

# Fund the People

Why + How to Invest in Grantee Staff



**Fund the  
People**

Philanthropy New York  
May 16, 2018

# Welcome

1. Greetings!
2. Overview & Context
3. Learning Objectives
4. Review Agenda

# Agenda

1. About Fund the People
2. Talent-Investment Theory
3. Lessons from Haas Jr. Fund
4. Talent-Investment Practices
5. Planning Your Talent-Investing
6. Resources

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# About Us

## Purpose

- Maximize
- Essential
- Power

## Strategies

- Make the Case
- Equip for Action
- Build Movement

## Past + Present Supporters

Annie E. Casey Foundation  
American Express Philanthropy  
Bush Foundation  
David and Lucile Packard Foundation  
Durfee Foundation  
Ford Foundation  
Kresge Foundation  
Public Welfare Foundation  
Robert Sterling Clark Foundation  
W.K. Kellogg Foundation

A Project of

# Agenda

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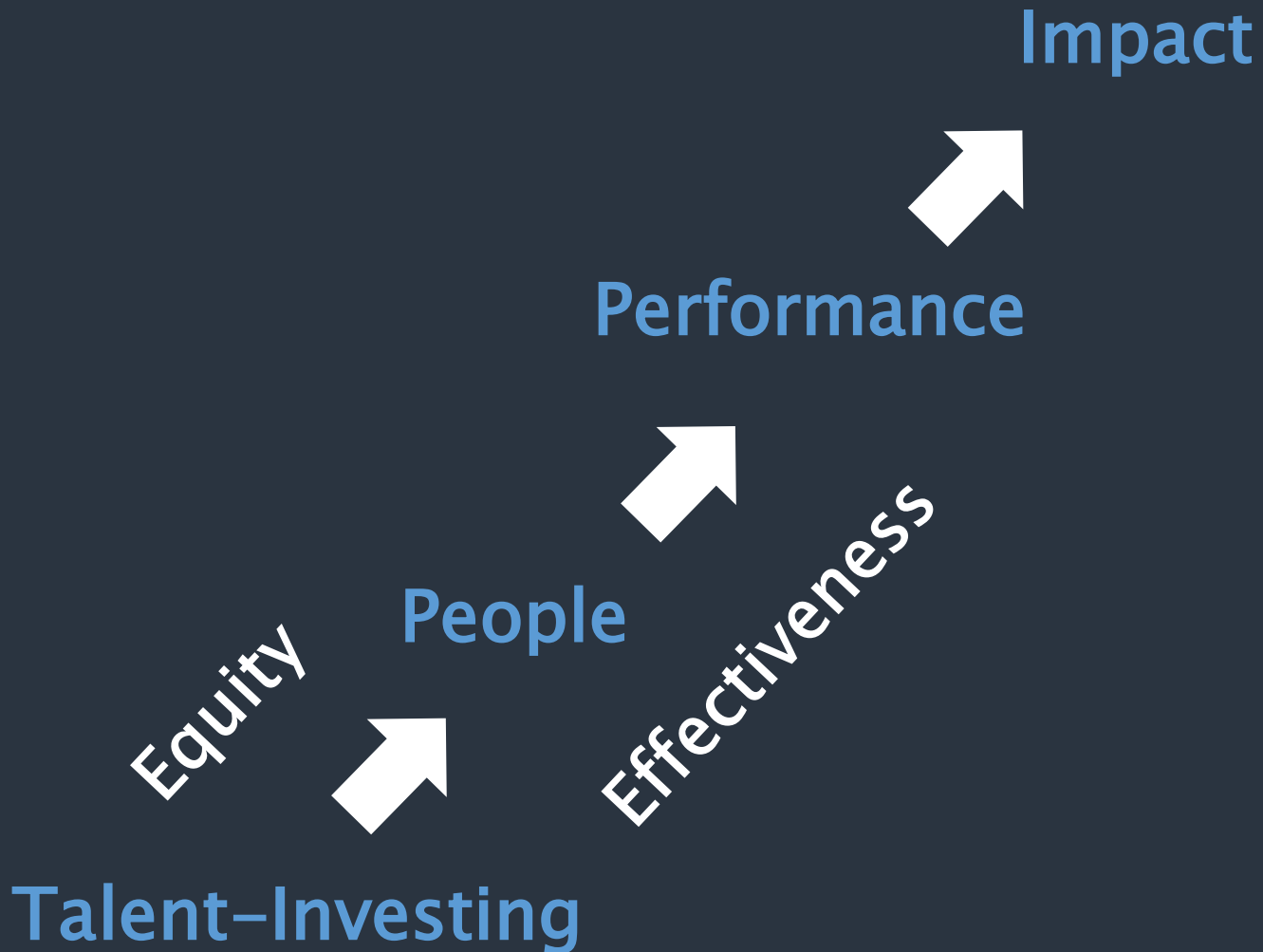
# Attitudes

What words or phrases come to mind about nonprofit people?

# The Concept



# Invest at the Source



# What's the ROI?

## The Pathway to Leadership

Lessons from Clinic Leadership Institute



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HAAS JR. fund

## 5-YEAR EVALUATION OF THE FLEXIBLE LEADERSHIP AWARDS

HAAS LEADERSHIP INITIATIVE

JANUARY 2013  
PREPARED BY WILLIAM S. RYAN



## Preparing the Clinic Leaders of Tomorrow

The Clinic Leadership Institute Emerging Leaders Program



**INTRODUCTION**  
Leadership development programs require strong, motivated leaders who can manage their organizations through an increasingly complex regulatory system and meet the needs of their diverse patient populations. Clinics are facing considerable pressure to adopt new changes brought on by the passage of healthcare reform, the shift toward more integrated and patient-oriented care, the profession of health information technology and the realization of state and local measures. In this environment, clinic executives require an ever-growing set of skills to lead effectively and advance organizations.

While the need for strong clinic leaders is clear, many current executive and operating leadership programs, and the majority of these leaders have not yet been adequately prepared to take their place. It is with this need in mind that the Board of Directors of the California Foundation for the Advancement of Health Care (CAFAHC) has established the Clinic Leadership Institute Emerging Leaders Program. The Institute, which is a joint program between the University of California, San Francisco and the California Foundation for the Advancement of Health Care, was created to design and deliver a program for the preparation of emerging leaders in the healthcare industry.

Who remains problem solvers, able to make a strong and lasting impact on the organization. The program has trained approximately 400 emerging leaders over five cohorts.

**KEY PROGRAM IMPACTS**

- Participants have improved professional growth and management skills regarding programs, for example:
  - 80% increased in their overall role in practice
  - 80% increased in their overall role in the organization
  - 80% increased in their overall role in the organization
  - 80% increased in their overall role in the organization

New Individuals Contribute to the Strength of Communities, Institutions and Fields



## CREATING BROADER IMPACT

The Bush Foundation Fellowships



## Developing the Next City Health Leaders

### SUMMARY

From 2007 through 2012, the University of California, San Francisco (UCSF) and the University of California, San Diego (UCSD) have been working together to develop a program to train and support emerging leaders in the healthcare industry. This program is designed to provide a rigorous, interdisciplinary, and experiential education for emerging leaders in the healthcare industry. The program is designed to provide a rigorous, interdisciplinary, and experiential education for emerging leaders in the healthcare industry.

### CONTEXT

The healthcare industry is facing a number of challenges, including a changing regulatory environment, a shifting patient population, and a need for more integrated and patient-oriented care. The healthcare industry is facing a number of challenges, including a changing regulatory environment, a shifting patient population, and a need for more integrated and patient-oriented care.

### IMPACTS IN THIS AREA

The program has had a significant impact on the healthcare industry, including a number of key outcomes. The program has had a significant impact on the healthcare industry, including a number of key outcomes.



## Brief Assessment of The Irvine Foundation's Fund for Leadership Advancement: Findings & Forward-Looking Lessons

September 2011

The Irvine Foundation created the Fund for Leadership Advancement (FLA) in 2005 as a mechanism to support leadership development of the group of its grantees. Since its inception, the Foundation has made over \$1.5 million in grants to support the FLA program across a wide range of health care organizations and individuals in California. These grants have advanced the professional development of individuals and the work of their organizations through the support of intensive coaching and other services. The Foundation includes this program in its annual budget to address a wide range of needs and to provide a perspective on ensuring they were sustainable among its nonprofit partners in California.

In July 2011, the Irvine Foundation asked Harder+Company Community Research to assess the impact of the FLA program and to provide recommendations for the future. The assessment was conducted through a series of focus groups and interviews with grantees and staff members of the Foundation and Harder+Company to address the following questions:

1. What have been the short- and long-term organizational impacts of FLA?
2. What are the organizational factors that have influenced the success of FLA?
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4. What are the organizational factors that have influenced the success of FLA?
5. What are the organizational factors that have influenced the success of FLA?

The methods used for the brief assessment were very straightforward. Analysis of FLA grant data and consultant reports. Review of FLA grant data and consultant reports. Interviews with grant recipients. Interviews with grant recipients. Interviews with grant recipients.

All of the grantees and consultants involved with FLA since its inception were asked to share their experiences with the FLA program. The findings and recommendations are based on the experiences of the grantees and consultants. The findings and recommendations are based on the experiences of the grantees and consultants.

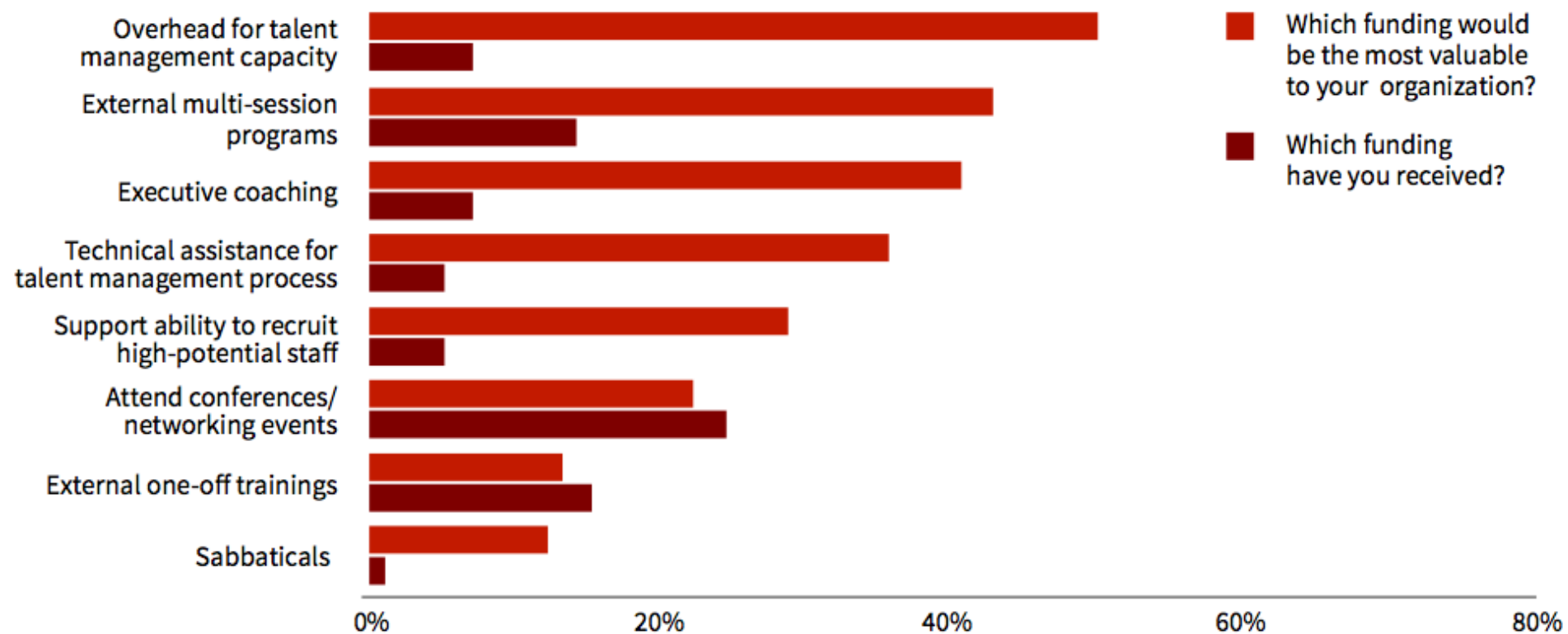
# The Data Says...

1. Enhance the skills of individual leaders & their organizations
2. Create networks that strengthen movements, fields, and sector
3. Build shared visions that drive change
4. Strengthen funder-nonprofit relationships to improve philanthropy

# The Problem

# Systemic Need

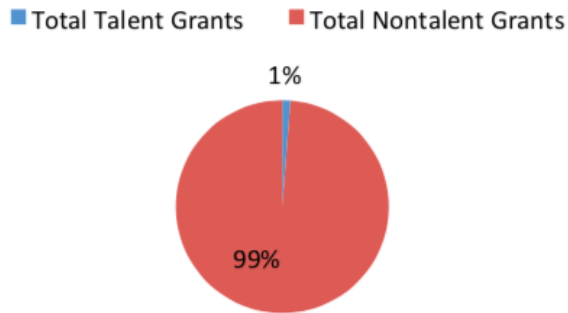
## Leadership Funding for Nonprofits



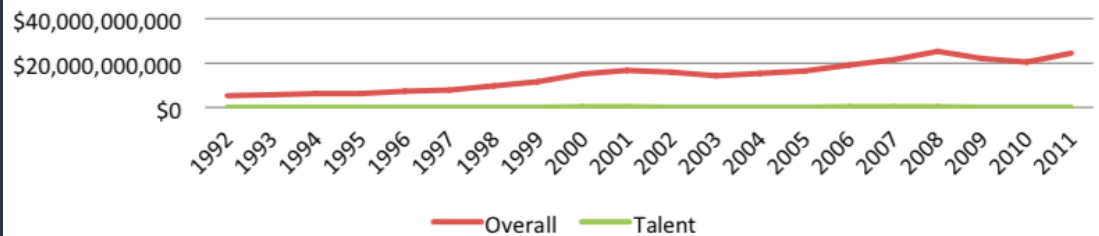
Source: January 2015 Bridgespan Group survey of 438 nonprofit senior leaders on their ability to recruit, develop, and retain senior managers.

# Funders Under-Invest

## Percentage of Total Foundation Grant Dollars for Talent Grants, 1992-2011



## Foundation Grant Dollars for Nonprofit Talent Costs vs. Total Foundation Grant Dollars, 1992-2011



# Nonprofits Under-Invest

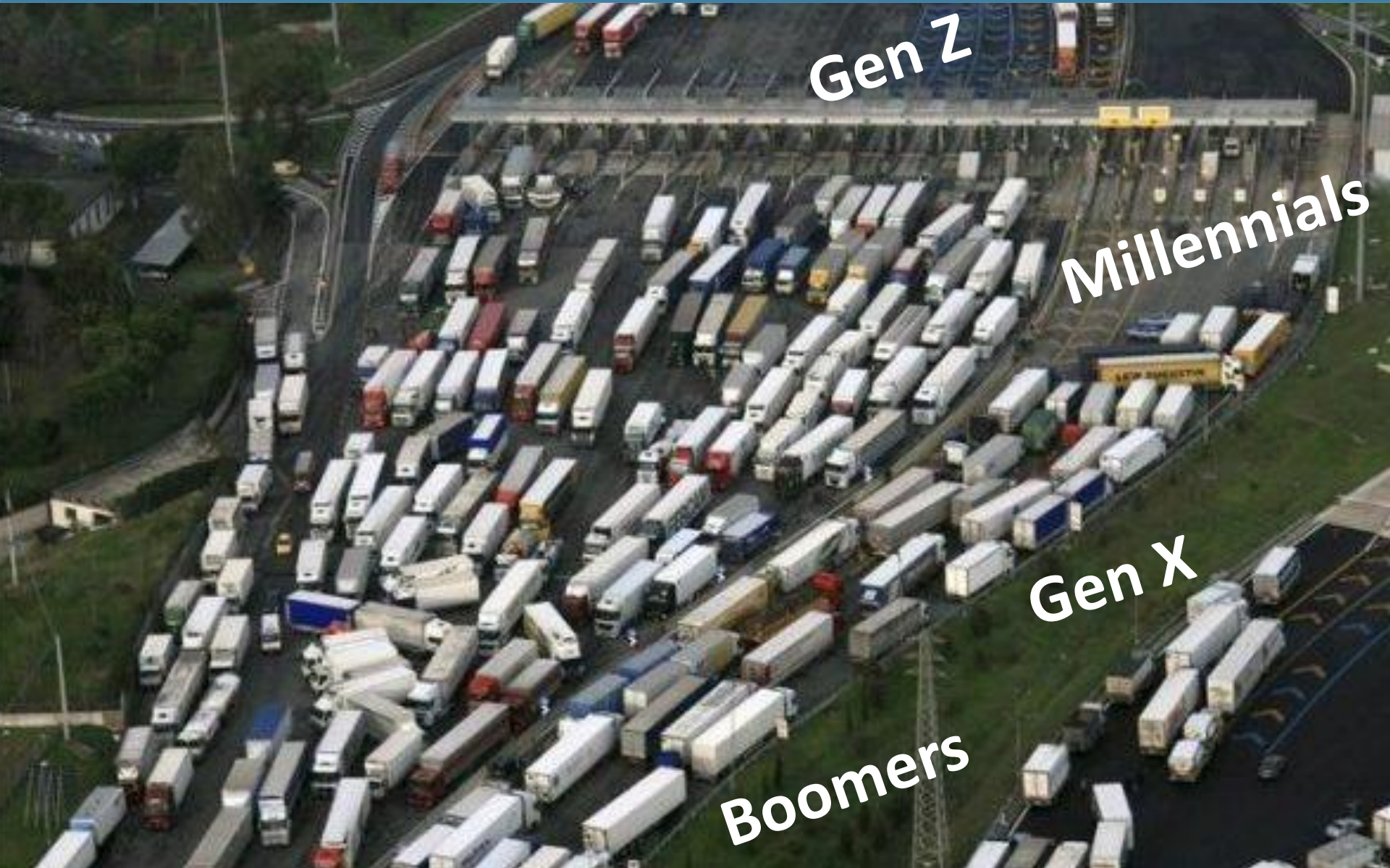
77% of nonprofits that submitted proposals to Weinberg Foundation in 2016 said they use less than 1% of their budget for staff development



1%



# Result: Leadership Bottleneck



Gen Z

Millennials

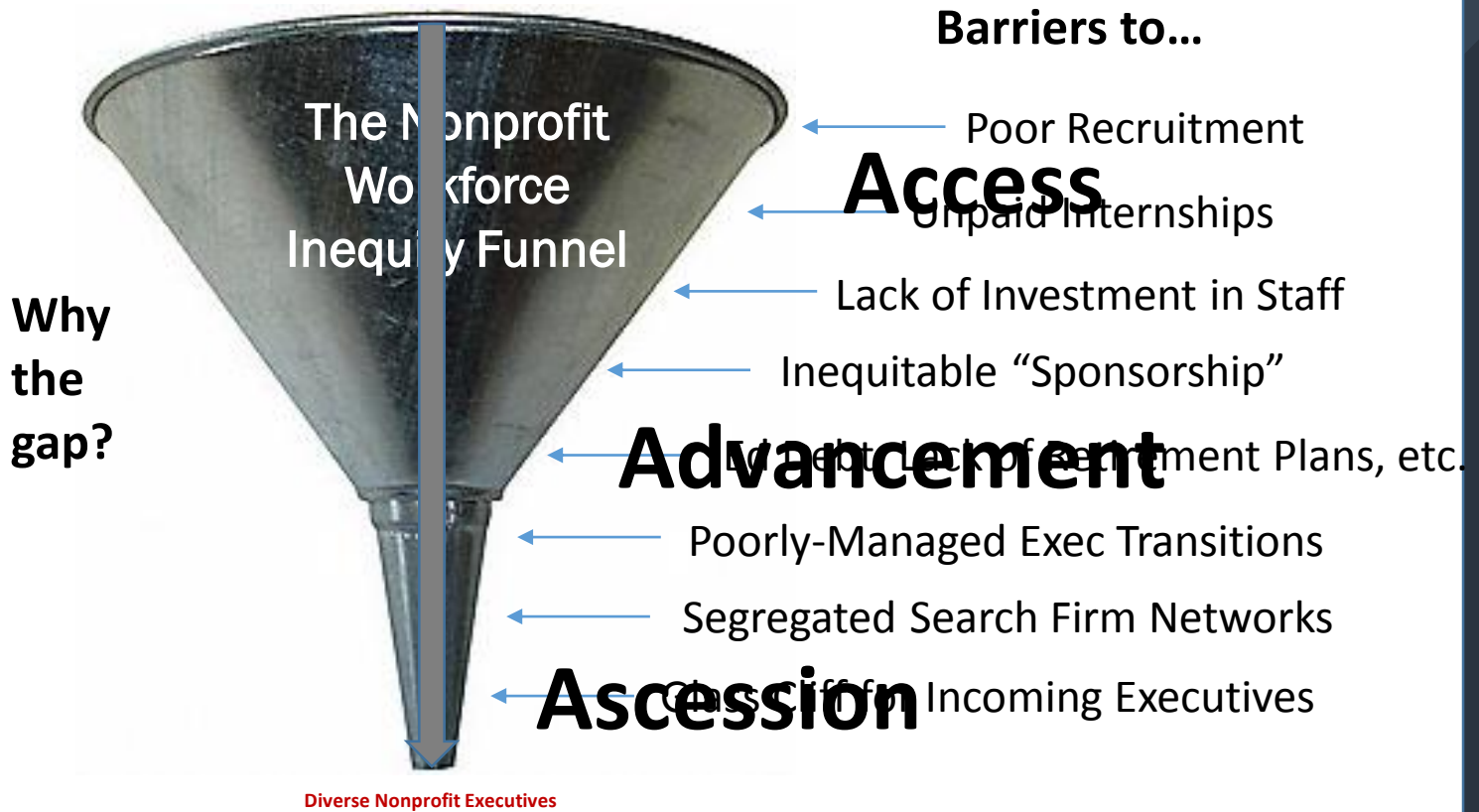
Gen X

Boomers



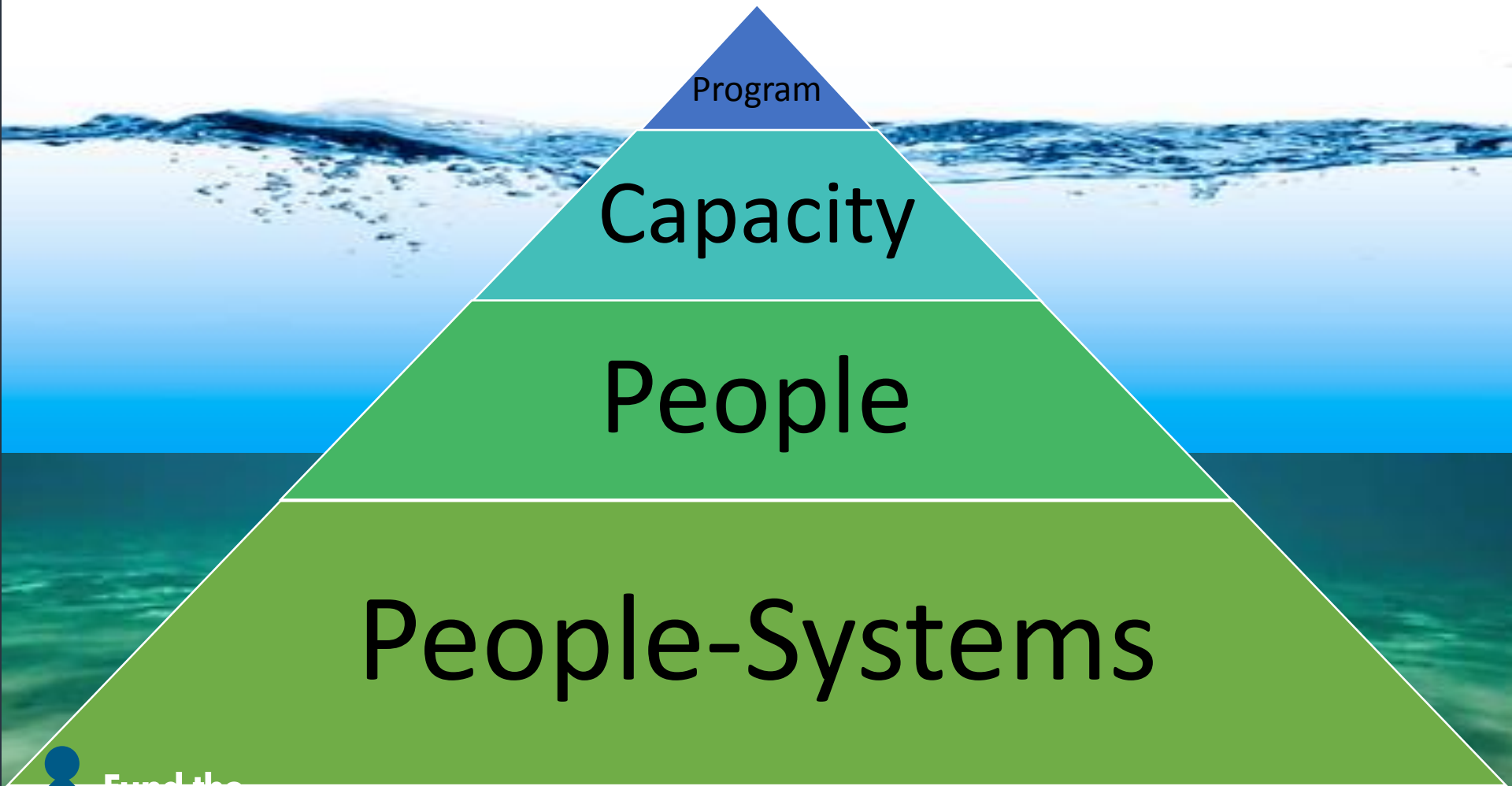
# Result: Inequity

## Diverse Potential Nonprofit Leaders



# What Is To Be Done?

# Fund Below the Surface



# Bake It In



Bake It In



Fund the  
People

# Reflection Questions

- How could talent-investing reinforce your foundation's mission and current efforts?
- How would talent-investing challenge your institution (in a healthy way)?

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# INVESTING IN LEADERSHIP ACCELERATES IMPACT

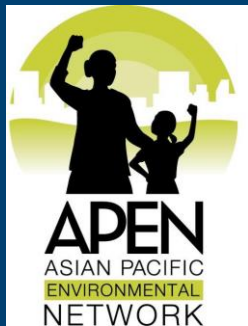


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CREATING OPPORTUNITIES.

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# The Value Proposition



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# In Support of Movements



21<sup>st</sup> Century Fellows Program  
\$700,000—4 grants  
72 fellows

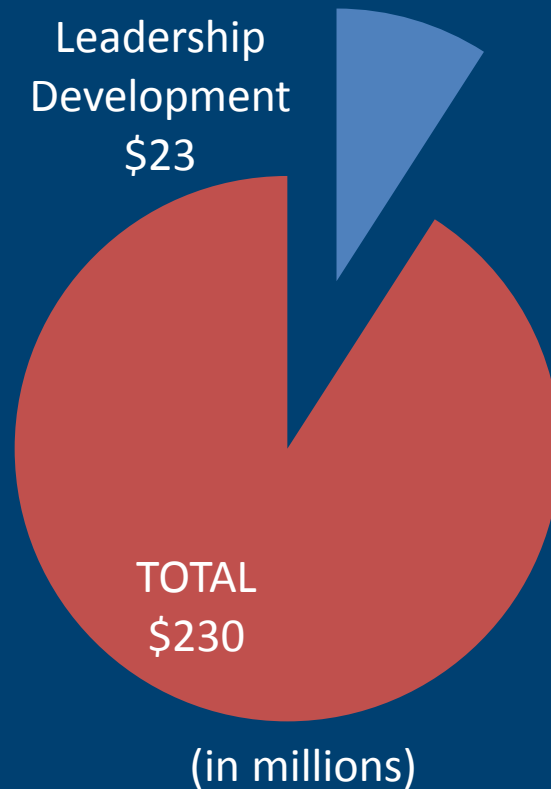
Fellowship for New California  
\$500,000 – 4 grants  
90 fellows



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# 10% of Total Haas Jr. Fund Grantmaking



1)

- \$15M Flexible Leadership Awards
- Fellowships
- Grants to Capacity Builders/Training Organizations
- Field Building

# *HOW* The Flexible Leadership Awards Program



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# The 6 Core Principles

1. It is selective.
2. It reaches beyond the executive director.
3. It tightly links organizational and leadership goals.
4. It is tailored to grantee priorities and needs.
5. It provides multi-year support.
6. It is focused on deep transformational change.



“As soon as we have two nickels to rub together, we want to hire another organizing position because that’s where the need is, that’s how you build power.

But we can’t do those things without a stronger foundation and support to build it.”

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**What do you hope to accomplish?  
And what kind of leadership is needed to reach your goals?**

Individual  
coaching and onboarding  
management skills

Organizational  
strategic pivot  
executive transition  
stronger board and senior team

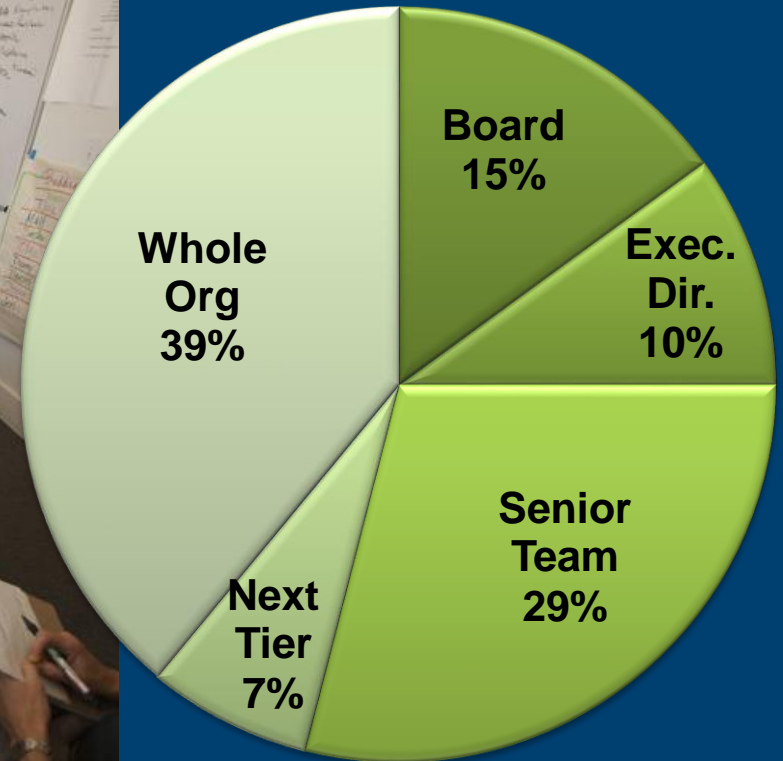
Movement  
diversity



Janson Wu,  
GLAD E.D.

FLEXIBLE LEADERSHIP AWARDS:: Who?

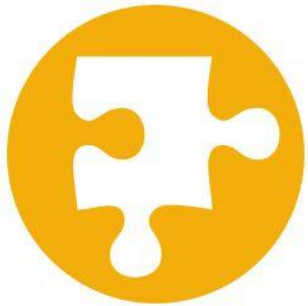
## Distributed Leadership



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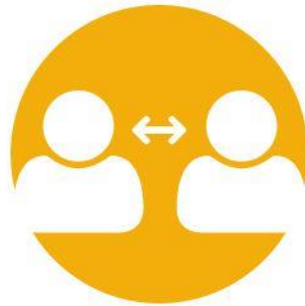
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The FLA program engages executive directors, senior staff and board members to think expansively about where their organizations want to go, and what kind of leadership it will take to get them there.



### Flexible Funding

In addition to ongoing funding, FLA grants offer support for three to five years to address leadership opportunities and challenges.



### Peer Learning

The cohort of FLA grantees meet online and offline to exchange ideas and provide mutual support.



### Strategic Advice

Each organization is paired with a consultant to develop and implement a leadership development plan.

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# Impact of Leadership Investments: Evaluation Questions and Key Findings

## WHAT WERE THE LEADERSHIP GAINS?

- 12 of 14 orgs met or surpassed leadership goals

## WHAT WERE THE MISSION GAINS?

- 13 of 14 orgs met or surpassed mission goals

## The Flexible Leadership Awards Program: Evaluation Findings



“It’s impossible to imagine that vouchers alone could produce these kinds of results.” Bill Ryan

# Emerging Issues

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Challenges that Come with Growth Opportunities

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Heightened Risk and Systems Strain

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Strategy Development in this Dynamic Policy and Funding Moment

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Personal Resilience

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Leading with Equity



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# Customize It



# Talent-Investment Menu

THE KRESGE FOUNDATION

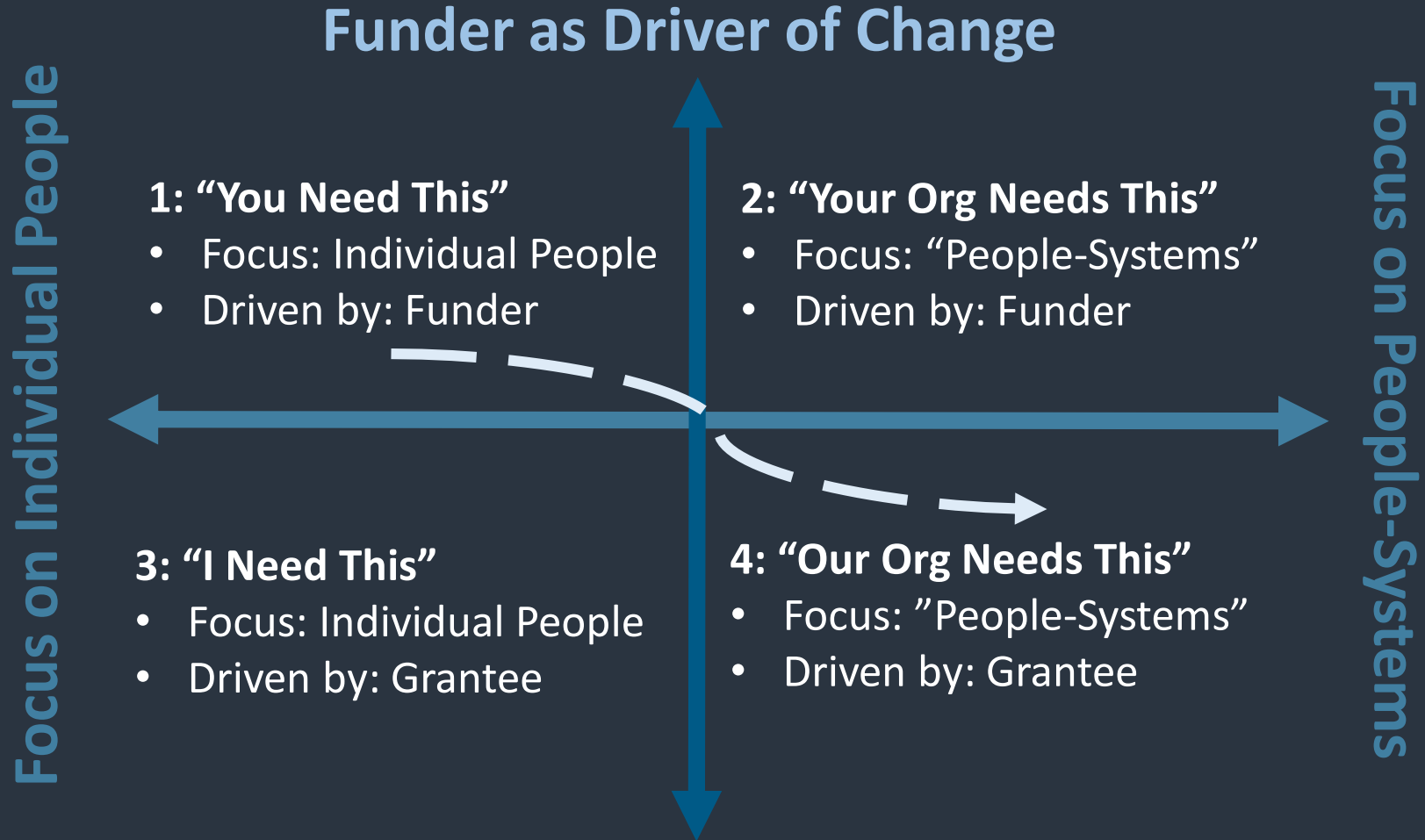


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# Focus & Drivers of Change



# Levels of Intervention



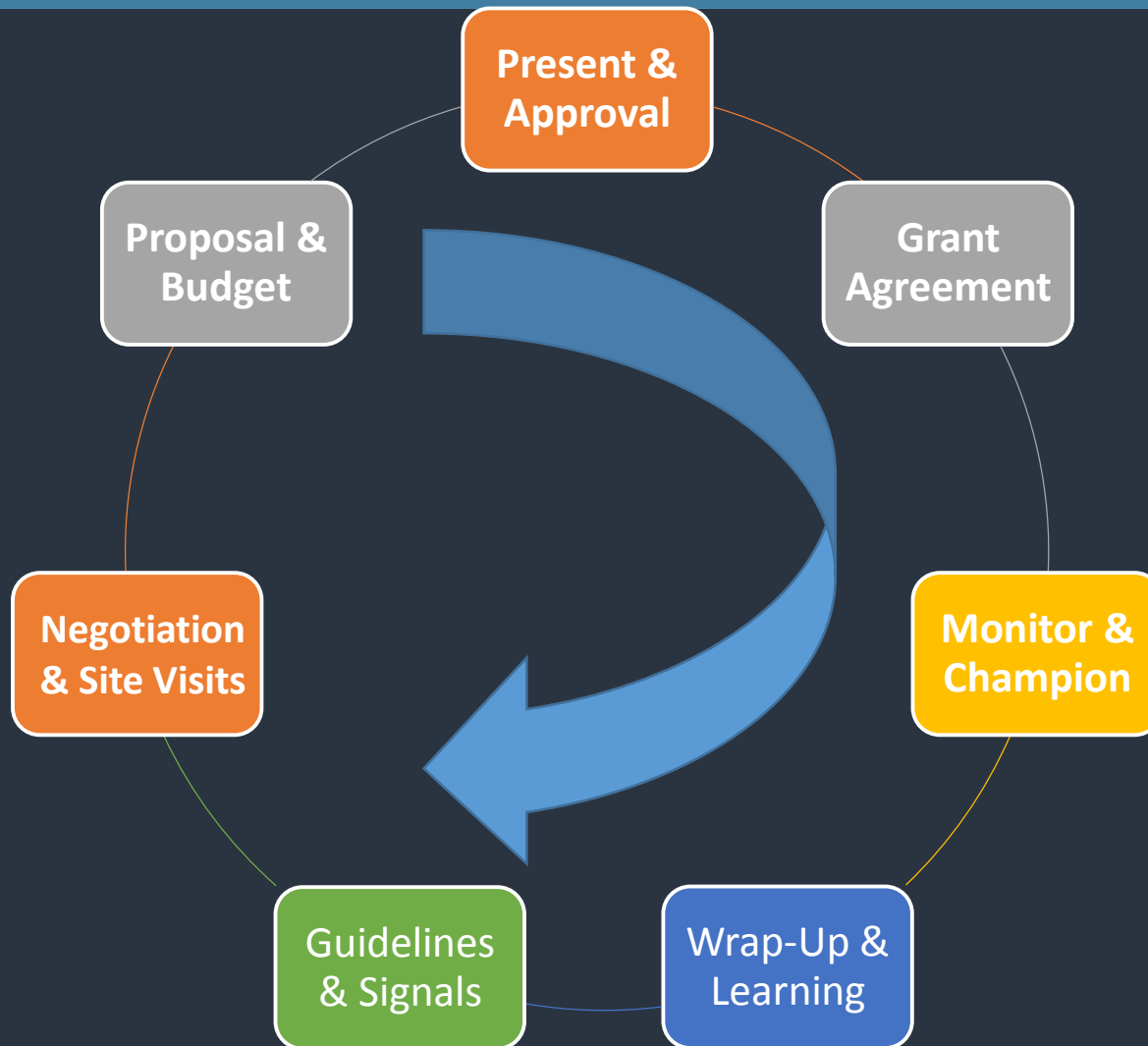
# 5 Ways to Bake In Talent-Investing

1. **Foundation Strategy**
2. **Grantmaking Strategy**
3. **Individual Grants**
4. **Within Grantees**
5. **Around Grantees**

# Grantmaking Strategy



# Individual Grants



# All Types of Grants

- Capacity Building
- General Support
- Program Grants
- Other Grants

Talent-Investment



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# Reflection & Action Planning

- Individual Reflection
- Action Planning
- Small Group Discussion
- Sharing Next Steps

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Case-Making  
Resources

How-To  
Guides

Field  
Stories

Equity +  
Inclusion

Discussion  
Guides



[FundthePeople.org/Toolkit](https://FundthePeople.org/Toolkit)



# Additional Resources

- ROI Data Report
- Equity in Nonprofit Work Project
- New Toolkit Content
- August 14 Webinar with Foundation Center
- Funder Briefings

# Keep in Touch!

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**fundthepeople.org**

# Let's Get Social!



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# Fund the People

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