

RESPONSIVE PHILANTHROPY

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Specialist or Generalist: A False Dichotomy

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Many of our colleagues have shared the same observation about a staffing trend in philanthropy: Foundation leaders seem to be hiring more program or issue "specialists," believing specialists can then gain "softer" generalist skills somewhat easily. It seems less popular to assume accomplished generalists can gain specialized expertise as easily.

We believe that the multifaceted skills of a generalist are neither soft, nor easily attained. Furthermore, thoughtful grantmaking requires us to address struggles and limitations that specialists and generalists (as well as those who fall somewhere on the middle of the continuum) have with their skill sets. Upon doing so, we realize that the struggles of specialists may be more difficult to overcome than some might expect, while the underrepresentation of generalists is at the root of some growing problems in our sector.

Specialists and generalists are both vital for philanthropy. Yet, we cannot expect every philanthropic practitioner to express only the best qualities of both specialists and generalists. So, we hope to catalyze a dialog that disabuses us from thinking generalist skills are soft, lets us better understand and overcome common struggles, and helps correct the specialist-generalist imbalance.

Staff expertise and experience are crucial ingredients for a foundation's success and usefulness. Therefore, discussion of the generalist-specialist dynamic can help us all better serve our constituents, as we continue to strive for grantmaking that improves the conditions and life opportunities for people living in poor, low-income and working class communities.

SPECIALISTS, THE EXPERTS

For the purpose of this article, we define a philanthropic specialist as an individual at a grantmaking foundation who has an impressively deep and specific range of expertise. Specialists enter philanthropy having previously honed their highly-developed expertise and resolute perspectives in a particular area. Many times, specialists will concentrate on one or more issue areas, such as environmental quality or the arts, or recipient groups, such as preschool children or the homeless.

It is possible for someone to specialize in a certain geographic areas, but working on a variety of issues and with a variety of recipient groups in Miami or the Northwest, for instance, will likely yield highly-developed generalist skills. Likewise, someone could specialize in certain strategies, such as direct service of food distribution that could alleviate suffering for the hungry in the short term, or advocacy for job creation legislation that could alleviate suffering for the hungry in the long term. However, due to the diversity of their work, strategy specialists soon will acquire generalist skills. They know that seldom does one strategy work in isolation; constellations of strategies create more benefits.

Specialists are necessary to philanthropy; they provide rich analysis and deep knowledge, and can give expert advice to grantees and communities. Additionally, their esteemed and respected reputations, earned from their previous sectors of work, help their new foundation to leverage the legitimacy of their programs and foster new and valuable relationships.

GENERALISTS, THE OTHER EXPERTS

Like specialists, generalists are experts, too. The difference between the two is not simply a

question of depth versus breadth, but of one kind of expertise versus another. Generalists also leverage their foundation's legitimacy, limited dollars and relationships. However, on the whole, generalists collect a broad network of contacts and relationships, having built their careers on their ability to compare, contrast and connect a variety of disciplines and approaches.

The skills of a generalist include, but are not limited to, building and managing complex partnerships, developing and implementing interconnected strategies, listening to and synthesizing divergent ideas without predetermining the outcomes or approaches, and finding commonalities and shared goals among people who normally work in different or competing fields.

We view philanthropic generalists as skilled Broadway producers or investors who perceive value in connecting writers, actors, directors, choreographers, musicians, costumers, set designers, publicists and even the ushers to each other and to audiences. Their craft is to gather talent and assess risk, so each person shines individually and the ensemble dazzles collectively. Their job is not to be silent partners who mail a big check during preproduction and then read critics' reviews after opening night. Broadway producers and investors don't write the script – though they may occasionally assist on a necessary rewrite; they don't direct the show – though they may wait in the wings, should the director seek their advice; they don't design the sets – though they may set financial limits on the extravagance of the set; and they don't take a bow at curtain call – though they may applaud heartily from their front-row seats.

Undeniably, the expertise that generalists bring to philanthropy proves absolutely indispensable for the development of refined and effective strategies. We believe that this expertise holds the same degree of importance as what specialists bring to the table.

HOW TO AVOID SOME COMMON TRAPS

The "traps" we can fall into are many and deep. So, let's explore some practical ways we can help ourselves and others to avoid them.

(1) Connecting Silos

Grantmakers cannot afford to limit their horizons to a point of devaluing and not fully considering the multitude of interconnected issue areas, recipient groups, geographic differences, strategies or approaches, and social contexts that all border their grantmaking goals.

The comfort of working in silos may be particularly tempting for specialists, who have often devoted their academic and practitioner careers to a specific, refined approach to solving a social problem. For the generalist, this may be less of a danger.

For instance, even a specialist who works for a foundation that focuses exclusively on one goal would realize that no goal exists in a vacuum. However, whether a generalist or a specialist, s/he would know that affordable housing connects to low-income workforce development; low-income workforce development connects to childhood education; childhood education connects to health; health connects to environmental conditions; and environmental conditions connect back to affordable housing.

(2) Shedding One's Previous Role

Let's say an education policy academic joins a foundation, becoming a philanthropic practitioner. That person can no longer identify as an education policy academic who now just happens to work at a foundation and can fund the ideas s/he had spent decades endorsing at universities or think tanks. His or her field of practice is now philanthropy – certainly philanthropy informed by previously attained expertise – but s/he can no longer afford to be an academic with predetermined ideas about a specific problem and the corresponding solution.

As we all come to learn in philanthropy, grantees will listen to what you say. To have authentic conversations with grantees, it is crucial to shed that previous field role and assume the role of informed, responsive grantmaker. This way, as much as possible, specialists can avoid the danger of thinking that a grantee is only listening to learn about their specialized opinions.

This also helps specialists avoid an even worse danger: grantees contorting their work to align with the specialists' opinions. To secure essential funding, grantees might even risk their own judgment and some community needs or buy-in (trying to fit the proverbial square peg in a round hole). Grantees certainly will value specialists' knowledge, experience, relationships and insights. However, once you leave the field, you've left the field; you are no longer the practitioner you once were, and there are new skills and disciplines to acquire in philanthropy.

(3) Acquiring New Skills

Anyone moving into philanthropy must acquire new skills, including but never limited to building

partnerships; managing staff and developing their talent; carrying out an ambitious, yet achievable strategic plan; being responsive to the community; developing and maintaining a grantmaking portfolio; welcoming new opinions; providing financial and nonfinancial support to grantees; and learning from failure (and knowing that failure to a foundation is starkly different than failure to a grantee or community).

When generalists or specialists generously share their knowledge, expertise, relationships and insights with grantees (and philanthropic colleagues), they are appreciated. However, when they humbly share their questions, challenges, limitations and eagerness to gain more information, they are admired.

Money does not equate to expertise, but it often produces power. So, it is helpful when a philanthropic practitioner addresses the power/money elephant in the room. S/he need not remind grantees of the experience and money the foundation gives to initiatives, but should remind grantees of the capacity grantees have for carrying out initiatives. This fosters more honest and unfiltered dialogs, symbiotic relationships, and learning experiences from both successes and failures. For generalists and specialists, this is a formidable series of tasks that are neither easily attained, nor easily maintained. Honing these skills require constant practice, reflection, patience and eagerness to acquire new skills outside of comfort zones.

We challenge the bias that a foundation can hire a specialist and expect that person to easily and quickly acquire the skills a generalist has spent a career developing and refining. No one thinks you can hire generalists, and by auditing a few classes they can gain the specialized skills and knowledge associated with a master of public health degree. Likewise, specialists in public health cannot attend some conference workshops and expect to master the skills associated with the generalist – such as pursuing collaboration and inquiry; seeking a variety of perspectives in order to inform, design, implement, evaluate and reassess a theory of change; and refraining from driving toward a particular approach or outcome.

BOTTOM LINE

Our sector must value both specialists and generalists. By doing so, we as philanthropic practitioners, our institutions and our sector will foster environments wherein specialists gain a diversity of knowledge and networks from generalists, while generalists garner more specific understanding from specialists.

Also, we believe posing "specialist vs. generalist" is a false dichotomy. Clearly, someone can be

both a specialist and generalist. One's generalist side supplies nimble, adaptive and collaborative skills, while his or her specialist tendencies help differentiate strong ideas from weaker ones, provide deep analysis and call upon time-tested advice on particular areas of concern. However, expecting all those qualities in all grantmakers is asking a little too much. Thus, we suggest, to the degree possible in staffing patterns, that foundations employ both specialists and generalists and value all roles and contributions equally.

"My business is to comfort the afflicted and afflict the comfortable." These words of Mary Harris Jones, a nineteenth century labor rights leader, should make us – comfortable philanthropic practitioners – reflect, discuss and then afflict ourselves with tougher questions.

At the end of the day, let us not forget that our work is not about us, our careers or even our theories of change. We aren't simply posing esoteric arguments about abstract concepts. Rather, we are learning how to improve ourselves and our philanthropic sector, so we can better meet the responsibility and privilege of helping improve the lives.

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