



**Fund the
People Toolkit**

Field Stories
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Field Stories

Community Memorial Foundation





Community Memorial Foundation

cmfdn.org

At a Glance



Founded	1995
Current Talent Investments	Leadership Institute (for board/executive teams), Executive Coaching, “Ladders to Leadership” for mid-level managers
Assets:	\$90 million
Foundation	Community Memorial Foundation
Type	Private Health Conversion Foundation
Service Area	27 communities in western Chicago suburbs

For Community Memorial Foundation (CMF), a health-focused private foundation in suburban Illinois, helping to increase the capacity of its nonprofit grantees is a core part of its mission and vision. Over the years, that’s increasingly meant a focus on talent and leadership development.

From the outset, CMF offered technical assistance and workshops to grantees for capacity building, but the organization quickly learned that the nonprofits they supported needed more than discrete skill-building engagements.

“We did a lot of listening within the sector,” says Greg DiDomenico, president and CEO. “Our current initiatives are a direct response to our grantees’ need for a comprehensive, strategic approach to leadership development.”

CMF decided to build off of its existing capacity-building programs by immersing nonprofit leaders in more intentional developmental opportunities.



Program Offerings

1

CMF's Leadership Institute began in 2011 as a program for grantee board members, but it has grown to include senior staff for development, communication, program, and other areas as well. The Leadership Institute provides a range of workshops on various aspects of nonprofit management, such as leadership development or succession planning, and couples those sessions with "deep dives" into specifics. For example, training on the board's role in staff leadership development is followed by assistance in creating a staff leadership development plan. While other programs are open only to existing and past grantees, any area nonprofit can take part in Leadership Institute sessions. There is high demand, as organizations across the area seek to develop their own talent and capacity but resources for doing so are few and far between. In this way, CMF's Leadership Institute adds value to the entire nonprofit landscape.

nearing the end of executive service who wish to leave a positive legacy and transition out of their roles as smoothly as possible.

"There aren't many opportunities to get this type of one-to-one support," says DiDomenico. "Participants see it as a rare opportunity that is uniquely tailored to both their skill set and career stage."

3

After focusing on board and executive leaders, CMF turned its attention to mid-level managers, whom they refer to as emerging leaders. The Foundation saw the need to "build the bench" by building the confidence and skill sets of this level of leadership.

"The focus on emerging leaders is important, but it requires a level of quality and intensity that very few nonprofits can support on their own," says Tom Fuechtmann, a program officer who oversees CMF's capacity-building offerings. "Community Memorial Foundation saw this as a real opportunity to serve our grantees."

In 2014, CMF launched Ladder to Leadership, a 16-month, cohort-based program for mid-level professionals, created and presented by the Center for Creative Leadership (CCL). CMF selected the Ladder to Leadership program after 18 months of research into available leadership training models and conversations with other foundations. The introduction to CCL came from the Robert Wood Johnson Foundation (RWJF), which paid for the creation of the Ladder to Leadership program for its own grantees. RWJF's evaluation of its program showed that 95 percent of participants and 90

2

The foundation also provides executive coaching for its grantees, and after starting with six slots, it quickly grew to serve approximately a dozen area nonprofit CEOs per year. CMF consulted with the Retirement Research Foundation to learn about coaching methods and models as well as application and interview processes. Foundation staff then took these lessons to develop CMF's executive coaching program.

Executive coaching helps CEOs at three different stages of their careers. It supports new executives who are at the helm for the first time, experienced executives who face significant new challenges, and those who are



percent of participant supervisors, peers, and direct reports saw an increase or significant increase in the participants' leadership effectiveness. They also gave the program high marks for increasing their ability to collaborate effectively, coach others, and become ready for promotion. "The Ladder to Leadership program requires a significant commitment on behalf of all parties, but we quickly realized that it was the only way to facilitate the type of professional growth that also has meaningful impact on an organization," says DiDomenico.

Cohorts of 12–14 participants collaboratively learn how to influence systems, bring about organizational change, adapt and innovate, and collaborate across sectors or boundaries. (CMF graduated its first cohort in 2015 and is now in the midst of training its second cohort.) Smaller groups within the cohort then work together on collaborative projects to address community issues. One such project included a community-wide public awareness campaign about mental health that has since become an ongoing program of a local nonprofit.

"The Ladder to Leadership program requires a significant commitment on behalf of all parties, but we quickly realized that it was the only way to facilitate the type of professional growth that also has meaningful impact on an organization."

Participant feedback from the Ladder to Leadership program is overwhelmingly positive. A formal evaluation of the first cohort showed high levels of satisfaction and increased self-confidence, as well as increased connections among organizations and broader community perspectives among participants. Since that cohort graduated, 10 of the 13 members have moved up into higher positions, many within their organizations.

Internal Investment

"Nonprofit leadership development isn't an add-on for the Foundation. We believe that strengthening our grantees is critical to transforming our communities, so we invest significantly in this work"

"We are very intentional about tying our talent and leadership development work into our mission, vision, and programmatic investments," explains DiDomenico. Part

of the foundation's budget for each program initiative includes funds to help grantee organizations build their own capacity and leadership capability.

The Foundation also invests staff hours in talent and leadership development; five of the six foundation staff have defined roles in the creation and delivery of each leadership development program. For Fuechtmann, it's a major part of his job and a role that is key to grantee success.

"Nonprofit leadership development isn't an add-on for the Foundation. We believe that strengthening our grantees is critical to transforming our communities, so we invest significantly in this work," he says.



Quick Case 1

Create Future Leaders

After 17 years at the helm of Aging Care Connections, Executive Director Debra Verschelde is no stranger to leadership development herself, nor to the vitally important role it will play in her organization's future.

"I started my own executive development by participating in a small learning circle that CMF offered," she recalls. "At first I was hesitant — I thought I had way too much to do and couldn't fit it in. But it turned out to be one of the best things I ever did and really got me in the mind-set of seeing talent and leadership development as helpful rather than a burden."

Since then, Verschelde has participated in CMF's executive coaching as well as some Leadership Institute sessions with her board members. She's also enrolled one middle manager in the Ladder to Leadership program. This investment in rising leaders is essential, she says, because of the changing nature of the workforce.

"We don't see people coming up and making a long-term commitment like we have in the past, especially in the field of aging," she observes. This observation is coupled with the reality that Verschelde, like many of her peers in executive positions, are contemplating retirement in the near term. "There's going to be a huge void for leader talent in the nonprofit community over the next 5–10 years. For us, succession planning is a pressing need."

Verschelde and her board very much want to promote her replacement from within, and she has worked with her executive coach to study the options and identify prospects. She intentionally works with staff to give them more responsibility, but she notes different levels of engagement between senior staff and middle management.

"It's harder to get middle management engaged in leadership development," she observes. "I don't see a lot of young talent wanting to take on the level of responsibility and commitment for upper leadership. Workplace mind-sets are changing as we move toward an economy where workers tend to be more transient and less connected, so we believe that leadership and talent development is important for retention."

This is where leadership development programs like Ladder to Leadership prove to be highly valuable. "We have some young talent with great potential, and anything we can do to give them formal leadership training is valuable. The staff who have that potential realize that we wouldn't be investing in them if we didn't believe in them. The end result is always well worth it."

Those results are not something Verschelde's organization could secure on its own, and CMF's investment in talent and leadership development is highly valued.

"We would have had to pay hundreds of thousands of dollars if we'd tried to do this level of development on our own," she says. "For a nonprofit in general, and especially one like us that is growing larger, it would be very difficult to spend money on our own talent and leadership development. CMF offers so much in terms of their support for nonprofit professionals. They should be a model for others."



Quick Case 2

Unleashing Executive Confidence

Eight years ago, Deb Baker reentered the workforce as an assistant to the executive director at HCS Family Services after spending 13 years as a stay-at-home mom. Today, after leadership training compliments of CMF, she's worked her way to the agency's helm.

It wasn't the smoothest of roads. While Baker rose through the ranks from assistant to development director and finally to assistant director, the agency was plagued by a series of executive-director turnovers that left it on the brink of crisis and left Baker in a stressful situation. "Because we had so much turnover, I was put in a position where I was managing the staff but wasn't really their supervisor. There were lots of inconsistencies here, and [it was] hard for me to grow in my position. I was always the bad guy."

Fortunately, one board chair saw Baker's potential and suggested she enroll in CMF's Ladder to Leadership program. "At first I just looked at it as a way to build self-confidence, but I learned so much more about myself," she says. "It changed my professional and personal life."

Baker learned about her own leadership style and worked one-on-one with a coach to address weaknesses and build strengths. She worked with a team from her cohort on a collaborative project. And she built a tightly knit network of peers who continue to serve as sounding boards and to bolster her confidence. Those newfound skills and that network were assets Baker called into action immediately.

"Right when Ladder to Leadership ended, our board let an interim executive director go and I was demoted to operations director," says Baker. "Had I not gone through Ladder to Leadership, I may have taken that very personally and probably would have left. But instead I knew what needed to be fixed, got the staff organized, and focused on team building. The board

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quickly saw that the previous executive directors had been handcuffing me a bit and saw us move forward. That built their confidence in me."

Baker saw that the staff was stretched too thin, because responsibilities were unclear and overlapping. She helped determine staff needs and clarify roles. She developed a set of goals that her team was able to achieve quickly, which restored their confidence and that of the agency's funders.

In response to Baker's performance, the board named her executive director in 2015, but her leadership development didn't end there. CMF provided an executive coach, who helped Baker map out a path forward for her board while she continued to hone her management and presentation skills. As a result, Baker has taken the organization to new heights, opening a groundbreaking new school-based food pantry and securing a highly competitive \$500,000 grant from the local Junior League.

"Without CMF's support for leadership development, I think our organization might have folded," says Baker. "I don't know that our board realized how important it was at the time, but they understand that now. Seeing how much CMF believed in our organization – and in me – helped keep them motivated when times were hard. CMF's investment in our organization really helped us get to the next stage."



Lessons Learned

1

Establishing talent development programs takes time for foundations

Developing a meaningful approach requires intentional consideration of how that approach aligns with a foundation’s strategy, mission, and vision. Then there’s the time required to create or adapt a relevant curriculum and figure out the logistics.

leadership development may be reluctant to take part and may require encouragement (or permission) from funders about the importance and value of leadership development.

2

Participating in talent development requires time from nonprofits

For many nonprofits, the barrier of time can be just as intimidating as the barrier of cost. The hours spent honing talent to become better leaders may be seen as hours not spent on “regular work.” However, investments of time definitely pay off in terms of skills gained and their resulting benefits to the organization.

4

Let grantees lead

CMF didn’t develop its plans for talent and leadership development within its offices. It took an externally focused, iterative approach — and every iteration was led by the needs expressed by grantees.

3

Buy-in is needed at every level

Foundation boards must be willing to invest in programs for which impact may be difficult to quantify. Nonprofit boards and even potential participants in talent and

5

Be willing to fully engage

Leadership development can be an intense process, but that intensity is often necessary to do the job well and create an experience that is relevant, meaningful, and lasting. Be committed to, but not intimidated by, what will deliver the best outcomes.



Looking Forward

Connecting the Dots

What's next on the horizon for CMF? The Foundation would like to “connect the dots” between its leadership capacity offerings. By doing so, CMF hopes to provide greater cohesion among programs and more firmly imbed learnings in the minds of leaders who participate. This, in turn, can make for greater, longer-term effectiveness and stability for the organizations each leader represents — a win-win for the individual leader, nonprofits, and CMF.

Focus on Diversity

DiDomenico and Fuechtmann would also like to place increased focus on diversity within their talent and leadership work. “As a foundation, we’ve always been intentional about supporting programs that reflect our increasingly diverse community,” says DiDomenico. “Now we’re interested in exploring diversity as a leadership development strategy, whether it be cultural, functional, or otherwise. One of our current Ladder to Leadership teams is focused on promoting diversity,

equity, and inclusion in the workplace, which tells us that there is a need for this type of engagement.” CMF also sees the importance of increasing coordination and collaboration across nonprofits in their community and would like to help create leaders who know how to work in concert with others. “True sustainability and impact will come from people working together,” says Fuechtmann. “Right now, we’re exploring what leadership development focused on coordination might look like.”

Expanding Opportunity

One option may be supporting groups of leaders who want to come together to tackle specific issues and move them forward together. In tandem with that approach, CMF is also considering expanding eligibility for its talent and leadership development support beyond existing grantees. “We want to open the door to include other stakeholders,” says DiDomenico. “It is only through engagement with all sectors that the foundation will achieve its vision of becoming the healthiest region in the country.”



CMF Leadership Programs

Program name	Leadership Institute	Executive Coaching	Ladder to Leadership
Target participants	Board members and/or executive directors	Executive directors	Mid-level leaders
Number of participants per year	100-180	11-12	13-14
Content partner	National thought leaders/experts	Individual coaches	Center for Creative Leadership
Topics covered	Examples include fund-raising, succession planning, board development, and strategic planning	Tailored to the needs of the individual	360 assessments, team building, management skills, collaboration
Time commitment	4-6 sessions per year	One year, renewable	16 months
Annual program cost	\$50,000-\$70,000	\$50,000	\$200,000
Year started	2011	2012	2014



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

Acknowledgments

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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Field Stories

Pierce Family Foundation





Pierce Family Foundation

piercefoundation.org

At a Glance



Type:	Family Foundation
Service Area:	Chicago
Assets:	\$8 million
Founded:	2007
Current Talent Investments:	Top Talent Institute, Peer Skill Share
Past Investments:	One-on-one, mid-level coaching

“It doesn’t take long to learn that no matter how brilliant a strategy is or how well it’s funded, if you don’t have the right people at the helm, something will go wrong or it won’t meet potential.”

Those words of wisdom from Marianne Philbin, executive director at the Pierce Family Foundation in Chicago, come from years of experience in the nonprofit sector. That experience, coupled with the interest of the Foundation’s donor, drove the Foundation’s emphasis on capacity building in general, and its evolution to investments in talent development specifically.

“We initially wanted to help grantees with the basics of operations and organizational development, especially fund-raising, but we found that the challenge wasn’t just in filling gaps in areas like donor management software or budgeting — it was personnel, skills, and capacity. We realized we needed to invest in staff, not just in tools and processes,” Philbin explains.

Investing in staff capacity is not something that the nonprofit sector has historically done well, especially

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when compared to the for-profit sector. And while many foundations make grants to help fund the technology, tools, and processes that Philbin mentions, few invest in nonprofit staff development in other critical areas, such as organizational leadership or employee management. “There are a lot of cultural and market forces working against them. There’s a belief — even among many board members — that nonprofit staff don’t need or deserve corporate-style support and investment. And there’s a misperception that if an individual chooses to



work in a nonprofit, they know what they're getting into. These are shortsighted and often destructive ways of looking at nonprofit work."

As talent development became a clearer part of the vision for the Pierce Family Foundation, Philbin explains that "it took us a little time to figure out what would be most effective, and what specific programs would make the most sense for us." The foundation staff leaned into their relationships with grantees, listening carefully to the challenges nonprofits were facing and developing responses to address them.

The Foundation focuses most of its talent development investments on 12 "core grantees": organizations to which the Foundation has made a five-year commitment that includes \$25,000 in annual general operating funds

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and access to consultants who serve as "grantee support specialists" who are retained by the Foundation to provide technical assistance upon request.

Targeting Mid-Level Talent

The Foundation's signature programs also include the Top Talent Institute (TTI), targeted specifically to mid-level managers from all disciplines, including development, finance, human resources, programs, and more. TTI is open to the Foundation's core grantees and was designed by Grantee Support Specialist Kris Torkelson.

"In my first year of working with Pierce grantees, I saw so many people who had never had any kind of management training, yet they were supervising staff," says Torkelson. "And while there were places for executive directors to go to learn these skills, the next generation of leaders coming up had no place to go. We realized that Pierce could offer that training and support before those middle managers took the next step."

Torkelson hunted for mid-level talent development models to adopt at Pierce but found none. So she developed her own approach, based on her knowledge of

executive programs and her own experience as a training program participant. The result was a cohort-based, nine-month program of three-hour, monthly sessions for 15–18 participants.

One unique aspect of TTI is that each cohort designs its own curriculum. "We really wanted participants to choose the curriculum, rather than mandate what it would be," says Torkelson. "I expected them to choose general nonprofit management topics — like how to do finance, run a board, or read a budget. But I quickly found that our participants really wanted to know more about how to manage people and teams, improve their leadership skills, and manage up the ladder. TTI became all about that."

TTI sessions have covered topics such as understanding and applying personal management styles, building teams, resolving conflict, hiring and firing, understanding intergenerational differences, managing through



change, breaking down departmental silos, and preventing burnout, among others. They've also included core operations skills such as understanding budgets, effective storytelling, and board management.

Torkelson intentionally populates each cohort with an eye toward diversity of all types, including age, race, ethnicity, gender, and roles. "There are always problems with different functions in an organization understanding each other," she explains. "We wanted our program to break those barriers by helping all participants understand and learn from one another."

In 2011, the Pierce Family Foundation piloted a one-on-one coaching program for interested TTI alumni. Although the six who participated gave the experience favorable reviews, it was determined to be cost prohibitive and was not continued.

The biggest program that the Pierce Family Foundation developed is **Peer Skill Share** — a peer learning

exchange that matches grantees who have particular areas of expertise with grantees wishing to learn. This system, which Philbin describes as "kind of like Match.com for expertise," was initially open to all of Pierce's 90+ grantees and quickly grew so large that the Foundation handed its operation over to Forefront (formerly the Donors Forum) in January 2016. There are now 700 agencies in the "crowdsourcing" pool and 15 foundation partners that offer access to the Peer Skill Share exchange, which makes more than 300 matches each year. Many of those who participate in the Top Talent Institute go on to seek and offer knowledge via the exchange.

"Peer skill shares can be as detailed as how to work with a specific tab in a software program or as general as how to deal with difficult board members," Philbin explains. "We customized some off-the-shelf software to run it, and now it can cover any topic that any nonprofit employee wants to discuss with someone else in the field. Many of those volunteering their expertise come from a different role or experience than those they're matched with, so that makes for an even richer cross-pollination of ideas."

Internal Investment

The Pierce Family Foundation staff is lean. Philbin works with one program director, an IT chief, and one administrative person. As a result, she views talent development as everyone's responsibility. In addition, the Foundation's 12 core grantees receive allowances for work with a number of outside support specialists, like Torkelson.

For Top Talent Institute, the Foundation invests roughly \$15,000–\$18,000 each year for planning, facilitation, logistics, and food, as well as administrative staff time to coordinate feedback surveys of each exiting cohort.

In addition, Pierce staff and board have made investments to help promote the idea of better compensation within the nonprofit sector — including compiling and distributing annual compensation information to area nonprofits, and helping Forefront launch a regional "Real Talk about Real Costs" initiative that drew nation-

al attention to the cost of delivering quality nonprofit services (of which talent compensation is a part).

"We're all about general operating, so we've been very active in getting nonprofits and funders to look at real, direct, and indirect costs of running an organization and understanding the cost of people you're employing to do that work," says Philbin. "When people are underpaid, their tenure is short-lived, and the next person who comes in is often barely trained. That's a perpetual barrier to longer-term planning and investment in a nonprofit's own organizational development. In response to our own talent conversations with grantees, one of our support specialists now accesses annual salary survey data, compiles it, and scrubs it down to usable information. Then she meets with groups to talk through where they want to fall in terms of leading, lagging, or meeting the average. Often this helps them see where salary might be a factor in turnover."



Quick Case 1

Uncommon Value

Sarah Borgeson, director of corporate and foundation relations at the Rehabilitation Institute of Chicago, likes learning from others. She's curious and loves sitting down with someone new. That's not an opportunity that many mid-level nonprofit employees get to embrace in the Chicago area.

"You have a lot of entry-level training and then there are executive director boot camps, but the middle is so key and a lot of institutions are still trying to figure out that space," Borgeson observes. "The Top Talent Institute was one of the most valuable experiences I've found."

The multidisciplinary nature of the program was particularly attractive to Borgeson, who at the time had been senior associate for corporate and foundation relations at a housing organization for several years.

"This was a chance to get outside and see how others approach different lines of business," she says. "It's always beneficial to hear about similar experiences and share wisdom and knowledge. And it's helpful to hear the anecdotes and stories — the real-life experiences that people will share in a safe, confidential space — versus a training where you're thinking in the abstract). That's a great value of the cohort approach."

"In particular, I learned a lot from the differences in experiences between different age groups. So often you interact with people who are similar to your own age, and learning from intergenerational dialog was key."

But the biggest benefit overall, says Borgeson, was developing management skills. "I got a great overview from TTI, including conflict resolution, hiring, firing, and more. And I did it at a faster pace than I would have on my own. I interacted with people who have gone through various issues and experiences that I may not even have imagined. But now I'm ready, or at least have an idea of how to deal with those issues if they arise."

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A couple of years after completing TTI, Borgeson moved to a higher position in a new organization. However, she emphasizes that TTI was not just a career-builder for her. It gave her the capacity to strengthen development practices at her past and current organizations as well.

"Experiences for mid-level staff are invaluable to organizations because they are a way to engage and retain talent and expand knowledge. The multidisciplinary approach provides knowledge about different types of fields, and I was able to bring back examples of what other organizations were doing. That helped my agency connect with and learn from other nonprofits in the community. To have that kind of resource available — at no cost — is an incredible value."

Borgeson also brought her new knowledge to a new post where she supervises a staff of her own. Although this organization is not a Pierce Family Foundation grantee, she hopes her staff will have similar development opportunities.

"Resources like TTI have shown me the importance of developing staff in a way that I might not have realized otherwise. I will highly encourage my staff to take advantage of any opportunity like this that comes their way. I'll definitely be proactive in presenting opportunities and making the space and time for them to engage. We owe it to our communities to do the best job we possibly can. And if you want to do the best you can, you have to invest in the people who are doing the work."



Quick Case 2

Coming Full Circle

When she was director of development at Spanish Coalition for Housing, Gabriela Román saw very few opportunities in the Chicago area for middle managers who wanted to grow professionally, learn about different areas of operation within an organization, and learn how to manage other staff. When she heard about Pierce's Top Talent Institute, she jumped at the chance, never realizing how quickly she'd need to apply her new learning.

Toward the end of her TTI experience, there was a sudden leadership departure at her organization, and the board asked Román to take the reins as interim executive director. Because the TTI curriculum had covered issues beyond development, such as HR and finance and management skills, Román felt more confident in accepting the interim post. But the support from the Pierce Family Foundation didn't stop there.

"After TTI, I immediately engaged in the Peer Skill Share," Román says. "I asked to be matched with other interim EDs, because I had a lot of questions. I was

able to talk with those who had been interims about how they worked with their staff and the board, and how they managed the change within the organization. As an interim ED, one big challenge is that it's not a permanent job, so you must get things done in a short time frame. The peers I talked to explained that I had to accept that the organization was mine to run now and made sure that I had a short-term action plan for all the activities I needed to do. They gave me excellent advice, which ultimately helped me secure the full-time executive director job."

Now Román uses Peer Skill Share to convey her own knowledge to others, and she has participated in sessions about supervising people, using social media, and even what it's like to be an interim executive director.

"It all came full circle," she says.

The same is true for TTI. After her own experience, Román sent four other staff members through the program: an accounting manager, an HR manager, a development manager, and a counselor. Since completing TTI, two of Román's staff have been promoted within the organization.

"In order to fulfill our mission, we need the best set of people," says Román. "From my experience, it's been better to develop our own people than to hire from the outside, because our line of work is so narrow. I definitely want to develop a pipeline of leaders, especially among those who have been here for a while, so that our organization can replenish itself. Programs like Top Talent Institute and Peer Skill Share enhance my staff's skills so they are ready to lead and advance."

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Lessons Learned

1

Tie talent investments to outcomes

If funders want to see a particular outcome from grant-making, they must take into consideration the capacity of the staff who will be expected to achieve it. If the capacity is not there, the outcome is not likely to happen. Funders should ask, “Who’s going to staff this effort, and how reasonable and realistic is that?” — then fund talent needs accordingly.

3

Supervisory skill is a growth area

In the nonprofit sector in general, there is very little focus on teaching people how to supervise and manage, nor on how to develop the talent of those they supervise. This is an area in which skill development is sorely needed, and it’s an area of potential investment for funders who want to help create a nonprofit-specific curriculum, approach, or model that could be widely applied in multiple disciplines.

2

Talent turnover is not a bad thing

There are many examples of individuals who have increased their personal capacity and then left their organizations for greener pastures. Turnover is a fact of life, but it shouldn’t be seen as a deterrent to talent development. Instead, funders and nonprofits should look for ways to institutionalize the knowledge that individuals develop so that it stays with an organization even if individuals leave. Funders also should realize that when talented individuals move from one organization to another, they are further benefitting the sector overall because they are sharing and applying the skills and knowledge they’ve learned more broadly.

4

Acknowledge participation

Small financial investments can make a big difference. The Pierce Family Foundation has supplied agencies of TTI participants with \$250 parking stipends, as well as providing individual participants with commemorative desk sculptures to mark their completion of the program. It also provides small stipends to those who offer their expertise through Peer Skill Share. While minimal in terms of cost, these actions show participants and their organizations that the Foundation values their time and their contributions to the programs.



Looking Forward

When contemplating the future of Pierce's investment in talent development, Philbin envisions a deeper relationship with a smaller number of organizations. Now that the broad Peer Skill Share program is operated by Forefront, the foundation can add more to the menu for its core grantees.

Pierce will explore new ways to build out the Top Talent Initiative, using suggestions from participants as a guiding light. It also hopes to do more to support succession planning within its grantee base, as it sees a number of nonprofits facing leadership transitions in the near future.

And while they're at it, Philbin and her team would like to figure out a way to conduct board education about the importance of investments in talent compensation.

"We're asking, as a funder, what we can do to advance conversations about making compensation more appropriate for nonprofit employees," she says. "What makes sense for us to look at? You can't just say to a nonprofit, 'You should pay your people more.' It's all connected to talent development and capacity building. For example, an agency can't recruit more effectively until it can compensate; it can't compensate until it has strong fund-raising; and it can't have strong fund-raising until it has strong talent. It's all tied together, and it all has an impact on our effectiveness as a sector."





Pierce Family Foundation Leadership Programs

Program name	Top Talent Institute	Peer Skill Share	Mid-level Coaching (no longer funded)
Target participants	Mid-level leaders at 12 “core grantee” organizations	Any staff at all grantee organizations supported by participating funders	Mid-level leaders at core grantee organizations
Number of participants per year	15-18	300 + matches involving 600+ people	6
Content partner	Contracted grantee support specialist and various experts	Now operated by Forefront of Chicago (transferred in 2016)	Various vetted coaches
Topics covered	Determined by preferences of each cohort	Tailored to the needs of the individual	Tailored to the needs of the individual
Time commitment	9 months	One meeting to several meetings	6–8 months
Annual program cost	\$15,000–\$18,000	\$30,000–\$40,000 for contractual coordinator/admin, software fees	Tailored to the needs of the individual
Year started	2011	2008	2013 pilot



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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.

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**Fund the
People Toolkit**

Field Stories

The New York Community Trust





The New York Community Trust

nycommunitytrust.org

At a Glance



Type:	Community Foundation
Service Area:	New York City, Westchester and Long Island
Assets:	\$2.55 billion
Founded:	1924
Recent Talent Investments:	The New York Community Trust Leadership Fellows program

In 2014, during their annual retreat, The New York Community Trust's program staff all realized that they shared a common observation about their grantees and the broader pool of grant applicants — there weren't enough leaders of color.

That reality didn't reflect the diversity of New York, and it certainly didn't reflect the values of The Trust. "The issue of diversity led us to step up our presence in the leadership development space," says Senior Program Officer Patricia Swann, who led The Trust's effort to create The New York Community Trust Leadership Fellows program at Baruch College.

"The issue of diversity led us to step up our presence in the leadership development space."

The Leadership Fellows program focuses on providing an in-depth experience specifically for mid-career professionals, as opposed to senior leaders or "101"-type workshops. "We found there were a lot of resources for executive directors and CEOs, and a lot for rookies, but not much targeted specifically to people who had been in the field a few years and were supervising others and assuming responsibility for outcomes," says Swann.

The Trust had a history of supporting area capacity-building efforts that included leadership development components, but designing a leadership program from scratch was a new frontier. Swann and her staff convened focus groups of CEOs of nonprofit intermediary organizations to learn what they thought was missing in terms of leadership and professional development for outstanding staff members.

"Through our conversations, we learned that top-level leaders wanted their promising staff to have a holistic



understanding of operations, from fund-raising and budget planning to communications and governance,” says Swann. “In addition to classroom courses, supports like mentoring and coaching would be especially valuable. We also learned that providing an opportunity for participants to apply their learning in real time within their organizations would be an added benefit.”

“We learned that top-level leaders wanted their promising staff to have a holistic understanding of operations, from fund-raising and budget planning to communications and governance.”

The Perfect Partner

“Faculty is key. At the core are people who know how to teach adults. They are strong, diverse, and very professionally oriented and grounded in actual practice, not just theory.”

Its history and reputation made Baruch an obvious choice. The College had more than a decade of experience running successful certificate programs for and with nonprofits and public agencies. It also had the largest footprint in the city for providing these programs, and it could offer a transition to a master’s degree program in public affairs, with a nonprofit concentration, for those who wished to extend their learning. Fellows learn from Baruch faculty and other subject-matter experts. The focus is on a participatory pedagogy.

Swann and The Trust realized that they’d need a strong partner to launch the kind of experience they envisioned, so they turned to the Austin W. Marxe School of Public and International Affairs at Baruch College of the City University of New York to co-design and deliver the Leadership Fellows program.

“The faculty is key,” says Swann. “The program follows an academic model, and at the core are people who know how to teach adults. They are strong, diverse, and very professionally oriented and grounded in actual practice, not just theory.”

Building the Program

The Leadership Fellows program is limited to 30 participants each cohort and is open to staff of The Trust’s current and recent grantees, representing roughly 600–700 organizations at any time. This makes for a competitive universe, so The Trust and Baruch made two important decisions about application and selection criteria.

First, although the primary intent of the Leadership Fellows program is to prepare leaders of color, it is marketed as an opportunity for all. “Neither The Trust nor Baruch wanted to market an exclusive program,” Swann explains. However, the program does make an active effort to recruit diverse participants.



Second, they decided that nominations for program participants should come from CEOs or executive directors, so that they would think about which people on their staff would benefit most. Having CEOs nominate also clarifies their commitment and support for staff who must take time away from work to attend program sessions.

The curriculum for the 12-week program includes weekly class sessions that cover a wide range of topics, such as social/emotional intelligence, social media, financial management, resource mobilization, leadership, strategic planning and cultural competency. In addition, fellows attend four Dean's Dinners with "movers and shakers" in the nonprofit field and with local and state government leaders, all of whom can lead big-picture discussions. At the end of the program, fellows receive an executive certificate.

"We intentionally built in opportunities for fellows to expand their relationship capital, learn about leadership and management from key leaders, and expand their knowledge of the sector overall," says Michael Seltzer, Distinguished Lecturer and Leadership Fellows program director at Baruch.

In addition to classroom sessions and Dean's Dinners, each fellow selects a "change project" that allows them to apply what they're learning to their own organizations in real time. "We ask them to put forth a project that will extend their skills and that their CEO deems a front-burner issue," says Seltzer. "That's the spine of the fellowship experience. It can change and alter as they learn more and work with their mentors. They must design the project, and in many cases they will be able to start implementing it as well during the course of the fellowship."

He notes that a number of change projects are about accelerating cultural inclusivity within the fellows' organizations — which ultimately will help further The Trust's goal of growing leadership diversity.

Each fellow chooses a mentor — either one they request or one matched to their interests. The program intentionally creates a mentor pool that reflects the diversity of the city. Mentors support the fellows in pursuit of their change projects, and they also serve as sounding boards and coaches during (and often after) the program to help the fellows become more effective change agents.

"Everything has evolved as we've moved forward — from curriculum to how change projects work to how we select and view the role of mentors," says Seltzer. "We agreed to learn as we go, so we're constantly looking at how to retool."

Since the program began in 2015, four cohorts have produced 113 graduates. Two of the graduates have gone on to enroll in Baruch's master's degree program in public administration.

In addition, Seltzer notes one unanticipated benefit. "Because of the large size and scope of the metropolitan New York City nonprofit community, organizations tend to be siloed according to their subsectors. This is one of the few meeting grounds where representatives from arts and culture, youth development, environmental, human services, community development, and other fields interact with each other. We're also seeing new, creative, cross-sector partnerships arise between organizations within each cohort."



Internal Investment

After a \$10,000 planning grant, The Trust has invested approximately \$450,000 per year into the Leadership Fellows program. The investment has been significant, not only in terms of size but also as a signal to the field.

“The Trust’s grant to support the Leadership Fellows is one of the largest made by a New York foundation for leadership development,” says Seltzer. “It says that we understand the ongoing growth of diversity within the nonprofit sector, and we need to seize every educational opportunity we have to ensure diverse leaders have the skills, tools, and knowledge they need to create a better city, region, and nation.”

In addition, The Trust is investing in an assessment of the program to determine its impact and provide ongoing data on its effectiveness.

From a staff time perspective, Swann estimates that about 15 percent of her time is dedicated to the program. The grant funding to Baruch covers the cost of a full-time associate director and part of Seltzer’s time. Seltzer also leverages contributions of time from others on Baruch’s faculty and staff, including a graduate student and volunteers, Dean David S. Birdsell (who hosts the Dean’s Dinners), college financial staff, and other funders who serve on the nomination review committee.

The program has benefited from the wisdom and contributions of Maria Mottola, Executive Director of the New York Foundation, and Deborah Velazquez, Associate Director at the Altman Foundation, both of whom served on the selection committee in 2016. In addition, Ingrid Benedict, Director of the Daphne Foundation served as a mentor in two cohorts.

Quick Case 1

Tactical and Practical

Sharese Bullock-Bailey is a devoted leadership development fan. “Leadership in the social sector has always been a priority for me, so I’ve always been aware and engaged in fine-tuning and investing in myself through leadership development programs. I’ve been part of many,” she says.

But none has offered the tactical and practical experience of The New York Community Trust Leadership

Fellows program. “The Fellows program provided nuts-and-bolts information about leading an organization, leading a team, and being action oriented. It’s about looking at strengths within yourself and others in your organization. You also cover key components of social sector leadership — the mission, vision, values, faculty time, mentor stipends, meeting expenses (space, food, etc), communications/website consultants, and miscellaneous expenses.



“The fellowship provided layers of tools and strategies that I’m bringing to my team. I feel like I have a basket of resources I can dig into at any time.”

And it provided layers and layers of tools and strategies that I’m bringing to my team. I feel like I have a basket of resources I can dig into at any time. ”

As the director of Tribeca Teaches, an education program of the Tribeca Film Institute, Bullock-Bailey chose to create an impact assessment of the Institute’s programs for her Leadership Fellows program change project. She worked with two programs to design and pilot two different approaches during her spring 2016 term as a fellow, and she plans to deploy a redesigned assessment tool for all programming in 2016–17.

“For everyone in our institution, better assessment is a priority, and I’ve been able to offer one example of how that might be achieved. Being a fellow gave me a clear platform to talk about what I was doing and share it with other teams at Tribeca,” she says.

Bullock-Bailey particularly found value in the diversity within her own cohort. “It’s easy to get caught in your own silo. I loved that we were from all around New York City and not all in the same field. There were people from health care, housing, education, community development, the arts, and more. It really gave me a sense of how all these organizations come together. Seeing all the great work others are doing gave me a new perspective about whom I can partner with and learn from. I also learned directly from other cohort members about things that are specifically applicable to my own leadership right now.”

The “tactical and practical” skills that Bullock-Bailey attained as a Leadership Fellow have provided her with another key benefit: more confidence. “Understanding the value of my own leadership has helped me step forward and be more proactive about finding solutions,” she says. “Now I share what I learn and think with my supervisor, and know I’m coming from an authentic place.”

Quick Case 2

A Mentor’s Perspective

Brian Newman was honored when Sharese Bullock-Bailey asked him to be her mentor for The New York Community Trust Leadership Fellows program. He wasn’t surprised, because he’d known Bullock-Bailey for years and had actually recommended that she apply to the program. But he didn’t anticipate that he’d get just as much as she did from the experience.

After Newman completed the Leadership Fellows program’s vetting and orientation process, the two met for coffee several times during the program, talking for an hour or more about Bullock-Bailey’s ideas for better assessing the impact of the programs at the Tribeca Film Institute. As a former Tribeca executive director, Newman, now a business development consultant, also shared his insights on dealing with the culture and politics that can surround leadership in the nonprofit world.



“We talked about her ideas for ways to have an impact on structural issues in the film world around diversity and financing for diverse filmmakers. She’s thinking about new ways to approach it, with new partners. It’s exciting.”

Newman also provided Bullock-Bailey with something just as valuable as advice: his contacts. For rising leaders, making connections is just as important as building skills, and mentoring relationships in the Leadership Fellows program are expected to do both.

“He’s been a great mentor, because he has historic knowledge about our organization and he brings a focus on data and technical knowledge that’s great to have,” says Bullock-Bailey. “I could have safe conversations with him and talk about different approaches without it being too risky. He helped me understand when to push and pull around new ideas and opportunities and how I might stretch and grow beyond the fellowship.”

Mentoring is important, says Newman, because the future leaders of the nonprofit sector face more challenges than many of their predecessors. “In talking with Sharese, I learned that there’s less upward mobility for nonprofit staff than there used to be. I was able to become an executive director at 28, but I don’t see that happening as much any more. People are staying in place longer, and there’s a trend toward wanting more experience for leadership roles rather than being willing to take a chance. Young people with exciting ideas who really want to contribute probably aren’t being used enough, or given enough challenges.”

Newman took his own lesson to heart from the experience. “I want to do more mentorship,” he says. “I’ve been mentored by others who were more senior than I and it’s always been extremely helpful. I’ve done a lot of informal mentoring here and there, but this experience inspired me to be more intentional about that.”

Lessons Learned

1

Integrating individual projects into a 12-week curriculum can be tricky

For the first Leadership Fellows cohort, The Trust built in a five week break during the regular weekly class schedule, during which participants were meant to work intensively on their change projects. Class feedback revealed that this timing didn’t always align with participants’ own implementation timetables for their projects. For the second cohort the break was eliminated, but program staff are still working to figure out the best way to integrate highly individualized projects more closely with the overall class curriculum.

2

Creating an inclusive program requires a great degree of intentionality

The Trust and Baruch chose not to market the Leadership Fellows program as one only for leaders of color. But in the absence of that designation, says Swann, they have found that the proactive outreach required to build a diverse cohort is challenging — both in terms of time and of the contacts and networks necessary for The Trust and the College to maintain.



3

Constantly revisit curriculum and pedagogy

Seltzer constantly questions how Baruch can tweak or enhance the program. He pushes for more sharing of lessons among organizations and new ways to turn classrooms into participatory learning communities. He also looks for ways to ensure they are incorporating twenty-first-century adult education methods into teaching, using approaches such as social media, group work, infographics, and other tools.

4

Understand staffing demands

Those offering a leadership program must understand the demands and constraints of their staffing structure. For Baruch, there's always more that could be done, and Seltzer admits they could have been more realistic in their initial projections of staff time required. To help address the need, he's made use of graduate students and volunteers when possible.

Looking Ahead

Surveying Fellowship Alumni

Seltzer is excited about the ongoing prospects for continually improving and refining the Leadership Fellows experience, and also about building a cadre of active alumni.

“The idea of peer learning groups is exciting, because we've seen them be very successful, but mostly for those at the executive director level,” he says. “We'll have a chance to apply best practices in peer learning for mid-level leaders.”

Future of Leadership Fellows Program

Although it's still early, Swann is already considering the future of the Leadership Fellows program. “As a community foundation, we don't have the luxury of parking our money with any one organization for a very long time,” she says. She plans to use upcoming assessment results to help identify not only what's working well and what could be improved but also which elements are most critical to fund should The Trust need to step down its support.

“We're also looking at ways to market different and new components of this program to other funders,” she adds.



The New York Community Trust Leadership Fellows Program

Target participants	Mid-level managers with at least five years' experience
Number of participants per year	30 maximum per cohort; cohorts run spring and fall each year
Content partner	Austin W. Marxe School of Public and International Affairs Center for Nonprofit Strategy and Management Office of Executive Programs
Topics covered	Curriculum evolves and has included resource mobilization, financial management and planning, communications, social media, social/emotional intelligence, leading diversity, management, and governance
Time commitment	Once-a-week, daylong classroom sessions over a 12-week period, mentor meetings as desired, time spent on change projects outside of class, weekly readings, and monthly Dean's Dinners
Annual program cost	Approximately \$450,000
Year started	2015



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Field Stories
Bush Foundation





Bush Foundation

bushfoundation.org

At a Glance



Type:	Private foundation
Service Area:	Minnesota, North Dakota, South Dakota, 23 Native nations
Assets:	\$883 million
Founded:	1953 by 3M executive Archibald Bush and his wife, Edith
Recent Talent Investments:	Bush Fellowships; Leadership Ecosystem Grants; Native Nation Rebuilders

The Bush Foundation has a strong reputation for building leaders, going back to 1964 when it created the Bush Fellows program, which still continues today. Given the scope, reach, and impact of the Bush Fellows program and the depth of its other investments in non-profit talent and leadership development, one might assume that the Bush Foundation is a national funder. However, this St. Paul-based foundation is solidly focused on Minnesota, North Dakota, South Dakota, and the 23 Native nations that share that geography.

“We’re place based, and, as such, we are fundamentally limited by the ambitions and skills of the people here. That’s both our biggest strategic constraint and our biggest opportunity,” explains Jennifer Ford Reedy, Foundation president. “If we’re not thinking about capacity and growing it, we’re missing a fundamental

issue. We talk and think about ‘great ideas and the people who power them.’ We want people here to be inspired, equipped, and connected to get that work done.”

That’s a sentiment shared by Bush Foundation Board Chair Pam Moret, who served as a senior executive in two Fortune 500 companies and as a start-up company CEO. “There are a lot of similarities between the business and nonprofit sectors, in that you are trying to help people gain a better understanding of how to have impact through leadership. I think of leadership as a means of leverage. It’s how you multiply the impact of one person by having him or her be an effective leader and translate their own philosophy and impact to others. I think that’s considerably more difficult in the nonprofit world.”



Over the years, the Bush Foundation has explored leadership development from many different angles. The Bush Fellowship is highly individualized and allows fellows to completely design their own experience. On the other hand, the Native Nation Rebuilders program is cohort based, with the specific purpose of developing new leaders for tribal governance. And a two-year pilot series of Leadership Network Grants, which supported individual organizations in their work to develop leaders, has now evolved into the just-launched Leadership Ecosystem Grants that will support organizations that are building and maintaining networks of leaders.

“I think of leadership as a means of leverage. It’s how you multiply the impact of one person by having him or her be an effective leader and translate their own philosophy and impact to others.”

Bush Fellows

The Bush Fellowship program has taken different forms over the years, depending on the criteria and approaches that are deemed most likely to resonate in the community and create a transformational experience for the fellows. Currently, the fellowship is extremely flexible, allowing applicants to propose just about any plan imaginable for improving their own leadership skills, from pursuing a graduate degree to traveling abroad to study indigenous cultures to mastering meditation and mindfulness.

Former Bush Fellows, community members, and Foundation board members are all involved in the selection process. They look for applicants who are active learners

“The Bush Fellowship is a constant. It’s probably the one thing board members would never be willing to discard.”

and inspiring individuals with a sense of purpose. The process itself is intense, since applicants must present a thoroughly considered plan for development and then interview with eight community leaders. “The Foundation grants fellowships to up to 24 people a year, which is about a 3.5 percent acceptance rate.”

“Because the fellowships are so individualized, the experience is different for every person”, says Anita Patel, leadership programs director. To kick off the beginning of their 12–24 month \$100,000 fellowship, fellows gather for a launch retreat to work through the elements and logistics of their fellowships. “We work with fellows to solidify their plans and budgets. We ask if they are thinking big enough, and how they are creating space for the work they want to do. In order to ensure a solid link between leadership development and skills around equity and inclusion, they take the Intercultural Development Inventory (IDI) to help them learn how they perceive themselves, where their strengths and opportunities lie, and how they can incorporate that knowledge into their plan.”



Fellows also start connecting with one another in ways that mutually support and challenge each of them. All are assigned a fellowship coach who asks tough questions, pushes when needed, helps to celebrate milestones, and serves as a touch point throughout the experience.

Even the experience of being turned down for a Bush Fellowship is a leadership development opportunity. Those who don't make it receive coaching on how they might strengthen their applications and when they should apply again. In some cases, former Bush Fellows help coach them through the improvement process.

“As years go by and the world changes, some programs come and go. But the Bush Fellowship is one constant—

it is the thing we always want to measure better and look at in a contemporary way,” says Moret. “It's probably the one thing board members would never be willing to discard.”

Reedy admits that she questioned the investment when she first took the reins. “When I got this job, I thought investing in individuals was a really expensive way to do philanthropy, and very hard to measure. Then, over and over, I heard from Bush Fellows about how the experience really made a difference and changed what they thought was possible in their lives. That was a giant ‘aha’ for me. I realized that when we invested in people in a way that changed their capacity, it's affected everything they've done since. That's very valuable.”

Native Nation Rebuilders

Jaime Pinkham (Nez Perce), senior advisor to the Native Governance Center (funded by the Bush Foundation), traces the roots of the Native Nation Rebuilders program back to a conversation with a tribal leader who made a case for creating a strong connection between leadership development and community engagement.

“He told me, ‘There are a lot of people who want to be leaders, but the kind of change you're talking about requires community change. They expect tribal leaders to carry that effort, but the community has to participate. We need leaders who can work alongside political institutions,’” Pinkham recalls. “He wasn't talking about elected leaders, but community leaders who could provide a bridge between the government and the people. That became the premise of the Rebuilders program.”

In 2008, the Bush Foundation identified creating Native nation leaders as a “goal for the decade.” “We decided to get on it and build as we go,” says Pinkham. “We'd put together seminars, learn from the cohort, and take our

cue from them.” The Native Nations Rebuilders program officially launched in 2009.

Bush chose the Native Nations Institute (NNI) at the University of Arizona to create a nation-building curriculum and handle the scheduling and logistics for each cohort. The Foundation selected participants and approved the framework for the two-year program. Participants gather at quarterly seminars co led by NNI and Bush Foundation staff, and the Foundation covers all of their travel, lodging, and food expenses. (Recently, the Bush Foundation transferred operations of the program to the Native Governance Center, which works with NNI to deliver the program.)

The first year of the program, participants learn the tenets of nation building, leadership skills, interpersonal skills, and grassroots organizing. In the second year, they create action plans to begin and sustain a nation-building dialog in their communities. As of 2016, 122 people from 20 of the 23 eligible nations had



completed or were enrolled in the program, and they were formulating or executing plans to engage their communities in conversations about nation building and more. Rebuilder graduates now hold posts as elected leaders in tribal, state, and local governments, sit on their states' Indian Cabinet, and work for federal or state agencies.

The cohort approach was key, says Pinkham. "We wanted them to learn and share together, and build relationships that last. We brought the first four cohorts together for a reunion, and the Native Governance Center is currently planning a Rebuilders 2.0 program to provide

"We had to be comfortable with starting without a clear-cut strategy and improving over time. There's some risk involved in that."

additional support and resources to boost their impact." In order to build the program, the Bush Foundation had to embrace some ambiguity, says Pinkham. "We had a 10-year window, and we had to be comfortable with starting without a clear-cut strategy and improving over time. There's some risk involved in that."

There also was the challenge of bringing together diverse tribes with different cultures, languages, and traditions. To accommodate this diversity and at the same time remain agnostic, the Native Governance Center leaves the definition of each cohort's culture up to each cohort. "Cultural leaders naturally emerge," says Pinkham, "so we don't have to invent it."

Pinkham adds that the Rebuilders program is helping repair damage sustained from decades of federal policies that did not recognize traditional forms of tribal governance, and it helps tribes embrace an opportunity to rebuild governance models that are culturally appropriate. "Ultimately, the system of government has to reflect the needs and visions of the tribes, not the vision that is pushed on them."

Internal Investment

All Bush Foundation staff spend time on talent and leadership development in some way, because building human capacity is a core strategy for making change in the region. But specific programs have more quantifiable investments.

For example, four staff support the Bush Fellowship, and the Foundation invests approximately \$3 million

each year in the program. The Native Nation Rebuilders program was developed by the Foundation in 2009 with the attention of three staff members. In 2016, the Foundation launched the Native Governance Center (NGC), now incorporated as a separate non-profit. The Native Nation Rebuilders program was moved from Bush to NGC.



Quick Case 1

A Life-Changing Opportunity

Gary Cunningham's resume is impressive. He's currently the President and CEO of the Metropolitan Economic Development Association (Meda), a minority business development firm. He's served as a hospital CEO and a vice president at the Northwest Area Foundation. He's been in senior leadership positions with school districts and with county and state government agencies. He's won numerous awards and serves on several boards. But there is one item on his resume that Cunningham describes as "life changing" — becoming a Bush Fellow.

Back in the late 1980s, Cunningham was researching the lack of women and people of color in real estate positions in Minneapolis. He proposed a pioneering new

"The network matters. It opens all kinds of doors. Your views get expanded, your network gets expanded, and your knowledge gets expanded."

scholarship program to encourage women and people of color to move into higher-level management positions in real estate (a program that still exists today). That work got the attention of another Bush Fellow, who told Cunningham about the program.

"I was excited, but then I didn't apply right away," says Cunningham. "I knew I wanted to use the fellowship to go to graduate school at Harvard, but I had three to four years of rigorous coursework ahead of me before I could get accepted there."

Fast-forward to 1991, and Cunningham's plan to attend Harvard's Kennedy School of Government to learn how to help shape public policy won him a Bush Fellowship.

"The Bush Fellowship allowed me an opportunity I never would have had otherwise," says Cunningham. "I wouldn't have gone to Harvard without it. I would have had a totally different life trajectory. I knew I was at a point in my career where I couldn't move to the next level without management, analysis, and human resources skills. Harvard's program was the best fit, and it was a powerful experience."

Getting through the fellowship application process wasn't easy. Cunningham took a psychological exam, aptitude tests, and completed an "intense" application process. Later, after his fellowship was complete, he returned to the application process as part of the selection committee, helping to evolve and hone the process over the next ten years. He spoke at applicant workshops and coached those who weren't selected so that they would reapply. "I'd do anything Bush asked me to," he says. "The whole process is a class act."

It's also a valuable one. Cunningham has stayed engaged with a growing network of Bush Fellows from all walks of life, building lifelong bonds. "The network matters, particularly as you move up in your career," he says. "It opens all kinds of doors and shifts your trajectory to a higher level. Your views get expanded, your network gets expanded, and your knowledge gets expanded. It has opened up more and more opportunities that I wouldn't have had — almost all in service roles."

"I still feel the impact more than 20 years later," he adds. "The Bush Fellowship has had a huge impact on the quality, output, and impact of the sector in our region. It's changed the universe in the three states in which the Foundation operates, and well beyond."



Quick Case 2

Finding a Voice

In 2003, drunk drivers killed six of Crystal Owen's relatives. For two years, she turned inward and remained silent, but that changed when she decided she wanted to do more to raise awareness and help others in her community.

"Before that, I wasn't someone who spoke out in public," she says. "I wanted to learn more about how I could make a better impact."

As she began to engage in her community, she noticed a lack of facilitators, public speakers, and community organizers. People seemed unaware of the need for grassroots leadership, and it was hard to motivate them toward community action.

"I wanted to be the person in my community who would be able to help," she says. "I wanted to learn more and speak out, and find different ways to engage my community in conversation and in taking action toward issues that are important to them. I wanted to help them use their voices."

She joined the Native Nation Rebuilders in 2013 and discovered a wealth of new skills to help achieve her vision.

"The curriculum was eye-opening and challenging, and it made me want to do my best," she says. "I was in a group of other like-minded individuals, we all had hope, and we wanted to find solutions to common problems."

For Owen, the skills surrounding communication were especially helpful. "A lot of times in our community, people will get up and speak from the heart, and that's nice, but I wanted to learn other ways to get messages across — especially when talking to different audiences. I learned messaging, presentation, and facilitation skills. Now I can share my story more effectively and encourage others to do likewise."

"I was in a group of other like-minded individuals, we all had hope, and we wanted to find solutions to common problems."

As a Rebuilders graduate, Owen became the host of her own weekly talk show, "Getting Real About Life with Crystal," on the tribal radio station for two hours each Wednesday. Before long, she decided to run for office.

"I knew that through the tribal political system, I could probably do a lot more to get ideas out there and get others to take part in the process," she says. She ran for the post of Tribal Secretary, winning her primary and general elections but then facing a recount challenge that ended up in court before she finally was declared the victor.

"I saw how ugly politics can be, but I didn't let that hold me back," she says. "I hit the ground running and am up for re-election this fall."

As Tribal Secretary, Owen oversees 25 health and welfare programs. She points with pride to her ability to garner support from the majority of her community and help her program managers succeed. "I love using the skills I learned in Rebuilders to help those who run the programs to really listen to the community. I empower others to work together," she says.

"My viewpoint has become very hopeful. Service to community keeps the focus on future generations. Rebuilders really helped me to set a good foundation for that."



Lessons Learned

1

Learn continuously

Funders can and should learn throughout a leadership development process or program. Evaluations are an important tool for understanding the benefits of helping people think through their own leadership values, goals, and vision. Funders can also share knowledge and ideas by sharing the lessons and stories of what leaders are learning. The Bush Foundation has learning logs on its website that allow Bush Fellows to share what they are learning and to inspire others.

2

Leadership development – investing in people – must be part of any strategy

No matter what you're trying to take on, investing in leaders who power projects and ideas is critical. This is not an add-on. It's part of achieving your own mission.

3

Leadership and equity and inclusion work are one and the same

Funders need to be aware of and address the implicit bias in their selection process that may limit who is seen as

a leader and what their characteristics “should” be. This means that everyone needs to be committed to developing their own self-awareness and intercultural competency skills.

4

Look at it as long term

“You can't think of leadership development as a three-year program, unless you are incredibly constrained by a particular group or project,” says Bush Foundation Board Chair Moret. Funders need to be aware of and address the implicit bias in their selection process that may limit who is seen as a leader and what their characteristics “should” be. This means that everyone needs to be committed to developing their own self-awareness and intercultural competency skills.

5

Push for the personal

“When you're seeking a fellowship, you're often programmed to think about a project with a specific outcome,” says Leadership Programs Director Patel. “But in leadership development, the project is you. How are you stronger? It can take a lot of coaching to help people realize what they're learning, how to internalize it, how they are growing and changing, and how to bring that forward.”



Looking Ahead

With Bush Fellows and Native Nation Rebuilders now numbering in the thousands, the impact of Bush Foundation's leadership building work is apparent throughout the region. The Foundation takes an active role in promoting the work of its leadership graduates through social media, an online magazine, and a searchable database of graduates from both programs.

Within each program, the Foundation will continue to hone and refine both its selection processes and the experiences in which participants engage. It will also

continue to look for ways to support connections and networks among program alumni.

"Leadership development is a part of the Bush Foundation's history, woven into everything we do. There may be new programs or new ways of supporting leaders that emerge, but our core commitment will remain the same," says Moret. "Talent and leadership development is absolutely essential to achieving impact in our region, so I anticipate it will be an integral part of our focus always."





Bush Foundation Leadership Programs

Program name	Bush Fellows	Native Nation Rebuilders	Leadership Ecosystem Grants
Target participants	Extraordinary leaders who have the potential for even greater impact	Enrolled citizens of 23 Native nations	Organizations that build and sustain leaders, organizations that shape the field of leadership
Number of participants per year	Up to 24	About 20 per year	TBD
Content partner	Individualized according to each participant	Native Nations Institute	TBD
Topics covered	Individualized according to each participant	Nation building tenets, community engagement	TBD
Time commitment	12–24 months	2 years	2 years
Annual program cost	\$2.5 million	About \$500k per year	\$700,000
Year started	1964	2009	2016



About Fund the People



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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

Acknowledgments

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.

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Field Stories

**The Harry and Jeanette
Weinberg Foundation**





The Harry and Jeanette Weinberg Foundation

hjweinbergfoundation.org

At a Glance



Type:	Private independent foundation
Service Area:	National and international, with a focus in Maryland, North-eastern Pennsylvania, Hawaii, Greater Chicago, and Israel
Assets:	\$2.3 billion
Founded:	1959
Recent Talent Investments:	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

“If we don’t invest in developing talent now, we will be investing in mediocrity in seven years.”

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

"I used to think we needed to know how to run programs. I learned that, really, we aren't the best ones to do that work. Instead, our strength is knowing who's doing it well so we can partner with them."

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.



5

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.

6

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 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



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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.

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Field Stories

Evelyn & Walter Haas, Jr. Fund





Evelyn & Walter Haas, Jr. Fund

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.

"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?"

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

“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.”

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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