



A PODCAST WITH RUSTY STAHL | S2 EP4

WITH SPECIAL GUESTS

Heather Parish
Pierce Family Foundation
and Lisa May Simpson
Forefront



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RUSTY: [00:00:08] Welcome to the Fund the People podcast. I'm your host, Rusty Stahl. We all know that philanthropy and nonprofits do an extraordinary amount of good. We also know that our system isn't working as well as it should. We all know that people drive change but too many nonprofit, people feel less like drivers and more like roadkill. Since the year 2000, I've worked in organized, philanthropy and nonprofits where I've focused on leadership and professional development. I've studied the lack of investment in our nonprofit leaders and workers, and how our systems of grant-making, fundraising, governance, and management reinforce the lack of support or can transform it. When we invest in our people, we can create a more equitable and effective sector, fueled by rising levels of performance, impact and sustainability. To bring that vision to life, in 2014, I helped to launch Fund the People, the national campaign to maximize investment in America's nonprofit workforce. Our podcast shares critical ideas, stories and conversations about how organizations and their funders are strengthening their work by investing in the people who do the work. So buckle up, start your engines, and let's get driving.

RUSTY [00:01:45] Welcome to Season 2 Episode 4 of the Fund the People Podcast. Thanks for listening. I'm pleased to introduce you to Heather Parish who co-leads the Pierce Family Foundation. A philanthropy with a really interesting approach to talent investing. The foundation focuses on Chicago nonprofits, working on housing and homelessness. We also have with us Lisa May Simpson, an executive at Forefront, the Illinois association of funders and nonprofits.

Forefront partners with Pierce Family Foundation on several of their programs helping them to offer peer learning for nonprofits and funders across the state of Illinois. Our conversation explores how smart talent investments can draw upon the deep well of knowledge and skills within the nonprofit workforce to help us quench our need for learning and replenishment. To help us build up our stamina as adaptive leaders. And to help cool the flames of burnout that are

constantly licking the feet of nonprofit workers. Here's my conversation with Heather Parish and Lisa May Simpson. I hope you find the conversation refreshing.

RUSTY: [00:03:12] All right. Well, aside from those leaders, both voluntary and professional, we always love to ask our guest just a little bit about, you know, how you got to where you are from birth to this podcast?

HEATHER: The whole thing?

RUSTY: No, just a little bit about what motivated you to join the nonprofit and philanthropic world and a little bit about your journey that may not be in your bio, whatever you want to share as much or as little. And then if you can just, you know, give us a little bit of an overview, briefly, of your institution so people know, you know, the basics. Why don't you go first? Heather.

HEATHER: [00:03:55]

Okay, great, thank you. So my journey. One, I'm a native Californian. I grew up in the Bay Area in the East Bay, Berkeley California. I grew up a child of divorced parents, and my mother was a single parent raising my brother and I. She was a teacher and working class background. And growing up, I would always wonder why we had to pay more money to live where we lived. Meaning relatively more money for food, gas, essentials, utilities, and at the same time we weren't necessarily getting the same quality of life, or services for the things that we were paying for. Now we know that there's structural racism and inequities and things have been baked into our life that we didn't know what to call it at the time. But yeah, I just knew that I had early on developed a calling for "How do I somehow come back to my community that I'm from and help to improve the quality of life here?" I was also very good at numbers, through math, so I said there's a way for us to think about financially how to make our communities more self-sustaining and thriving. And while segregation at the time, years ago, wasn't the best situation for us as a country, at the same time, in Black communities because they were so self-contained, they were also pretty much economically independent and able to thrive on that level. And so I was always thinking, how do I help our communities recreate that sense of economic, independent security and not having to rely on others to provide services to us, particularly if those services aren't going to be of the quality that we deserve.

[00:05:51] So that's kind of like the general calling of my life and so I guess that's why it kind of led me naturally to social justice in the nonprofit sector. Growing up in Berkeley, you know, we have kind of a progressive history of activism and I was just exposed to a lot early on, growing up and I'm very fortunate for that. So when I went to college I ended up majoring in Applied Mathematics, and as I was getting closer to graduation, and I was in the minor in ethnic studies, but as I was getting closer to graduation starting to interview for positions, I'm like, "I'm not trying to go down the traditional map, career track" which is research or working for a military contracting facility or something. I guess that wasn't me. So I ended up getting a fellowship in public policy when I did not know what public policy was until I got that fellowship. So I did that my junior year, senior year and then ended up going into the Harvard Kennedy School for my Master's Degree and luckily they had a focus or focus areas around housing and community development, and urban economic development. So I kind of took classes in all three of those concentration areas and that helped to kind of shape the direction of the work that I'm doing now.

After graduate school, I went back to California and worked for about a year-and-a-half in the legislative analyst office, as a system policy analyst in the banking, corporation and income tax arena. Which again, totally, like, did not know how much tax policy and loopholes influence decisions around economic development and that's been like, "Whoa!". So that was an eye-opener for me. That kind of helped me out on what I'm doing and then also went to work for KPMG doing government services management consulting, which is how I started to learn the whole nature of consulting, and what that means. I was traveling all over the country doing that for a couple years. Then I got wooed into working here in Chicago for Prudential Securities. I was not looking to move to Chicago, but after several phone calls and interviews, they convinced me to come here and work in their Public Finance office that they were opening at the time. And I said, "Well, I don't know anything about Chicago, but if I go, you know, and if things don't work out, I'll figure it out," because I had done enough research to know that there's a rich history of community development and community organizing, and things that really happened here that I thought, "Okay, well, we'll just see what happens." And so a year-and-a-half later, I got laid off from my job. I call it 'my emancipation moment' and I started consulting. I thought short-term and then that turned into a full-blown, full-time practice for over 17 years, working with small to large nonprofits, foundation initiatives around capacity building, organizational capacity building, program design and implementation, a lot of strategic planning and project management, and usually in the housing and community development space. But I work with a lot of different initiatives.

[00:08:54] So then in 2012, my consultant took a little bit of a dip, and I was thinking about what my next move could be if I had to get a job, and then my colleague at the Pierce Family Foundation, Marianne Philbin, she was the executive director. And she and I had also worked together for years as consultants the decade prior. So she at some point put her consulting practice to the side and went to work for Pierce full-time. And my predecessor announced she was leaving, like, December, 2012, and Marianne said, "Heather, can you come over and help me for like two or three months so I can figure out what I'm going to do with this position?" I think deep down she was testing me out to kind of see if I would be a good fit. So yeah. Three months later, they asked me to join them full-time as their program director. And I said, "Well, can I still do my consulting a little bit on the side?" and they said, "Sure, if it doesn't conflict, you can try to do both." So that's what I did. So while I did 17 years full-time as a consultant, I had a little bit of a side hustle, where I'm still working with some foundations locally that had their own capacity building initiatives with their grantees and I would help do a lot of different things with them. And so in 2019, when I was promoted to co-executive director, I said, "okay, I'm going to hang up the consulting thing and put that on hold for now, and really devote myself full-time and dive into being co-executive director in a real meaningful way." So that's my journey.

RUSTY: [00:10:17]

Wow, thank you for sharing it. You learn so much about people, where they're coming from, what motivates them, values and experiences, just by asking that simple question. So, I appreciate how much you shared about what brought you, not just to a non-profit but the content areas that you've been committed to for so long. So, Lisa, let's hear from you about your journey and a little bit about what you've been doing at Forefront.

LISA: [00:10:49]

Briefly, I grew up all over the Western half of the US and Canada. Also the child of divorced parents, interestingly, and my dad and my stepmom and I moved around every couple of years,

just because. But there were a few things that I think led me to working in nonprofits. One is that both my mom and my stepmom ended up going back to school to get their Master's when I was older. One, my mom became a librarian and dedicated her whole career to public service that way, and my stepmom got her degree and went into working for the Department of Environmental Quality in Oregon. So I had two, you know, examples of what it looks like to really invest in your own professional development and to invest then in the community. And to do that in a way that really spoke to their personal passions, but also was very focused on service. And so I just had sort of an assumption growing up that that was something that you could do and that maybe I would want to do someday in some form. So, I ended up getting a degree in theater which of course, had nothing to do with service but did have a lot to do with finding ways to collaborate and be creative in groups in ways where you could negotiate what it meant to express an idea. And I wouldn't have told you that that was what I was after when I was getting that degree, but that's definitely one of the main things that I've taken away from that. A theater degree doesn't do much in terms of getting you a day job, but I got a day job when I was done with college and pretty quickly realized I needed a little more out of my day job. So I was lucky enough to find work working for a woman's clinic just outside of Seattle. I learned a lot working there. One of the things that I learned was what burnout looks like. One of my clearest memories was watching a co-worker leave one day and literally, like, is burning burned into my brain...the back of her walking away through the parking lot with her hand up saying, "I'm done. I can't do this anymore," and we literally never saw her again. And one of the first thoughts I had was, "I have to get out of here before that happens to me." And I feel like a lot of my career and nonprofits since then have been interrogating that thought of "Is this inevitable?" Because that was, that was my assumption at the time was, "Well, that's just what it looks like." Like, you do this work until you can't do it anymore, and then you go up in flames and we never see you again.

[00:13:41] And so, to start to unpack that, you know, I kept finding myself drawn to nonprofit work. After moving to Chicago, I found work with what is now Arts Alliance Illinois. You know, again, I still have a real passion for the arts, so it was lucky to start working there and to work with someone who was willing to help me develop. I started as the office manager there and expressed some interest in learning about fundraising and was able to go to what was then Donors Forum and take some workshops to learn about that and grow into that role. But I kept seeing the same pattern of people that we were serving, the Arts Alliance, you know, people who founded organizations working so hard about something that they really cared about and burning out. And I learned that, you know, it looks a lot of different ways, but it's still, but the end result is very, very similar, whether you go up in flames or it's a slow burn and you end up a pile of ash. There's a lot of harm that gets caused. I think that's both to individuals, but also by those individuals in the systems that we're part of. And I know that, you know, I myself have burned out and, I know now, today, I can claim that, like, claim the fact that I caused harm when I was burning out. I did not do anybody any good, including myself, but also, like I caused harm in the organizations that I was part of, in the systems that I was part of. And, you know, and I can make those connections today too, this sort of white supremacy culture that tells me as a white woman that it's my job to save other people and that contributes hugely to this burn-out cycle and the harm that comes with that. So you know, so my purpose for a long time has been to interrupt that cycle and to start to take a look at, in whatever ways I can, at some of the root causes, and that's what I'm really interested in doing as a professional. So I'm really grateful that I get to work today at Forefront. Our mission as you shared, Rusty, is to build a vibrant social impact sector for all the people of Illinois. I get to interact with folks in grant-making institutions

and operating nonprofits, with consultants who serve those populations. And we get to build capacity when it comes to management. But also to take a look at, like, what does it mean to be a leader?

RUSTY [00:16:19] Thanks Lisa. Wow. In the last season of this podcast I had the opportunity to interview Dr. Christina Maslach from UC Berkeley who has studied burnout in sort of caring professions for a longer than I've been alive, and it was really a fascinating conversation with her and she did emphasize that burnout is a systems issue, not an individual issue, as we often think about. It has individual impact, but is caused in part at least by the workplaces in which we operate. So I think you really spoke to some of that. So I thought we could start with the grantee support specialists and just hear what does that mean to a foundation to engage consultants to serve as grantee support specialists? What do they do? How does it work? Where did it come from? And Heather, maybe could kick us off with that.

HEATHER: [00:17:20] Okay, sure. From the very beginning, we have always provided general operating support, unrestricted funding, coupled with what we call capacity building grants or capacity building support for a group of what we call 'core grantees.' We usually have anywhere from nine to twelve organizations at a time that we would give five year commitments of job rating coupled with capacity building support that they can take advantage of throughout the five-year tenure. And so the grantee support specialists are a part of our model for how we see ourselves engaging with our nonprofit organizations that we support. So as a part of the core grantee program or initiative, each organization is allowed in addition to the general operating grant, a \$2,000 stipend for professional development, a \$5,000 stipend--this is every year by the way, to use it or lose it thing--\$2,000 a year for professional development or workshops trainings, \$5,000 a year to work with what we call a grantee support specialist, or basically a consultant who has an area of expertise that they can provide or offer to the organization depending on what their need is. We also give them \$5,000 in IT support. So for anything around software, hardware, training, servers, whatever they needed, we have an IT program officer on staff that actually works with our core grantees to be sure that they can address all of the ITs that they have. So, the grantee support specialists are really consultants that have an area of expertise that can provide assistance around HR or board development, or fundraising, or strategic planning, marketing, communications, whatever organization wants to work on that year, they're able to use it. However, we have a pool of grantee support specialists that we can refer out, or they have a relationship with another consultant on their own, they can use the dollars for that as well. But we really felt like it was important to provide organizations with hands-on opportunities to work, one-on-one, with the consultant who can really dive in and work with them in a way that was meaningful. And I should also say as a part of our core grantee initiative, when they're invited to participate, we always do an organizational assessment with them up front. There's a tool that we take them through, kind of get a sense of where they are doing well, where they have some challenges, and how we can help support them. And then at the end of the five years, we do an exit survey with them to kind of see how the five years helped to improve their infrastructure and operations and the way that they work organizationally, so...

RUSTY: [00:19:57] That's great. It's really helpful to understand that you have this core grantee initiative, that sort of wraps around all these various supports including the grantee support specialists and other things. And can you share how many core grantees you have at a time that you consider core grantees? How do groups, sort of, get into that core grantee group?

HEATHER: [00:20:20] So we are an invitation-only foundation, meaning we don't take unsolicited applications, so a lot of times just being out in the field, we know--and I should have said too, that we focus primarily on organizations that are in the homeless services sector or providing supportive housing for people experiencing homelessness, so that's kind of the focus--and so we know who those groups are generally. And sometimes we've had relationships with them that we've cultivated over the years. Our founder, in particular, has a soft spot or a passion of wanting to help organizations that are in the homeless services sector. And so anywhere from seven to twelve organizations at a time, that participate in our core grantee initiative, and right now we have actually rolled everybody off. So all of the invitations that we have provided for core grantee support have actually now served their course. And so now we have 19 core alumni that we're now providing general operating grants to consistently. And we are also now providing what we call capacity-building bump grants or customized grants for certain organizations that might need it. Particularly because of the pandemic and everything that's been going on. We recognize that there are organizations that are BIPOC-led in particular or serving those communities that sometimes are at a disadvantage around resources and access to capacity building versus some of their colleagues that are white-led. So we are kind of looking at some of the disparities around that and trying to figure out how we can provide some more intentional and customized capacity building support for them as we go through the months ahead. So, sometimes we would get some funder colleagues who say, "Look I'm supporting this organization, would you mind taking a look at them?" Sometimes we get recommendations from our grantees themselves in saying, "This is someone who we've been collaborating with, we think they're doing great work. It's somebody you should keep an eye on" and sometime, just through our existing relationships we would be out and see people, or at a conference, or learn more about their work and somebody and then wanted to potentially invite them to start a relationship.

RUSTY [00:22:33] Your founders, I know there's a couple, The Pierces, who were behind the foundation...and my sense is they're pretty involved. But it sounds like they're very supportive of this kind of work.

HEATHER [00:22:47] Yeah, absolutely. And actually it was Martha Pierce's experience as a non-profit executive director that helped inform and drive why the foundation focuses on just general operating, coupled with capacity. But it's important. She would always come home talking about all the challenge she was having at work every day around, you know, the printer breaking down, or they didn't have enough space to run certain things, or you know, the computers were too slow, or they didn't get this grant when they expected it to, and at that had a domino effect on some other things, or volunteers weren't necessarily as organized, you know, they were just a lot of different infrastructure, back-office, organizational, day-to-day stuff that she would always come home talking to her husband about and they were like, "Well when we start the foundation, that's what we need to do. We know that these organizations are experts at the work they do. They need this backbone support to help their infrastructures be stronger, so that they don't have to worry about that stuff." And just focus on the program, delivery service, delivery and doing the work they know how to do well.

RUSTY [00:23:55] That's incredible. I know every funder should have somebody in their founding donor community, who has that experience. So, that makes sense, then, that you started with the technology issues, because she was experiencing that, like physical

infrastructure, technology. And then it sort of evolved, it sounds like, into this more the people skills as well as the things. Okay? So we're going to talk about the things that are listed in that field story that I mentioned and also some things that weren't happening yet then. Obviously, we have the pandemic going on and things. Things have changed since 2017 or whenever we published this profile. So it does mention in there that you for a while provided coaching to mid-level nonprofit leaders, but that is no longer funded and I wanted to give you a chance to just tell us a little bit more about what was done, and why did it stop? Coaching has been such a particularly popular tactic that funders kind of latched onto in a lot of cases, that I'm curious to hear the Pierce experience with that.

HEATHER [00:25:03] Sure. Coaching is very valuable, but it's also because it's one-on-one, it can be a little costly depending on how many people decide or want to apply for that type of support. So, in 2013, after running the top talent for a couple of years, we thought it might be a good idea to try to check back in with some of the alumni that had gone through top talent to see if they might need some one-on-one coaching, to kind of see how we're doing, if there's anything that they need help with in terms of applying to the things that they learn to be a manager or supervisor. So, we worked with six alumni and we had provided them one-on-one coaches for about six to nine months to see if that would be helpful for them. And all of them raved about it. That wasn't the issue. I think if we had enough resources, we would have been able to potentially provide it. But we're a very small foundation. We're not a big player, but we try to use the dollars that we do give out efficiently and well in a way that will have some impact around infrastructure and operational support. So while we didn't continue it per se, our grantees in the core that are poor grantees, have used their professional development dollars, sometimes, for coaching, for staff, or for team training, and leadership development training and workshops. And as we continued with our core grantee initiatives, I talked about how they were in buckets. We started giving them more flexibility because we realized that the core grantee initiative capacity building grants are really based on an equality model, versus an equity model. Meaning, we were giving the same type of grant to each organization, regardless of the situation and not really taking into account what unique situations around capacity they might be dealing with. So at some point we started letting them bundle the grant. So like, for instance, they can just take their IT grant, support specialist grant and professional development...they wanted to put all their chips on one thing, they could. Or if they wanted to spend it all on the strategic planning process, they could. So, we started being a lot even more flexible around the capacity-building grants and how we were providing them. So yeah. So all of that to say, some of the organizations have taken advantage of either group coaching, or training opportunities, or actually leadership development for some of their key staff to go through some coaching or specific training.

RUSTY [00:27:33] Yeah, you know, that that speaks to one of the principles that we've been promoting for talent investing is to be responsive and customized for context. Not everybody wants a coach, not everybody needs a coach, but they may need this other thing. That's, that's great- the bundling, and I hadn't thought of it as an equity versus, sort of, equality. But that's great. Thank you for telling us about that. So, coaching is still happening?

HEATHER [00:28:00] Right. Exactly. Because we definitely feel that it's an invaluable experience they have a coach. HR has been the one support specialist area in particular, where we have really dug in, because we see that there's not enough attention being paid to HR practices in nonprofits. And we know that there are some, but that we need more momentum

around that. And I think, again, all the inequities that have been exposed have really put a laser focus on how as a sector we need to start rethinking how we are doing our work.

RUSTY: [00:28:33] Yeah, that actually reminds me to just skip back to the support... grantee support specialist for a moment. I know that one of them, Chris, I've talked to, and she's featured in that case study, does some of that, helps groups think about their....building a more rational pay scale and looking at their pay in the context of their market, the labor market, and trying to create more equitable competitive, I guess, compensation packages. So, that's great. Thank you for mentioning that HR has been one of those important skill layers in the grantee support specialist work. And I just think the whole sector needs that kind of support around like, "I'm hiring someone. What should I pay them? How should we negotiate? Like, how should we set up our pay structure?" So, you know, if there's anything you want to share about, like, how groups tap into that. Like what happens with that? That HR?

HEATHER: [00:29:36] Yes, you characterize it correctly and there's more to it. Chris has been a God-send in terms of the HR capacity she brings when she provides to our grantees. And there's others in her network-- there's a few others that we have brought in around HR, either trainings or workshops for grantees as well that complement what she does. But she'll do anything from redoing job descriptions, organizational structures, salary compensation, and in particular, we have subscribed to most of the salary compensation surveys that allow her to then compile that information and make sure that she can be responsive to the organizations around salary, and how they are looking at it. And one thing we have also started doing more recently as we've been offering training around implicit bias in hiring and making sure that people are paying attention to that, as well. We've done workshops in the past on hiring and the firing process and what that potentially looks like. We've done a lot of work around board developments, and just HR administrative functions in terms of, you know, making sure that you have your finance, your administration, your operations people keep leadership in place. We know that oftentimes with nonprofits, it's like one person trying to do all the HR and the finance, and the bookkeeping, and all that back office stuff which we know is not sustainable. So we've really been trying to make sure that organizations know how it's really a three-legged stool around program, administration, or operations and finance, and development, fundraising. You need to have all of those things together and adequately staffed. And because of the homeless services sector and the way, unfortunately, it has really been forced to operate with very little in terms of funding and being very heavily reliant on government funding sometimes. They don't always have the back office support or budget to help support those types of functions to do well. And they have a lot of turnover also, this even within their program staff, direct service providers there... It can be a very burnout-type situation to be working in, in an environment where there's a lot of vicarious trauma that people experience, as well as trauma that clients, or the people they're trying to serve, are trying to process and manage. And so there's just a lot of stress and emotional charge around the work in general, which has led to some high turnover in staff.

[00:32:08] So, one thing that we did, because we were seeing and hearing from our program directors how they were constantly in a cycle of having to try to onboard new staff, get them trained, and by the time they got them trained, then they would leave again. So we actually put together a manual on how to onboard direct service provider staff in homeless services agencies, and give them soup-to-nuts all the resources that they needed to make sure they can onboard those staff well, but we're actually in the process of exploring with a local provider here,

Workforce Development Agency, around how do we maybe develop a staffing service, for lack of a better term, where there's a pool of employees that are trained and ready to go that these homeless services agencies, if they need them, can go to them if they need temporary staff or somebody's called off, maybe even have a substitute come in, or they need a service for an agency that can actually screen applicants for them, and make sure that they're trained, and they know what they're getting themselves into. So yeah. So we're in the process of exploring that right now with the local provider to see if we can actually launch that. So it's a high-need around HR support and infrastructure. Some of it is the technical stuff but it's also, a lot of it is organizational culture, and how people are approaching, or investing, or not investing in the staff, and paying attention to the needs of the whole organization in terms of how to make it sustainable, and that gets into adaptive leadership and those types of qualities that we try to engender with our nonprofit leaders. And that's been a really key thing that Forefront and Lisa, under her leadership, has really been providing for our top talent folks. So I wanted to lift that up too.

RUSTY: [00:33:49] Thank you for looping back to how the grantee support specialists and other work you're exploring, are really diving into these HR and staffing issues and supports, more than just the technical HR issues but really the whole plethora of supporting the staff. And we'll definitely get to the adaptive leadership stuff. So first, we're going to talk about peer skill share and then we'll get to the top talent institute. So, Lisa, why don't you tell us about Peer Skill Share? What is it? And maybe you can tell a little bit of the story of how it got from being a Pierce Family Foundation-only thing, at the forefront of the whole state and the whole sector.

LISA: [00:34:28] Yeah. Yeah. Thanks. And Heather, if I get any of this history wrong, I trust that you'll jump in and correct me. So Peer Skill Share is a program that the Pierce Family Foundation started as part of their capacity building support for their core grantees. And as I understand the story, it started out as folks within the foundation doing what a lot of foundation professionals do, which is saying, you know, getting a question from one grantee and saying, "You know who you should talk to is this other grantee. I'm going to put you in touch with each other." And we at Forefront do that a lot for our members, a lot of regional associations, and a lot of grant-making professionals do this. It's just it's part of our daily work. But I'll back up a little bit and talk about the mechanics of it. So Peer Skill Share is pretty much exactly what it sounds like it is. It's a matching service. For example, we send the survey to our users, to the program users. (We know it could be a little better, but that's not just not our area of expertise. We need somebody who's outside of our organization to take a look at the survey and tell us how we could, maybe, improve it and just think about that aspect of our data collection.) So they could make a request and get matched up with somebody who has some experience with that. And spend maybe two hours talking it through. So usually the advisor will get some information in advance and then come prepared to talk for an hour or two. We used to do that in person. Now it all happens via video conference. They get to exchange some information, provide some help, get some help. And then we sent a quick survey afterwards saying, how did that go? Is there any feedback you have for the adviser? And then hopefully, you have a new professional contact, a new professional friend. And you have some information that you need and everybody moves on. So it's a micro sort of technical assistance program, that's really built on the premise that people within the sector have a lot to offer each other. And those connections....one of the things that I love so much about the program is that those connections don't go away, right? They start to build the network. It started as a Chicago-focused program, but now that we've had an opportunity to grow it, it reaches across the state. So we get an

opportunity to have folks in Carbondale, helping folks in Naperville, with a common challenge. And then, you know that network then builds across the state, which is a big part of our mission as well. So what did I miss, Heather?

HEATHER: [00:37:16] There's just a couple things. One, I will say that sometimes people in Peer Skill Share may have a very technical question, like a survey or software question, or learning a certain program or something. But there's also heavy questions around, "Well, I have a difficult board chair. I'm not sure how to channel and engage with this person. I need some advice." So there might be some just pure learning that can happen just around dynamics within the organization itself and how do you manage that? So the requests are wide-ranging. I would also say that we've oftentimes seen groups matched in unlikely ways. You might have the development director for the Lyric Opera match with some small arts organization on the South Side that needs support around fundraising. And that person would give them advice. And again, like Lisa said, there would be ongoing relationships that would happen to be cultivated as a result of making those matches. But initially it was just within our grantees in the homeless services sector. But as Lisa mentioned, we started inviting our other foundation colleagues who were interested in wanting to put their grantees in the pool, so to speak, and at one point we had up to I think 16 foundation partners that were all throwing their grantees in and there was all the cross-sector collaboration that was happening, that was really beautiful and we would not have anticipated that otherwise. The one thing that has changed though under Forefront that was a part of our original model is that we provided a stipend. So each- the advisor as well as the organization getting advice- to value the time that they were putting into the meeting, valuing the time of the advisor and the expertise that he, or she was bringing, he/she or they I should say, and also valuing the time of the advisee. So that would allow the organization's leadership to let that person have it, because, you know, oftentimes, it's like, if you're not doing something directly related to your job, why are you having this meeting? Although it was, but at the same time, it's professional development. And professional development often is not budgeted for in organizations. So, this was a way for really small organizations who had no professional development access or budget whatsoever to be able to get access to advise and support through Peer Skill Share, and also be able to bring back a small micro grant of a couple hundred dollars with them for the time that they spent in that interaction. So that's now been incorporated into Forefront's membership fee structure and model, which ends up being a benefit of being a member of Forefront, but at the time, we really felt that we wanted to value people's time and investment that they were making and doing those matches. So that was a very integral part of the model.

LISA [00:39:59] And that's something that we really valued as well when we took the program on at first. And the challenge there, you know, just to speak to folks who may want to replicate this or do something similar, I think what we found is that, of course, having foundation partners who are able to invest in building the infrastructure that supports it. We do have one full-time staff member whose primary responsibility is, among others, is managing Peer Skill Share and it's important to note that there is a human behind all of this, right? We've had software programs but they're databases there, it's not AI it's not an algorithm that's matching folks, it is a human being who knows the sector, who knows people. We've been lucky enough to have the same staff member working on this program since we took it over, and people talk about, you know, how amazing Emily is just in how attentive she is, how much attention she pays to the subtleties of what folks need, and how well she takes care of the advisors that we go to regularly. So it's important to have that foundation investment in that human infrastructure that

makes the program run as well as any financial investment that you want to make in the participants. And we found actually that there was such high demand for the program, that the financial piece of it, the stipends, were not something that we were able to sustain as the program manager organization. The demand exceeded our pool of available stipends and so we had to make a decision and you know and that's something that we're still testing out. Frankly today is access: Do we want to make it broadly accessible to as many people as possible without the financial investment, or do we want to limit access and keep that financial stipend piece. And so right now we're running an experiment on the hypothesis that broad access is important. And so we'll try this out for at least a year, and we'll see how it goes, and then we'll assess, and we'll see if we need to make adjustments.

HEATHER: [00:42:28] Lisa, thank you for also looking at the human capital element of the program, because you're right. We had two staff at the foundation who are consultants who actually serve that human service or customer service role with the grantees. That's the very important part of the work that we did in establishing that. One of our grants administrators who helped launch Peer Skill Share, we actually let her work with Forefront when the transition happened, she worked there for several months to be sure that there was a smooth transition, the infrastructure was there. They had all the protocols in place around customer service. So yeah, I'm thank you for lifting it up. That is very important.

RUSTY: [00:43:08] It seems like the matching, that somebody who knows the issues, and the people, and the players would be so key to this process. I think it's so ingenious, the whole thing, the Peer Skill Share because it's an asset-based approach to professional development. It's saying we have the knowledge within our community of nonprofit leaders and professionals to teach each other and we don't have to go pay Harvard or Stanford or University of Chicago or some expensive consulting firm to deliver that knowledge to us empty vessels, you know, so it sort of flips that banking model of learning on its head and says, let's teach each other. So I appreciate it so much for that premise.

HEATHER: [00:44:01] Not that we say that Peer Skill Share should substitute for any other professional development that might be more expensive around training and other things that are offered. We're not saying it's a substitute. Because we did have some foundation partners that were only providing it as professional development and they weren't going to.. and I was like, "No that's not what we meant. We wanted this to be a compliment to professional development and conferences and workshops that they wouldn't have to go to anyway, ideally." But we also, like you said, Rusty, are valuing the assets or the information that people already embody and that they can provide and contribute to the sector in terms of strengthening it in general.

RUSTY: [00:44:38] Let's turn to the Top Talent Institute though. I know we're over time because this conversation has been so good. So Top Talent Institute, Heather, maybe you could tell us, what is it? Why do you do it? How does it work? And then we can talk about Lisa's role.

HEATHER: [00:44:54] So, Top Talent Institute. This again was a brainchild of our HR support specialist, Kris Torkelson. I believe it started around 2010-11. And we were thinking about how we can support our mid-level manager staff within our core grantee organizations. Specifically those who are in supervisory or managerial roles and have never been trained to be in those positions and to this day, it's very hard to find any training on how to be a supervisor or a new

manager - the mid-level. There's usually executive director training or bootcamp, but never something at the mid-level. So we created what we call the Top Talent Institute to work with those mid-level managers within our homeless services agencies that have core grantees. And we would make an intentional effort to bring together 15 to 18 participants per year that usually come together for like a six to nine month period. And it would be a peer learning cohort that actually self determined the types of topics that they wanted to have addressed that can help them become better supervisors and managers in their work. And so we put together an executive-level program for them and every month, they would meet for up to about three hours a time, every/each month, and then they were just different topics that they would try to address along the way. Not only just about being a supervisor or manager, but how do you deal with intergenerational leadership issues. How you've done with diversity issues. How are you dealing with staff turnover? How are you dealing with coaching your staff themselves and trying to be managers for them and meet their needs? So it ranged on a variety of different topics and at some point, we saw that there needed to be also a connection around how to make sure that these leaders could be what we call adaptive, and really helped to contribute to the organizational culture, and how they can play a role in helping to promote best practices, or things that really help nurture leadership, either that are reporting to them but also teaching them skills around, how do they manage up or above to the people that they report you, right? How did you deal with those inter-dynamic relationships and cultivate those in a way that's going to be beneficial, not only for you, but for the organization as a whole. And so that's when we started partnering with Forefront to provide what was the adaptive leadership series that they have been able to develop in-house for the organizations that they support in general through their membership. But we actually have our top talent folks, now I think it's just in four or five sessions, now with the Forefront around adaptive leadership series. So they spend about half the time of the nine months in self-identified topics, and then they spend the other half with Lisa and Forefront around adaptive leadership.

RUSTY: [00:48:12] Yeah. Lisa, you want to talk about that second half of what happened? What is adaptive leadership and why should people know about it and what's happening with the groups that participate in your sessions?

LISA: [00:48:25] Yeah. So adaptive leadership is a leadership framework that actually got developed at the Harvard Kennedy School of Government by Ron Heifetz and Marty Linsky. I learned about it through the Kansas Leadership Center, which is based in Wichita, and does amazing work training individuals and communities. And it's based on that principle that leadership is an activity, and not a position and therefore anybody can do it anywhere, anytime. That leadership is an activity that needs to be rooted in purpose, that there is a risk involved. And so it's something that I've been learning about and teaching for about 4 or 5 years within the Forefront structure of workshops. And I get to bring it to this Top Talent group, which is as an amazing type of group to be able to do this work with because as Heather said, there are folks who are supporting folks who report to them, but they don't have as much authority as the folks who are at the top of the org chart. So they have some authority but it's somewhat limited. And so, you know, my own experience with that, is that you have to be really intentional about how you use the authority you have, and also, when to step outside the bounds of your authority. And so, part of what we talked about in these trainings is, is the differential between authority and leadership. If leadership is an activity, you can do that with or without authority. It often looks a little different but authority is, you know, it's power that's granted in exchange for services. That's a basic definition that we share. But learning to navigate all of that along with, which is

something that I should be really clear about, it's something that folks do in the nonprofit sector intuitively and has been the folks who are part of Top Talent Institute do intuitively. So part of what the adaptive leadership framework offers is not necessarily new skills, but a shared language and a framework that folks can engage with, with intentionality in a way that I find particularly, and I think folks, find helpful, because it gives you something to sort of hang your hat on and say, "all right, I'm engaging in this, and I'm doing it with intention now," and it gives it a little more momentum than the intuitive can sometimes, give us. So, a lot of what we talk about too is distinguishing the kinds of challenges that we face, particularly in the nonprofit sector. There are the technical challenges and those are really important and we have to address them. An expert can come in and fix it and it happens quickly, right? But those aren't the kinds of challenges that we're trying to work on in the nonprofit sector. We're working on big, hairy, systemic challenges: homelessness, poverty, education inequity, all kinds of inequity that are the root of all of these big, hairy challenges that we're trying to deal with. Our real goal is to make progress on them. And that's really hard. That is like hard, emotional work and especially for folks, as Heather said, who are already working in spaces where a lot of people who are bringing their trauma that they brought before, they're experiencing trauma in the workplace. And so to have the skills to hold that for yourself, and for others. Those are the kinds of things that we talk about. And again, especially folks in the Top Talent Institute and other folks who come through these programs. They know it, they do it, but to give them space to really acknowledge, like, "Ah yes! This is what I'm doing. This is the progress that we make as a result." I feel like it can also help to address some of those burnout issues that we talked about earlier, because often just noticing, like, "Ah, yes I'm doing this. I'm doing it while I'm making progress. I'm seeing it and I have a group of people that I can talk to who support me, and we have a shared language to talk about what we're doing together."

RUSTY [00:52:45] As we move towards wrapping up here, I want to move us to lessons learned. There are four kinds of lessons learned shared in that field story about the Pierce Family Foundation and I wanted to just touch on those and see if you all have any thoughts or comments based on your experiences with this or anything else at Forefront. So, one was "tie talent investments to outcomes." You know, I think you could reverse it: "tie outcomes to talent investments." You could think of it either way, but curious if you guys had any thoughts on how that plays out?

HEATHER: [00:53:22] Well, I mentioned a little bit earlier that we're exploring now the local workforce development provider. How we can create the staffing service agency or pool that can help fill the gaps around direct service provision that sometimes happens with high staff turnover or when people have to call in sick or they can't show up for their shift. How can there be an HR resource or pool of employees that are already trained and know what to do in a shelter that they can kind of drawn. So that's kind of an example of how if there's investment and talent around that type of function, then you'll get better outcomes overall within your agency. So in actuality the organization that we're working with here, who's doing this for us, they already do workforce development with people who have experienced homelessness or displacement from their jobs, but they haven't necessarily done it for a non-profit homeless services sector. They've done it for more of a corporate typical job development agency type. So this has been helpful for them to see it, like another avenue being able to work with people with lived experience, and how to place them and so we're trying to take all of those different things into account around how do we do talent investments with people who really could have an entree to a living wage job or career ladder that they may not have had access to otherwise.

RUSTY [00:54:47] Interesting. I think this is one way that funders who won't do general op, who only do program funding, could say, you know what, we're going to fund this program. But there are people who run this program and what do they need? And how can they do their best work? And how can we help them do that through the program support? So "talent turnover is not a bad thing" was the second finding. "Supervisory skills is a growth area in the sector" was the third lesson learned, and the fourth was "acknowledge participation," which we were talking about earlier, the stipends. So, folks who want to read more about those lessons learned, please do look at the field story about Pierce Family Foundation that's on the Fund the People website. So, in terms of the impact of the pandemic, I know we talked before we recorded here about the AMPT program, and I wanted to give you a second, Heather, to talk about that, but before we do that, I know the Forefront is tracking how the pandemic has impacted funders, nonprofits, consultants across Illinois, and you did some research on that midway through the last year, so we wanted to give you a chance to share what has happened with the sector, and the workforce, in the state, Lisa.

LISA: [00:56:06] So we've done a couple of surveys over the last year and the most recent one we conducted near the end of 2020. I think what we're seeing in Illinois is similar to what folks are seeing across the country. Organizations are seeing a real increase in demand for their services. Not necessarily seeing an increase that corresponds to funding. While there have been great emergency funds available and I would encourage folks, (I can share a link Rusty. If they want to take a look at Illinois, specific one. There's a compendium of them on the National Council of nonprofits about surveys that have been done across the country) but one you know one takeaway is that the organizations we heard from that are identified as BIPOC-led saw a percentage higher increase in demand for their services, but did not see a relevant percentage increase in funding. And so those systemic problems that we knew existed have not gone away. And in spite of the specific investments that some funders have made in BIPOC-led organizations over the last year, it hasn't been enough to make up for those systemic inequities that they started with. I think one other thing that I'll just highlight is that we heard from folks in terms of what they needed and what they wanted in terms of capacity building, and really supported what Heather mentioned earlier in terms of folks who do want to learn from each other. Peer-to-peer was really valued, so was one-on-one support, whether that's from peers or from external experts, like coaches, consultants. But I think we definitely heard that folks are wanting support and they're wanting community. So those kinds of connections are definitely what folks seem to be seeking out specifically around fundraising, around collaborations, and around anti-racism training. Those were the three areas that we heard folks wanted and needed the most right now.

RUSTY: [00:58:15] Thank you for that. It's so important to see the realities versus the perceptions of what's happening with the sector. And it's so hard to find information at the national level about what layoffs really looked like, and other things in our sector. Where can people find Forefront on the web and find the research, as well as anything else you want to share?

LISA: [00:58:37] You can find more about Forefront and our work at myforefront.org. So I hope you'll join us and work to make Illinois an even more vibrant state.

RUSTY: [00:58:48] Terrific Lisa. Thank you for being such a leader in the field there and for

being such a good friend of Fund the People. So I wanted to give you a chance, Heather, to talk about AMPT for a moment.

HEATHER: [00:59:05]

So AMPT: Advancing Nonprofits is an organization that officially launched in 2019 based on research that was done through a capacity-building landscapes scan back in 2016-2017, and I would say 2015, I along with Marianne, my co-executive director and a couple of other foundation colleagues that we are always in communication with, we start just having an informal conversation about what is going on with capacity building? What were we doing with our respective grantees and wondering what other foundations were doing around capacity doing with their grandchildren? To see how we can learn from each other. We were also hearing that there were some grantees that we were sharing in common, now having to manage participating in multiple capacity building initiatives and we were probably driving them a little crazy. And we weren't leveraging our collective resources in a way that could be beneficial instead of stretching them to meet our individual silos needs. So we started gathering our peers and, you know, up to at some point, we had up to 24 foundations that were coming together convening just to learn from each other about what capacity building leadership development issues they were doing. Oh, and at the same time, there's another conversation happening that was being initiated by the Koch Brothers Foundation - that the capacity-building intermediary organizations like Forefront, the Axelson Center [for Nonprofit Management], the Nonprofit Finance Fund, other capacity building intermediaries were having conversations about how they can better work together and include service that was being provided to the nonprofit sector. So we decided to join forces. We convened, or commissioned a capacity-building landscapes scan of the Chicagoland area to figure out what's working, where there are gaps. They talked to over 300 nonprofits, foundations, capacity-building consultant intermediaries to get all this feedback. And there are four overarching recommendations that came forth from that work. One was to **have a greater focus on equity issues** because as we just heard from Lisa, there's organizations that are not getting the same access to resources and support in capacity-building in particular, those that are BIPOC-led. There was a recommendation around **having a stronger focus on development or developmental approach to capacity-building**. Meaning don't do these one-off, discretionary grants for capacity-building. Do a longer term, multi-year developmental approach to helping an organization really grow and thrive over time. And so that was another recommendation. There's another third recommendation around **supporting greater nonprofit connectivity within the sector** talking about the peer learning support and connectivity in exchange that we needed to have happen. Not only with nonprofits but also with the funder community and other ecosystem partners. And then there's a fourth recommendation about supporting **a navigator function**, like some nonprofits don't even know what they don't know. Sometimes, they just need help knowing what capacity-building means, what the implications are for their organization, what resources they/we should try to help navigate or help them learn more about. So, there was a fourth recommendation around that. So all that to say, we get some additional research especially with groups on the south and west side to see what kind of an entity would this look like if we were to stand up a capacity-building entity that could be responsive to the needs that were identified in the study. And so that kind of led to the genesis of AMPT: Advancing Nonprofits.

[01:02:28] And I should say that there was a working group that oversaw the landscape research that Forefront and some other nonprofits and funders, there was a collaborative effort that helped to launch that work. But as we got closer to actually standing up AMPT itself, there

was a group of funders, Pierce` Family Foundation being one of the founding funders that actually said, "Let's just take the charge on fundraising through this," helping just to put some basic infrastructure in place. And then pulling together a group of advisers or board nonprofits, that could help guide programming and all other things that we needed to do to help move this work forward. So we officially launched the year before the pandemic, and we hired our first staff person. Actually, in June of 2020 I mean we really were trying to stand up this organization in the midst of a crisis to say the least. And so last year, March, when the pandemic hit, we had an emergency board meeting, and we were hearing from our nonprofit board members that were on the ground, saying that "The organizations are confused about what kind of help they need." They are trying to pivot to now be as remote as they can. They don't necessarily have the technology or infrastructure. They need somebody as a thought partner or a leader to help guide them through this challenging time. They just need some counsel and advice and some coaching.

[01:03:51] So we set up a crisis management consulting Initiative for organizations, they can come, we would actually give them a small stipend for participating with their time. We would match them with a consultant that could work with them for maybe two to three hours. And we also developed a resource guide around all the funding opportunities and things that were being thrown at them. And that was another thing that we were hearing from them, and they were so confused about all the mutual aid and resource funding opportunities that were being put out there with good intention through the philanthropic sector but it was very confusing for them. So we had ways to help guide them through all of that. So we did two rounds of the crisis management consultant piece, and now we're launching some learning circles and doing some other things with the grantees that we were supporting or other organizations we've been supporting. Again, AMPT is designed, based on the research and what we learned, to focus on small nonprofits, budget sizes of under 2 million dollars, focused on the South and West sides of the city of Chicago that typically have been under-resourced and under-invested or dis-invested. And we have a priority focus on Black-led and Latinx-led organizations that are working in Black and Latinx communities. Not to say we won't serve other folks, but that's the priority because again, the research is telling us that those BIPOC-led organizations, in particular, are the ones that are expected to work with the most vulnerable, with the least amount of resources, in the very challenging community environments and situations that again, because of structural racism, they have not been given the same type of investments that they should, and deserve to have, and philanthropy is culpable in that, because we also have expected organizations to meet a certain bar or level in order to qualify for grant funding. And we recognize that we now have to repair harm that we have also caused around how we have not invested in those organizations, fairly. The pandemic is shown loud and clear that not only do we rely on those organizations on the ground to provide services and mutual aid and other things. We're expecting them to advocate and solve the problems and the challenges that have been thrown at them and then at us as a society. So we owe it to them to make greater investments in the work that they're doing and to be there with them for the long haul. And so we heard loud and clear, don't let this be a philanthropy initiative where you're in three years, up and out, and we don't see you, again, this has to be a long-term, multi-year effort, and the foundation partners that we have brought on, they understand that, and they know that now, we have a funder community, that is hopefully going to be supporting us for a long time to come.

RUSTY: [01:06:25] Hey, I'm so glad you brought AMPT to my attention and we're able to talk about it. It really does bring us full circle to what you talked about your own journey, and the

neighborhood you grew up in, and those racist policies and physical neighborhood that borders and all of that. That historic experience. And how it is like you said, it's not newly exposed, but it's newly focused on during this last year, year-and-a-half.

HEATHER: [01:07:01] It's also been our experience that groups that have been most in-demand of the services for capacity building that we're providing, because we've provided some grants as well as some capacity-building grants -- it's the groups with budget sizes of \$500,000 or less. That seems to be our sweet spot.

RUSTY: [01:07:17] Right. Well, thank you so much for your leadership in the field and for your truth speaking today and I'm sure always. Now where can folks find you and Pierce Family Foundation on the web?

HEATHER [01:07:32] PierceFamilyFoundation.org, all spelled out. [Pierce family foundation.org](http://Piercefamilyfoundation.org).

RUSTY: [01:07:40] Is there a place people can find more about AMPT?

HEATHER: [01:07:44] You can go to AMPTChicago.org and AMPT is not an acronym. I should tell you, AMPT is the way that we express the feeling or the passion for the work that we have for our nonprofit sector. So we are amped up to support them and so that's kind of where that comes from. So that's why we AMPT: Advancing Nonprofits together.

RUSTY: [01:08:05]
How is the URL spelled?

HEATHER: [AMPTChicago dot org](http://AMPTChicago.org).

RUSTY: [01:08:11] all right? And we will get that link up as well on the show page for the episode along with other social media resources and the field story that's been mentioned multiple times and the research. Thank you so much Heather for everything.

HEATHER: [01:08:27] You're welcome. Thank you for having us.

RUSTY: [01:08:28] Yeah, I'm excited to share this story in the ideas behind your work. So thank you.

[01:08:39] Thanks for listening to Fund the People, a podcast with me, Rusty Stahl, where we amplify how and why philanthropy should support the nonprofit workforce. For links to the resources that were mentioned in this episode, check out our show notes and more at FundthePeople.org/podcast. Be sure to subscribe to the show, and if you enjoyed the episode or you're a regular listener, please share the podcast with your network, or at least with one or two colleagues who you believe would find it valuable. Thanks for all you do every day for our community and our country, through your nonprofit work. Stick with it, keep your tank full, and take care of one another.