



Performance Management Service Grant



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

The Annie E. Casey Foundation

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Outline

- Introduction
- Leadership Development and Strategic HR (LDSHR)
- How does the Performance Management Service Grant fit in?
- What are the deliverables and what value does the Grant bring
- What is in scope for this Service Grant?
- 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.

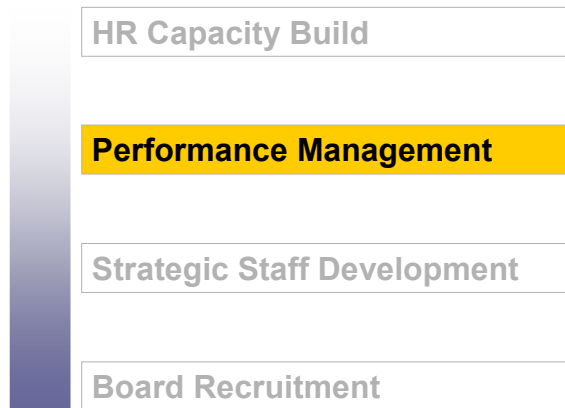
Our Leadership Development and Strategic HR Services Grants work to get them here



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 Performance Management Fits in



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Performance Management

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

- Assess current performance management needs
- Develop a customized internal communication plan
- Create necessary metrics, templates and timelines
- Conduct test runs and training

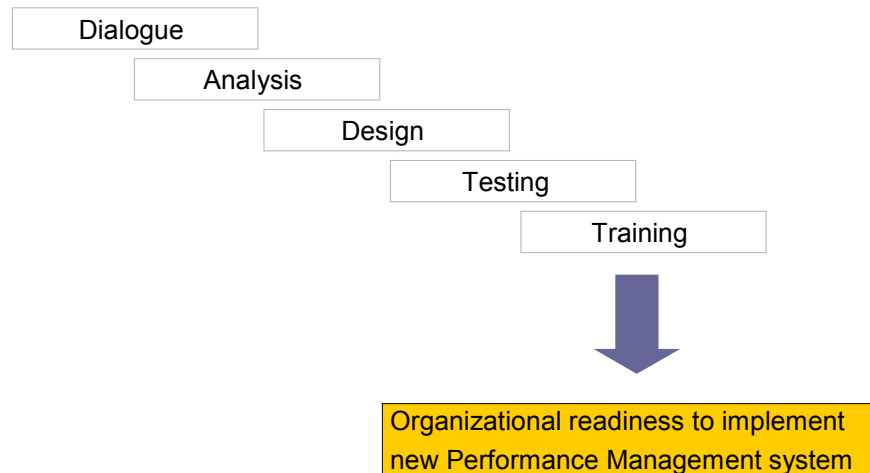
Why is this important?

Performance management is critical to aligning and enabling people at the organization and gaining from higher productivity, improved morale and higher retention rates

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What Happens During a Performance Management Project



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Challenges that can be explored

- Gaps resulting from rapid growth
- Role overlap/misalignment
- High turn-over
- Declining satisfaction/engagement
- Burn out
- Gaps in skills
- Confusion about process
- Poor management training on performance issues

* The Pro Bono Consultant team will not have time to explore all of these issues in depth, only those that are most relevant

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What activities are in scope

Assessment

- Conduct thorough review of existing materials
- Assess overall HR situation and general PM needs

Performance Management system

- Include templates, sample communications, and training

Training

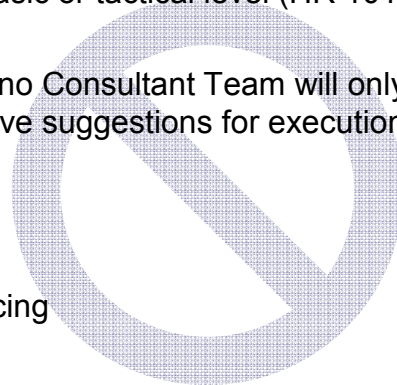
- Provide training for up to 8 managers

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What activities are not in scope

- Getting an organization to basic or tactical level (HR 101)
- Strategic planning
- Implementation: 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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Grant Criteria

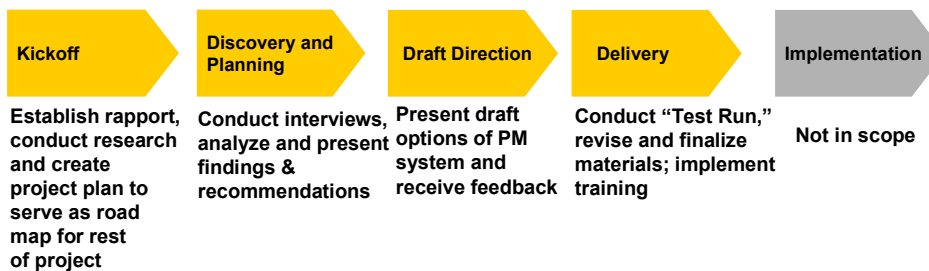
- Clear strategic priorities and organizational goals
- Accurate job descriptions for all or most employees
- An Executive Director strongly committed to this project
- At least 12 employees
- A somewhat flexible compensation system
- Managers who have received at least some managerial training
 - Executive Director: 20-25 hours total
 - Human Resources Director*: 3-5 hours each week
 - Day-to-Day Contact (may be the same as the HR Director): 4-5 hours each week
 - Managers (up to 10): 20-25 hours each
 - All employees: 5-10 hours each

* Or the person responsible for HR

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The Process



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The Performance Management Team

- Account Director
- Project Manager
- Performance Management Analyst
- Training Specialist
- Internal Communications Manager

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Management and Tools

Taproot Foundation Intranet

- Performance Management 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 Timeline
Letter of Intent (LOI) sent	
AD Assigned/Site Visit	1 month after LOI is sent
Staffed	2 months after LOI is sent
Kick Off completed	2 – 3 months after LOI is sent
Findings and Recommendations presented	4 – 5 months after LOI is sent
Draft Direction presented	5 – 6 months after LOI is sent
Training conducted	7 – 8 months after LOI is sent
Project Closed	8 – 9 months after LOI is sent

* Ultimately depends on your team.

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Litmus Test for a Successful Project

- Are the final deliverables adapted to the Client's unique needs?
- Is the Client prepared to adapt the process and implement long-term solutions?
- Are the tools and solutions proposed simple, actionable, and aligned with the Client's organizational culture?

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