Talent Management in the Private and Education Sectors: A Literature Review

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Introduction

Although teacher recruitment and retention have been policy concerns for many years, the strategic alignment of educator talent management initiatives has only recently begun to gain momentum. The adoption of a more comprehensive and strategic approach to securing a sufficient number of effective teachers is evidenced by the creation of human capital or talent management directorship positions and initiatives in many large U.S. school districts. Talent management directors oversee the various policies and practices that aim to attract top talent to the district. Smaller districts also are concerned with creating the appropriate mix of incentives to maintain a strong teaching force for their students.

The education field is not alone in striving to develop a workforce that can effectively deliver quality service to clients. For years, other sectors, particularly in private industry, have competed for the top talent and, arguably, have been more successful than the education sector at attracting the smartest, most motivated, and most effective college graduates.

This literature review examines effective talent management practices in education and other sectors, with an emphasis on strategies to attract and retain members of Generation Y (i.e., those born roughly between 1977 and 1995).

Methodology

This review focuses on literature that takes a more holistic approach to examining talent management, considering each aspect of talent management in relation to the others (as opposed to considering only one particular practice, such as compensation or professional development). The review includes both academic and professional literature.

The literature review addresses the following research questions:

- What are the human capital management best practices within and outside of the education field?

- How do other fields address the recruitment, selection, development, and compensation of Gen Y professionals?

Talent Management Best Practices Within and Outside of the Education Field

Best practices in talent management vary from industry to industry, among companies within an industry, and among jobs within a company. The most effective practices are not necessarily uniform across geographical regions or over time, and no single, "one-size-fits-all" talent management approach exists.

However, more similarities than differences exist in the types of talent management strategies advocated within and outside of the education field. After all, employees generally have the same priorities—interesting work, a salary to support their lifestyle, a positive work environment, and flexibility to maintain a reasonable work–life balance. Within and outside of the education field, talent management practices generally span three categories along the career continuum: recruitment, retention, and development.

According to a joint study by IBM Corporation and the Human Capital Institute, although attention to talent management practices varied substantially across industries, the education field was found to be the least likely to engage in "enlightened talent management practices." Education and government lagged behind all of the following industries: banking, retail, financial markets, health care, telecom, professional services, industrial products, electronics/technology, and consumer products. Interestingly, the industries that engage in the most talent management activities (e.g., electronics/technology and professional services) were referred to as the "knowledge-intensive industries," while education, which clearly should be knowledge-intensive, was not (Ringo, Schweyer, DeMarco, Jones, & Lesser, 2008, p. 2). Indeed, Olson (2008) claims that there is "no system for attracting, training, and supporting the best people for the job" in the field of education.
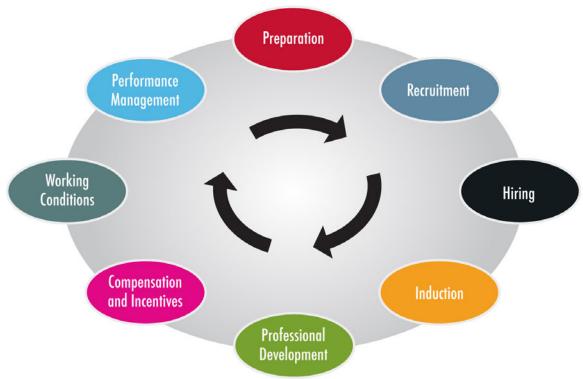
However, the education field does invest in understanding these talent management activities. For example, the Strategic Management of Human Capital (SMHC) initiative at the Consortium for Policy Research in Education has embarked on an effort to dramatically improve student achievement by strategically improving teacher and administrator recruitment, retention, and development. The initiative focuses on the 100 largest urban districts in the country and consists of a website, an annual conference, case studies, and a National Reform Network (Consortium

for Policy Research in Education, n.d.). At the local level, Heneman and Milanowski (2004) developed a human resource alignment model that demonstrates how district teacher policies may be horizontally aligned with one another and vertically aligned with a teacher competency model. Meanwhile, the Vancouver School District has developed an action-oriented approach, which emphasizes district-level strategies and approaches to managing Gen Y educator talent (Goeke & Wilgus, 2007).

An immense body of literature, based on both perception surveys and observational studies, addresses the appeal of various policies and practices to educators. Learning Point Associates has systematically summarized the findings of this body of literature in its *Managing Educator Talent: A Research-Based Framework for District and State Policymakers*—also called the METworks[SM] Framework (Behrstock, Meyer, Wraight, & Bhatt, 2009). The METworks Framework offers a variety of strategies to assist states and districts in taking a more comprehensive and deliberate approach to securing excellent educator talent and identifies the following eight key areas for effectively managing this talent:

- **Preparation.** Institutions of higher education need to ensure that their teacher preparation programs are selective in their admissions and responsive to local needs for teachers in certain subjects, use a wide variety of pedagogical approaches, develop skills and knowledge applicable to a diverse range of schools and classes, and collect data on the effectiveness of their approaches.

- **Recruitment.** District and state officials must identify and then market the positive characteristics of the profession and teaching in the districts where highly effective teachers are most needed. In addition, officials must maintain high recruitment standards while reaching out to a diverse pool of potential candidates.

- **Hiring.** Streamlined hiring processes should be conducted on an early hiring timeline and allow for rich information sharing between districts and teachers.

- **Induction.** A high-quality induction and mentoring program should be available to all new teachers; the program should be accompanied by appropriate and manageable teaching assignments that recognize their novice status.

- **Professional Development.** Ongoing, job-embedded, differentiated professional development should be available for all teachers.

- **Compensation and Incentives.** Teachers should be rewarded generously with salaries that are market-sensitive, competitive, and performance-based.

- **Working Conditions.** Teachers should enjoy a professional workplace that includes positive, collaborative, and team-oriented school cultures; limited discipline and classroom management problems; safe, clean, and appropriately equipped facilities; and reasonable workloads.

- **Performance Management.** Teachers' evaluations should be differentiated and provide clear and timely feedback; they also should be linked to teachers' goals, professional development, and incentives.

These areas of best practice span the educator career continuum, as illustrated in Figure 1.

Figure 1. Educator Talent Management Components

Source: Behrstock et al., 2009

In addition, Smylie and Wenzel (2006) find that studies of school districts or schools that incorporated coordinated talent management policies and practices reveal an association between such an approach and more successful reform efforts, including more ambitious instruction. This finding is corroborated by their review of such practices in three Chicago elementary schools. However, they maintain that more research is needed in this area:

> To date, we know of no comprehensive studies of systems of HRM [human resource management] practices in education at the school or district level.…the ground is fertile for research that would test this theory of strategic HRM in practice as it relates to instructional improvement and outcomes for students. (Smylie & Wenzel, 2006, p. 33)

In light of the dearth of research on the topic in education, it is helpful to consider studies that other industries have produced. In some respects, the teaching profession is unique in its talent management needs. For example, teachers occupy 4 percent of the civilian labor force (Ingersoll, 2003), and the sheer size of this population has implications for talent management in this sector. Moreover, the largely uniform school calendar makes the hiring process for schools unique. However, in other respects, teaching shares commonalities with other professions. Recent efforts to specifically recruit career-changing teachers from other professions and the long-standing transitioning of teachers out of the field and into the private sector are evidence that similar types of issues affect professionals' decisions to either teach or work in other sectors.

In a report on integrated talent management across various sectors, Ringo et al. (2008) identify the following broad dimensions of talent management based on surveys of more than 1,000 private and public sector organizations (p. 3):

- **"Develop Strategy."** Implement the best long-term approach for recruiting and retaining workers.

- **"Attract and Retain."** Recruit and retain those that possess the particular skills and knowledge needed by the organization.

- **"Motivate and Develop."** Develop workers' skills and knowledge to meet the company's needs and provide the motivational factors to ensure job satisfaction.

- **"Deploy and Manage."** Create scheduling and resource deployment practices that align well with the needs of the organization.

- **"Connect and Enable."** Encourage collaboration and the sharing of expertise as well as the information technology capabilities to help individuals across the organization identify and connect with others who can share their relevant talents.

- **"Transform and Sustain."** Maintain continuity of procedures while achieving clear, measurable change to advance the talent in the organization.

Compared to other sectors, the education sector was found to underperform the most in its talent management practices in the following areas: attracting and retaining talent, motivating and developing workers, and transforming and sustaining the workforce (Ringo et al., 2008).

In their review of the private sector literature, Smylie and Wenzel (2006) find that effective human resource management systems are indeed associated with outcomes such as reduced employee turnover and heightened productivity. This finding is based largely on research conducted by Huselid, Jackson, and Schuler (1997). They also note that Schein (1977) finds planning to be the most important aspect of human resource management because the landscape in which these policies and practices play out is constantly evolving and in need of adaptation. Finally, Smylie and Wenzel (2006) conclude from their private sector literature review and from their own findings in the education sector that human resource management functions often are detached from strategic planning functions in organizations.

Best practices in talent management in the corporate sector vary based on the characteristics of the company considered. Lawler (2008) identifies the two most common types of talent management approaches in the corporate sector today:

- The high involvement approach devolves important decision making to lower levels within an organization and requires shared leadership or strong leaders who can facilitate participative decision making and an egalitarian atmosphere. These companies nurture long-term relationships between the employee and employer and provide training and retraining to ensure organizational growth potential.

- The global competitor approach emphasizes short-term, flexible employee–employer relationships. This approach involves the acquisition and reacquisition of top talent through multiple contracts based upon performance. Employees are expected to build and

contribute their skills, rather than rely on the company to provide training. In exchange, talented employees are given challenging and interesting job responsibilities and substantial rewards.

Lawler (2008) recommends that to be effective, the senior managers in "human capital centric" organizations (i.e., organizations that strive for success by attracting, developing, retaining, organizing, and managing people) should spend 30–50 percent of their time on talent management. Lawler identifies the following best practices for recruitment, development, and retention:

- **Recruitment**
  - Facilitate the right employee–organization fit by providing accurate previews of the employee experience (e.g., in the job opening language, through online testimonials from current employees).

  - Develop employment contracts that formally state what employees can expect and what is expected of them.

  - Offer individualized employment contracts to account for diversity in age, preferences, and lifestyles of top talent. When to work, where to work, working hours, type of compensation, and other factors should be individualized.

  - Learn about applicants' past practices. Past practices are more indicative of future potential than interviews and resumes.

  - Create the impression that the hiring selection process is highly selective.

  - Offer to provide candidates with feedback on their performance in order to attract those who want to learn and develop themselves while dissuading those who do not.

  - Provide internship opportunities to expose potential applicants to a realistic preview of the company and gauge their performance before making an offer.

- **Development**
  - Encourage career self-management through timely and effective performance reviews that clarify the individuals' potential future roles in the organization and skills that must be developed further.

  - Publicize the plans for changing technology within the organization to indicate which skills employees should focus on developing.

  - Enable movement within an organization to encourage the best match. Although movement can cause disruption, it is vital for utilizing talent effectively and maintaining employee motivation and morale.

- **Retention**
  - Understand the market. Know why an employee might find another job opportunity more attractive than the current arrangement.

  - Understand employees. Values differ from employee to employee, and employers will benefit from knowing the values of their top performers.

- Focus retention efforts on the best talent to create an upward spiral of increasingly better talent attraction and retention.
- Identify and reward high performers.
- Collect information about the talent in the organization.

Through a survey of human resources leaders in the corporate sector, Wellins and Schweyer (n.d.) found that talent management practices related to professional development and working conditions were viewed as most effective. "At the top of the list was the desire for challenging work (89 percent), opportunities for training and development (83 percent), constant learning opportunities (78 percent), and non-monetary recognition for accomplishments (77 percent)" (Wellins & Schweyer, n.d., p. 8). Other top responses included high performance expectations (76 percent), high degree of autonomy and independence (75 percent), and relationships with coworkers (72 percent) (p. 9). Salaries were lower down on the list, identified as important by only 45 percent of respondents (p. 8).

Other researchers focus less on professional development and working conditions and instead highlight the centrality of the hiring decision. The late talent management pioneer Douglas Bray aptly wrote the following:

"If you have only one dollar to spend on either improving the way you develop people or improving your selection and hiring process, pick the latter…Hiring for the right skills is more efficient than developing those skills." (as cited in Wellins, Smith, & Erker, 2009, p. 8)

Wellins et al. (2009) support Bray's approach for the following reasons:

- A strong match between employee and employer is critical to preventing high turnover, and it is much more difficult to change the organization's work or culture than to hire individuals whose skills and interests are appropriate for the job.
- Some critical skills, such as judgment and adaptability, often cannot be easily developed.
- Even for skills that can be developed, assessing whether candidates have them at the time of hire is more cost-efficient than developing them later.

Clearly, a range of talent management practices are emphasized both in the education and corporate sector literature. Although each sector recognizes the importance of the range of talent recruitment, retention, and development practices, one observation that surfaced from this review was that the private sector has taken a much more aggressive talent management approach than has the education field, conveying just how motivated it is about this issue through the use of phrases like the "war for talent" (MacMillan, 2008; Wellins & Schweyer, n.d.; Wellins et al., 2009).

Approaches From Other Fields to Address the Recruitment, Selection, Development, and Compensation of Gen Y Professionals

Although there is little academic literature on the topic, there is a plethora of business literature that addresses Gen Y and its implications for talent management. This body of literature primarily consists of reports from multinational corporations and articles in business journals.

Research indicates that those managing talent in the private sector are focused on Gen Y. According to Shaffer (2008), a webcast poll conducted by the Human Capital Institute "found that 21 percent of respondents have already implemented strategies and plans to attract and retain the emerging Gen Y workforce, 25 percent are considering it in future planning, and 36 percent say their companies are currently researching options" (p. 5).

In a survey of members of the business community conducted by Fidelity HR Services, "80 percent of respondents said that Gen Y talent is extremely important or very important to business success over the next 5–10 years" (Shaffer, 2008, p. 1). In an international study of business leaders, the accounting firm KPMG International found that a majority of respondents (69 percent) wanted to better understand Gen Y employees, and many already had developed strategies specifically targeted to aid Gen Y recruitment (35 percent) and retention (36 percent) (Salt, 2007). The talent management strategies identified by those surveyed by KPMG as most effective for Gen Y include the following (Salt, 2007):

- Compensation based on merit

- Voluntary professional learning opportunities

- Job rotation into other departments

- Career advancement opportunities

Other Gen Y strategies that respondents employed included flexible work schedules, a high-quality work environment, career development programs for new young employees, and professional events for those under age 35 (Salt, 2007).

In a study conducted by Pitt-Catsouphes, Matz-Costa, and Besen (2009), the five most common types of flexible work arrangements were as follows:

- Having flexibility in determining the timing of one's breaks (91.8 percent)

- Having a say regarding decisions about overtime (84.1 percent)

- Having influence over which shifts are worked (69.8 percent)

- Having the opportunity for part- or full-time off-site (e.g., at-home) work (67.5 percent)

- Having a voice in work arrival and departure times (66.9 percent)

The need for flexibility to meet work–family responsibilities is not specific to female workers. According to Galinsky, Aumann, and Bond (2008), approximately half of all men take on equal (or greater) responsibilities for child care, including one-on-one care as well as the management of child care arrangements.

Deloitte LLP moves beyond focusing on flexible working arrangements to establishing Mass Career Customization (MCC), which increases employee loyalty, retention, and productivity by creating multiple career options—in terms of pace, workload, role, and location/schedule—for employees to choose among when building a career journey that meets their work–life needs (Benko & Weisberg, 2007).

In another study, NAS Recruitment Communications (2006) highlights the following seven Gen Y retention strategies:

- Support their values, individuality, and self-expression.

- Provide adequate training.

- Offer mentoring support and thorough feedback.

- Convey how their work affects the bottom line.

- Be direct and ethical.

- Develop individualized career tracks.

- Equip them with the latest technology.

According to the NAS Recruitment Communications (2006) study, Gen Y workers value the following:

- Positive relationships with colleagues

- Attractive salaries

- Opportunities for the expansion of one's skills and knowledge

- Appreciation for one's skills, knowledge, and accomplishments at work

- Exposure to challenging assignments

- Flexibility in the their work schedules

- A relaxed dress code

Based on a survey conducted by the International Association of Business Communicators of 1,279 members (all ages), specialists at Deloitte Consulting LLP concluded that engaging Gen Y workers so that they feel connected, updated, and involved was the key issue. In order to develop strategies to better engage Gen Y, they reached out to Gen Y members of the association, who shared the following insights (Reynolds, Bush, & Geist, 2008):

- Offer regular, brief updates.

- Develop genuine communication structures.

- Encourage employees to become "change agents."

- Create opportunities for Gen Y to develop ideas to advance organizational performance.

Fidelity HR Services found similar strategies to be effective, highlighting the significance of flexibility and customization, honesty and transparency, continuous feedback, and collaboration (Shaffer, 2008). According to David Weisman, director of the Fidelity Center for Applied Technology, "Companies need to think about the right mentor….Often it is a Boomer, not a Gen Xer," as members of Gen X may not be able to identify with Gen Y's need for constant guidance and feedback (as cited in Shaffer, 2008, p. 4).

Pitt-Catsouphes et al. (2009) consider the extent to which some of these conditions exist in workplaces. In their study, just more than half (50 to 59 percent) of respondents found their work to be full of meaning and purpose, felt that either to a moderate extent or a great extent they had the flexible work arrangements they needed to meet their personal and work needs, were satisfied with the access they had to opportunities for learning and development, believed they worked in inclusive work environments, and experienced at least moderate work overload. Sixty-two percent viewed their supervisors as highly supportive, with 59 percent rating their supervisors or team leaders as excellent or very good. More workers (74 percent) felt they had adequate job security. This finding may explain why job security ranks at the bottom of the list of Gen Y workers' priorities, with less than 8 percent of Gen Y workers desiring better job security (Deloitte, 2009).

Fewer workers (48 percent) were satisfied with the benefits they currently receive, and only 36 percent believe that their jobs offer opportunities to develop close friendships at work. In addition, Pitt-Catsouphes et al. (2009) found that Gen Y workers experience *more* work overload than others do.

In summary, the recurring themes that emerge from the private sector literature on Gen Y highlight the following needs:

- Develop policies and practices that value Gen Y workers and their self-expression.

- Provide regular, if not constant, feedback to help Gen Y workers develop the skills and knowledge they need to be successful.

- Be straightforward with Gen Y in evaluations of their performance and in the developments within the organization or field.

- Allow flexible working schedules and casual dress when appropriate.

In addition to the desire to work in environments with these characteristics, Leah Reynolds, a specialist in Generational Change and Total Rewards Communication at Deloitte, contends that members of Gen Y are concerned with the wider impact of their company or organization.

> Gen Y-ers consider a multitude of issues, such as the future of the industry, the path of the company going forward, whether they align with the company's path, the global impact of the company in the marketplace and ethical views of the company and industry. (as cited in Yuva, 2007, p. 23)

In addition, Gen Y workers favor employers that offer time for philanthropic activities in the community (Shaffer, 2008, p. 4).

Some evidence suggests that Gen Y and Baby Boomers share many workplace preferences and that those who recognize the sheer size of their combined numbers and the implications for developing policies that are attractive to these two generations will be better placed to compete for top talent. Hewlett, Sherbin, and Sumberg (2009) find similarities in these two generations' preference for working in an environment that contributes to society and allows them to "give back," fosters social relationships at work, and offers flexible work arrangements and opportunities to explore their passions or hobbies. They find that both Gen Y and Baby Boomers rate the following rewards higher than salaries: a great team, challenging assignments, a range of new experiences, and explicit performance evaluations and recognition.

Summary of Findings

Literature on talent management within and outside of the education sector suggests that taking a coordinated approach to developing aligned policies across the career continuum is beneficial. The literature does not indicate that certain types of policies are more effective than others are (e.g., salaries versus professional development) but rather that multiple policy components need to work in conjunction to retain effective employees.

In the private sector, these talent management policies and practices are being actively adapted to meet the needs of Gen Y workers. Specifically, companies are finding out what Gen Y wants and changing their human resource policies to make sure that they get it. The education sector, however, has lagged behind in taking strategic talent management approaches and addressing the needs of Gen Y teachers.

In addition to the topics presented, this literature review attempted to include studies of the *impact* of talent management systems on the retention of high-performing workers; however, no such studies were located in the education or private sector literature. Although the groundwork has been laid for understanding the policies and practices that are likely to attract and retain the best teachers, the education sector will benefit from not only further investment in but also further investigation into effective talent management, particularly for Gen Y.

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