



**Fund the
People Toolkit**

Field Stories

Evelyn & Walter Haas, Jr. Fund





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haasjr.org

At a Glance



Type:	Family Foundation
Service Area:	In the San Francisco Bay Area, throughout CA, and across the nation
Assets:	\$450,000,000
Founded:	1953
Recent Talent Investments:	Flexible Leadership Awards and several fellowship programs

A deep respect and appreciation for the power of effective leadership is in the Haas, Jr. Fund’s DNA. “Our decision to invest in leadership as one of the Fund’s key strategies reflects our trustee’s values,” says Sylvia Yee, former vice president of programs. “The Haas, Jr. family—through the roles they’ve played in Levi Strauss & Co and their personal involvement on the boards of many civic institutions—understands the importance of leaders and leadership. They understand in their gut the difference that strong leadership makes.”

“People are not born with everything it takes to manage and motivate a team, build coalitions, and lead change—and are certainly not born knowing how to be good board members,” Haas, Jr. Fund President emeritus Ira Hirschfield recently wrote in a Stanford Social Innovation Review blog post. “These are skills that current and future leaders develop as they are doing actual work. Leaders who have the opportunity to reflect on their strategies and hone their skills make better choices, develop innovative solutions and forge stronger collaborations.” But the Fund’s investments aren’t just for building individual leaders. The Haas,

“We want our support to be catalytic, not standalone.”

Jr. Fund views them as a transformational strategy to get better results in the foundation’s priority areas by investing in the leadership of organizations and movements. “We hear a lot of people talk about turnover and burnout, but that’s not what motivates our trustees,” says Linda Wood, senior director, Haas Leadership Initiatives. “They want to know how much farther our grantees can go. We want our support to be catalytic, not standalone.” In fact, the Fund’s grants for leadership are awarded as additional resources over and above the regular program and/or general operating support grants the organization receives.



For example, leadership development is specifically interwoven into the Fund's strategies for building movements to advance the rights of immigrants and LGBTQ Americans. "We believe that investing in the leadership of organizations and of social movements has big payoffs," says Yee. "Movements depend on the strength

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of their members and their ability to motivate and inspire joint action. We look to develop what we like to call 'generous leadership' that can share credit and can build bridges across sectors and across communities — leadership that can provide the essential "connective tissue" for the partners to achieve common goals."

Flexible Leadership Awards

The largest program in the Haas Leadership Initiatives is the Flexible Leadership Awards (FLA). Launched in 2005, the FLA was informed by listening deeply to grantees about their challenges and opportunities. The Fund also solicited input from leadership development program providers and other foundations. "We concluded that where grantees needed help most was in the day-to-day leadership of their organizations," says Wood. "While a fellowship program would have been appreciated, it wasn't first on their list. That understanding is what shaped FLA."

The FLA strategically selects organizations in consultation with colleagues who direct the Haas, Jr. Fund's program grantmaking portfolios in immigrant rights, education equity and LGBT rights. Organizations are selected for FLA grants of \$35,000-\$50,000 because they play a strategic role in advancing the field or movement goals.

The FLA program asks grantees two core questions: Where does your organization want to go? What kind of leadership does it need to get there? Grantees work with an FLA plan consultant, who serves as a confidential thought partner and resource to answer these questions, assess organizational needs and interests, and create a plan for moving the mission and leadership work forward that can address multiple issues from strategy, to fund development, to workplace culture, to governance and, of course, individual leadership development.

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FLA engagements are definitely not a "one-size-fits-all" undertaking. For each organization, the plan consultant works closely with senior staff and board to create an approach that is specifically tailored to support the organization's answer to the two core questions, and seamlessly interweaves capacity building assistance with leadership development to advance the organization's goals.

Once a leadership plan is created, plan consultants stay with their organizations throughout implementation, helping them identify resources for training, coaching or learning, and making adjustments to the plan when required. Although plan consultants typically work closely with an organization's executive director, they also help the board and senior leadership teams in organizations work together to improve their own abilities. "FLA is not



just about the executive director,” says Wood. “These organizations have ambitious goals, and they need teams of capable leaders in place in order to achieve them.”

The Fund pays for the plan consultant’s services, as well as the fees of additional consultants chosen by the organization to provide specific expertise as part of the plan’s implementation, for example such as for strategic planning or executive coaching. In addition, the Fund occasionally convenes FLA grantees to engage in peer learning.

Coaching is one of the most popular leadership development activities in an FLA plan – so much so that the Fund explored and shared the benefits of coaching on its [“Power of Coaching”](#) webpage, which includes a video series, an evaluation of coaching and an online toolkit about coaching for nonprofits.

In some instances, with the support of an FLA engagement the organization may decide to initiate a thoughtful executive transition. When that happens, the plan consultant helps the organization’s board and other leaders navigate through the transition and onboarding processes.

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A **2013 evaluation** of the first 14 FLA recipient organizations showed that most leadership goals set by organizations were met or surpassed, and the organizations also were highly successful in advancing their mission goals. They also saw significant budget growth - 64 percent on average. These findings are especially encouraging, says Wood, because they were derived from an objective, external evaluation rather than the self-reported data that is often used in leadership program evaluations.

“What may distinguish FLA from some other programs is that its focus on mission goals engenders a sense of commitment to and motivation to undertake the leadership work, which in many cases was quite challenging for overstretched executives,” wrote evaluator William P. Ryan. “Many EDs hesitate to take the lid off the black box of their boards, or investigate how their own blind spots undermine their colleagues, or confront troubling dynamics in their team. But when that challenging work is framed as an important driver of their mission success...it may become more attractive.”

Supporting Fellowships

While the FLA aims to strengthen organizational leadership, the Haas, Jr. Fund has also invested in strengthening leadership at the individual and movement levels.

Looking across two social movements, the Fund observed leadership gaps that could not be addressed by focusing on organizations.

The challenges were different in the fragmented immigrant rights movement in California, where tremendous diversity and regional tensions undermined efforts to organize collaboration and collective action.



21st Century Fellows

Along with the Arcus Foundation, the Gill Foundation and several other funders, the Haas, Jr. Fund helped launch the 21st Century Fellows program at The Pipeline Project, targeted at increasing the presence and capacity of leaders of color within LGBT advocacy and service organizations. The 21st Century Fellows program seeks to help individuals of color build skills and networks to strengthen their leadership abilities; strengthen organizations by supporting their development of key staff members of color, and; strengthen the movement by preparing a more diverse and better networked corps of leaders within it.

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21st Century Fellows engage in a year-long program that combines group leadership retreats with individual leadership development plans that include supports like coaching, conferences, courses or self-care activities. **A 2013 evaluation** showed that fellows felt more confident as leaders, and more connected to their purpose for working on LGBT issues. Two-thirds had experienced growth in job responsibilities; one-third had advanced to more senior roles in their original organization or another organization; and eight had advanced to executive director positions.

Fellowship for a New California

In 2011, the Fund envisioned and developed a new leadership program specifically to enhance the skills of those working within California's immigrant rights movement while building stronger relationships across organizations. "Immigrant rights is a major focus of the foundation, and we needed to nurture, grow and celebrate leaders who reflect the diverse population of our state, especially those who can lift the voices of members of the community who are not often heard," says Wood. "This is about supporting networks and a movement that can help ensure that California's policies and practices are keeping pace with the changing demographics of our state."

The Fellowship for a New California, operated by Rockwood Leadership Institute, enrolls some two-dozen leaders from immigrant rights organizations each year for a series of retreats as well as individual coaching sessions from professionals and peers. Fellows also receive leadership practice "assignments" to reinforce skills as they are learned. Funding from the Haas, Jr. Fund, the California Endowment, California Wellness Foundation and James Irvine Foundation covers the bulk of the Fellowship's \$12,000 per person cost, and participants are

"This is about supporting networks and a movement."

asked to pay a small portion, usually between \$100 and \$400, depending on their organization's budget.

Alumni now number seventy influential immigrant rights leaders that represent diverse urban and rural regions throughout the state, different ethnicities, and distinct strategies to increasing the political power and voice of immigrants. With Fund support, the alumni come together in order to further develop their individual leadership skills and to build the connections and trust that help them navigate contentious issues, find common ground and advance shared policy goals. Participants report that ongoing support to these fellows makes a palpable difference in strengthening the immigrant rights movement in California.



Foundation's Investments in Talent

All in all, the Haas, Jr. Fund invests approximately \$3 million in leadership development each year. About \$1.7 million is for the Flexible Leadership Awards program, of which \$1 million goes directly to grantees and the remaining \$700,000 covers indirect support such as plan consultants and convenings and program management. The Fund allocates approximately \$350,000 to support fellowships and another \$450,000 to field building to advance practice and knowledge in the field of leadership development. Finally, the Fund has allotted about \$500,000 to develop and launch a new initiative focused on building the fundraising capacity of grantees.

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The overall \$3 million portfolio is managed by Haas Leadership Initiatives senior director, Wood and a part time program associate at the Fund, relying on a fiscally-sponsored project at the Tides Center to manage and operate the FLA program. Within Tides, a full time FLA director and a full time practice manager are dedicated to FLA.

The arrangement with the Tides Center has the additional benefit of creating space between the grantmaking and consulting facets of the FLA and fosters greater freedom and candor.

Quick Case 1

One Leader's Journey

When attorney Janson Wu joined GLBTQ Legal Advocates & Defenders (GLAD) 10 years ago, he set a goal of eventually becoming an executive director, either at that organization or another nonprofit. The challenge, he says, was figuring out a way to get there.

“Did I need to go to business school? Join boards? I had never really held a leadership position in school or afterward, and I was happy doing what I was doing as a lawyer, but I also realized that I could do more if I developed my leadership ability and pursued a post as an executive director,” he says.

Wu learned about the Pipeline Project's 21st Century Fellows program and requested that GLAD's leadership nominate him. “I wanted to explore the possibilities, but I also thought GLAD could benefit from my participation,” he says. “It was an excellent first experience, a year-long program with a tight cohort, and we delved into inner leadership development skills, which was transformative. It really resonated with me.”

“When you're a young executive director of color, everyone wants to support you, but no one wants to fund you.”

At the same time, GLAD's long-time executive director was preparing the organization for her impending executive transition. With an eye towards her departure, and multi-year support from the Haas, Jr. Fund's FLA program, GLAD worked to build a stronger senior team and board and set the initial strategy of the organization's work under a new executive director.

Wu was promoted to the role of deputy director during the transition. As a member of the senior team, “I asked for coaching, and that experience was the second most important thing in my development and solidified my



desire to become an executive director,” he says. “My coach helped me think through whether to apply for the executive director job at GLAD and built my confidence to do so.”

In 2014, Wu became GLAD’s executive director. GLAD’s FLA grant also supported his onboarding and continued coaching, but his development didn’t stop there. “As a new E.D., I went to an FLA convening in San Jose. It was an interesting experience, because I had no idea what I was doing in many ways. Talking to other people and building relationships was very valuable. And my coach repeatedly emphasized that I should trust my instincts. I’m learning more about my own leadership style, and how to take what’s helpful and leave what’s not.”

In addition, FLA funds helped Wu and other staff attend the Managing to Change the World training, which has not only continued to strengthen the second tier of leadership but also given senior and mid-level leaders shared

language and tools to strengthen the organization. All of these experiences helped Wu lead the organization through a number of transitions, from his own arrival as a new executive director, to a wrap-up of the organization’s successful work to win marriage equality, to a new name for the organization, to a new strategic plan with a focus on racial and economic justice.

“My next era of change management is to use FLA funds for leadership development for the next wave of leaders in our organization,” he says. “Board leadership development will be another high priority.”

Wu encourages all funders to consider the importance of leadership development. “As one of my colleagues said, when you’re a young executive director of color, everyone wants to support you, but no one wants to fund you. One of the hardest things for new leaders is not having a network of relationships and connections. Support like fellowships and FLA help create a spirit of abundance.”

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Quick Case 2

The Role of a Plan Consultant

Gail Ginder has been an organizational consultant and coach for 25 years. As a Plan Consultant for the Haas, Jr. Fund’s Flexible Leadership Awards, she uses that expertise specifically to help grantee organizations understand where they want to go, and how to develop the leadership they’ll need to get there.

From day one, leadership development planning within FLA is a highly participatory process. “As a plan consultant, I first meet with the executive director of an organization to determine if I’m the right fit,” says Ginder. “Then, I will ask the executive director to bring people together who will be the committee to assess organizational needs and priorities – usually board members, the senior team, and the executive director. We conduct an assessment together, and I’ll conduct oral interviews with staff and board about the strengths, needs and

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opportunities for leadership development. Then, I’ll present all the findings to the team and have a shared conversation about what they might do.”



The approach to leadership development within an organization is never a one-size-fits-all proposition. Ginder says that many times, the plan developed for an organization provides resources that organization leaders haven't realized they needed. FLA plans may include a wide range of areas for capacity and leadership development, such as strategic planning, organizational change, fund development, racial equity, board development, or team development. For each aspect, Ginder works with the organizational team to identify additional consultants who are subject experts and a good fit for the organization. In this way, she says, organizations benefit from the best thinkers and consultation in each area, all guided by the same overarching goals.

FLA grants often include coaching for individuals and/or leadership teams. "All consultants have a sweet spot, and mine is executive coaching," says Ginder. "I love working with individuals and senior teams to help them be more high-performing and collaborative."

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Ginder and FLA grantees also appreciate the "firewall" that the Haas, Jr. Fund created between itself and grantee organizations. The director of the Flexible Leadership Awards program is employed by the Tides Center, fiscal sponsor of the program. This arms-length arrangement gives plan consultants more latitude. "We have a lot of autonomy, but the check and balance is the plan that we create with each organization. If that plan doesn't link leadership development activities with the organization's strategies, Haas, Jr. will call us on that. We need to be able to show where the organization wants to go and how the funds are helping them get there," says Ginder.

"The FLA program really allows organizations to make real change," she adds. "It's not just one grant for strategic planning and good luck. It's a focused, longer term commitment (3-5 years) as opposed to one-off programs or grants. Leaders can see themselves making an impact in real time, rather than going offsite to a fellowship. As a result, it's not just the leader who emerges stronger, but the entire organization."

Lessons Learned

1

Test for readiness

Although every organization may be happy to receive a leadership development grant, not everyone may be ready to make the most of it. A small, introductory grant can give organizations the chance to try it on for size and cultivate interest and the commitment to do the hard work.

2

Base leadership investments on deeper questions

Haas, Jr. Fund is very intentional in its purpose for funding leaders — to push organizations and movements forward. That's not happenstance. In considering investments, the Fund challenges grantees to ask themselves questions like: Are the investments we are making really moving toward what we want to accomplish? What's our vision of what the field needs? How do all investments align with that vision? How do we know we're making a difference?



Lessons Learned

3

Value candor

In order for foundations to create high-quality leadership investments, it's important for the leaders themselves to feel safe revealing their personal and organizational strengths and weaknesses. It can be difficult to be completely candid with a funder, so providing a supportive consultant who is the leaders' ally can create a "safety zone" that allows grantee leaders to explore openly and honestly where they are and what they and their organizations need to step up to get where they're going.

4

Flexibility is key

No two leaders have the same needs, and few leaders' needs stay static over time. Leadership development support must be adaptable — both to a wide range of skill development or training methods to suit individual leaders from different kinds of organizations, of different scale in different fields, with differing tenures.

5

Maintain focus

It can be a challenge for organizations to maintain leadership investments long enough to see transformational change in organizations, movements or fields. Using a plan consultant or coach, as well as dedicating funds, can help organizations maintain the focus to reach long term goals.



Looking Ahead

Haas, Jr. Fund's Wood recognizes that building the capacity of nonprofit leaders requires staying on the leading edge of practice. For that reason, the Fund continually looks at the changing needs of grantees and seeks to help advance new practices when appropriate. The area of executive coaching is one example.

“When we first started, there was not a lot known about executive coaching in the nonprofit world. In addition to providing it, we also did some learning around how to do it well,” says Wood. The Fund shared the results of that learning on a special [**coaching resource page on its website.**](#)

“Over time we are continually learning how to do this work better,” she adds. “We’re now focused on how to bring a stronger racial equity lens to leadership development. The field of strategic planning also has gone through a lot of iterations, so we’re looking for ways to help grantees and consultants understand various approaches and what’s right for a given organization at

a given time. More recently, Haas, Jr. Fund has focused some of its leadership development resources on helping fundraising professionals at nonprofit organizations enhance their own skills and abilities. This work is part of the Fund’s effort to “learn out loud” about the key issues nonprofits face as they work toward greater effectiveness. As part of the fund development learning, the [**Fund has shared reports, blog posts and resources about fundraising on its website.**](#)

As it moves forward, Haas, Jr. Fund will keep the “ecosystem view” on the radar as well as the organizational view. “We know that organizations play a role in the larger ecosystem that we’re trying to change,” says Wood. “Through our leadership initiatives, we’re working to help support leaders working in the context of movements understand their roles, validate them, and test them in those larger ecosystems, so they will know how to play those roles to full effect. We always want to serve in the best possible way in the moment.”



Haas, Jr. Fund Leadership Program Investments

Program name	Flexible Leadership Awards	21st Century Fellows	Fellowship for a New California
Target participants	Executive directors, senior leaders, and trustees of grantee organizations	Managers of color in LGBT organizations	Leaders in California's immigrant rights movement
Numbers	About 40 organizations	72 alumni to date	24 individuals annually, over 70 alumni to date
Content partner	One plan consultant for each participant organization, and a wide range of other consultants with specific content expertise	The Pipeline Project	Rockwood Leadership Institute
Topics covered	Completely tailored to strategies for advancing each organization's mission	Management and leadership skills, with individual leadership development plans	Skills and connections to build the movement
Time commitment	3-5 years	One year	One year
Annual investment	\$1.7 million (approximately \$50,000 per organization, including a \$35,000 grant plus \$10,000 per grantee for consulting and convening and \$5,000 for program management.)	\$125,000 to support new fellows and alumni (approximately \$16,000 per fellowship) co-funded with the Arcus Foundation and the Gill Foundation	\$150,000 to support new fellows, alumni, and plan consultants (approximately \$13,000 per fellowship) co-funded with The California Endowment, The California Wellness Foundation, and The James Irvine Foundation
Year started	2005	2009	2012



About Fund the People



Fund the People is the national campaign to maximize investment in the nonprofit workforce. To achieve this goal, we make the case, equip for action, and build a movement to change the attitudes and behaviors of funders, fundraising nonprofits, and the intermediaries that support them. There is a long-standing, sector-wide deficit of investment in the nonprofit workforce. Nonprofit professionals work in environments typified by high burnout and stretched resources. So there is a real demand for equitable salaries and benefits, more and better professional development, improved

human resources functions, and healthy organizational culture. Together, we can address these challenges by reshaping existing resources to prioritize nonprofit people as the central asset of nonprofit performance. Now more than ever, we can ensure that America's civic leadership is diverse, well-supported, high-performing, and sustainable for the long haul. Launched in 2014 and headquartered in Beacon, NY, Fund the People (originally known as Talent Philanthropy Project) is a project of Community Partners. Our work is informed by an Advisory Council of diverse leaders and a team of skilled staff and consultants, and is supported by a coalition of regional and national foundations.

To learn more about Fund the People visit: fundthepeople.org

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Authored by Elizabeth Russell and Kris Putnam-Walkerly, MSW, Putnam Consulting Group. Fund the People commissioned the firm to produce this field story which part of the field story collection in the Fund the People Toolkit, a source of practical resources meant to help funders and nonprofits to maximize their investment in the nonprofit workforce.

Putnam Consulting Group, Inc. is a global philanthropy consultancy. Since 1999, the firm has helped foundations, corporations and philanthropists strategically allocate and assess over \$300 million in grants and gifts to increase impact, share success, and advance mission. Putnam provides experienced advising and coaching, strategy development, streamlined operations and assessment. The firm helps philanthropy communicate results to myriad stakeholders through targeted communications strategies and media to philanthropic leaders. **Learn more at putnam-consulting.com.**

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