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Talent Initiative Case Study: Nonprofit with High-Performing, Vibrant Culture Builds Talent Infrastructure to Support International Growth



At a Glance in 2010

- **Year Founded:** 1999
- **Employees:** 63
- **Operating Budget:** \$6.5M
- **Staff growth from 2010-2013:** 50%
- **Sector focus:** Social impact investing
- **Challenge:** Scaling and geographic expansion
- **Solution:** Talent Initiative from AchieveMission

The Opportunity

In 2010, Root Capital, a highly lauded nonprofit social investment fund, was rapidly growing and expanding its programs and geographies, from an earlier focus on Central American coffee cooperatives to investments in a range of industries in over 30 countries in Africa and Latin America. Root Capital had always benefitted from a vibrant, people-centered culture, but the organization was now facing complex challenges achieving its ambitious growth goals.

“As we were growing, we were realizing how difficult it was going to be to maintain our shared culture over disparate geographies and time zones,” described Katherine Borsecnik, Vice Chair of the Board of Directors. And culture was just the beginning. To create the cohesive multi-national organization they envisioned and maintain the consistent quality of Root Capital’s services, Root Capital’s leaders knew that they needed to invest in a wide variety of talent systems. As Borsecnik explained, “To successfully achieve our international growth and impact, we needed to bring a new level of discipline to our talent infrastructure.”

The Solution – Talent Initiative

Talent Initiative was a great fit, explained Board Vice Chair Borsecnik: “We were impressed by the program design, in that it applied a philosophy of assessment, evaluation and improvement while also incorporating the best thinking about the science of HR.” Bonnie Cockman, Senior Vice President of Operations continued, “We have a practice of wanting to speak to the experts about our work, and this was an opportunity to learn.”

Once enrolled, Root Capital’s leadership partnered with AchieveMission Consultant Edith Buhs to assess the organization’s specific talent challenges and build a 3-year Strategic Human Capital Management Plan that would enable the organization to realize its bold new vision. Buhs commented: “For example, through the process Root Capital realized that it needed to do more to develop its emerging middle managers so senior leaders could focus on increasingly complex strategic issues.” Involving the board and executive team in the plan’s creation was a key part of the process, described Cockman: “The board’s engagement



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helped build buy-in and keep the organization focused on and accountable for our talent goals... After the plan was completed, the board wanted to receive full updates on our talent work.”

Brenda Smith, Vice President of Finance and Administration, led the plan’s implementation, initially with support from AchieveMission. Explained Buhs, “Early and concrete implementation victories further built organization-wide momentum. We adjusted our level of support so Root Capital’s team would feel confident continuing the work after the program ended.” One early victory was the development of a competency model rooted in the organization’s culture and core values. “Willy, our CEO, always says that our staff has a ‘special sauce,’” explains Smith. “Through our competency model, we have been able to define the ingredients of that sauce and we’re using it in every aspect of our organization – how we hire, how we onboard, how we manage performance and how we promote our culture.”

The Impact

“AchieveMission’s Talent Initiative accomplished far more than we expected,” reflects Borsechnik looking back two years after the program’s completion. “It has been very successful not only because of specific accomplishments at the initiative level but also because we have built the infrastructure for this work into our culture.”

Since completing Talent Initiative, Root Capital has experienced better hires, improved leadership, stronger program results and consequentially, increased recognition, including being named one of the Top 20 NGOs in the world by *The Global Journal*. Explains Cockman: “What the Talent Initiative did was give us a road-map for prioritizing this work and a process for building the buy-in of the executive team and the board. I can’t imagine we could have been nearly as successful without it.”

Recommendations & Lessons Learned

1. Build buy-in: “Ensure that staff at every level feels some ownership and input, and understand how the work impacts them individually.”

2. Be prepared for change: “Talent Initiative is about transforming to a comprehensive, systems approach to talent and you need to have an appetite for large-scale transformation.”

3. Reasonably push the pace: “We moved fast, but we couldn’t have moved much faster. You need to appreciate the organization’s ability to absorb new initiatives and ideas.”

4. Investing in talent is for everyone: “This process is for organizations that feel like they are struggling and for ones that believe they are on a good path and want to make it easier to stay on that path.”

Impact of Talent Initiative

- ▶ Strategic Human Capital Management Plan
- ▶ Talent embedded into culture
- ▶ Clearer leadership structure and roles
- ▶ Culture defined through competency model
- ▶ Better hiring and onboarding
- ▶ Stronger team
- ▶ Improved organizational performance

To learn more about Talent Initiative, visit:

www.achievemission.org/talentinitiative