

Managing Talent in a Nonprofit Environment

United Way of the Bay Area Gets Help in Creating an Environment That Supports Critical Talent

—Stacey Harris, *Principal Analyst* | May, 2011

▶ IN THIS CASE STUDY

United Way of the Bay Area (UWBA) places a high value on talent management, and wants to create an environment that propels great employee performance. The organization recognizes that better talent management can enable better use of limited resources, enabling it to better help millions of people. Unfortunately, like many nonprofits, the UWBA has found itself lacking the funds to realize its talent management goals, specifically in the areas of developing, coaching, training and retaining critical talent.

Luckily, the UWBA recently became the beneficiary of the same charitable assistance it so often extends to other organizations in the Bay Area. A grant of software and consulting services from the Cornerstone OnDemand Foundation enabled the nonprofit to design and implement an online system for goal-setting, performance management, and needs assessment to replace its outdated annual review process. This was a critical step in enabling the organization's vision for managing talent in the future.

This case study outlines some of the challenges faced by the UWBA, and provides a compelling model for how corporate philanthropy can help nonprofits to manage talent better.

FOCUS:

TALENT
MANAGEMENT

TALENT
STRATEGY

WORKFORCE
PLANNING

PERFORMANCE
MANAGEMENT

LEADERSHIP
DEVELOPMENT

SUCCESSION
MANAGEMENT

COMPETENCY
MANAGEMENT

TALENT
SYSTEMS

This case study will examine:

- Some of the challenges nonprofits face in the current economy;
- Challenges and benefits to managing talent in a nonprofit environment;
- How the UWBA updated its annual goal-setting and performance-review process;
- The business benefits of philanthropy; and
- The benefits the UWBA expects to see from helping its constituents leverage talent tools. ↻



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Company Overview

The UWBA is an autonomous, dues-paying member of the United Way of America.¹ It develops programs independently – largely through partnerships with grass-roots supporters, corporations, other nonprofits, and motivated individuals – to serve the seven counties of the Bay Area while still drawing branding, training and strategic support from the parent organization. The UWBA combats poverty by providing grants and fundraising assistance to nonprofits in three main areas:

- **Education: Helping children reach their potential.**

The UWBA funds programs aimed at increasing child literacy rates, closing the achievement gap between high and low income students, and providing young people with the skills and resources needed to ensure a successful transition to adulthood.

- **Income: Helping families to achieve financial stability and independence.**

The UWBA funds programs that help working families to develop debt-management strategies, to increase income, to take full advantage of available resources, and to build emergency funds. SparkPoint Centers serve as one of the UWBA's signature programs. Their services include financial coaching and programs to help families build assets and manage their credit. Centers commit to helping families for up to three years.²

- **Health: Improving people's access to healthcare.**

The UWBA works toward the goal of ensuring that all Bay Area children have health insurance and that low-income communities have access to high-quality healthcare. Grants also focus on eliminating health disparities among different communities and promoting behavior changes that lead to better health.

The UWBA also runs a 2-1-1 community information line, in partnership with other nonprofit organizations. Callers are connected with specialists well versed in the Bay Area's various social resources. These specialists assess callers' needs and provide recommendations and referrals to service providers capable of assisting with those needs.³

¹ Find more information on the United Way of the Bay Area at <http://www.uwba.org/> and on the United Way of America at <http://liveunited.org/>.

² For more information about SparkPoint, please visit <http://www.uwba.org/our-work/sparkpoint/>.

³ For more information about 2-1-1, please visit <http://www.uwba.org/our-work/2-1-1/>.

Figure 1: United Way of the Bay Area at a Glance

- **Employees:** Approximately 120 Employees
- **Annual Operating Budget:** Approximately \$12 Million
- **Industry:** Nonprofit
- **Focus:** Combating area poverty in partnership with other nonprofits, activists, individual donors, and corporations.

Source: *United Way of the Bay Area, 2011.*

Business Environment and Challenges

The financial downturn has hit nonprofits hard. Some corporate sources for large gifts no longer exist; endowments have shrunk along with the Dow; and individual donors have less to give. At the same time, economic hardships spur even greater demand for the assistance that nonprofits provide.

No matter the economic times, nonprofits often struggle to fill critical positions. Support roles, such as HR, usually receive even less funding than community-facing roles. In these organizations, HR often occupies a wholly administrative role, handling such essentials as hiring and payroll, with minimal influence on overall strategy and without a focus on managing talent. That's not the case with the United Way of the Bay Area, which values talent management highly enough to have had a chief HR officer on its senior leadership team for several years. Nevertheless, as of 2010, the UWBA was able to direct less than 1 percent of its operating budget to talent management.

For-profit organizations have a great deal of choice in how they allocate funds; nonprofits operate in a different environment. Donations to nonprofits come in two forms: designated and undesignated. Designated donations carry stipulations regarding how they must be spent. They must go toward the designated purpose, or to organizational costs attributable to that purpose. Undesignated donations, by contrast, can go toward whatever purpose the nonprofit deems best. These funds typically pay salaries, utilities, rent and other general organizational expenses – including those for HR.

For many nonprofits, a minimal focus on HR is driven more by pragmatism than by principle. Nonprofits typically experience greater difficulty in soliciting undesignated donations than they do donations for a particular high-profile cause. Contributors are sometimes wary of cases in which their gifts might go toward organizational overhead, instead of the beneficiaries they envisioned. Nonprofits are required by law to publicly disclose the ratio

**KEY POINT**

One of the areas nonprofits are most likely to spend least on is their own internal support structures, such as HR, finance, or even technology roles.

of internal expense to external philanthropy. The Better Business Bureau recommends that no more than 35 percent of a nonprofit's income go toward overhead. For fiscal 2009, the UWBA reported its overhead at 21.3 percent, excluding nonrecurring pension expense.⁴

With undesignated donations hard to come by, nonprofits often find themselves lacking the necessary budgets to make strategic investments in talent management in the areas of systems and personnel. And yet, in the nonprofit world, as in the for-profit world, effective talent management serves as a critical source of mid- and long-term organizational efficiency and effectiveness. In other words, money is simply better spent, and services have more impact, when talent is well-developed and well-equipped.

The Value of Managing Talent

As shown in Figures 2 and 3, organizations that achieve higher levels of maturity in their approach to talent management report improvement in several key areas. Perhaps most relevant to nonprofits is the increased ability to retain top performers, which helps to lower turnover costs, as does having a pipeline of ready successors.

Similarly, organizations with mature or maturing talent-management strategies find themselves improving in their ability to place the right people in the right jobs, to develop employees with the right skills, and to improve employee productivity.

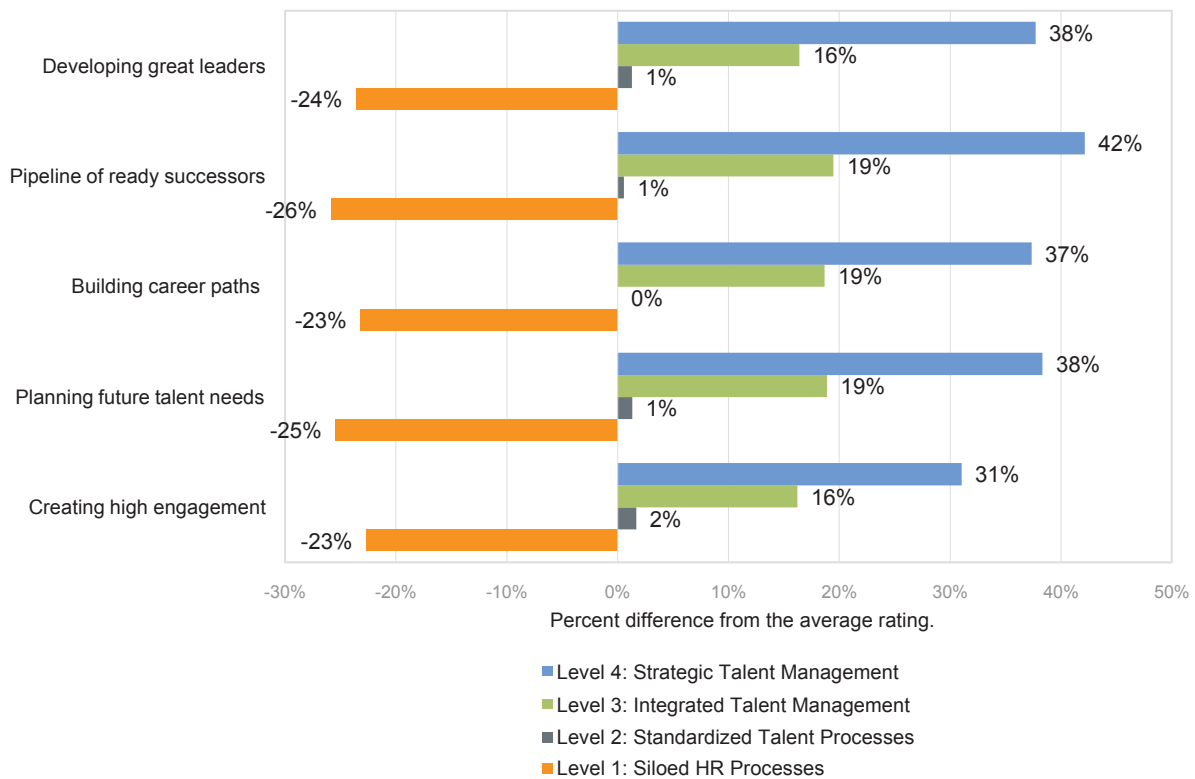


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⁴ Source: <http://www.uwba.org/about/faqs/>.

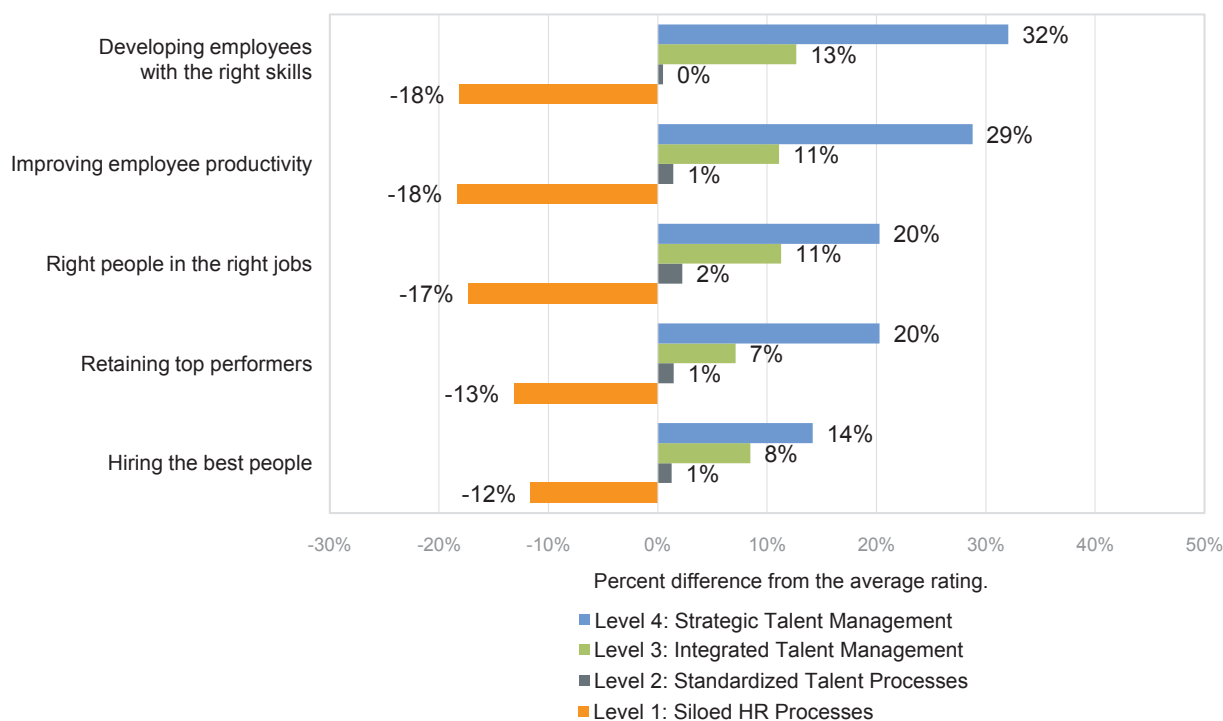
Figure 2: Impact of Talent Management Maturity on Effectiveness Measures



Source: Bersin & Associates, 2010.

In Figures 2 and 3, the vertical line at zero percent represents the mean rating across all organizations in the study. The horizontal bars represent percentages of difference from this mean rating. The figures indicate that organizations at higher levels of talent-management maturity find themselves achieving better results. The data for these charts comes from a study conducted in March and April of 2010. In the study, Bersin & Associates gathered included input from 725 U.S.-based organizations, each with more than 100 employees.

Figure 3: Impact of Talent Management Maturity on Other Effectiveness Measures



Source: Bersin & Associates, 2010.

The United Way Bay Area, just like for-profit organizations, values improvements in these metrics. But like other nonprofit organizations, the UWBA faces significant budgetary hurdles as it attempts to mature its talent strategies and build talent management infrastructure.

HR Organization and Environment

“The work that the United Way does is through our people; we do not produce a hard product. We are a service organization, so the talents of our employees are our greatest asset.”

CEO

United Way of the Bay Area

Although the UWBA endures the same struggle with a lack of HR resources as other nonprofit organizations, it enjoys the benefit of a corporate culture that truly prizes and respects its employees. This culture includes recognition for the value of talent management, all the way up to the senior leadership team.

This recognition enabled the UWBA for several years to justify the expense of a dedicated chief HR officer (CHRO). Additionally, the organization has two support HR roles focused on benefits, payroll, HR systems, and employee development. Having a dedicated CHRO allowed the UWBA to engage more aggressively in talent-management projects and process improvements. For example, one project focused on a comprehensive human-capital needs analysis.

Finally, UWBA's HR organization is also able to draw on the expertise of the members of its board of directors, drawn from local business leaders. Many of these members bring valuable talent-management experience and insight from their own companies.

Talent Challenges

The UWBA's talent management processes have historically been completed in a paper based format, as opposed to an online enterprise level software solution. The manual processes were time-consuming and made it impossible for the UWBA's small HR organization to aggregate and monitor data for ongoing talent management. The UWBA's inability to efficiently assess talent and connect individuals with coaching and development opportunities has been a major roadblock on the organization's path to achieving its talent-management vision.

One example exists in the annual performance management process in which managers set goals for their employees and assess their performance against past goals. Even with the limitations of a paper-based system, the HR staff was able to collect these reviews, record compliance and review goals. However, regularly ensuring there was ongoing dialogue between an employee and his or her manager was simply not feasible. As a result, the process focused more on compliance than on impact.

The situation had a negative impact on the UWBA's ability to integrate its performance reviews with its compensation processes. The UWBA has a strong union presence, and two collective bargaining agreements are in place that affect a large percentage of its employees. HR would eventually like to increase talent management discussions with the union representatives, with the goal of improving the retention of high-potential employees. However, it realizes that it must first build the unions' confidence that performance assessments are fair, objective and comprehensive, and that employees have the tools they need to succeed.

Previously, the paper-based performance-review process wasn't generating that kind of confidence. HR recognized that automating and moving the process online would be a way to monitor its effectiveness and impact on an ongoing basis – a step toward building credibility with everyone in the organization. However, the UWBA simply lacked the necessary money and



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technical expertise to purchase, implement and achieve widespread adoption of enterprise talent-management software.

Cornerstone OnDemand Foundation

Ultimately, the UWBA has not allowed financial obstacles to prevent talent-management progress. Thanks to top-level internal support, the organization applied for, and won a grant from the Cornerstone OnDemand Foundation⁵ through the foundation's Strategic Partnership program. Through this program, the foundation each year gives a number of nonprofits the use of its SaaS⁶ talent management platform and implementation services at no cost for two years. The grant application was relatively short. It focused on quantitative specifics, such as organization size and budget; and qualitative assessments of the technologies and technology support already in place at the UWBA. It also gathered information on how the UWBA intended to use and benefit from the Cornerstone OnDemand software.

The UWBA won the grant. It planned to use the software to integrate its once-annual performance-management process more prominently and successfully into managers' day-to-day work. Additionally, by providing an environment for dialogue between managers and their direct reports, HR planned to not only foster ongoing communication about individual goals, but also to guide and contribute to those conversations to ensure alignment with the larger strategic goals of the organization.

No software product in and of itself is a panacea for every challenge an organization faces. To achieve positive results, organizations must find the right product and implement it in the right way, with the right kind of support. In recognition of this principle, The Cornerstone OnDemand Foundation, also provides an HR Pro Bono Corps program, which recruits talent-management practitioners as subject matter experts from its global client base to help the foundation's growing portfolio of nonprofit beneficiaries. These consultants are well-versed in Cornerstone OnDemand software, as well as best practices for implementing talent-management processes, and the foundation makes sure to match them with nonprofits whose needs are a good fit for their expertise.

The UWBA was matched with Feeding America⁷, a leading domestic hunger-relief charity and a current client of Cornerstone OnDemand. In addition to

★ BEST PRACTICE

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⁵ Find more information about the Cornerstone OnDemand Foundation at <http://www.cornerstoneondemand.com/cornerstone-foundation>.

⁶ "SaaS" refers to "Software as a Service." SaaS products are generally deployed over the Internet. Users therefore avoid the infrastructure costs often associated with other types of enterprise-level software.

⁷ Find more information about Feeding America at www.feedingamerica.org/.

providing some user support, Feeding America also gave advice on how to drive adoption of the new goal-setting system.

Cornerstone OnDemand clients accept these assignments not only as philanthropic opportunities but also because they provide an opportunity for volunteer consultants to build skills and network. The volunteers gain further experience with the platform and the opportunity to engage in a professional development experience. To help make these experiences positive, the Cornerstone OnDemand Foundation provides support and oversight and ensures that projects are well-defined in terms of their scope and the time they will require.

The UWBA's New Performance Management Portal and Process

"Like so many organizations, we really need to manage against our bandwidth and the core competencies we have on our staff. Tools that allow us to measure alignment and progress on a real-time basis, as opposed to waiting until the end of the year, are really important."

CEO

United Way of the Bay Area

In previous sections, we discussed how the manual nature of the UWBA's performance-management process created a situation in which HR focused more on measuring compliance than on ensuring and supporting impact. In this section, we detail the new automated process for goal setting and performance management, and highlight its advantages.

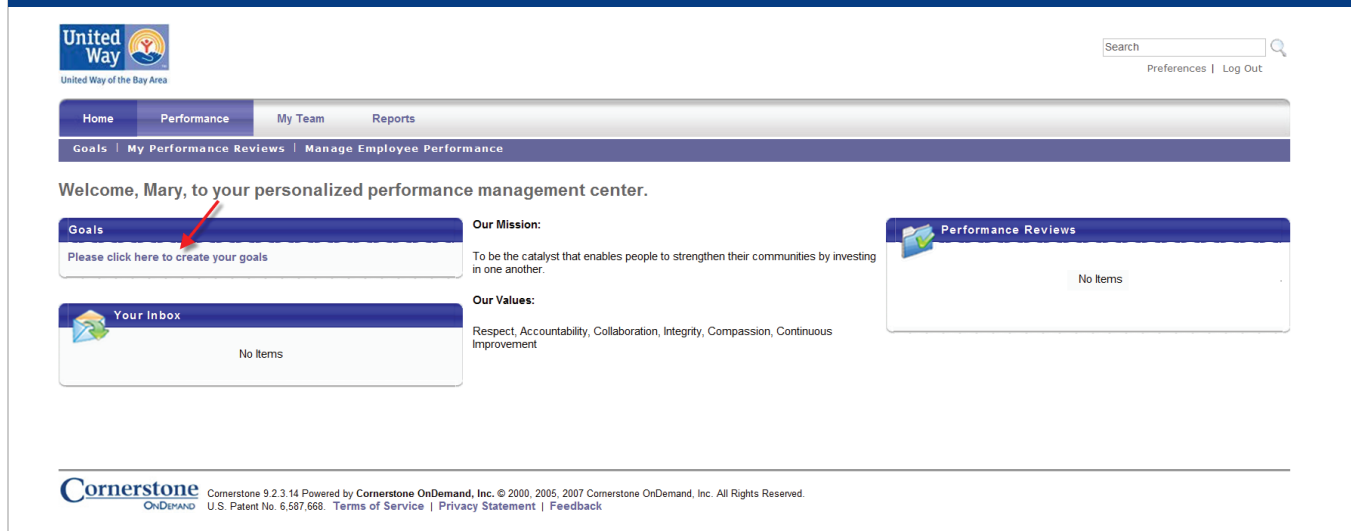
A first step in implementing the new system was configuring its online performance-management portal. The aim was to create an environment that would align with the culture of UWBA and help the organization to pursue its goals. One key goal is to drive discussions and coaching throughout the performance management process.



KEY POINT

A first step in implementing the new system was configuring its online performance-management portal. The aim was to create an environment that would align with the culture of UWBA and help the organization to pursue its goals.

Figure 4: The “Home” Page for the UWBA’s Performance Management Portal



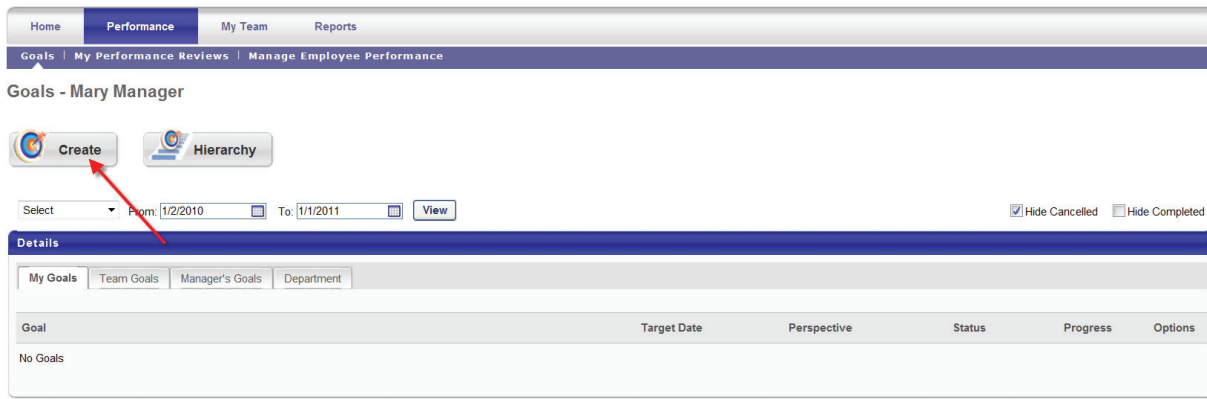
Source: *United Way of the Bay Area, 2010.*

Upon entering the online performance management portal for the goals module, UWBA users see a “Welcome” page containing several tabs:

Home: This tab is available to all users, and serves as a dashboard for three discussion areas:

- The “Goals” area contains a link to the location for maintaining and updating goals.
- Directly beneath this link is the ‘inbox’ area, which contains links to any active action items for the process.
- Finally, a “performance review” area becomes active when an employee is called on to complete his or her own performance review.

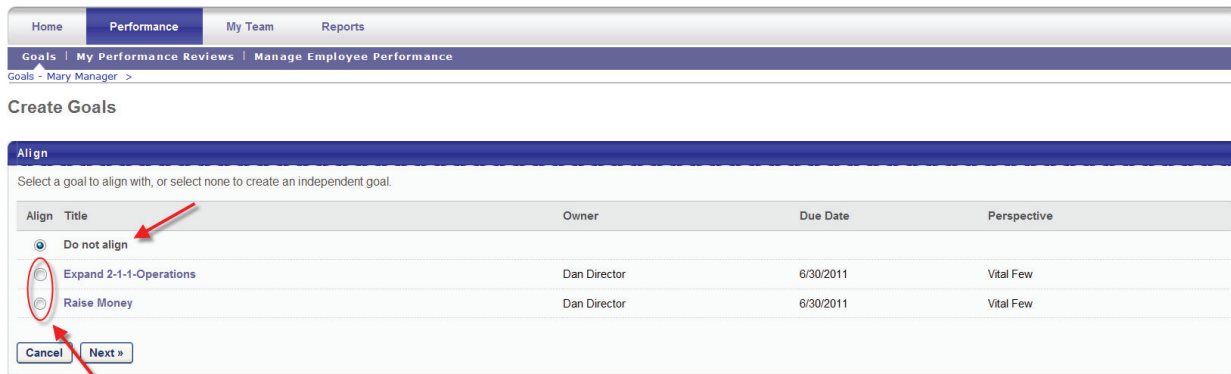
Figure 5: The “Performance” Page for the Performance Management Portal



Source: United Way of the Bay Area, 2010.

Performance: This tab is also available to all users, and contains several sections for setting up goals. Users can create personal goals and align them hierarchically with group and departmental goals set by their managers and their manager’s managers – all the way up to the organizational goals set by senior leaders. Users may also create goals independent of this hierarchy.

Figure 6: The “Create Goal” Page for the Performance Management Portal



Source: United Way of the Bay Area, 2010.

The UWBA expects a great deal of dialogue and discussion to take place between managers and employees as they create performance-management goals. To help start the discussion, the UWBA has set up five types of goals that can be developed for employees:

- **Vital Few.** These are high-level goals for the current fiscal year, set and approved by senior leaders. Vital Few goals are part of the Strategic Plan.
- **Departmental Goal.** Department VPs set these goals, which may be aligned to a Vital Few goal, to support the business plan.

- **Individual Goal.** These are non-aligned goals and should generally not be visible to direct reports.
- **Professional Development Goal.** These goals are not required, and may not be specifically job-related. They can be used for career enhancement.
- **Relationship Management Goal.** For FY11, the UWBA has made the commitment to embrace relationship management to increase communication and effectiveness within the organization. Senior leaders will set relationship-management goals, and all employees are expected to incorporate them into their performance.

Managers were also trained specifically in goal setting according to the SMART framework, which states that goals should be:

- **Specific.** A goal should identify specifics, such as who will be involved in achievement and why the goal is important.
- **Measurable.** The benefits of achieving a goal should be quantifiable;
- **Achievable.** A goal should be attainable with available resources;
- **Realistic/Relevant.** A goal should require the group or individual to stretch, but it should not be unreasonable in light of the goal-setters experience and capabilities.
- **Time-bound.** A goal should include a time frame for completion.

Managers were encouraged to set both short- and long-term goals, and were given insight into how to align those goals with the UWBA's strategic plan, mission, vision and values. Larger organization goals ran the gamut from the general (improve morale in your team), to the practical (ensure all new hires are on-boarded), to the inspirational (increase FUM⁸ by 10 percent by year's end).

Within the system, managers and employees are also able to define intermediate tasks and targets on the path toward goal achievement, as well as establishing whether the goals are for themselves or for members of their team. They are further able to record the completion or achievement percentage of tasks, targets, and the goals themselves. Both managers and the managed are also able to attach documents and comments to goals, tasks and targets.

Once a goal is created, users are prompted to:

- Name their goals;
- Set start dates and target completion dates;

⁸ "FUM" refers to funds under management – undesignated donations that can be used for overhead expenses, such as salaries and office supplies.

- Decide whether to make goals a part of the hierarchy and therefore visible to a manager's direct reports to aid with alignment; and
- Label the scope of the goal in the field called "Perspective."

Ultimately, managers are encouraged to expand their repertoire – going beyond a focus on managing tasks to become "talent managers" who work with employees on their development and goals. HR continues to encourage this change through e-mail contact, in one- on-one consultations with managers, and by monitoring goals, communication and progress within the platform.

Change Management

The UWBA and its partners on this project took several important steps to manage the change they were implementing. For starters, the UWBA's HR team ensured that senior leaders backed the change being undertaken. Soliciting public support from senior leaders helped HR to command the time and attention needed from line managers at all levels to provide proper training for managers and their direct reports.

The UWBA also ensured that managers and employees were empowered and engaged, and saw value in the new processes. Based on advice from their talent-management consultants from Feeding America, as well as their own HR experience, members of the UWBA team realized that simply configuring and implementing the system technically would add little value for the organization. They also needed to educate managers and employees on how to use the new portal to support effective talent management. This education has been critical to the effort's success so far.

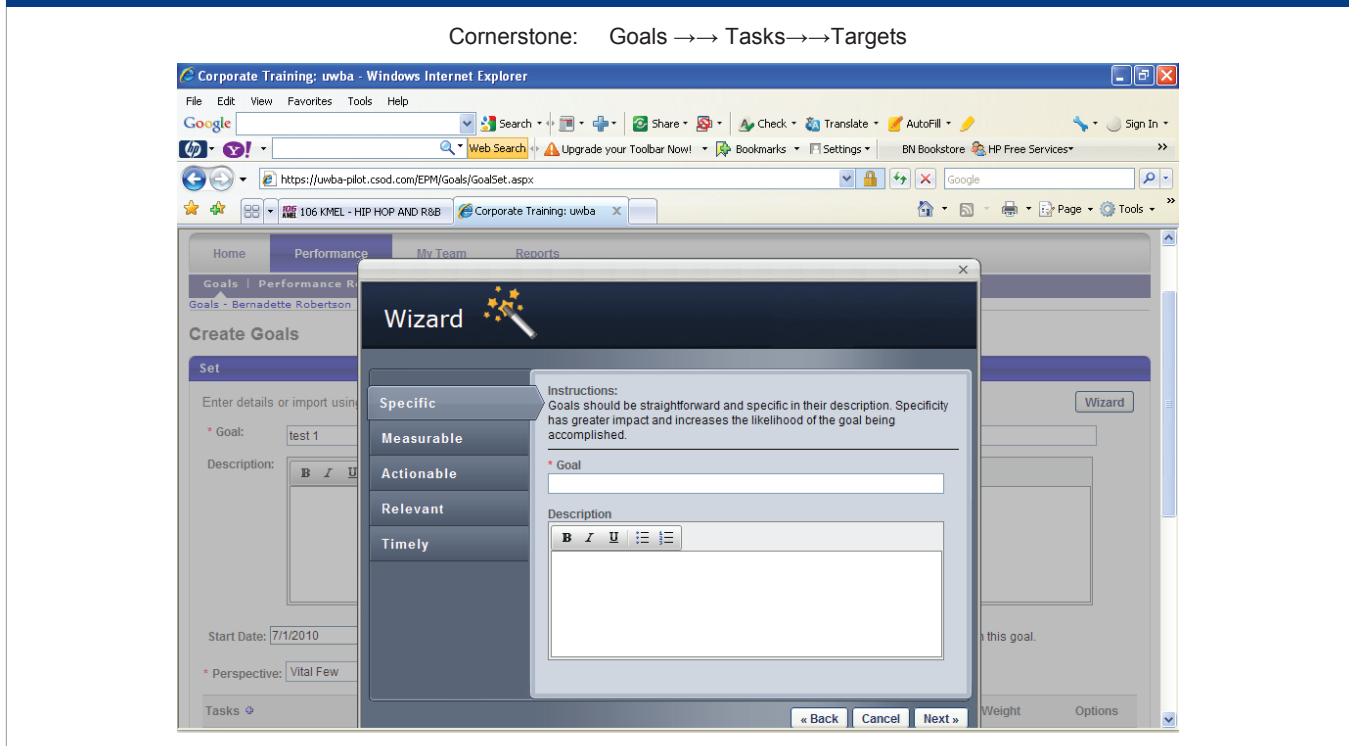
Training sessions called "labs," initially held first for senior management, proved so successful that they were expanded to serve 95 percent of staff within the organization. In these sessions, participants were provided with laptops and led through the process of creating and managing actual goals within the new portal.



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Figure 7: Sample Slide from Lab Session for Managers



Source: United Way of the Bay Area, 2010.

Sessions were tailored to the needs of participants groups. For example, managers were trained on how to set goals for direct reports, while employees were trained to access their goals and make notes. Optional labs were held as needed to ensure everyone was comfortable with the platform. More importantly, training sessions focused on helping managers and employees to understand the value of the new system, within the context of deeper talent conversations.

Metrics / Evaluation / Business Impact

The UWBA's new talent-management platform has been live for several months now, and anecdotal feedback has been overwhelmingly positive. Employees have been very engaged, an especially positive outcome considering the stress created by recent layoffs. So far, 75 percent of employees have their goals loaded into the system; the remaining 25 percent are mostly in one department.

Under the new system, employees are able to see how each of their goals fits into the larger goal hierarchy of the organization, and how their individual roles contribute to the positive work the organization does within the Bay

★ BEST PRACTICE

To make this transition successful, the UWBA's HR team needed to ensure that managers and employees were empowered and engaged, and saw value in the new processes.

Area. This is expected to greatly improve alignment and increase employees' sense of connection to the UWBA's mission and success.

The new system also has improved the UWBA's approach to talent management in the following categories:

- **Transparency:** Goals, notes, attachments and status updates are easily viewable by employees, managers and HR.
- **Communication:** The easily viewable portal fosters regular communication and provides a means of integrating performance management into daily responsibilities.
- **Assessment:** Because goals are arranged hierarchically, managers up and down the chain can assess skill, performance and focus gaps by tabulating the alignment between individual, departmental, and Vital Few goals.

Business Benefits of Philanthropy and Social Responsibility

This project would have never come about without Cornerstone OnDemand's philanthropic foundation. There is no question that nonprofits benefit greatly from the generosity of their for-profit donors and partners. However, it's also important to note that for-profit organizations also stand to gain some very practical business benefits from charitable work. Philanthropy can positively affect a company's brand, with consumers and with potential and current employees.

Consumers increasingly favor companies that demonstrate social responsibility, and tools for gauging social responsibility are increasingly available. Several respected organizations, such as Boston College's Center for Corporate Citizenship, put out yearly indices that measure and rank corporations based on, among other factors, their philanthropic work. Analysis by the center indicates that improving reputation scores leads to greater willingness among consumers to recommend the company.⁹

Current and potential employees are also affected by the reputation of an organization's brand. While it is difficult to generate research that clearly singles out and monetizes the impacts of corporate philanthropy, significant anecdotal evidence suggests strong connections between branding and employee recruitment, retention, and performance.

⁹ *The 2010 Corporate Social Responsibility Index*, Boston College Center for Corporate Citizenship, <http://www.bccc.net/pdf/CSRIReport2010.pdf>.



KEY POINT

For-profit organizations also stand to gain some very practical business benefits from charitable work.

“We see corporations giving credence to the notion that philanthropy drives employee engagement, drives retention, and drives productivity. This is the common understanding, and the common culture in corporate America.”

*Vice President of Corporate Social Responsibility
Cornerstone OnDemand*

Monetary funding is often a primary component of an organization's corporate philanthropy strategy. As this case study shows, broadening the scope of philanthropic efforts to include services or products allows even small organizations to make a big difference. When companies can leverage what they naturally do best, they often provide greater value and impact. Beneficiaries receive the value of highly specialized products or services that they would likely be unable to afford with simple funding donations. This creates a positive environment for both organizations and a strong partnership built on the foundation of helping others.

Best Practices / Lessons Learned

In general, the best practices we highlight in this case study would be just as valuable in a for-profit organization. The most significant differentiator is not the UWBA's tax status, but rather the lack of resources that it faced. While the ultimate impact of the solution it found remains to be seen, the UWBA's experience offers important lessons that other nonprofits should seek to replicate as they move forward with their own talent-management strategies.

Seek senior-level support. Support for talent management initiatives must come from the top. Strong champions can provide the necessary management will and stamina to promote an ambitious project from conception through implementation. These champions are also critical as HR works through the process of winning acceptance of the new processes from an audience of users who might otherwise consider them burdensome additions to an already overflowing plate.

Solicit outside expertise. While nonprofits may often suffer from a lack of HR funding and experience, they have the ability to avail themselves of resources from their donors and board members that would be extremely costly for a for-profit organization. The UWBA, for example, is governed by a board of directors drawn from community-based business leaders, many of whom possess or have access to relevant talent management and HR expertise. By seeking contributions of consultative support, nonprofits can rise above budgetary limitations.

Show patience and perseverance. Transforming processes and perspectives can be an arduous, long-term project, and even with senior level support, it is unlikely that every manager will immediately become a convert. Some may be ideologically opposed to changes. Others may be happy with the current processes and systems. Still others may simply find the new process or technology confusing. In all of these cases, it falls upon the HR leader to overcome resistance through persuasion, education and technical support, and by generating and publicizing success stories that illustrate what is possible. It is important to slowly and methodically build a structure upon which the project can comfortably rest. Make sure your organization is truly ready before proceeding with implementation.

Test the user interface. When transitioning to a an online process, it is important to recognize the importance of the user interface. An interface that is poorly designed or confusing, or simply doesn't clearly support the needs of the organization is unlikely to be adopted consistently. By working closely with consultants from the Cornerstone OnDemand Foundation, the UWBA was able to better tailor the system to meet its needs, as well as develop effective training and change-management measures to help speed the adoption of the new system.

Next Steps / Looking Ahead

While the UWBA has so far concentrated on the goal-setting and performance management capabilities of its new talent-management platform, leaders hope eventually to take advantage of its capabilities as a learning management system, as well. This further implementation will likely be a key responsibility for the executive leading the HR team.

Additionally, the UWBA hopes to expand usage of this platform among its community partners. The mission-driven goals of the UWBA rely upon strong partnerships with a multitude of organizations. By giving those organizations access to the system and encouraging its adoption, the UWBA can encourage an even tighter strategic alignment. Also, because these organizations are nonprofits that face similar obstacles to investing in talent management, granting access to this platform will enhance the UWBA's value as a partner.

Once implemented, the UWBA also plans to similarly expand the usage of the learning module of this platform. Ultimately, the UWBA hopes to also use this tool to efficiently and effectively provide additional services to its community partners in the areas of disaster recovery as well as providing business-skill training and certification classes that can be provided to members of the community to assist them as they look for work.

★ BEST PRACTICE

The UWBA hopes to expand usage of this platform among its community partners. Because these organizations are nonprofits that face similar obstacles to investing in talent management, granting access to this platform will enhance the UWBA's value as a partner.

This holistic vision of supporting its partners and communities is where the UWBA began its discussions on Talent Management. It understood that achieving its vision required incremental progress one step at a time, but that outcomes could have an amazing impact on all of the people who they touch annually.

Summary / Conclusion

In this case study, we explored how a grant from the Cornerstone OnDemand Foundation provided the United Way of the Bay Area the opportunity to transform an ineffective annual goal-setting process into a dynamic approach and tool for talent management and organizational alignment. We also discussed how the benefits of corporate giving can be a positive experience for everyone involved. Donor organizations of all sizes can have a large impact when they leverage their own strengths in both services and products as CornerStone OnDemand has for UWBA. Together these organizations are now supporting those who have the greatest need in our communities.

Appendix I: Topics for Discussion and Learning

The following sections will provide you with considerations for sharing and implementing the best practices that were highlighted in this report.

Key Learnings

Below is a list of key learnings (the “gems”) from this case study.

1. Nonprofits are just as positively impacted by mature and strategic talent-management processes as their for-profit counterparts.
2. Reinforcing the HR organization as a strategic partner helps to empower it to promote positive change.
3. It is vitally important that organizations making philanthropic gifts of software or services also provide the recipients with the consultative support necessary for successful implementation.
4. Change management is critical to the success of any cultural shift
5. Being socially responsible and philanthropic not only feels good, it has a positive business impact. For example, it can help with branding, increase development opportunities, and provide sources for product research and references.

Ideas for Action

Below is a list of actions that you can take in order to apply or implement the best practices highlighted in this report. These are some of the foundational elements that we highly recommend be in place inside your company in order to execute such a plan, process or program.

1. Don't assume that, because your organization is a nonprofit, the best practices for managing talent are out of reach. Do your research and find connections that can provide value without cost.
2. Engage your board and senior leaders in talent-management discussions; you may be surprised by their level of engagement.
3. Focus on the outcomes you hope to achieve – not the tools or systems you feel are needed. This will provide a better starting point and a more transparent objective.



KEY POINT

Nonprofits are just as positively impacted by mature and strategic talent-management processes as their for-profit counterparts.

Questions to Consider

Below is a list of discussion questions that you can ask your team, colleagues and business leaders, which will help you to take the next steps.

1. Who is on the nonprofit organization's board? Have you or your leaders spoken to board members about talent?
2. If you improved the ability to align goals, provide feedback and develop both employees and volunteers in your organization, how would that impact your organization's ability to meet its goals?
3. If there are roadblocks to managing talent, have you defined them and looked at them honestly?

★ BEST PRACTICE

You should engage your board and senior leaders in talent management discussions – you may be surprised by their level of engagement.

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About Us

Bersin & Associates is the only research and advisory consulting firm focused solely on *WhatWorks*® research in enterprise learning and talent management. With more than 25 years of experience in enterprise learning, technology and HR business processes, Bersin & Associates provides actionable, research-based services to help learning and HR managers and executives improve operational effectiveness and business impact.

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