



**Fund the
People Toolkit**

Discussion Guides
Collection





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- [Talking Talent for Funders](#)
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**Fund the
People Toolkit**

Discussion Guides

Talking Talent for Funders





Talking Talent for Funders

Objectives



This tool will:

- Provide guidance and a shared vocabulary that facilitates productive conversations about talent
- Increase the number and frequency of conversations that funders have about talent needs and potential talent investments
- Increase funders' understanding of the strengths and challenges of nonprofit talent, and the mutual benefits that can result from such investments

Purpose of Guide

Fund the People has designed this guide to help your foundation conduct meaningful discussions about investing in staff development in your grantees or the wider nonprofit community, and to determine your next steps for action.

Parameters for Discussion & Action on Talent Investing

We recommend that your foundation carry out these discussions over the course of three to four months. This timeframe allows time to discuss this topic, reflect and consider opportunities to build the talent of nonprofit grantees, and take action on your grantmaking strategy. It is essential that you involve several groups in driving this process: represent your foundation's leadership, program, and grants management staff (if applicable), your board of trustees, and other key stakeholders. The guide can be used with the foundation's full team or sub-groups (executive leadership, program staff, program teams, grants committees, board, etc.).

Ideas for Use

- **Think/Pair/Share:** Ask each member of your staff or board to consider the questions posed in the discussion guide individually, taking notes as they silently reflect. Individual staff members then discuss their responses with one or two other people before sharing highlights with the full group.
- Use selected questions as a reflective exercise at the start of your next meeting.
- **Recruit a team of staff and board representatives to explore the potential benefits of and opportunities for talent-focused grantmaking in your organization. Ask them to determine responses to these questions after conversations with other staff and board members.**

Caveat

We recommend that your foundation staff survey current grantees to hear directly from them about their talent development needs. Completing this initial



exploration will allow your foundation to pursue more meaningful discussions that will help to identify existing gaps and to develop a cohesive talent-investing strategy. We outline this and other steps in *How To Guide: A Funders' Guide to Investing in Grantee Talent*. But the lack of such survey data need not stymie initial internal conversations to gauge what your team already knows and believes.

Suggested Readings from the Fund the People Toolkit

- [Glossary of Terms](#)
- [Thinking Through Choices on Talent-Investment](#)
- [Top Reasons to Invest in Nonprofit Talent](#)
- [Funder Myths & Realities](#)
- [Guide to Investing in Grantee Talent](#)

Section 1: Orientation Toward Talent Investment

- 1) What are our (individual and organizational) assumptions about the people who work in our grantee organizations and other nonprofits?
 - a) How do these assumptions shape our individual and organizational attitudes and behaviors toward current and prospective grantees and other nonprofits?

Learn More: You may find it useful to review [Fund the People's Funder Myths vs. Realities tool](#), which elucidates beliefs about the nonprofit workforce commonly held by funders
- 2) What do we believe are the benefits and drawbacks of investing in the staff and people systems of our grantees and the wider nonprofit community?
 - a) Are perspectives aligned across our organization, and between board and staff?
 - b) Describe the perspective, or range of perspectives.
 - c) Do we understand enough about the staff and people systems of our grantees?
- 3) What are our beliefs about diversity, equity, and inclusion in the staff of our grantees?
 - a) Are the leaders and staff of our grantees diverse in

terms of race, ethnicity, gender, socio-economic background, and other areas? How about the leaders in wider nonprofit community in our funding area?

Section 2: Current Practice

- 4) To what extent do we already invest in nonprofit talent?
 - a) At what levels of funding have we invested?
 - b) At what levels have we supported talent (individual leaders, organizations, ecosystem)?
 - c) What types of interventions have we invested in? (See our [Talent-Investment Menu](#) for types of investments.)
 - d) What has worked well in the talent investments we've already made? What has been challenging? What progress have we made on diversity, equity and inclusion in our talent investments?
- 5) What do we know about the talent-investment needs of our grantees?
 - a) What don't we know?
 - b) How could we learn more?

Learn More: [Fund the People's field stories](#) offer useful examples of how funders learn about the talent-investment needs of grantees. [The Weinberg Foundation](#) and the [Evelyn & Walter Haas, Jr. Fund](#) field stories are particularly useful on this topic.
- 6) Given our current funding structure and priorities, what are the potential challenges of including talent investments within the grants we make?

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- 7) What is our vision for building our investment in grantee talent?
 - What do we want to achieve by investing in nonprofit people?

Section 3: Vision for Future



- How will an intentional focus on equity and inclusion inform our future talent investments?

8) What form(s) might our talent funding take?

- Invest in current grantees as part of their primary grants, by adding additional funding to existing grants, or as a separate program or portfolio?
- At what “level”— from individual leader to nonprofit ecosystem—will we target our investments? For more information on the components of talent investment, see our [Talent-Investment Menu](#).
- Which aspects or levels of talent investment appeal to us most? Are we interested in funding individuals, organizations, or a nonprofit ecosystem (geographical, issue-based, or other)?
- How will we deploy our resources?
 - Create a program that we implement (e.g. fellowship or training program)
 - Engage an intermediary to design and manage a program
 - Provide funds to grantees for agreed-upon talent investments
 - Some combination of these options?

Section 4: Practical Next Steps

9) What else do we need to learn to move forward?

10) Who else needs to be involved in this conversation in order for our foundation’s talent-investing strategy to succeed?

Levels of Talent Funding Commitment: As your foundation identifies the current talent needs of your grantees we suggest you consider three different levels at which to invest in talent. Often nonprofits will direct general operating funding toward programmatic needs. You have the opportunity to change this practice by being intentional about your grant support and earmarking dollars specifically for talent development.

Level 1

Incorporate specific questions in your grant applications to determine if and how nonprofits are investing in the talent of their employees. See the questions that are included in the [Weinberg Foundation’s program](#) and [general operating support applications](#).

Level 2

Ask grantees the questions listed above. If the answers align with your objectives, approve funding targeted at their top talent need.

Level 3

Ask grantees the questions listed above. If the answers align with your objectives, approve funding that targets more than one of your grantee’s talents and concerns.



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.

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Discussion Guides

Talking Talent for Nonprofits





Talking Talent for Nonprofits

Objectives



This tool will:

- Provide guidance and a shared vocabulary that facilitates productive conversations about talent
- Increase the number and frequency of conversations that funders and nonprofits have about talent needs and potential talent investments
- Increase funders' understanding of the strengths and challenges of nonprofit talent, and the mutual benefits that can result from such investments

Purpose of Guide

This discussion guide is designed to help your nonprofit team initiate a meaningful conversation about your people systems – the organizational practices, policies, habits, and structures that support and strengthen the morale, ability, and advancement of employees and volunteers so that they perform at the highest levels of excellence. The idea is to identify your strengths and weaknesses, so that you can subsequently plan, budget, and secure resources to build on the strengths and address the weaknesses.

How to use

Use this guide with your entire team or sub-groups (i.e., emerging leaders, line staff, managers, board members, etc.). We suggest sending the questions to your team in advance so they can reflect, inquire for data, and take note of their own thoughts. If you believe sensitive issues will arise, you might want to create an

anonymous survey based on these questions, then hold a facilitated team meeting to discuss the results.

Caveats

- **Facilitation:** More important than the questions, securing skilled facilitation is crucial to having a frank and productive conversation. Consider professional facilitation, if possible. You may also engage the best facilitator on your team or find a skilled volunteer who is allied with your organization.
- **Buy-In:** Before your organization can secure resources to invest in talent, this conversation should take place across the organizational chart, from bottom to top. Executive leadership should discuss with the board; emerging leaders and apprentices (such as interns) should weigh in as well. Optimally, the board and staff should be aligned in their thinking about how intentional staff development can advance the organization's performance, impact and sustainability.



Ideas for Use

- **Think/Pair/Share:** Ask each member of your staff or board to consider the questions posed in the discussion guide, taking notes as they silently reflect. Individuals should then discuss their responses with one or two other people before sharing highlights with the full group.
- Use selected questions as a reflective exercise at the start of your next meeting or series of meetings.
- Create a team of staff and board representatives to explore talent funding. Ask them to determine responses to these questions after conversations with other staff and board members.

Required Readings from the Fund the People Toolkit

- [Case Making Materials](#)
- [Glossary of Terms](#)
- [Talent-Investment Menu](#)

Section 1: Current Status of Talent Investment and Funding

- 1) **What do we believe are the benefits of investing in our organization's leaders and staff?**
 - a) Are perspectives aligned across our organization and between board and staff? Describe the perspectives.
 - b) To what extent do our practices align with our beliefs about investing in talent?
- 2) **How is talent currently developed in our organization?**
 - a) Think about formal and informal learning opportunities, internal and external trainings and programs, and development available to new and seasoned staff
 - b) Is there a focus on opportunities, equity and inclusion across your organization's talent development systems? If not, how can you begin to incorporate this into your strategies, tactics and activities?

- 3) **Are current talent development practices sufficient to attract, retain, and develop the staff our organization needs to accomplish our mission? Why or why not?**
 - a) Approximately what percentage of our budget goes toward developing our people? ([Fund the People's Talent Ratio report](#) might be useful.
 - b) Approximately what percentage of time (by the executive team, managers, and/or the board of directors) goes toward developing our people?
 - c) What gets in the way?
 - d) How are we incorporating a equity and inclusion lens into attracting, retaining and developing our staff?
- 4) **Do our organization's funders understand our talent development needs?**
 - a) Do we ask them to invest in our people? Why or why not?

Section 2: Visions for Future

- 5) **What could we accomplish with more funding for talent development?**
 - a) What new (or expanded) professional growth programs would we develop? ([Fund the People's Talent-Investment Menu](#) might help you consider this question.)
 - b) What impact could an increase in talent investment have on specific programs/activities that our funders support, our specific issue areas, ultimate beneficiaries and/or our mission?
 - c) How could having an explicit focus on, equity and inclusion impact our target audience and mission?
 - d) What is the strongest case we could make to our funders for talent funding?



Section 3: Practical Next Steps

- 6) What else do we need to learn about our assets and talent needs in order to move forward?
- 7) How can we frame our needs so that the benefits of investing in talent development are clear and compelling?
- 8) Which of our funders might we approach about investing in our talent development? What do we already know about their priorities and openness to a conversation about this topic?
- 9) How do we see equity and inclusion as integral to developing our talent?
- 10) Who else needs to be involved in this conversation in order for it to succeed?



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.

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**Talking Talent Between
Funders & Nonprofits**





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Objectives



This tool will:

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Purpose of Guide

Talking about talent development can feel challenging—even scary—for nonprofits and funders. Let's face it: most nonprofit leaders don't want to announce to their funders that they don't have the capacity they need to accomplish their missions. They may believe that talent development is a luxury they can't afford. And funders may not recognize the needs or know how to ask about them. They also may not know how they can best support their nonprofit partners with talent funding. We encourage grantees and funders to be open, honest, and transparent with one another when engaging in discussions about talent development.

And yet, if you're using this discussion guide, you probably share our belief that nonprofit impact is strengthened by investment in talent. So get the conversation started and help funders and nonprofits reach a mutual understanding of possibilities for talent investment!

How to use

This guide will be most useful if both the funder and nonprofit organization have had their own internal discussions about talent funding and talent needs. You can use Fund the People's [Talking Talent Between Funders & Nonprofits](#) and [Talking Talent for Nonprofits](#) if you'd like help with this step. If it isn't possible to have a full discussion about this topic, we suggest that you consider having a few separate discussions that build upon each other to help funders and grantees fully address this issue.

Ideas for Use

- **Provide copies of the full Ask the Question guide for all participants in the conversation. Transparency is the name of the game here, so it's helpful for everyone to see all the questions.**
- **You can prepare for your conversation by reflecting on and writing notes about the answers you'll give to the questions you will be asked.**



- Create a comfortable environment for the conversation, so that it doesn't feel overly formal.
- Schedule this conversation for a time when other funding (if relevant) isn't on the table or in jeopardy.

Useful Materials

• [Funder Myths & Realities](#)

• [Nonprofit Myths & Realities](#)

- Notes (if any) from internal discussions

For Funders

It's not easy for nonprofits to talk about their talent investment needs with their funder. They may assume that your foundation won't or can't assist them with talent investments because nothing relevant is mentioned on your website, grantmaking guidelines, application questions, or proposal budget template. They may see talent development as a luxury that comes only after everything else is funded. They may also feel that other funding will be in jeopardy if they appear to lack capacity.

The best time for this conversation is when other funding is not in jeopardy—either because you are approaching the nonprofit solely about talent funding or because you've already invested in them (organizationally or programmatically) and are considering the addition of talent funding.

The most important question that you can ask your grantee (or potential grantee) about funding is:

Do you have the leadership and talent you need to accomplish your strategic goals?

This is a hefty question, so some more detailed prompts might help you dig more deeply.

1. *Tell me about your current organizational structure and talent. Where do you feel strongest? Where do you feel you could grow?*

2. *How does your staff learn how to be most effective in their work? Are there internal learning opportunities? External learning opportunities?*
3. *How do you assess staff performance now? Are there ways you'd like to grow or change your current performance management system?*
4. *How is your organization incorporating equity and inclusion into your current organizational structure and talent strategies? If you haven't done so, how could you begin to include this focus in your talent development planning?*
5. *How do you reward excellence or address poor performance?*
6. *As the organization's leader, how do you get your professional learning? What would help you be even more effective in your job?*
7. *What type of talent investment would make the biggest difference to your ability to achieve your objectives?*
8. *If the organization is taking on new work: How will you do this new/additional work? Will you add staff or increase capacity of current staff? Either way, what will your training and staffing needs be?*

For Nonprofits

- Grantmakers may shy away from funding their grantees' talent-development needs. They may not even realize that there's a need, because nonprofits generally don't discuss their staffing challenges, professional development needs, human resource policies and practices, or other talent-related issues.
- They might think that the results from their investment in talent would be impossible to track or assess. And they may not be sure of the best way to help.
- For a more detailed look at what prevents talent investment, check out our [Funder Myths & Realities](#) and [Nonprofit Myths & Realities](#) resources.



The most important question that you can ask your funder (or potential funder) is:

How can you help me build our organization and team so that we can have the greatest impact in our work?

This is a hefty question, so some more detailed prompts might help you dig more deeply.

1. *Has your foundation invested in talent in the past? If so, what have you seen to be the benefits to the nonprofit? The community? The specific issue area? The foundation itself?*
2. *If relevant, tell me about your current approach to funding talent development. Do you invest in individual leaders or staff—at the organizational level or as part of a wider ecosystem of nonprofits? (See our **Menu of Talent-Investing Opportunities** for more on these distinctions.)*
3. *What would a great talent investment look like to you? How would you like to communicate with us about our progress on this front?*
4. *How has equity and inclusion factored into your talent investments? If it hasn't been an explicit focus in the past, how are you thinking it could be embedded in your work moving forward?*

5. ***When talking with a funder primarily focused on supporting programs or projects:*** *Is your foundation willing to help us explore ways to maximize performance of our leaders and staff so that this project/program is most effective?*

6. ***When talking with a funder primarily focused on supporting capacity building:*** *How can we maximize your capacity building support with some targeted investments in our team's development?*

7. ***When talking with a funder primarily focused on supporting general operating support:*** *Are you open to increasing the benefit of general operating support by applying it to some targeted investments in our team or by adding a targeted talent investment?*

8. *How else can you help us grow? Are there other organizations we could learn from, or specific resources, other funders, or consultants you'd recommend? Do you know of good professional growth opportunities for nonprofit leaders?*

Reflection (for funder and nonprofit)

1. *What did you hear in the discussion that resonated?*
2. *What additional questions do you have?*
3. *What are your next steps?*



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