

FLEXIBLE LEADERSHIP AWARDS

THE HAAS LEADERSHIP INITIATIVE

The Evelyn and Walter Haas, Jr. Fund launched the Flexible Leadership Awards (FLA) program in 2005. **The program's goal is to support leaders so they can more effectively advance the goals of their organizations and the movements in which they work.**

The FLA program is an expression of the Fund's profound respect and support for the nonprofit leaders who are doing the hard work that is vital to creating a more just and caring society. The program also reflects our conviction that investments in leadership lead not only to improved performance for organizations, but also to stronger movements and accelerated social-change.

Currently, the Flexible Leadership Awards serve 45 grantees from the Fund's primary program areas: gay and lesbian rights, immigrant rights and education equity. The awards give these local, state and national organizations targeted support to focus on strengthening their leadership. (FLA grantees continue to receive separate program or operating support grants from the Fund.)

RESULTS

While the prevalent approach to assessing leadership development programs relies on exit surveys, the FLA program took a much more intensive approach to evaluating impact. Backed by hard evidence, an independent, five-year evaluation showed that the FLA program was highly successful in helping leaders get better results for their organizations and their movements. Almost all (13 of the 14) FLA grantees in the first cohort not only met their leadership development goals but, more importantly, achieved the strategic goals they had set for their organizations. In addition, 13 of 14 dramatically grew their budgets, by an average of 64%, despite the economic recession; and seven organizations completed successful executive transitions between 2005 and 2010.



“Because I participated in the FLA program over several years, through different stages of my organization’s development, the organization benefited in a much deeper way. The emphasis on my individual leadership was integrated into what was good for the organization overall.”

NTanya Lee, former Executive Director, Coleman Advocates for Children and Youth

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FLA grantees attending a peer learning convening

HOW IT WORKS

The FLA program starts with a simple question: **Where does your organization want to go and what kind of leadership does it need to get there?** It engages executive directors, senior staff and board members to think strategically about their goals and the skills, teams and organizational systems needed to carry out their work.

A Flexible Leadership Award consists of three key elements:

- **GRANT FUNDING.** The initial FLA award is a one-year grant to selected Fund grantees to help them tackle short-term leadership development goals. From among this group, we then identify a smaller group for multi-year funding. These are organizations whose work is most central to the Fund's grantmaking priorities and whose leaders have demonstrated interest and readiness to take on deeper, transformational change.

Organizations selected for multi-year funding receive \$35,000-\$50,000 per year for at least three years that they can use to pay for coaching, training and specialized consulting on specific issues like senior team development, strategic planning and board development.

- **AN ADVISOR.** Each organization works with a "plan consultant" who helps its leaders create a leadership development plan and determine what resources they need to implement it. The plan consultant becomes an expert ally to help the organization make informed and strategic choices about how to select consultants and how to sequence and sustain the leadership development work.
- **PEER LEARNING.** The Haas, Jr. Fund convenes FLA grantees regularly to provide opportunities for peer learning and mutual support.

EXAMPLES OF HOW ORGANIZATIONS USE FLA SUPPORT

STEPPING UP TO NEW LEADERSHIP ROLES. Almost all of the executive directors tackle variations of the same fundamental question: What does my organization demand of my leadership and how do I step up to provide it? For some, this means mastering the skills and mindset needed to be effective in their external roles as movement leaders, fundraisers or advocates. In order to improve its advocacy in federal policy-making circles, one ED worked on both ‘soft’ (e.g., gaining confidence) and ‘hard’ (e.g., networking strategies) aspects of his leadership. For others, it means improving their internal leadership. This might mean shifting from being the ‘most senior program expert’ to a leader who develops and supports the organization’s program experts.

DEEPENING THE LEADERSHIP BENCH. Organizations have used their FLA support to invest not only in the executive director but also in senior management teams. Among the outcomes of this work is a shift from operating in silos to shared leadership of the organization as a whole among senior teams.

STRENGTHENING BOARD LEADERSHIP. FLA grantees have sought to address challenges relating to board engagement that are common in the nonprofit sector. Priorities have included: engaging board members more effectively as stewards, strategic thinkers and fundraisers; diversifying the membership of boards; and mobilizing board members to become more effective advocates in their communities.

MANAGING INTERNAL AND EXTERNAL LEADERSHIP ROLES. The tension between internal and external duties is a challenge for many leaders of social-change organizations. Internally, they must be skilled managers and motivators, while they also have to play a strong external role raising funds and advocating for social-change. Through coaching and other support, the FLA program helps executive directors redistribute leadership responsibilities and move beyond an unsustainable “heroic leader” model.

FACILITATING EXECUTIVE TRANSITIONS. Quite a few organizations have gone through an executive transition while participating in the FLA program. FLA support has enabled these organizations to manage the transition successfully through coaching for departing and incoming executives, support for boards as they initiate and manage a search, and onboarding support for new executives.

GUIDING PRINCIPLES

The FLA program is shaped by the following principles:

- 1. It tightly links organizational and leadership goals.** To define their leadership priorities, organizations participating in the FLA program start by identifying or clarifying the overarching impact or social-change goals they aim to achieve. This in turn shapes the leadership development agenda. The work revolves around the core question:
Where does an organization want to go in three to five years and what kind of leadership does it need to get there?
- 2. It is tailored to grantee priorities and needs.** By providing organizations with expert guidance, real-time support, and dedicated leadership resources, the FLA program is based on an understanding that one-size-fits-all approaches to leadership development do not work.
- 3. It is selective.** Organizations eligible for the FLA program are Haas, Jr. Fund grantees that play a strategic role in the foundation's core program areas. The program does not cherry-pick high-potential leaders, nor does it target organizations that are struggling. Rather, the program provides highly focused support to grantee organizations that are ready and committed to take their leadership to the next level.
- 4. It provides multi-year support.** Personal and organizational growth takes time. The FLA program recognizes that it takes at least three years of support to help an organization significantly strengthen its leadership. This does not mean that leadership development requires huge investments; rather, the Fund's experience shows that modest, reliable grants of \$35,000-\$50,000 can yield impressive results.
- 5. It reaches beyond the executive director.** The FLA program is about more than developing executive directors alone. The Haas, Jr. Fund knows that leadership development is most effective when it is focused on the entire leadership team of an organization, including the executive director, the board and senior staff.
- 6. It is focused on deep transformational change.** Rather than just helping organizations respond to an immediate crisis or tackle a discrete leadership challenge, the FLA program helps organizations carry out deep, long-term work that can transform the way they operate and significantly increase their success in advancing social-change.

Nonprofit organizations and social change movements need strong leadership to succeed. Yet, in stark contrast to the business world, investing in leadership is not common practice in the nonprofit sector. It's often seen as nonessential—nice to have but not closely connected to the organization's success in achieving its goals.

The Evelyn and Walter Haas, Jr. Fund set out to advance understanding of how leadership development makes a difference—and what works—with a five-year evaluation of its Flexible Leadership Awards (FLA) program. The Fund's evaluation, conducted by Bill Ryan of Harvard University's Hauser Center for Nonprofit Organizations, took a detailed look at the 14 organizations in the first cohort participating in the FLA from 2005-2010. The study goes beyond the typical "self-report" surveys that inform most evaluations of leadership development programs, to take an intensive, multi-year approach to evaluating results and connecting the dots between investments in leadership and the impact on the work itself.

ASSESSING RESULTS

In the FLA program, organizations define two sets of goals: a set of strategic organizational goals looking out 3-5 years and a related set of leadership development goals, as the examples in the chart below illustrate.

SAMPLE FLA GOALS

	STRATEGIC GOAL	LEADERSHIP GOAL
Org A	Provide national leadership on marriage equality through litigation and advocacy in California and file briefs in six other states.	Build a stronger senior team so that the executive director and legal director can spend more time externally on advocacy.
Org B	Increase the community loan portfolio from \$8 million to \$18 million over five years.	Build the board's governance capacity to support and guide the expansion.

“I feel like more funders need to understand that the work flows from the leadership, and so investing in leadership **is** investing in the work.”

Erika Katske,
Director, San Francisco
Organization Project

CLEAR LEADERSHIP AND MISSION GAINS

Using multiple data sources and at least three outside assessments, the evaluator analyzed each organization’s success in meeting their goals. The upshot is that the FLA organizations were strikingly successful on both fronts: 13 of the 14 grantees met or surpassed their strategic organizational goals, and 12 of the 14 met or surpassed their leadership development goals. The evaluation shows that most of the organizations that surpassed their goals started with significant leadership challenges, made marked progress, and credit the FLA program as a turning point. Moreover, the evaluator found compelling examples of how the leadership work directly supported the organizational impacts.

Ryan’s interviews with executive directors underscored the connection between the investments in leadership and the impact of the FLA support on the overall work of these organizations. Said Erika Katske, director of the San Francisco Organizing Project: “I feel like more funders need to understand that the work flows from the leadership, and so investing in leadership is investing in the work.”

In addition, the evaluation identified other noteworthy indications of the FLA’s impact:

STRIKING BUDGET GROWTH. On average, the 14 organizations grew their budgets by 64 percent, for a total \$19 million portfolio-wide increase between 2005 and 2010. Only one organization saw its budget decline during this time period, despite widespread retrenching in the nonprofit sector due to the economic recession.

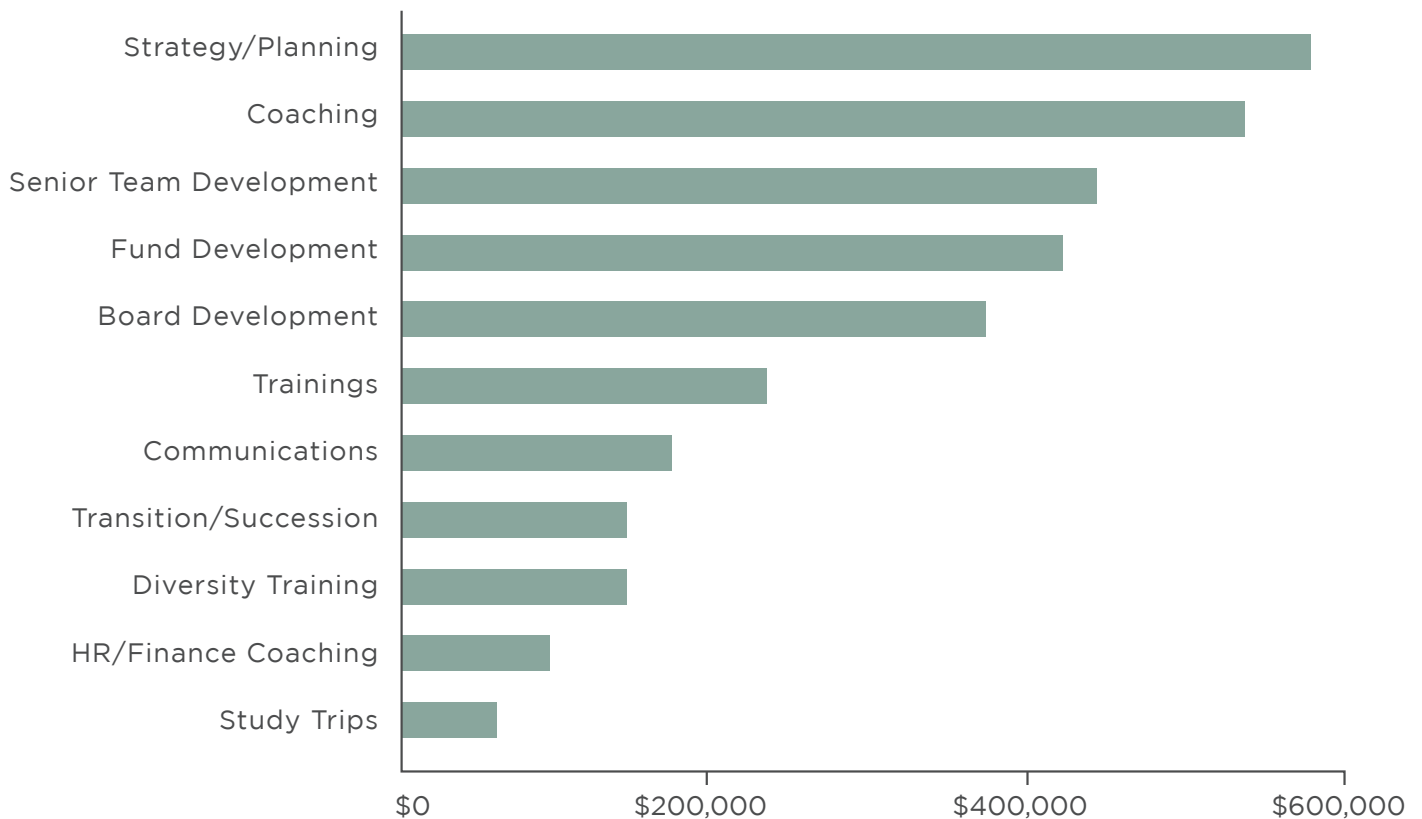
SUCCESSFUL EXECUTIVE TRANSITIONS. While the FLA program was not designed explicitly to support executive transitions, seven of the 14 organizations in the first FLA group negotiated successful transitions over the five years. In many of these cases, FLA resources helped the organizations navigate the tricky transition in leadership between a founding director and a new executive director, emerging from the process stronger and refocused.

HOW ORGANIZATIONS USED THEIR AWARDS

The Flexible Leadership Awards give organizations the freedom to select from a wide menu of possible leadership investments. Their choices shine a light on the types of leadership support that organizations believe can deliver the highest impact.

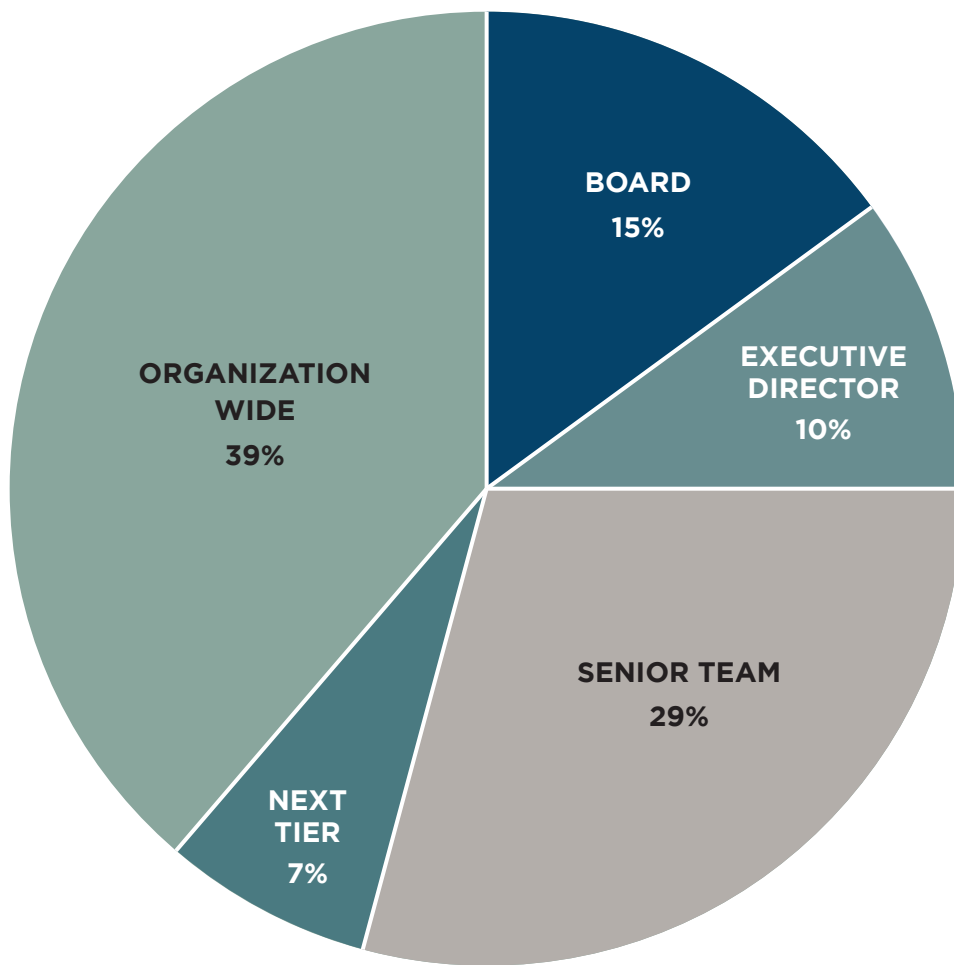
COACHING CAN BE A GAME-CHANGER. From the start of the FLA program, coaching was what grantees were most passionate about. A key theme that emerged from the Fund’s research and literature review on coaching, as well as the evaluation, was this: Coaching is highly cost-effective and has enormous power and potential to support not only individual but organizational goals.

WHAT DID GRANTEES INVEST IN?



EMBRACING “DISTRIBUTED LEADERSHIP”: Organizations participating in the program directed just 10 percent of their FLA resources to the executive director. Ryan’s research shows that many, if not all, of the FLA organizations chose to invest in senior management teams in order to create a deeper “leadership bench” and promote teamwork and distributed leadership. The “whole organization” category, garnering 39 percent of all investments, included funding for strategic planning, fund development, communications and other priorities.

WHOM DID GRANTEES INVEST IN?



KEY FACTORS IN THE PROGRAM'S SUCCESS

Ryan's evaluation identifies a combination of three important factors that go beyond the grantmaking to explain the success of the FLA program. These include:

EXPERTISE. The FLA provided organizations with flexible resources to engage consultants with the expertise they needed to achieve their specific goals. In addition, the FLA provided an advisor, the "plan consultant," to work one-on-one with each organization and help them create a leadership development plan, determine what resources they need to implement it, and identify and engage high quality consultants.

FOCUS. The FLA program is structured to motivate organizations and their leaders to put in the time and attention needed to strengthen their leadership. By making an explicit connection between leadership and organizational goals, FLA removes the barrier that so often keeps organizations from doing this work: that there is "just too much else going on." In addition, through ongoing contact with plan consultants, executive director convenings, coaching sessions and other activities, the program, in Ryan's words, "created an environment conducive to sustained leadership development."

ACCOUNTABILITY. The FLA program includes systems and processes that support participants to be more accountable for achieving the goals they set at the start of the program. Progress reports, regular check-ins with their plan consultants, and coaching and consulting keyed to each organization's specific goals, help participants be honest with themselves about their progress and devise new approaches to help move the work forward in the face of stumbling blocks.