the everyday practice of philanthropy. The guide has four components: a tool to define the most important competencies for a program professional position; a questionnaire to help plan professional development, performance differentiation, and transitions for program officers; a “thought experiment” on transitions; and a management case study. The exercises are designed primarily for groups, but can also be used by individuals.

1. Attracting Program Professionals

This is an exercise for foundation staff and senior leaders who are embarking on a search for a program professional. Since so many foundations work in teams now, this is ideally an exercise for everyone who is involved in the hiring process to complete. *Before* the position description is developed, each member of the team should independently provide an ordinal ranking for each of the 14 competencies, with 1 being the most valued and 14 being the least. Each competency should receive a ranking, and no number should be used twice.

Passion/advocacy	_____
Objectivity	_____
Analytical skills	_____
Interpersonal skills	_____
Academic specialty	_____
Results orientation	_____
Strategic focus	_____
Ability to listen to others	_____
Individual expertise	_____
Teamwork & facilitation skills	_____
Strength of external networks	_____
Internal leadership & management	_____
Program vision	_____
Attention to detail	_____

The team members should combine their scores for each competency (i.e., add all scores for passion/advocacy, add scores for objectivity and so forth), and develop a master ranking of valued competencies for the position. Based on the scores, and looking at the top rankings, the group should collectively identify or describe the ideal candidate. The team can discuss:

- What do the rankings suggest about the person's preferred experience?
- Where might they lead you to search more intensively?
- Where did team members differ most in their rankings?
- Have you given high priority to both sides of the continua discussed in the paper? Shmavonian suggests that effective program officers often encompass the competing qualities at both ends of these continua. What are likely to be the challenges in managing an individual with these qualities?

Passion/advocacy -----Objectivity
Analytic skills -----Leadership and interpersonal skills
Academic specialty -----Results orientation
Strategic focus-----Ability to listen to others
Individual expertise -----Teamwork and facilitation skills
Strength of external networks -Internal leadership and management
Program vision-----Attention to detail.

Finally, have each person in the team develop his/her own specific interview questions for prospective candidates that probe the top 5 to 7 competencies. The interview questions should be very directly linked to the specific competencies the team has identified.

2. Management and Development

This exercise looks at professional development, performance differentiation, and managing transitions. It is directed toward managers, and should be conducted for each program professional reporting to the manager.

For each staff member, the manager should consider the following questions:

- What is the expected tenure (approximately) of a given program officer?

- Do you expect this individual to remain with the foundation indefinitely, or do you (and the individual) have other expectations of his/her tenure?

A. If the answer to the above question is that you expect an indefinitely long tenure:

- How will you recognize and motivate this employee for top performance? What tools are available to you in this regard? (e.g., recognition, promotion, compensation)
- How will you ensure that the program officer will maintain and expand his/her networks?
- How can you work with the individual to guard against limiting program/organizational biases that may arise over time?
- What plans should you put in place to ensure continued growth and development for a long-term tenure? For example:
 - promotional opportunities
 - educational opportunities
 - management development
 - professional standing through publications and/or public-speaking opportunities
 - external growth opportunities, such as serving on boards or other volunteer activities.
- Have you encountered challenges in accomplishing these tasks with past or current employees? What are some examples? When have you done a great job with these tasks?

B. If the answer is that the individual's tenure will be time-limited:

- Have you and the program officer discussed his/her expected tenure? If not, do you have a plan for doing so?
- What are your goals for the program officer's work before he/she leaves the foundation?
- What are reasonable developmental goals for this individual before he/she leaves the foundation? How will these goals be realized in a developmental plan?
- How will you and the foundation work to ensure that this individual's portfolio of grants and contacts—both experiential and relationships—will be transferred responsibly to a successor?

- What are essential elements of this individual’s knowledge and experience that must be captured by the foundation before he/she leaves?
- Have you encountered challenges in accomplishing these tasks with past or current employees? What are some examples? When have you done a great job with these tasks?

3. Managing Transitions

This exercise for foundation staff and senior officers offers two “thought experiments” to plan transitions for staff to new positions within or outside the foundation.

A. Team members should think of a time when a program officer moved on to a job outside the foundation, or to another role inside the foundation, at just the right time.

- Why did that work?
- How did it happen?
- What can you extrapolate from that experience?

B. Team members should think of a time when a staff member was in his/her role for too long—either for the individual or for the program.

- What were the warning signs and blind spots?
- With 20/20 hindsight, what could have been done differently?

4. Management Case Study

The ABC Foundation has a staff that includes approximately 15 program professionals working in five major thematic areas. The foundation currently places a high value on “teamwork,” as historically the organization has been plagued by a tendency toward individual thematic “silos” with little-to-no collective problem-solving capacity. With a new president, the ability to work in teams has been heralded as a critical competency, and is now one of the eight performance criteria measured on the annual performance appraisal instrument. The president has not had many opportunities to hire new staff, as the turnover is quite low. However, as one of the first hiring decisions, the president recruited an extremely dynamic and innovative individual to lead the foundation’s health grantmaking unit. In addition to stellar academic and professional credentials, this individual has already impressed both the president and the Board of Trustees with an ability to “think outside the box,” and to attract attention and other

fundlers to the foundation's initiatives through highly creative and aggressive programming decisions.

The president is excited about the individual's grantmaking approach, as it represents the kind of innovation being sought in the staff, and the president certainly enjoys the reflected glow of the Board's praise for this individual's leadership. What the Board does not know, however, is that this "star" program professional has hired and fired three program assistants in a short one-year tenure, two of which were very messy situations from a management standpoint. In addition, the other four theme leaders are up in arms, as this individual is haughty and dismissive of their respective programs, and shows little to no interest or ability to listen to colleagues. The "star's" focus is almost entirely on external relations in the health field that will be of personal, career benefit and has demonstrated no willingness or commitment to fulfill internal leadership, management, and administrative responsibilities. The president is in a bind, choosing between an interest in promoting teamwork and a collective management structure, and inspiring innovative program leadership.

How should the situation be handled?