



# Sound Strategies for Next Gen Engagement

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# Introduction

Many family and community foundations around the country are actively working to engage the next generation of philanthropic leaders. In fact, a trends survey from the National Center of Family Philanthropy indicated that between 2016 and 2020, 43% of family foundations plan to engage younger generations in family giving.

The definition of what constitutes a “next gen” leader varies across the sector and within each foundation, so for this resource we will define the age of this group to be between 18-35 years old. This guide outlines three proven strategies to build-up these next generation leaders by exploring tools for engaging and retaining next gen staff members as well as concrete ways to create room for the voices of next gen trustees.

You can use this guide as a reference for quick tips to utilize now or to help spark ideas for long-term succession planning and change management in the future.





# Acknowledge and Elevate Next Gen Voices

It is important to consider opportunities in which next gen staff and trustees can have true ownership and voice in the management of projects or – in the case of trustees—the overall direction of the foundation.

For family foundations with next gen board members, it is especially important to create space for next gen input on grant decision-making. This may look different depending on your foundation's structure, history and overall goals. Some foundations will give younger board members full voting authorities. Others may choose to withhold full voting rights but create discretionary funds for next gen disbursement. Another option is to allow family members to “earn” grant capital toward a favorite nonprofit through volunteer hours served.

Each foundation board will need to determine the best method for their unique situation. Having clear policies and procedures in place for all board members, including clear age requirements for different levels of authority is helpful before bringing on new or younger generations of board members. In terms of staff, clear job descriptions describing areas of true autonomy are essential tools to guide performance benchmarks and track progress. For both staff and trustees, an effective onboarding experience will help empower next gen leaders to act. An onboarding experience should clarify roles and expectations and outline the areas where there is leeway for next gen leaders to exercise independent judgment and share feedback. An effective initiation process with these elements will help manage everyone's expectations.



## Pitfalls and Possibilities

Young professionals do not want to feel like they are at the “kids table,” and giving them nominal authority with no real ownership or ability to execute original ideas will all but guarantee discontent. Before bringing on new staff or trustees, consider where you are willing to let go of some control and in what aspects you could allow a different way of doing things.

If you are a manager, make sure to clearly communicate a goal, and then step-back to let your staff make some independent decisions on how to reach that goal. Provide context, clarity, and support but avoid the temptation to micro-manage by dictating the means to the end. Creating a welcoming space for next gen staff members to privately disagree with your perspective or share new ideas is a quick way to let them know you value their voice and opinions. If 100% effort is given to achieve a goal, then accept that the small disagreements that lead up to that decision can be the sign of a healthy team.

## Bite-Sized Action Steps

Invite your next gen trustees to attend an upcoming site visit and ask them to report back on their experience to the full board. Ask next gen staff to take the lead facilitating a meeting or conversation in your place and give them a chance to exercise their leadership skills.





# Provide Access to High-Quality Mentors

Exceptional philanthropic leaders often credit mentorship as an integral and ongoing part of their professional journey. Mentorship can also be a highly effective way to engage and retain talented next gen leaders. Fortunately, there are an increasing number of philanthropic leadership training programs with built-in formal mentorship components, including programs specifically designed for emerging professionals. These programs provide next gen leaders access to seasoned philanthropic professionals outside their place of employment for one-on-one coaching and mentorship. This not only exposes emerging leaders to innovative ways of thinking, but also provides a space for the type of guidance and constructive feedback essential to building professional maturity. Additionally, participants in sector-based mentoring programs often return with new knowledge about trends and best practices from the wider philanthropic community to advance the foundation's broader goals.

Some of the best-known training programs with a structured mentorship component include Exponent Philanthropy's Next Gen Fellows Program and the Thousand Currents Academy. These programs are open to both foundation staff and trustees and are just two examples of many similar leadership development programs that incorporate a supportive community of practitioners while matching participants with field leading mentors.



## Pitfalls and Possibilities

While formal mentorship programs are transformative, the tuition fees for these programs are sometimes a barrier to participation. Some programs offer a sliding scale based on annual grant making disbursements. If your foundation budget does not allow for participation in formal training programs, there are still many other ways to support next gen leaders in finding high-quality mentors. Mentorship circles are a common practice in the corporate world and are an easy way to build intra-organizational relationships while supporting employee growth and development. Intra-organizational mentoring is cost-effective and supports an overall culture of learning. Another option is to encourage and support next gen leaders in coordinating quarterly peer-mentorship collaborative as an inexpensive way to build a peer support system.

## Bite-Sized Action Steps

Not ready to build a mentorship circle or invest in a formal mentorship program? Ask your next gen staff member what type of mentorship they most need. Then offer to connect your next gen leader with a top-performer or leader of influence within the sector for an informal mentoring chat over coffee.



# Effectively Utilize and Build Next Gen Skills

The number one most important factor in retaining talented employees is the provision of meaningful work. Employees are most satisfied when they believe their skills are well-utilized, whereas they are more likely to leave a role if they are not challenged (Deloitte Talent 2020 Research Brief, 2012). Early career professionals are especially hungry to learn, build, test, and hone skills while gaining clarity about long-term career objectives. Therefore, engaging high-caliber next gen leaders begins with understanding how their professional skills and objectives align with the foundation's mission and priorities. Provide projects that both match and periodically stretch the next gen leader's capacities in order to keep them fulfilled long-term. Identify unique opportunities for them to build new skills that will benefit and advance the foundation's work and help them learn new things.

For more siloed roles, consider pairing employees across departments or functions to collaborate on new projects. In this arrangement, each employee gains exposure to new aspects of the foundation's work and deepens their knowledge of a different philanthropic skillset. This will also help everyone understand how diverse roles across the foundation work in concert towards strategic goals and overall team performance.





## Pitfalls and Possibilities

Because many foundations adhere to flat hierarchal structures, it is important for next gen leaders to understand if and how they can advance professionally within the current system. Even if there truly is no room for upward mobility, it is still critical to periodically reflect together on the ways they can develop and evolve within the foundation. Consider reviewing and revising job descriptions annually. Ask for input from next gen leaders on where they see their job description shifting, and then provide feedback on that input. If you are not sure that they are ready for new projects, point out current gaps in the skills that will allow them to take on the next level of responsibilities later.

There will come a day when most employees (next gen or otherwise) will be ready to move on to the next opportunity, but if they feel invested-in and challenged it is more likely that they will stay longer and perform better.

Transparent conversations can also lead to creative solutions. If a salary increase is not possible, could a title change help to demonstrate a progression of job responsibilities? Perhaps there is an opportunity for a lateral move with the foundation that will help your next-gen employee build-out an entirely new skillset while keeping them on your team. Or maybe there is space for them to build leadership skills on a steering committee or presenting at a conference while highlighting the foundation's programming.

Change is difficult and seasoned staff members may be resistant to shifting job responsibilities or new roles, especially if they themselves feel stagnant or under-appreciated. If you are going to invest in the growth of next gen employees, remember not to overlook your veteran high performers in the process. Either way, shifting responsibilities, the lack of new responsibilities, or mismatched priorities may result in some employees seeking out new opportunities. Although difficult, this can lead to healthy organizational change overall.

## Bite-Sized Action Steps

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# Conclusion

Engaging and retaining the next generation of philanthropic leadership requires building trust-based relationships and creating room for meaningful input. Tried and true strategies for engagement include making space for next gen voices in decision making, opening doors for mentorship, and leveraging and building up next gen skills. These strategies can be easily adapted to meet the unique needs of any organization. Please consider this guide when your current leaders are ready to empower and collaborate with those of the next generation.





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