



**Fund the  
People Toolkit**

Field Stories

**The Harry and Jeanette  
Weinberg Foundation**





# The Harry and Jeanette Weinberg Foundation

[hjweinbergfoundation.org](http://hjweinbergfoundation.org)

## At a Glance



<b>Type:</b>	Private independent foundation
<b>Service Area:</b>	National and international, with a focus in Maryland, North-eastern Pennsylvania, Hawaii, Greater Chicago, and Israel
<b>Assets:</b>	\$2.3 billion
<b>Founded:</b>	1959
<b>Recent Talent Investments:</b>	Weinberg Sector Skills Academy (2015), Leading Edge (2014), Weinberg Fellows (Hawaii)

Think of the The Harry and Jeanette Weinberg Foundation in Baltimore, and you may think of the Weinberg Fellows program, an intensive, academics-based program for nonprofit CEOs. That’s not surprising, since the program produced 151 graduates over its eight-year span of operation in Baltimore. But that program was implemented to fill an academic gap in the city’s nonprofit leadership development structure — a gap that has since been filled by area colleges and universities that have added nonprofit certificate and degree programs. As a result, the Baltimore Weinberg Fellows program wound down in 2011.

Did the Weinberg Foundation’s interest in talent and leadership development wind down as well? Not a chance. The original Weinberg Fellows program has operated in Hawaii for more than 10 years, and the need for it still exists. It engages executive directors from nonprofits across the state in multi-day retreats to hone skills, fill knowledge gaps, and create new networks. In Baltimore, talent development remains an imbedded

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priority within the Foundation’s work, and its staff and board have been investing in other options for supporting nonprofit leadership.

“We give 190 grants a year, and review about 1,000. We have a reputation for kicking the tires hard, but the single most important marker for us is a strong executive director, board, and senior staff,” says Foundation President and CEO Rachel Garbow Monroe. “If they are strong, then the organization is strong. If we don’t invest in developing that talent now, we will be investing in mediocrity in seven years.”



## Leading Edge

This program, involving more than a dozen foundations, nonprofits, and federations, seeks to build an excellent North American leadership pipeline by identifying and fully preparing tomorrow's leaders of nonprofits that serve the Jewish community worldwide.

Leading Edge arose from a series of conversations among many of the largest funders of Jewish organizations, including the Weinberg Foundation, who recognized the growing difficulty in finding new leaders as seasoned executives retired. With the Weinberg Foundation as a principal funder, Leading Edge was created to explore and implement ways to fill the talent pipeline, specifically, at the executive level.

Leading Edge is comprised of three main programs including providing support to new CEOs of Jewish organizations; examining what volunteer leaders — board members in particular — can do to build stronger governance and strengthen the lay-professional partnership; and focusing more directly on identifying and creating great places to work that will attract and keep great leaders, as well as improving organizational culture and positively impacting the field.

Leading Edge recently released the results of its [2016 employee engagement survey](#).

## Gathering Nonprofit Data

The Foundation recently began asking grant applicants to share data on their own professional development plans or activities, stressing that the information is for learning purposes only and doesn't influence grant decisions. In its first wave of data collection, the Foundation discovered that 77% of organizations budgeted less than 1% of their total annual budget for professional development activities, and organizations with the largest budgets and capacity did not necessarily commit the most funding for professional development. The most common form of professional development was attendance at professional conferences, and 43% of organizations said they offered professional coaching.

Time and money were cited as the biggest barriers to staff development (see sidebar for more details).

Given the importance the Foundation places on leadership, trustee Donn Weinberg explains why gathering data on the field is important. "We rely on excellent leadership and need to know where our investments in leadership could have the greatest impact. And just the fact that we're asking about practices helps nonprofit boards realize that they can't replace a departing executive with just anyone. It makes them think about succession planning and professional development for mid-level folks."



## The Weinberg Sector Skills Academy

One of the Weinberg Foundation's focus areas is workforce development. In 2014 the Foundation tasked Program Director Marci Hunn with creating a leadership opportunity specifically for organizations in the workforce sector.

After thoroughly reviewing existing options nationally, Hunn realized that the Aspen Institute's national Sector Skills Academy would hands-down be the best provider for leadership training in Baltimore. Undeterred by the fact that the Aspen Institute had actually ended its national leadership program, Hunn convinced them to offer the Academy in Baltimore, specifically for workforce organizations serving the city. The Aspen Institute assigned three faculty members to the job, and Hunn secured additional funding and support from the Annie E. Casey Foundation and Abell Foundation. The Baltimore Workforce Funders Collaborative provided leadership support for the program. To emphasize the local nature of the experience, the Foundation lent its own name to the program, the Weinberg Sector Skills Academy (WSSA).

"Working with the Weinberg Foundation gave us an opportunity to adapt the national curriculum to a particular local context. We were able to take account of factors such as the participants' local labor market, the resources and capacities of the local institutions, and the assets and needs of the people whose careers they seek to advance. The Weinberg Sector Skills Academy participants took full advantage of the opportunity to focus on work within their organizations and to develop partnerships with other stakeholders—both essential for success. The energy and passion that they brought to this work was exciting" stated Sheila Maguire, Senior Fellow, EOP, the Aspen Institute.

WSSA connected a diverse range of participants. Representatives from construction, manufacturing, green industries, health care, and other industries were present. Participants all had senior staff positions, but very different titles and roles. In addition to nonprofit workforce development agencies, the cohort included representatives from local and state workforce agencies.

In the spring of 2015, 18 WSSA participants were announced. A week after that, the "Baltimore uprising" occurred. And two weeks later, the WSSA cohort of 18 individuals convened for the first time.

"Because of the uprising, our WSSA participants brought even more passion and meaning to this chance to come together and create a new space and increase opportunities for Baltimore residents," says Hunn. "Few of our participants knew one another when they started, but they all saw it as a shared challenge, not just one for each organization. From day one, there was much more of a focus on stepping out of the box and collaborating more. They had more honest conversations, because this was a safe space."

WSSA began with an opening retreat at Aspen's Wye River Conference Center on Maryland's Eastern Shore. From there, participants attended five one-day meetings in Baltimore throughout the year, joined in conference calls, took advantage of mentoring opportunities, and divided into three teams to pursue capstone projects before attending a closing retreat back at Wye River. The capstone presentations were attended by more than 100 local foundation, corporate, and public leaders the following month.

The Aspen Institute faculty offered a series of themes from which to build curriculum: personal leadership; organizational capacity; maintaining effective partnerships; leveraging power and influence; working with industry, serving workers; serving employers; and creating strategies for change. Hunn says that participant input helped inform the curriculum, which focused specifically on challenges and opportunities within Baltimore and included topics such as personal leadership and collaboration. The Academy brought in national experts to talk about policy, statewide efforts, cooperatives, the economic landscape, and successes in other communities, but it also featured local leaders from the Baltimore City Mayor's office, higher education, and the medical community to address issues such as equity and local hiring practices.



While Foundation staff also helped shape the curriculum, they intentionally limited their involvement in the WSSA experience. “We would pop in for an occasional meeting, but mostly it was just the cohort, the Aspen faculty, and guest speakers,” says Hunn. “We didn’t want to be ‘Big Brother’ watching or changing the organic process that was taking shape.”

Like all of Weinberg Foundation’s leadership offerings, WSSA requires that all participants pay a small portion of the cost — in this case, \$500. The funders pick up the rest but believe that “having skin in the game” fosters a sense of responsibility and helps participants understand that they’ll get out of the experience what they put into it. It’s a practice that has played a part in all of the Foundation’s talent and leadership development programs.

“The idea of ‘skin in the game’ is a universal principle of human psychology. We use it in our business,” says trustee Weinberg. “It’s motivation for participants to show up and engage every time.”

Engagement has certainly been the name of the game. Months after the experience ended, Hunn met with each of the cohort participants and heard phenomenal feedback. “Their relationships have created opportunities for collaboration, going after grants together, partnering, thinking strategically, and reaching out to one another as a strong community. I’d say they did a good job of breaking down those silos for the benefit of Baltimore city residents!”

## Internal Investment

It’s difficult for the Weinberg Foundation to break out its investment of time or dollars in leadership development, because it infuses every aspect of the Foundation’s work, says Monroe. “Leadership development transcends every program area, and our trustees and staff talk about it regularly. It’s not a siloed agenda item.”

The Foundation also invests in its own leadership development as part of its strategy to elevate leadership overall. Staff members are encouraged to take part in

Leadership Baltimore and assume leadership roles in sector collaborations either locally or nationally. (Hunn, for example, chairs the Baltimore Workforce Funders Collaborative at the Association of Baltimore Area Grantmakers, and is a member of the Baltimore workforce development board.)

“We are very eager to see our staff serve on boards and assume other volunteer leadership roles. We do this to help lead the field, but also to provide leadership development to our own people,” Monroe says.



## Quick Case 1

### Connecting the Dots

Tona Cravioto had broad experience in finance and workforce development before taking a job in Baltimore. He had even participated in one of the Aspen Institute's national sector skills academies. But after taking a job as senior director of workforce development services at St. Vincent de Paul, the exclusive focus on low-income inner-city communities was a complete shift.

"I was new in the city and completely the underdog," he says. "I was struggling with workforce development issues like racism, background checks, and lack of education — all things that were new to me. The Weinberg Sector Skills Academy gave me the very important feeling that I was not alone. I learned much more about who is in Baltimore, who is doing what, and the key roles they play in the city in terms of employment. We all work in isolation. This completely connects the dots."

Another key benefit of WSSA, says Cravioto, was the focus on developing as an individual leader. "The Academy helped me think beyond my position at St. Vincent de Paul. It made me realize that I don't have to wear my agency hat all the time to do something positive. I have a clearer idea of my own place in the city, and how I can invest time and energy in more ways to be more of a leader."

Taking off the agency hat wasn't easy, at least at first, Cravioto admits, but WSSA quickly provided an atmosphere that made stepping out of his comfort zone feel safe.

"The WSSA staff was always positive and very engaging, regardless of what was going on. We were all used to supervising people, but in WSSA that was not the case. We were not in charge, and that was really healthy. We also had the 'Vegas rule,' which gave us the opportunity to talk freely about whatever."

**"We all work in isolation. This completely connects the dots."**

Cravioto particularly appreciated the ways in which WSSA presented best practices and case studies from around the state and the country, but emphasized a local perspective. "Our challenge is to adapt and apply these best practices to Baltimore, because every community is different," he says. "The capstone teams allowed us to analyze particular issues and practices more deeply."

For their capstone project, Cravioto's team chose an issue that represented the biggest problem in his work — criminal background checks. "I worked closely with a very talented group, and we came up with a great idea to force transparency in the hiring process and reveal the reasons why those background checks were there. We knew we couldn't change individual company hiring processes, so we proposed creating an independent entity that was charged with monitoring all the hiring practices."

Cravioto and his team have now presented their capstone project idea four times, and they are working to secure funding for a six-month planning process to make their idea a reality.

"I would not have had the opportunity to meet and work with these people at the level I now do if there was no WSSA," he says. "Three months into the one-year program, we started working together, partnering, and co-applying for grants. I feel truly empowered now."



## Quick Case 2

### Forging New Partnerships

Sara Muempfer, director of Workforce Development at Maryland's Department of Human Resources, joined the WSSA because she knew the program she was working on to provide employment and training to food benefit recipients needed to better connect to the Baltimore community.

"I work at a state agency, so we don't often look through any other lens than that, but we run two workforce programs for those on temporary cash assistance and on food stamps, and the lion's share of those recipients are in Baltimore. We needed a better understanding of sector skills," she says.

Muempfer learned about the skills of her fellow WSSA participants, but she also learned a thing or two about creating partnerships. "We did work on how to influence others, with tools like influence maps and how to talk to different audiences and get them to move in the way you need them to. I began to use these skills right away to move things forward with our benefits program."

Now that she's graduated, Muempfer says her way of working has changed for the better, and so has her agency's strategy.

"I'm much more thoughtful now," she says. "If I'm working on a project, I really take the time to stop and think, 'Have I talked to everyone I need to?' I learned that garnering other people's feedback is crucial to systems change, and I learned how to do that well.

"I also know better what our organizational strengths and weaknesses are. I used to think we needed to know how to run programs. I learned that, really, we aren't the

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best ones to do that work. Instead, our strength is knowing who's doing it well so we can partner with them. Now we can fund and partner with the right organizations."

In fact, shortly after the WSSA program ended, Muempfer onboarded six new program partners — all of whom were WSSA members. She's also worked with new partners to make inroads into ex-offender-friendly industries like manufacturing and construction, found partners who excel at support services, and helped pass a bill to fund demonstration programs in partnership with the state's court system.

"I know the partnerships of the folks in WSSA will continue for a long, long time because of our shared experience," she says. "And we're all truly better leaders because of it."



## Lessons Learned

### 1

#### Small programs can make a big difference

The Weinberg Sector Skills Academy had only 18 participants, but they are now in the process of leveraging their new knowledge and connections to transform the entire workforce development field in the city. This specific focus can result in a positive ripple effect for policy and practice in other areas, such as housing, food security, or education.

### 3

#### Target the right people

For the Sector Skills Academy, the best participants are not always the most senior but must have influence over agency budgets and operations in order to make future changes. Think carefully and target the people who would benefit and contribute the most, and create a group that offers enough range of experience that everyone feels they have at least one peer. Hunn put together an advisory council of local foundation, government, corporate, and nonprofit leaders to help select the 18 participants and advise the program throughout the year.

### 2

#### National programs need to be locally funded in order to resonate.

Applying a proven national program to local leadership development can secure best practices and avoid reinventing the wheel, but it also can make an experience seem somewhat disconnected from local reality. A local funder can help ensure that the curriculum is spot-on for the area, tap local experts as presenters, and signal the importance of building local connections and collaborations.

### 4

#### Size matters

Hunn recommends cohorts that are no fewer than 15 and no larger than 25. Any smaller, and you'll miss the diversity of experience that is necessary to broaden understanding and spark creativity and collaboration. Any larger, and the sense of camaraderie that leads to candid expression and honest dialog may be lost.





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### Get out of the way

Funders can have undue influence on group conversations and can unintentionally push their own perspective forward and limit group creativity and discussion. In some cases, their presence can prevent grantees from feeling they can speak freely about challenges or concerns. The better bet may be for funders to either participate in leadership development programs as listeners only, or recuse themselves from discussions altogether.

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### Consider budgeting for post-training collaborations

One thing Hunn might suggest for future sector skills academies is additional funding to help move capstone projects forward after the formal academy experience ends. These funds could be used to help collaborating groups access national experts, visit best-practice sites, and engage in other ways to keep the good work going. At this time, Hunn and other partners are helping the three capstone groups move their projects forward without additional funding.

## Looking Ahead

The Weinberg Foundation anticipates that its investments in leadership through Leading Edge and the Hawaii Weinberg Fellows program will continue for at least the near future. As for WSSA, the Foundation determined that it would provide this one-year, sector-based training and then consider other program area-specific leadership programs for the future.

That's not to say the local sector skills academy idea is on hiatus. In fact, the Aspen Institute faculty are currently looking at replicating this approach in other cities including Detroit and Toronto.

For organizations that may be interested in this model, please visit <https://www.aspeninstitute.org/programs/economic-opportunities-program/> or contact Sheila Maguire, Senior Fellow, EOP, the Aspen Institute at [sheila.Maguire@aspeninstitute.org](mailto:sheila.Maguire@aspeninstitute.org) or (347) 786-0866.

No matter how Weinberg Foundation continues to invest, it knows it will continue to deliver value, for individual leaders, their organizations, and their respective fields.

“Psychologically, if you’re invited to participate in a leadership development program, you might not have realized how important you are. The investment shows how significant you and your work are, and raises a sense of importance,” says Hunn. “And every graduate benefits the field. Sure, there may be people who take a leadership course and then leave the field, but the fact that opportunities for leadership development exist year after year assures a greater talent pool over time.”



The Weinberg Foundation asks organizations to highlight their commitment to professional and leadership development (PLD) and training on its grant application. In an analysis of 50 grant proposals submitted between January 1, 2016, and July 18, 2016, the Foundation learned that:

**88%** of organizations reported a specific dollar amount budgeted for PLD and training for their current fiscal year.

**77%** of organizations budgeted less than 1% of their total annual budget on PLD activities (percentages ranged from .08% to 4.29%).

The PLD budget line items ranged from **\$3,200** to more than **\$550,000**.

The organizations with the largest budgets and capacity did not necessarily commit the most funding for PLD.

The most commonly reported PLD activity was professional conferences, at **56%**.

**Half** of the organizations provided financial support for continuing education, certification or credential attainment, and professional membership dues.

**43%** of organizations stated that they offered professional coaching.

## Challenges

Time and money topped the charts as the biggest barriers to PLD. Many regularly sacrifice PLD funds for operating costs, and staff have no time to commit to workshops or continuing education. Other challenges (in order of most to least reported) included:

- Recent organizational growth or restructuring
- Lack of technology infrastructure and data systems
- Staff turnover and problems with knowledge transfer
- Developing junior and entry-level staff
- Geography of staff and training resources



# Weinberg Foundation Leadership Program Investments

Program name	Weinberg Sector Skills Academy (Baltimore only)	Leading Edge	Weinberg Fellows (Hawaii only)
Target participants	Senior-level staff in the workforce development sector	CEOs and volunteer leaders in Jewish organizations	CEOs
Number of participants per year	15–20	Varies by program	12–15
Content partner	The Aspen Institute and guest presenters	Varies by program	Varies
Topics covered	Policy, statewide efforts, cooperatives, economic landscape, successes in other communities, equity, hiring practices, etc.	Varies by program	Fund-raising, public relations, marketing, financial management, etc.
Time commitment	One year	Varies by program	Four 3-day sessions
Year started	2015 pilot	2014	1992



## 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:**  
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