



Human Resources Capacity Build Service Grant



The Leadership Development and Strategic HR practice is presented by American Express



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Outline

- Introduction
- Leadership Development and Strategic HR (LDSHR)
- How does the Human Resources Capacity Build Service Grant fit in?
- What are the deliverables and what value does the Grant bring?
- What is in scope for this Service Grant?
- Case study
- What are the criteria to qualify for this Service Grant?
- Process
 - Key milestones
 - Pro Bono Consultant team
 - Project management and tools
 - Timeline
- Litmus test for a successful project

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Leadership Development & Strategic HR

The Purpose:

- Help organizations think and act strategically with regard to talent management
- Use targeted leadership development to build capacity
- Integrate HR goals with broader priorities

The Result:

- Engaged employees
- Stronger, more aligned organization
- Standard practices and reduced administrative burden

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What experts and funders are saying



“Many successful business CEOs spend well over half their time on people-related issues. In contrast, the executive directors of nonprofits tend to devote the lion’s share of their time to fundraising.”

THE BRIDGESPAN GROUP

The Nonprofit Sector’s Leadership Deficit

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evelyn & walter HAAS, JR. fund

“A growing number of grantmakers are recognizing that leadership development is a key driver of organizational effectiveness and are beginning to invest in new and more robust models to help.”

SYLVIA YEE

Vice President, Evelyn and Walter Haas, Jr. Fund

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The Change

Most organizations are here



Basic HR tackles the necessary tasks, but is often isolated from other initiatives.



Well-managed HR supports the organization and considers leadership, but isn't fully connected to the bigger strategy.

Our Leadership Development and Strategic HR Services Grants work to get them here



Strategic HR and leadership development fully integrates HR goals with broader priorities and tasks to create a stronger, more aligned organization.

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Where the HR Capacity Build Fits in



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HR Capacity Build Value Proposition

What does a Pro Bono Consultant team accomplish through this grant?

- Assess the entire HR function
- Make a detailed, feasible plan for long-term and short-term action
- Take small steps in critical areas

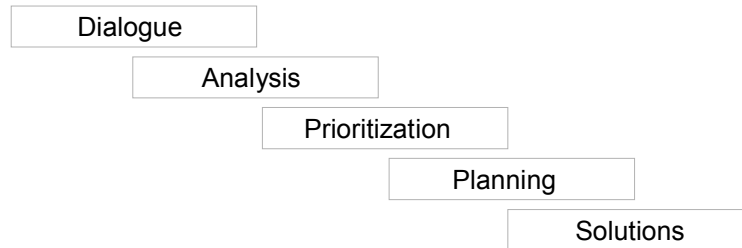
Why is this important?

Before individual solutions can be employed, an organization needs to gain an accurate and comprehensive understanding of the current state of their HR function and its needs

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What Happens During HR Capacity Build



Thorough understanding of the current state & potential of HR function

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Challenges that can be explored

- Issues resulting from rapid growth
 - High turn-over
 - Declining satisfaction
 - Burn out
- HR siloed with executive director
- Administrative inefficiency
- Performance issues
- Gaps in skills
- Inconsistent HR practices

*Note: The Pro Bono Consultant team will likely only be able explore a few challenges specific to the Client

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Activities that are in scope

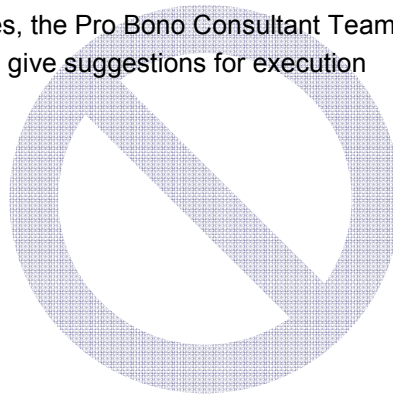
- Capacity assessment of areas such as:
 - Administration
 - Performance management
 - Board Performance
- Creation of Priorities and Action Plan
- A few “Quick-Fix” implementations
Examples include: decision-making matrix, communication plan, sample job descriptions, referral form, hiring guide (logistics)

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Activities that are not in scope


- Getting an organization to basic or tactical level (HR 101)
- Strategic planning
- Implementation: Beyond quick-fixes, the Pro Bono Consultant Team will only recommend solutions and give suggestions for execution
- Organizational design
- Staff recruitment
- Board management
- Systems revamp or outsourcing
- Succession planning
- Executive coaching or mentoring



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Case Study

The Project	The Work	The Impact
<p>Oakland Asian Students' Educational Services (OASES) needed to address challenges posed by rapid growth, increase leadership capacity, & improve retention.</p> 	<p>Pro bono Consultant team provided OASES with comprehensive assessment of HR systems & an actionable improvement plan.</p>	<p>Identified need for management team to oversee the day-to-day tasks, building the executive team's capacity to manage big picture.</p> <p>Created incentives, career pathways, and professional development goals.</p>

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Grant Criteria

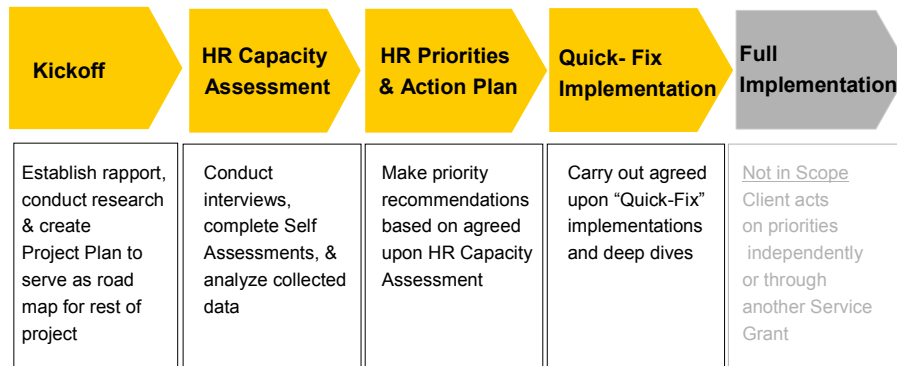
- Clearly articulated strategic priorities and organizational goals
- An Executive Director or HR Director who is strongly committed to this project
- An employee manual outlining organizational workplace policies
- Basic HR systems that manage performance evaluation, hiring and recruiting, and benefits and compensation
- Staff that can invest the necessary time to make the project succeed:
 - Executive Director: 2-3 hours each week
 - Human Resources Director*: 2-3 hours each week
 - Day-to-Day Contact (may be same as HR Director): 3 hours each week
 - Managers (2-3): 10-15 hours over the course of the project
 - Selection of board members, volunteers, employees: 2-3 hours each over the course of the project

* Or person responsible for HR in the organization

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The Process



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The HR Capacity Build Team

- Account Director
- Project Manager
- HR Strategist
- 2 HR Generalists

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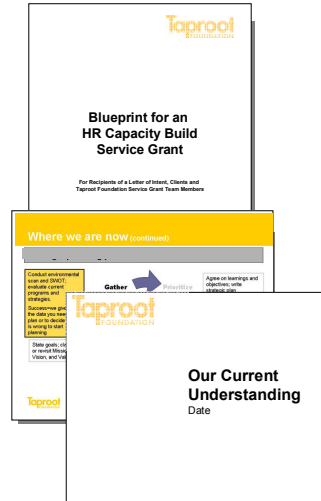
Management and Tools

Taproot Foundation Intranet

- HR Capacity Build blueprint
- PowerPoint templates for key presentations
- Other templates:
 - Confidentiality agreement
 - Timeline spreadsheet
- Helpful articles and links

People

- Taproot Foundation Program Manager
- Fellow Account Directors



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Ideal Timeline*

Stage	Approximate Timing
Letter of Intent (LOI) sent	
AD Assigned/Site Visit	1 month after LOI sent
Staffed	2 months after LOI sent
Kick Off completed	2 – 3 months after LOI sent
Capacity Assessment completed	4 – 5 months after LOI sent
Hr Priorities and Action Plan presented	5 – 6 months after LOI sent
Quick-Fix Implementation	6 – 8 months after LOI sent
Project Closed	8 – 9 months after LOI sent

* Ultimately depends on your team

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Litmus Test for a Successful Project

- Have key stakeholders at the organization been involved in the process?
- Is the Client prepared to adapt the process and implement long-term solutions?
- Will the Quick-Fixes and long-term solutions make HR more strategic?

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