

evelyn & walter  
**HAAS JR.** fund

# 5-YEAR EVALUATION OF THE FLEXIBLE LEADERSHIP AWARDS

**HAAS LEADERSHIP INITIATIVE**

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# INTRODUCTION

This report presents findings and analysis from an evaluation of the Flexible Leadership Awards (“FLA”) program (“the Program”). As the Program’s sponsor, the Evelyn and Walter Haas, Jr. Fund (“the Fund”) commissioned the evaluation both to inform its own work and to contribute to the ongoing dialogue about how foundations can best support their grantees’ leadership development.

## **THE FLA PROGRAM**

In 2005, the Fund invited 14 of its 363 grantees to participate in the FLA pilot, which was designed to help grantees create and implement leadership development plans geared specifically to advance their organizations’ most important strategic objectives. These ‘anchor grantees’ were selected for their successful track records and for their importance to the Fund’s strategic priorities. All of the organizations continued to receive separate general operating support or program support grants from the Fund in addition to their Flexible Leadership Awards.

The portfolio of organizations was extremely diverse (see Exhibit A). The leadership profiles of the organizations also varied widely, with both long-term founders and new Executive Directors (“ED”) participating.

## EXHIBIT A

### THE GRANTEE ORGANIZATIONS

*(See Appendix A for list of grantees)*

- Annual budgets: \$655,000–\$12.5 million
- Staff: 6–147
- Years in Operation: 7–50
- ED Tenure: 8 new EDs
- Missions:
  - LGBT Rights
  - Community Organizing and Development
  - Youth Development

Each organization was assigned a Plan Consultant to assist it in creating a leadership plan, to be carried out with the assistance of consultants, coaches and educational programs. The Fund supported implementation of the plan with three annual grants. Although the Fund set the maximum annual grant at \$100,000 for its own budgeting purposes, the average annual per grantee expenditure—of \$45,000—never came close to that ceiling. Exhibit B provides the Haas, Jr. Fund’s narrative description of FLA.

## EXHIBIT B

### THE FLEXIBLE LEADERSHIP AWARDS

Strengthening nonprofit leadership is a key grantmaking strategy for the Evelyn and Walter Haas, Jr. Fund. After investing in various forms of leadership development and capacity building for grantees over many years, the Fund launched the Flexible Leadership Awards in 2005 to help anchor groups strengthen leadership in order to achieve key organizational goals.

The Flexible Leadership Awards program is based on the belief that stronger leadership leads to improved performance for non profits—and, in turn, greater impact on issues of strategic importance to the Fund.

In addition to ongoing unrestricted general operating support, the Haas, Jr. Fund made separate Flexible Leadership Awards to 14 grantees whose work was crucial to achieving the Fund’s grantmaking priorities. FLAs gave these organizations multi-year support to focus on strengthening their leadership capacity.

### HOW IT WORKS

The FLA starts with a simple question: Where does an 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 mission goals and the leadership needed to achieve them, including the skills, teams and structures needed to carry out their work.

Flexible Leadership Awards consist of three key elements:

1. **A Grant.** Each organization receives \$35,000–\$50,000 per year for up to five years for coaching, training and specialized consulting—e.g., executive coaching, senior team development, strategic planning and board development.
2. **A Plan Consultant.** Each organization is paired with a “plan consultant” who helps them create a leadership development plan and determine what resources they need to implement it. The plan consultant becomes an expert ally to help them make informed and strategic choices about how to select consultants and how to sequence and sustain the leadership development work.
3. **Peer Learning.** The Haas, Jr. Fund convenes FLA grantees regularly to provide opportunities for peer learning and mutual support.

The FLA program is based on an understanding that one-size-fits-all approaches to leadership development don’t work. It provides expert guidance, real-time support, and dedicated leadership resources to help nonprofits meet today’s challenges while strengthening their organizations for tomorrow.

One feature of the Program’s logic distinguished it from other capacity building programs: It focused on the interaction between leadership-development and mission-advancing goals. Many programs offer participants a variety of supports for strengthening their leadership. Often these are delivered outside the workplace—in university-based, executive education programs or training workshops—and leave it up to participants to apply new insights and tools to their on-the-job challenges. Even those

*FLA sought to organize leadership development around—and in support of—the organization’s most important strategies for advancing its mission.*

offered in the workplace are not necessarily tailored to helping leaders meet their organizations’ most important goals. In contrast, FLA sought to organize leadership development around—and in support of—the organization’s most important

strategies for advancing its mission. Advancing these strategies was the end of the Program, and leadership development was the means. The value of, and challenges posed by, this approach is the focus of much of the analysis in this report.

In keeping with its emphasis on flexibility, the Program subscribed to no single school of leadership, leaving to grantees the job of finding approaches that were in tune with their needs, cultures and values. That latitude notwithstanding, the Fund did encourage grantees to consider the benefits of distributed leadership. But this preference was more practical than theoretical. The Fund had learned from grantees over the years, as well as studies of nonprofit leadership, that the burdens of the ED role were increasingly considered untenable. In response, it offered the FLA grantees the resources to develop the capacity of their boards of directors, senior management teams, mid-level (and even front line) staff.

## ORGANIZATION OF THE REPORT

The report has three sections:

- An overview of the Fund’s approach to learning and evaluation, which provides context for this report.
- A review of grantees’ progress, which assesses how the organizations fared in meeting the leadership development and mission advancing goals they had set at the outset of the Program; and explores how FLA contributed to grantees’ gains.
- An account of how the Program worked, which presents a detailed description of key elements of the Program’s design, as well as lessons learned during implementation that may benefit other funders considering investing in leadership development.

# LEARNING & EVALUATION APPROACH

The Fund adopted a comprehensive approach to learning and evaluation that included a number of studies and engaged multiple stakeholders as learners. (See Appendix B). To provide real-time feedback, it commissioned interviews with all participating EDs in the Program's early months, as well as a survey on participant satisfaction mid-way through the Program. For a nuanced exploration of the Program's mechanisms and effects, it commissioned an in-depth case study of the first grantee to complete the Program. After seeing how heavily FLA participants relied on executive coaching, the Fund also commissioned a study that reported on trends and best practices in this emerging field, as well as findings from a series of debriefs with EDs who had obtained coaching through FLA. And throughout the Program, the evaluator designed and facilitated meetings that engaged EDs, Plan Consultants, and the grantees' coaches and content consultants, in reflecting on and learning from their experiences.

## STUDY QUESTIONS

This study is the first to consider the Program in retrospect and covers the period 2005-2010. It follows two lines of inquiry:

- The first investigates whether and to what extent the grantees, using FLA resources, improved their leadership and advanced their missions.
- The second reviews how the FLA Program worked, focusing on questions that are likely to be of most interest to funders engaged in, or considering starting, similar leadership development programs.

While this second line of inquiry is easily investigated using the Fund's own records, the effort to assess grantees' progress required a more involved methodology, which is outlined in detail on page 10.

The intensive approach presented there—which involves assessing progress on a set of goals that each grantee had set at the outset of the FLA—raises questions for other funders who are considering or undertaking leadership development programs.

The prevalent approach to studying leadership development programs relies on surveys (sometimes supplemented by interviews) conducted at the conclusion of a program, in which EDs rank a series of statements to indicate both how much progress they made on a given leadership task and to what extent they credit the leadership program for that progress. (For example, using a one-to-five scale, an ED might be asked how much she agrees with statements like: “The program has made me more effective in motivating my senior management team.”) This evaluator has used this approach many times (including for a

2009 FLA report) because it is good enough for some purposes. It quickly provides a picture of whether things are going well, or seem to have turned out well. It is also inexpensive for funders and places little burden on the participating EDs.

The Fund opted for a more intensive approach both to learn about leadership development and to determine if its large investment—\$4.5 million over five years—was a wise one. The ‘so what?’ question about what difference the Program ultimately made assumed even greater importance as many of the Fund’s peers began turning to the Fund to learn from the FLA experience. With this study, it can now speak to that question.

In addition to the evaluator’s time, this study demanded significant cooperation from the participating EDs, who generously agreed to interviews, collected corroborating documents and data, and answered countless follow-up queries. Additionally, FLA Program Director Paula Morris provided extensive background. Program Associate Peter Grace collected and organized an enormous amount of data about the grantees and all aspect of the FLA investments. Their significant contributions should be counted as part of the cost of taking such an approach to a leadership development evaluation.

# HOW DID THE GRANTEES FARE?

This section addresses the key question of how grantees fared, in four parts:

- A review of the methodology used for assessing grantee progress;
- A summary of grantees' progress toward meeting their leadership development goals;
- A summary of grantees' progress toward meeting their mission advancing goals; and
- A discussion of linkages —both between the mission and leadership goals, and between grantee gains and the FLA Program.

The key findings in this section can be previewed succinctly: The FLA grantees were highly successful in meeting their mission advancing and leadership development goals, and much of their success can be reasonably attributed to their participation in FLA.

## METHODOLOGY FOR ASSESSING GRANTEE PROGRESS

To support analysis of the grantees' progress, the goals each grantee set at the beginning of FLA were summarized in a two-part "dashboard", with one part displaying the organization's top three leadership goals and the other its top three mission-advancing goals. (See Exhibit C for an example.) The goals themselves were drawn from the plans that the grantees created at the outset of their FLA participation. For example: "Deepen leadership

bench and build a stronger and more high-functioning senior team”; or “Plan and implement a transition from a traditional

board composition to a fully-functioning, constituency-based membership board of directors.”

*The FLA grantees were highly successful in meeting their mission advancing and leadership development goals, and much of their success can be reasonably attributed to their participation in FLA.*

Several sources were then used to arrive at a judgment about a grantee’s progress toward these goals:

- Interviews with Executive Directors, which were supplemented and checked, where possible, against documentation—e.g., financial reports, accountings of constituents served, or reports of program evaluators (who were not engaged in reviewing the FLA Program);
- Review of grantees’ annual FLA reports, which provide contemporaneous accounts of their progress in each year of the Program;
- Interviews with the grantee’s Plan Consultant, responsible for supporting and closely monitoring progress throughout the Program; and
- Interviews with the FLA Program Director, who had extensive knowledge of each grantee’s work and thus a comparative basis for her judgments.

Each interviewee used the three-point scale of *check-minus*, *check*, and *check-plus* to indicate whether each of the grantee’s six goals—three for leadership development and three for mission advancement—was *missed*, *met*, or *surpassed*. The evaluator assigned the final rating. Where interviewee ratings differed, the

lower rating was almost always assigned. The three leadership and three mission-related goals were then considered together to generate a rating of a grantee's overall progress on each dimension (i.e., leadership development and mission advancement).

As comprehensive and systematic as it is, this methodology is subject to the limitations of any study of a small set of organizations pursuing complex goals. Although progress against quantitative goals could be easily rated, characterizing progress on qualitative goals—e.g., creating a more engaged board or distributing leadership to allow an ED more time to promote the mission externally—in the end relied on the subjective judgments of the raters, including the EDs' self-reports. The use of multiple interviewees combined with a review of pertinent, contemporaneous documentation was intended to make the evaluator's judgments more reliable. The question of attribution, which vexes all evaluators of leadership development—i.e., whether or how much a program like FLA can be credited for the leadership gains of the grantees and, further, whether or how much the leadership gains caused mission gains—is treated later in the report.

# National Center for Lesbian Rights - Organization Impacts

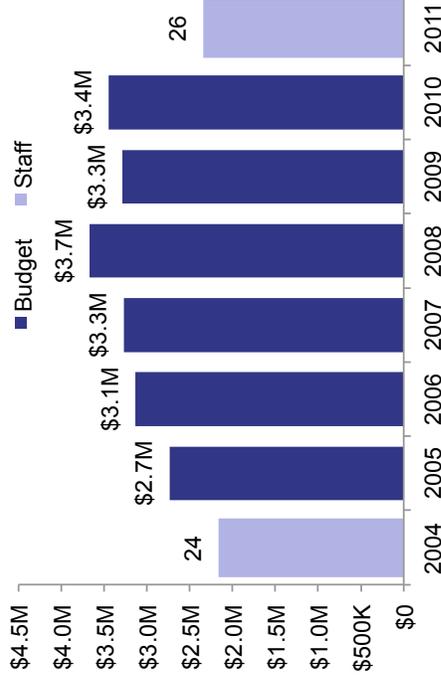
The National Center for Lesbian Rights is a national legal organization committed to advancing the civil and human rights of lesbian, gay, bisexual, and transgender people and their families through litigation, public policy advocacy, and public education.

## Progress on Organizational Impacts

When it joined the FLA in 2005, NCLR was in the second year of leading the challenge to California's law excluding same-sex couples from marriage while also deepening its legal and policy advocacy, particularly in areas of parenting and family rights; anti-homophobia in sports; protections for LGBT youth in schools; foster care and the justice system; representing LGBT asylum seekers and immigrants; and advocacy for LGBT elders. Under the dynamic leadership of Kate Kendall, the organization has achieved significant victories and advances in all of these areas, while also taking on greater leadership in the representation of low-income LGBT people, undocumented gay immigrants, and parents of transgender children. NCLR has balanced high-profile work—such as successfully arguing for marriage equality before the California Supreme Court and a major Supreme Court case defending the non-discrimination policies of Hastings Law School—with maintaining a broad docket of landmark cases on a range of issues.

As part of its "making rights real" strategy, NCLR is a leading partner to the Obama administration in ensuring implementation of major policy changes at HUD, DOJ, HHS and the Bureau of Prisons that are making a significant practical difference in the rights of LGBT people across the U.S. In addition, NCLR has implemented social media and communications strategies to bring visibility to LGBT people and to mobilize the LGBT community in support of its rights. Its broad donor base has allowed NCLR to maintain its budget even through the financial downturn and to expand its programming significantly. In addition to its high-profile roles, NCLR is recognized by its peers for its collaboration and generous partnership and behind-the-scenes supports for many initiatives within the LGBT and other social justice movements.

## Budget and Staff Size



## Goal #1: Secure Advances in Marriage Equality

**Goal:** Provide national leadership role in marriage equality battle through leading litigation and advocacy in California, filing briefs or leading in 6 other states, and spearheading advocacy and public education initiatives aimed at mobilizing broader public support.

**Outcomes:** ✓ Met goals

- ✓ In California, served as lead counsel in successful landmark case recognizing marriage equality; leader in anti-Prop 8 coalition; amicus briefs in successful challenge to Prop 8; U.S. Supreme Court briefs in Doe vs. Reed.
- ✓ Leadership or amicus briefs in CA, PA, IL, DC, Cherokee Nation, IA, CO, CT, NM (surpassing target of six states), amicus assistance in litigation efforts challenging DOMA.
- ✓ Prominent and effective public education using social media featuring real-life stories of couples impacted by marriage.

## Goal #2: Advocate Effectively for LGBT Rights

**Goal:** Continue effective advocacy in all other areas including winning key legal victories in expanding protections for same-sex partners and LGBT families; protecting the rights of LGBT youth, and challenging homophobia in sports.

**Outcomes:** ✓+ Surpassed goals

- ✓+ Key role in landmark victories in areas of family elder, youth law, plus additional leadership in immigration and transgender rights, including:
  - Lifting adoption ban in Florida; new TG medical policy in prisons; successful settlement of Minnesota anti-bullying case; Supreme Court victory on non-discrimination in colleges; legal victories against homophobia in sports; major NCAA policy shifts; victories for LGBT immigrant couples; LGBT families included in immigrant rights advocacy; landmark reports and victories against discrimination for LGBT elders and foster youth.

## Goal #3: Ensure Policy Implementation

**Goal:** Increase NCLR's leadership role in building partnerships with advocacy organizations in DC to work with federal agencies to push through policy and administrative changes that ensure implementation of legal rights for LGBT people

**Outcomes:** ✓+ Surpassed goals

- ✓+ Major area of expansion for NCLR as lead advisor to HUD, HHS, White House Council for Women & Girls, DOJ
- ✓+ Groundbreaking policy shifts including equal access rule protecting against housing discrimination; summit on LGBT elder housing; HHS adoption of new rules protecting visitation and medical-decision making in all hospitals; inclusion of LGBT protections in Affordable Care Act.

✓+ = Surpassed goal; ✓ = Met Goal; - = Did not meet goal.

# National Center for Lesbian Rights - Leadership Impacts

Progress on Leadership Impacts		Allocation of FLA Funding																			
<p>As it began the FLA, NCLR's recent, meteoric growth had outpaced its staffing and infrastructure. In particular, it needed to broaden its leadership from the two-person team of ED Kate Kendall and Legal Director Shannon Minter, who were juggling the internal management of the growing organization with their crucial external role in the movement for achieving equality in California and across the U.S. Both have recounted that by the time FLA began, they doubted they would stay in their over-taxing jobs much longer. And its rapid growth notwithstanding, NCLR's fundraising staff and systems were very thin, and unlikely to sustain it at its newer, larger scale.</p> <p>The organization had two strikes against it in its leadership development efforts. First, like many small law firms, its leaders preferred lawyering to managing. Second, like most social justice organizations, its leaders were barely able to keep pace with the organization's agenda. Indeed, NCLR approached FLA with much skepticism, fearing a distraction from its 'real' work. It is this context that makes its achievements so striking. Its ED and legal director now understand and have internalized their roles as managers. And the organization's first-ever management team has distributed the burdens and opportunities of leadership. As a result, the organization's broader cadre of leaders are able to manage their internal and external workloads, although both remain demanding. NCLR now has a number of leaders who are among the nation's most visible LGBT advocates.</p> <p>Meanwhile, it has made dramatic gains in building its fund development capacity and in its deft use of social media – which it has quickly mastered -- both to educate and expand its base.</p>		<table border="1"> <caption>Allocation of FLA Funding</caption> <tr><th>Category</th><th>Percentage</th></tr> <tr><td>Senior Team Devpt</td><td>50%</td></tr> <tr><td>Fund Development</td><td>13%</td></tr> <tr><td>Coaching</td><td>13%</td></tr> <tr><td>Board Devpt</td><td>7%</td></tr> <tr><td>Communications</td><td>6%</td></tr> <tr><td>Strategy/ Planning</td><td>6%</td></tr> <tr><td>Trainings</td><td>4%</td></tr> <tr><td>Transition/ Succession</td><td>1%</td></tr> </table>		Category	Percentage	Senior Team Devpt	50%	Fund Development	13%	Coaching	13%	Board Devpt	7%	Communications	6%	Strategy/ Planning	6%	Trainings	4%	Transition/ Succession	1%
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<p><b>Goal #1: Balance Internal/External Leadership</b></p> <p><b>Goal:</b> <i>Build the capacity of the Executive Director and Legal Director to balance internal management and external leadership roles.</i></p> <p><b>Outcomes:</b> ✓+ Goal surpassed</p> <ul style="list-style-type: none"> <li>✓+ Transformational shift in mindset of both leaders' conception of, and practical approaches to, their role as managers, supervisors, and team leaders – while also preserving their high profiles externally; from 'just not knowing what I didn't know' – as the ED put it – to appreciating and mastering new aspects of their leadership and management roles</li> <li>✓ Both leaders have a 'new lease on life,' as the greater clarity about their roles and more management depth (See Goal #2) protected them from impending burnout and exiting the organization.</li> <li>✓+ Legal Director shifted from close involvement in all cases in docket to role in supporting and leading the team (while still leading select cases himself)</li> </ul>	<p><b>Goal #2: Develop a Strong Senior Team</b></p> <p><b>Goal:</b> <i>Develop a strong senior team with clearly defined responsibilities and a stronger role in strategic thinking, planning and information-sharing.</i></p> <p><b>Outcomes:</b> ✓+ Goal surpassed</p> <ul style="list-style-type: none"> <li>✓+ Decisive success, moving from an organization with no team or appreciation for its value, to strong team whose members exercise leadership on behalf of entire organization, rather than focus on their respective portfolios.</li> <li>✓+ Significant new levels of partnership and collaboration between the communications, fund development and legal program staff with a direct impact on NCLR's impact and reach; similar impact felt within a restructured legal team.</li> </ul>	<p><b>Goal #3: Integrate Communications</b></p> <p><b>Goal:</b> <i>Build the capacity of NCLR to integrate effective communications, fund development and social media outreach into advocacy and public awareness activities to maximize the impact of NCLR's work.</i></p> <p><b>Outcomes:</b> ✓+ Goal surpassed</p> <ul style="list-style-type: none"> <li>✓+ Significant investments in training and support for staff to develop and test new uses of social media to communicate to donors and supporters, placing NCLR in vanguard of nonprofit social-media users with 5,000 followers</li> <li>✓+ Significant growth in donors (from 4,000 to 8,000)</li> <li>✓+ Significant growth in email list (from 9,000 to 20,000) to support fundraising and awareness</li> </ul>																			

✓+ = Surpassed goal; ✓ = Met goal; - = Did not meet goal.

# LEADERSHIP DEVELOPMENT GAINS

The organizations were highly successful in advancing their leadership development goals. The results are displayed in Exhibit D using the missed-met-surpassed schema. As noted earlier, the dashboards used to track each of the 14 organizations’ progress included three leadership development and three mission advancing goals. Thus, in addition to the 14 organizations’ overall pre- and post- situations, progress can be considered by reviewing these two sets of 42 discrete goals (three for each of the 14 organizations).

As Exhibit D shows, about one-third of the discrete leadership goals were surpassed; and 8 of the 14 organizations—when considering their discrete goals together—fall into the ‘surpassed’ category as well. Some examples and analysis are offered below as context for understanding the scores.

## EXHIBIT D

LEADERSHIP GOAL ATTAINMENT	NUMBER SURPASSED	NUMBER MET	NUMBER MISSED
BY DISCRETE GOAL			
The 14 organizations each set 3 goals, for a total of 42 discrete goals.	15	19	8
BY ORGANIZATION OVERALL			
The three goals of each organization were considered together to produce a view of how each of the 14 organizations performed overall.	8	4	2

## LEADERSHIP GOAL ATTAINMENT OVERALL FOR THE ORGANIZATIONS

Perhaps most notable about the leadership stories is that organizations in the ‘surpassed’ category did not usually start with strong leadership aptitude and become better still. Instead, most in that category started with significant deficits and challenges, made striking progress, and also credit FLA as a turning point.

For example, one service organization began FLA at about the time its long-time ED was exiting. On most every measure, it would be considered vulnerable to transition setbacks. The board was unclear about its role; relatively disengaged; providing weak oversight; and offering almost no strategic guidance to the ED. Senior managers were effective running their departments but expressed great frustration about their inability to function as a senior management team that could set organization-wide priorities. And the organization was heading into a transition just as a strategic plan reached the end of its useful life.

The departing ED used FLA, with the close involvement of the Plan Consultant, to develop an ambitious agenda that addressed all of these challenges. The organization not only successfully weathered the ED transition but also emerged with exemplary board and senior team practices, as well as a strategy that was compelling to staff, volunteers, and donors.

This story was documented through a series of interviews conducted over a five-year period—with both the outgoing and incoming EDs, board chairs, senior staff, and their consultants—with the findings reported to the Fund in a confidential

case study. The record shows both a stark before-and-after story of progress, and an example where FLA's contributions were almost certainly essential to its significant gains. Not all of the 'surpassed' organizations started in such difficult straits, but all saw accomplishments of similar import.

The two organizations in the 'missed' category suggest that the largely positive outcomes reported above were by no means a given. For example, the leadership development goals at a highly successful community organizing group were aimed at helping it cope with its recent growth, including a doubling of its staff, by narrowing its agenda and distributing its management responsibilities more broadly. Although some gains were realized, the organization's culture remained largely unchanged: ambitious, responsive, and reluctant to say 'no' to compelling community needs—even when overwhelmed with work. The other 'missed' organization had a similar story. Both are familiar to students of nonprofit leadership development, who often observe that trying to do less—by focusing on fewer, better defined priorities—is often harder for leaders than trying to doing more.

#### LEADERSHIP GOAL ATTAINMENT BY DISCRETE GOAL

The story of each organization's overall leadership development progress is really the sum of separate chapters, often featuring the efforts of an ED, senior management team, or board. Attainment levels did not vary meaningfully by type of goal (for example, as between development of boards and senior teams). The examples below illustrate the types of work that grantees tackled.

*Organizations in the 'surpassed' category did not usually start with strong leadership aptitude and become better still.*

*Instead, most started with significant deficits and challenges, made striking progress, and credit FLA as a turning point.*

## SENIOR TEAM

Grantees focused on senior team development for several reasons. First, they believed the stronger team would be a better leadership resource for the organization, tapping the divergent thinking and varied perspectives of the group to make better strategic judgments. Second, improving the team could improve the leadership of its individual members, who could bring new awareness and skills gained in team development to their own departments or programs. One or more of the team members might also emerge as a potential leader of the organization, improving ED succession prospects. Third, and particularly salient for most of the FLA organizations, a stronger team would help distribute the leadership burdens previously borne mostly by the ED, who would now be freed up to focus externally, usually to work on advocacy and fundraising.

### EXHIBIT E

**GOAL 1:**

Develop the Senior Team.

**OUTCOMES:**

Surpassed (Exceeded Goal)

- First team charter with clear decision-making roles
- Shift from silos and advocacy by department heads to shared leadership of organization as whole
- Improved dynamics, trust, communication
- First test of team decision-making involving difficult budget cuts made through shared cross-departmental sacrifices

## BOARDS OF DIRECTORS

The organizations that sought to develop their boards faced situations that are common in the nonprofit sector: boards that were unclear about their role; not sufficiently engaged as stewards and strategic thinkers; not effective advocates in their communities; or varying combinations of these. The example in Exhibit F depicts the work of an organization that not only wanted to remedy these common problems, but also create, almost from scratch, a board that would both advance and enact its commitment to citizen leadership.

### EXHIBIT F

#### **GOAL 1:**

Transition to a new board of directors

Plan and implement a transition from a traditional board composition to a constituency-based membership board of directors.

#### **OUTCOMES:**

Surpassed (Exceeded Goal)

- Moved from a small, insular, homogenous board to 24-member board populated by representatives of each program's diverse constituency
- Board diversity increased dramatically—by race, culture, language and age (with youth members) and the organization has invested heavily in the capacities needed to support the new board, from training for young people, to multi-lingual translation, to innovative use of board study trips
- Depth of board member engagement and drive for accountability has increased, as most members bring firsthand experience with programs and front-line knowledge

## EXECUTIVE DIRECTORS

Almost all of the EDs tackled variations of the same fundamental question: What does my organization demand of my leadership at this moment, and how do I step up to provide it? For some, this meant mastering the skills and mind-set needed to be effective in their external roles as movement leaders, fundraisers or advocates. For example, one organization had committed itself to improving its advocacy in federal policy-making circles. This in turn required the ED to work both on ‘soft’ (e.g., gaining confidence) and ‘hard’ (e.g., networking strategies) aspects of his leadership.

Conversely, some EDs focused on improving their internal leadership. This sometimes involved a shift from being the ‘most senior program expert’ to a leader who develops and supports the organization’s program experts. The example of the National Center for Lesbian Rights, depicted in Exhibit C, shows such movement, both in the ED and legal director. With FLA support, they created a management team that distributed leadership burdens and opportunities more broadly. Both conceded they had been contemplating exiting the organization before FLA began. They credit the program for making their jobs more manageable and themselves more effective.

Others focused principally on personal behaviors and styles that were inhibiting their effectiveness. At one fast-growing organization, the ED developed the skills and strategies needed to foster collaboration among a senior team that was facing unprecedented challenges.

As these examples reveal, the leadership development priorities and strategies emerged from the organization’s mission-advancing goals.

## ED TRANSITIONS

ED transitions are widely regarded as a time of peril for non profits. The risk is considered especially great for organizations facing the exit of a founding or long-tenure leader. These organizations often become highly dependent on the ED’s charisma, zeal and personal connections. The successes of FLA’s ED transitions provide a contrasting narrative to this prevalent story and are important to understanding the Program’s leadership-development impacts.

The FLA grantees were chosen for their importance to the Fund’s mission—without regard to the EDs’ tenure or expected exit. Eight of the 14 ended up being new EDs: six were appointed during the program, and two in the months immediately preceding the award. Six of those eight were first-time EDs. On average, their predecessors had served 19 years in the ED role (with a low and high tenure of 8 and 33 years, respectively). Four of the predecessors were founders. If the prevalent transition narrative is correct, these facts suggest the FLA portfolio would be at high risk for failure.

As reported earlier, almost all of the FLA organizations were successful in attaining most of their leadership-development and mission-advancing goals. So it is not the case that the new EDs were strikingly more successful than their counterparts. But the fact that they did do as well is notable—considering the widespread concerns about nonprofit transitions. In one national survey, for example, only a third of EDs were “very confident their board will hire the right successor.”<sup>3</sup> Or, as one long-tenure FLA

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3 Cornelius, Marla, Rick Moyers, and Jeanne Bell, *Daring to Lead 2011: A National Study of Nonprofit Executive Leadership* (San Francisco, CA: CompassPoint Nonprofit Services and the Meyer Foundation, 2011).

*It's one thing to know what to do in managing an executive transition, and another to actually do it. FLA enabled the organizations to **do**, and their new EDs to succeed.*

ED said of her board's readiness for her exit: "*The board hadn't a clue*" about the real nature of the challenges the organization faced. And the board chair at the same organization, reflecting the board's apprehensions about the transition, said of the ED, "*she was the rainmaker, the founder, the face of the organization. I was worried that without her [our organization] would lose its identity.*" In fact, that organization turned out to be one of the most successful in the FLA portfolio, ending up with uniformly high goal attainment.

The FLA transition investments reflect current "best practice," which focuses not just on the new ED but on creating "leaderful" organizations that can sustain progress during a transition and beyond. The six organizations participating in FLA at the time of their transition used their investments in this way. With consulting help, they developed a profile of their ideal candidate; assisted the departing EDs by helping them identify and tackle the leadership challenges of their "end game"; and improved their boards and senior management teams to ensure the departing ED did not create a disabling vacuum.

Once the new EDs were in place they used their FLA investments to support their on boarding and early leadership strategies, again reflecting recommended practice in the field. Most of them worked with coaches to tackle their individual leadership challenges in taking on their new jobs, which was all the more important for the six who were new to the ED role. Several of the new EDs, having seen the 'heroic ED model' elsewhere, were especially eager to build strong partnerships with management teams and boards so that they would not be burdened with too much of the leadership responsibility.

FLA is not distinctive for having introduced any innovative practices that would add to or challenge the recommended transition repertoire. What may be distinctive is the mere fact that the organizations were supported such that they could actually *do* all that is recommended as best practice. It's unlikely that most new EDs, or most organizations managing the exit of a long-time executive, would have the funds to pursue a best-practice approach to ED transition. And even fewer are likely to have any equivalent to a Plan Consultant, which most of the new EDs credited for helping them create and stay focused on their most important mission and leadership goals. It's one thing to know what to do in managing a transition, and another to actually do it. FLA enabled the organizations to *do*, and their EDs to succeed.

The pace of the new EDs in carrying out their FLA work also suggests how integral the investments were to their transitions. On average, it took them 51 months to complete all of their plans, about 25 percent faster than their counterparts, perhaps a sign that the leadership development was coming at a most opportune time for their organizations.

## **MISSION-ADVANCING GAINS**

**The FLA organizations were highly successful in advancing their mission goals** during the period under study. As Exhibit G shows, 10 of the 14 organizations—when considering their discrete goals together—fall into the ‘surpassed’ category, with only one in the ‘missed’ category. All but one of the discrete mission-advancing goals was met or surpassed.

**EXHIBIT G**

MISSION GOAL ATTAINMENT	NUMBER SURPASSED	NUMBER MET	NUMBER MISSED
DISCRETE GOALS			
The 14 organizations each set 3 goals—with the exception of one organization, which set only 2—for a total of 41 discrete goals.	21	19	1 <sup>2</sup>
ORGANIZATION OVERALL			
The three goals of each organization were considered together to produce a view of how each of the 14 organizations performed overall	10	3	1

Exhibit H shows two examples of mission-advancing goals. Goals that related directly to growth often included numeric targets, and were easiest to track. Advocacy goals tended to be broader, but were sometimes still easy to judge. For example, an advocacy group seeking to litigate influential cases can be judged by court rulings. Goals that related to community mobilization and organizing were sometimes tracked by number of new constituencies engaged, or particularly important policy wins.

2 Although this organization missed only one discrete goal, it was so central to its strategy that its overall attainment was also rated a ‘miss.’ So to the two ‘missed’ in the tables describe the same organization.

## EXHIBIT H

### EXAMPLES: MISSION-ADVANCING GOALS

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#### SAMPLE GOAL 1:

Increase annual loans from \$3 million to \$6 million and the portfolio from \$8 million to \$18 million over 5 years, starting in 2005.

- ✓+ Annual loans exceeded \$6 million in all years, up to \$8 and \$9 million some years. Loan Fund expanded to \$27 million. In 2009 alone, made \$9.9 million in new loans to 24 projects plus \$3 million from partner lenders.
  - ✓+ Received 2nd highest CARS rating, plus 3 federal awards totaling \$24 million.
  - ✓+ Doubled maximum amount and terms of loans.
- 

#### SAMPLE GOAL 2:

Shift advocacy to membership-building model, with base of 500 committed members-leaders and 5,000 supporters in priority communities.

- ✓+ Advocacy model and strategy transformed to focus on member—rather than expert-driven work.
  - ✓- Deepening and expansion of membership has lagged, with 500 members, but only 150 highly engaged; and only 2,500 (vs. 5,000) supporters.
  - ✓ New 2-day grassroots leadership training program established.
- 

#### OUTCOMES:

- ✓+ Surpassed Targets
- ✓ Goals Met
- ✓- Below Targets

While the striking successes of the organizations in advancing their missions is great news for them, and for those who designed and led FLA, it actually makes for a relatively thin evaluation story. The uniform success of this relatively small group makes

*The budget gains of the FLA organizations were impressive. Thirteen of the fourteen organizations saw their budgets increase from 2005-2010, on average by 64 percent, for a total \$19 million portfolio-wide increase.*

it difficult to determine which conditions, investments or organizations are most associated with success. A much larger sample, with greater variation in goal attainment, would offer the chance to compare high- and low-performers and, if not draw conclusions, at least form

hypotheses about success factors. But FLA offers a sample of almost all high-performers. A more nuanced rating scale than the simple one used here (that assessed only if organizations *missed*, *met* or *surpassed* their goals) may have uncovered variation. But those more nuanced judgments would have been more subjective, making the analysis less reliable and even more complicated. All that notwithstanding, performance did vary in one respect: The organization's pre- and post- budget situations, which are discussed below.

## BUDGET GROWTH

The pre- and post-FLA budgets provide another way to consider how the organizations fared in advancing their goals. And the budget gains of the FLA organizations were impressive.

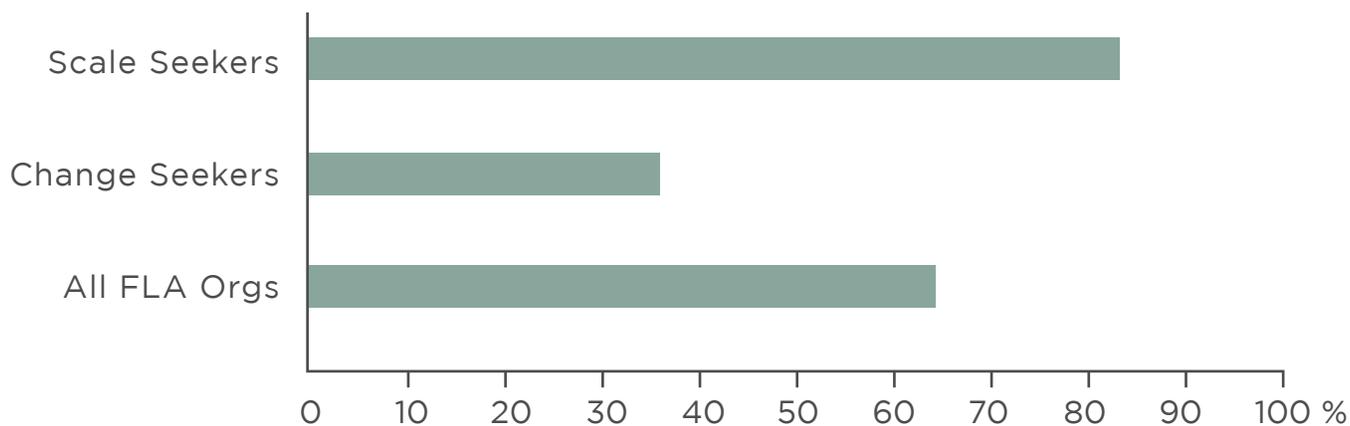
On average, the fourteen organizations saw their budgets increase from 2005-2010 by an average of 64 percent, for a total \$19 million portfolio-wide increase. The median budget growth was

49 percent, with a high and low of 158 and -13 percent, respectively. The portfolio would likely have seen even greater growth had it not been for the recession. From 2009 to 2010, nine of the 14 organizations saw their budgets drop an average of 11 percent as the recession took its toll.

This robust growth is consistent with the overall picture of the FLA organizations as successful. But for the data to speak more directly to the organizations' goal attainment requires distinguishing those that explicitly sought to grow—termed *scale seekers* in Exhibit I—from those that were focused more on increasing their impact by redesigning programs or strategies—labeled *change seekers*.

**EXHIBIT I:**

**PERCENTAGE CHANGE IN BUDGETS 2005-2010**



Two success stories emerge, as reflected in the Exhibit. The change seekers, although not focused on growth per se, still grew by an impressive 37 percent. The scale seekers saw an average budget gain of 85 percent, suggesting that their intentional growth efforts paid off with large gains.

This budget story is consistent with, and provides support for, the overall conclusion that the organizations were highly successful in advancing their missions.

The highly positive results reported above raise an important question: Are they too good to be true? Those with experience in philanthropy will immediately wonder if the Fund ‘creamed’ in selecting the FLA organizations, deliberately choosing those with the brightest prospects for success. As noted earlier, the Fund chose the organizations for their importance to its mission. That importance was partly a function of the organizations’ successful programmatic track records. But the Fund also believed that high performing organizations may face leadership deficits that threaten their long-term programmatic success. Judging from grantees’ own accounts of their pre- and post-leadership situations, that appears to have been the case.

It is also fair to wonder if the organizations deliberately set their original goals conservatively so as to improve their chances of surpassing them. This seems unlikely. None of the grantees knew, in setting the original goals, that there would be a rigorous assessment of their progress five years out. And the FLA culture, from its inception, was one of support, not scrutiny. There was little incentive to game the system. In addition, most of the organizations did report struggles, including in cases where they ended up surpassing their goals. All this considered, it is fair to conclude that the results were indeed very good, but not too good to be true.

With these accounts of the leadership-development and mission-advancing goal attainment in hand, it is possible to explore the linkages.

## **LINKAGES: MISSION GOALS, LEADERSHIP GOALS, AND FLA'S ROLE**

This section considers the relationship between the leadership gains and mission gains described above, as well as the contribution of the FLA Program to these gains. As understanding these relationships is a matter of judgment, the points below are the evaluator's propositions and conclusions.

### **LINKAGES IN DESIGN AND PRACTICE**

As explained earlier, and outlined graphically in Exhibit K on page 38, the FLA program design posits a linear, causal relationship between the FLA investments, leadership development gains, and mission gains. The FLA organizations adopted that paradigm, as illustrated in the two examples below, both of which are taken from early interviews with the EDs.

**EXHIBIT J**

MISSION- ADVANCING GOAL	LEADERSHIP- DEVELOPMENT GOALS	FLA RESOURCES
Expand scale and influence of organization to advance LGBT rights	<p>Create more effective management team capable of supporting growth (with better communications, decision making etc.)</p> <p><i>“I’ve figured out how to collaborate well with others, but not how to do it internally. How do we create team collaboration internally?”</i></p>	<p>Being more collaborative is <i>“the primary thing I’ve been working on with my [FLA-funded] executive coach.”</i></p>
Expand community organizing efforts to mobilize more low-income citizens	<p>Given intractable-seeming challenges we tackle, how do we develop and sustain staff for longer, burnout free tenures?</p> <p>Shift ED from “fear of management work” required to support others to “seeing the creative opportunities” that allow the ED to support, develop, and engage staff more productively in the face of these challenges.</p>	<p><i>“FLA has helped me turn the corner”</i> by providing space for reflection, coaching, and access to a leadership seminar focused on these issues.</p>

As the examples indicate, the grantees’ plans trace a path that ends with mission-advancing goals, supported by leadership development activities, which, in turn, are supported by FLA resources. With the grantees’ gains now established, it is possible to consider whether this linear, causal view is supported by the evidence.

In fact, leadership and mission gains were tightly linked. With only three exceptions, organizations that achieved their leadership-development goals also achieved their mission-advancing goals. And although it strains a bit to parse such a small sample of organizations, those that saw the highest gains in leadership development also saw the highest gains in mission advancement. It's not possible to conclude from this, of course, that the leadership gains caused the mission gains, although that is a reasonable hypothesis. In almost all of their accounts, the grantees' explicitly endorse this view, attributing mission gains to their organizations' improved leadership. Importantly, they also see the leadership gains as an investment in sustaining progress toward mission attainment over time. They suggest that stronger teams, more effective EDs, and highly engaged boards, for example, will also support the organizations in striving toward attainment of new goals.

*Taking the totality of the picture, it's reasonable to conclude that the leadership gains in all probability really did drive the mission gains.*

While the idea that leadership gains contributed to mission gains is a plausible one, it is also possible that the opposite is true: Perhaps it is the focus on mission goals that leads to success in advancing leadership goals. What may distinguish FLA from some other programs is that its focus on mission goals engenders a sense of commitment to and motivation to undertake the leadership work, which in many cases was quite challenging for overstretched executives. Many EDs hesitate to take the lid off the black box of their boards, or investigate how their own blind spots undermine their colleagues, or confront troubling dynamics in their team. But when that challenging work is framed as an

important driver of their mission success—advancing rights and social justice, in the examples above—it may become more attractive.

*Many EDs hesitate to take the lid off the black box of their boards, or investigate how their own blind spots undermine their colleagues. But when that challenging work is framed as an important driver of their mission success, it may become more attractive.*

The final question about linkage concerns FLA's contribution to the leadership successes of its grantees. And this obviously is a question of judgment. To answer it from the evaluator's point of view: Overall, the Program was highly successful in supporting the grantees in significantly improving their leadership. By all accounts, FLA was a critical, sometimes dispositive factor in grantees'

leadership successes. Several (involving ED transitions) could justifiably be considered *but-for* situations: It is implausible to imagine they would have enjoyed such success without FLA, and easy to imagine them floundering badly without it. The interviews also reveal that although some EDs benefited from other leadership development programs (e.g., fellowships), none were as comprehensive and sustained as FLA's. In virtually every case, 'leadership development' and 'FLA' were synonymous for the grantees.

## WHAT EXPLAINS FLA'S EFFECTIVENESS?

If the proposition that FLA contributed to grantees' gains is accepted, it raises another question: Exactly which of the Program's features most contributed to the positive outcomes? It is beyond the design of this study to make that determination with certainty, but the evaluator's hypothesis may be of interest to other funders. It posits that the interaction of three elements accounts for the Program's effectiveness.

- **Expertise.** The Program's most obvious contribution to the grantees' success is the expertise of the consultants, coaches and educators who supported them in their leadership development work. The centrality of the experts' role raises an interesting counterfactual scenario: Would the grantees have fared as well had the Fund simply given them a voucher to be used in purchasing whatever services they deemed useful?

Taken together, the studies and interviews conducted over the course of the program suggest that this is highly implausible. Of the 14, only one demonstrated the capacity to frame its mission-advancing goals, develop a leadership-development agenda that linked tightly to them, and identify and manage the various consultants and coaches needed to carry out the work. The other 13 displayed varying levels of need in these areas. Grantees also testified to shifts in their original plans, their thinking about leadership needs, and their capacity to manage a leadership development initiative in their organizations. They credit many of those shifts to their Plan Consultants (whose role is explained in detail at page 39). But even this coordinated deployment of experts seems insufficient to account for FLA's contributions to grantees' gains.

*What if the Fund had simply given people a voucher and said go get what you need?*

*It was pretty much impossible to imagine that they would have constructed goals as thoughtful as they did without the help of the plan consultants; that they would have been able to find and manage consultants the way they did; and that they would have kept things on track without FLA support. The program itself was the driver. It's not just the resources.*

- **Focus.** In some respects, FLA was the gift of additional work for over-stretched leaders. And the work often got worse before it got better, as the initial forays revealed that challenges were more complicated than they first appeared, and that not everyone was eager to embrace new ways of work. Even for those who were, adopting new mindsets and behaviors was challenging. In other words, there were many reasons for EDs to neglect the leadership work in favor of their highly demanding ‘real jobs.’

It may have been the FLA experience overall, rather than any discrete feature, that helped the leaders maintain their focus and motivation for the work. As noted elsewhere, some struggled on this front. But the annual planning, ongoing contact with Plan Consultants, ED convenings, and even evaluation interviews repeatedly reengaged them in thinking about their organizations’ leadership needs and the potential of leadership development to support their mission-advancing goals. FLA created an environment conducive to sustained leadership development. Without it, it seems likely that ED focus would have flagged.

- **Accountability.** Along with the many supports of the FLA Program came expectations. Although EDs were spared the literal writing of annual reports on their activities—which the Plan Consultants drafted—they were still required to give these accounts of their progress in implementing their plans. In theory, an organization’s board could foster a similar accountability. But most of the boards at FLA organizations were stretched as much as EDs, elevating the importance of FLA’s accountability mechanisms.

Taken together, the expertise, focus and accountability created conditions that were favorable to the sustained and intensive work that the Program supported and required. But what happens after FLA? What are the prospects for sustained attention to leadership development? If FLA has in fact succeeded in helping EDs cultivate new mindsets and capacities for developing leadership within their organizations, then the voucher scenario might look different going forward. The organizations would have internalized or institutionalized much of what FLA offered them, positioning them to sustain leadership development over the long haul.

## HOW DID THE PROGRAM WORK?

Exhibit B, on page 4, provides an overview of the overall FLA program design. This section describes how the design unfolded in practice and presents several lessons learned. This information may be of particular interest to other funders considering investing in leadership development programs:

- **Program Costs.** A breakdown of all the Fund's outlays by major category.
- **The Plan Consultant Role.** The Fund's rationale for this distinctive feature of the FLA Program and how it created value for grantees.
- **Confidentiality.** Managing the tension between the Fund's need for proper oversight of the Program and grantees' need to share sensitive aspects of their organizations with Fund-sponsored consultants.
- **Grantee Readiness.** Most notably the Fund's discovery that many grantees were not ready to handle a major investment in leadership development, and how the Program adapted.
- **Absorptive Capacity.** Addressing the question of how much help grantees can effectively use.
- **Whom Did Grantees Invest in?**  
Grantees' investment choices.
- **What Did Grantees Invest in?**  
Grantees' investment choices.

## **PROGRAM COSTS**

The Fund's direct investment in the grantees averaged \$54,500 per year. The investment included direct grants—which averaged around \$46,500 per year—that the organizations used to purchase consulting, coaching and training services. In addition, at an average annual cost of \$6,500 per grantee, it funded services provided to each organization by a Plan Consultant, who worked with grantees to create leadership development agendas; served as thought partners and trouble shooters; and coordinated the work of consultants assisting the organizations. (The role of the Plan Consultant is described in more detail below.) Finally, at an average annual cost per grantee of \$1,500, it funded semi-annual grantee convenings that provided both training from management or leadership experts and opportunities for the EDs to provide consultation and coaching to each other about their most critical leadership challenges. On average, these direct yearly investments in the grantees represented a 17 percent share of the program grants they received from the Fund over the same period.

In addition to the direct investments in grantees, the Fund expended an additional \$685,000 over the five years to develop and manage the Program. This includes an initial research and development phase; ongoing learning and evaluation; recruitment, management and training of the Plan Consultant team; and communications as the Fund began sharing its emerging lessons and findings with others considering sponsoring or investing in similar programs. All together, the direct investments in grantees and the Fund's costs totaled \$4.5 million for the five years from 2005-2010. See Exhibit K.

**EXHIBIT K**

EXPENSE	JAN 2005 - DEC 2010	% OF TOTAL	ANNUAL PER GRANTEE COST
DIRECT GRANTS	\$3,255,000	72.5	\$46,500
PLAN CONSULTANT	\$455,000	10	\$6,500
CONVENING	\$105,000	2.5	\$1,500
<b>DIRECT GRANTEE INVESTMENT SUBTOTAL</b>	<b>\$3,815,000</b>	<b>85</b>	<b>\$54,500</b>
PROGRAM DESIGN & MANAGEMENT	\$380,000	8	
PROGRAM EVALUATION	\$205,000	5	
FISCAL SPONSOR FEES & OTHER	\$100,000	2	
<b>PROGRAM MANAGEMENT SUBTOTAL</b>	<b>\$685,000</b>	<b>15</b>	
<b>TOTAL</b>	<b>\$4,500,000</b>	<b>100 %</b>	

## THE PLAN CONSULTANT ROLE

The Plan Consultant role was a prominent feature of FLA, conceived with the dual mandate of helping the grantees make the best use of their grants while also enabling the Fund to monitor their progress and learn about the challenges associated with leadership development. More specifically, the Plan Consultants carried out several functions:

- Through interviews, surveys and discussions with EDs, **the Plan Consultants helped grantees frame two sets of goals:** strategic priorities for advancing their missions; and leadership development priorities established specifically to support those priorities.
- With those priorities as a starting point, they worked with the grantees to **create leadership development plans**—updated annually—for advancing the work. They helped identify consultants, coaches, and educational opportunities to support the work. In an effort to reduce the administrative burden on grantees, the Fund tasked the Plan Consultants with writing the plans, which were submitted to it for approval.
- Plan Consultants assisted the grantees in **coordinating the work** of the multiple coaches and consultants many retained, a role some grantees referred to as ‘general contractor.’
- At the end of each year, Plan Consultants prepared a **summary of progress** to date, highlighting notable struggles and setbacks and the implications for the next year’s work.

- The Plan Consultants also acted as **research and development partners to FLA Program staff**, suggesting mid-course corrections and considering the Program’s implications for the Fund’s subsequent leadership development strategies.

To carry out this work, FLA retained four senior organizational development consultants, all with extensive experience helping nonprofits in strategic planning and leadership development. On average, their services cost the Fund \$6,500 per grantee per year.

In several cases, grantees expressed a desire to retain their Plan Consultant for a specific assignment (e.g., board- or senior team-development). The Fund and the Plan Consultants wrestled with the potential conflicts of this arrangement. One Plan Consultant declined such work to avoid any confusion in her overlapping roles. The others proceeded only after encouraging the grantees to identify and interview alternative candidates. For the grantees, Plan Consultants who assumed consulting roles brought a deep and intimate knowledge of the organization to their more specialized work, an advantage that other consultants would not have enjoyed.

As the job title indicates, planning was always envisioned as the core of the Plan Consultants’ work. But some of the challenges and, ultimately, the value of that work were not foreseen. As discussed at length in ‘Readiness’ (page 45), Plan Consultants first had to assist most of the grantees in establishing or refreshing their organizations’ strategic priorities. This work was unexpected, as the Fund had assumed all of them would have had such priorities in place at the outset of the Program. It was only then that they were able to develop appropriate leadership development plans.

The Plan Consultants all had experience helping clients move from their ‘presenting problem’—the challenge as they conceived it before discussion with the consultant—to a more robust sense of the problem that was likely to lead to better results. This work was very intensive with some of the grantees. For example, a close examination of the presenting and final goals of one organization showed the grantee’s own framing of its goals was initially narrow and technical. Most notably, an impending ED succession was conceived strictly as an executive search process. Ultimately the grantee and Plan Consul-

*Grantees referred to this work as the Plan Consultant’s ‘thought partner’ role. The process of testing assumptions, probing more deeply into the nature of organizational challenges, and becoming more aware of individual leadership needs modeled the thinking that strong leaders are able to supply for themselves, their teams and their boards.*

tant agreed that the organization needed a strengthened board and senior management team to stabilize itself so the new ED could build on a strong foundation. (The process led to excellent results, with a highly valued ED stepping into an organization that was better managed and governed than it had been for years.)

Grantees referred to this work as the Plan Consultant’s ‘thought partner’ role. It not only created better plans, as described above, but it was also a developmental opportunity for the leaders. The process of testing assumptions, probing more deeply into the nature of organizational challenges, and becoming more aware of individual leadership needs modeled the thinking that strong leaders are able to supply for themselves, their teams and their boards. In addition to thought partnering during the planning phase, Plan Consultants assisted leaders in troubleshooting a variety of problems over the course of the Program, again modeling and reinforcing helpful leadership stances.

Plan Consultants met with varying success in tackling another aspect of their role: helping the grantees sustain momentum in carrying out their leadership work. As noted in the discussion of ‘absorptive capacity’ (page 50), it took grantees longer than they expected—a little over 17 months—to carry out a one-year work plan. Some aspects of the work proved more complex than anticipated, requiring more time. But in a number of instances, EDs themselves were the cause of a slow-down, especially in planning for later years of the work. Plan Consultants walked a fine line, trying to be supportive and empathetic in dealing with overloaded EDs on the one hand and pressing them to move on the other. Drawing on this experience, Plan Consultants in future rounds of FLA will discuss the challenges of pacing with EDs at the outset, setting expectations and ground rules together.

With only one exception, interviews with EDs and a 2009 survey showed uniformly high satisfaction with the Plan Consultants in their multiple roles as planners, grantee-Fund liaisons, consultant coordinators, and thought partners. The depth of the Plan Consultant-ED engagement, and the value reported by EDs, did not vary by Plan Consultant, and seems more likely a product of the EDs’ motivation and ability to remain focused on the work.

## **CONFIDENTIALITY**

Like most investors in capacity building, the Fund was attentive at the outset to the tricky issue of confidentiality. On the one hand, in order to improve, leaders need to be able to speak freely to consultants or coaches about their weaknesses, problems, and mistakes—none of which they typically would disclose to a funder. On the other hand, a funder needs some realistic account of

grantees' work in order to assess its investment and consider how it could improve its program. How are the two balanced?

The Fund opted to err on the side of grantee confidentiality. It built a firewall between its leadership development and programmatic grantmaking, with no leadership staff involvement in programmatic decisions, and no programmatic staff involvement in the leadership work. Even the administration of the FLA was handled by an intermediary—the Tides Center, an incubator of and host to unincorporated nonprofit programs—meaning that the FLA Program staff and consultants were not retained directly by the Fund.

*On the one hand, in order to improve, leaders need to be able to speak freely to consultants or coaches about their weaknesses, problems, and mistakes – none of which they typically would disclose to a funder. On the other hand, a funder needs some realistic account of grantees' work in order to assess its investment and consider how it could improve its program. How are the two balanced?*

The Plan Consultant role was itself an additional firewall, conceived as an independent liaison who would have the confidence of both the Fund and the grantees. The Plan Consultants were encouraged to use discretion as they balanced the need to give the Fund accurate reports with the need to create conditions that favored candor among the grantees. As another telling precaution, Fund leader-

ship staff were careful to excuse themselves from ED meetings that might depend on frank discussion about grantees' leadership struggles. And in assessing its own performance, the Fund used standard procedures like anonymous surveys and confidential interviews with a third party to encourage candor.

Although Plan Consultants occasionally struggled to reconcile Fund and grantee needs, all the cases were resolved. There were no reported incidents in which grantees felt betrayed or the Fund was caught off guard for lack of information. In fact, three years into the Program, EDs reported they “could communicate candidly about sensitive issues with my Plan Consultant,” giving that statement a 5.9 on a 1-to-6 disagree/agree scale. And none of the evaluation interviews revealed any troubling incidents about confidentiality (although it would be impossible for an evaluator to know whether a grantee was withholding information from a Plan Consultant in the first place).

The Fund’s many precautions may have given grantees confidence that highly sensitive information would not be shared by Plan Consultants, and that any unflattering reported information would not be used against them by program grantmakers. But it is also possible that it was the Fund’s pre-FLA relationship to the grantees that inspired their trust. In the first evaluation interviews, all of the grantees described their FLA awards as yet another sign of the Fund’s long-standing commitment to them, as reflected by general operating support grants and constructive, respectful relations. That relationship probably encouraged trust and candor as much as any of the formal precautions.

The calculation will be different for funders offering leadership support to newer grantees. In fact, the Fund now finds itself in that position. As its own program strategies have changed over time, it is providing leadership assistance to first-time grantees. Under those conditions, the formal precautions are doubtless more important.

## GRANTEE READINESS

FLA's leaders backed into the question of readiness. They invited grantees to join the program based on the importance of their work to the Fund's strategies and not because they were necessarily ready for the work. In exploratory calls, they probed the level of interest of the invited ED, but used no formal readiness framework in making the awards. Since then, the Program has offered important lessons about readiness, which is considered below at the *individual* and *organizational* levels.

### ORGANIZATIONAL READINESS.

The biggest surprise to FLA leaders came early in the program, when Plan Consultants discovered a gap between grantees' situations and FLA design assumptions. As described earlier, the logic of FLA is roughly sequential. Organizations were presumed to start with their established strategic goals for advancing their missions; then set leadership development priorities that would support those goals; and then develop a plan, to be funded from their grants, for investing in that leadership capacity.

But many of the EDs and Plan Consultants agreed that the organizations' strategic goals should be sharpened or updated before organizing a leadership development agenda linked to them.

In most cases, this did not involve deferring the creation of the leadership development agenda in its entirety. For example, an under-performing senior management team would likely make a short list of leadership development goals, regardless of how the organization's strategic priorities might be adjusted. So in fact leadership development and strategy development proceeded

side-by-side. In other instances, grantees returned to their strategic goals later in the Program, adjusting their strategies once more to respond to new conditions.

Reflecting the need for the strategy work, Plan Consultants and grantees allocated significant shares of their grants for assistance with strategic planning. In fact, overall, except for executive coaching, FLA ended up investing more in strategic planning than in any other activity, for a total of approximately \$760,000—or an average of \$54,000 per organization.

Grantees welcomed this early course correction. As one ED explained to an evaluator shortly after the Program’s launch:

*I really appreciated the fact that the Fund was open to “phase zero.” We could have launched into a focus on leadership too quickly, when we are at a point when the work we do is changing. We need to have a clear sense of where the leadership is leading. So the fact that the Fund was willing and able to step back was appreciated.*

Most of the organizations benefited by the work of this “phase zero”. They ended up with ambitious, specific strategic goals that were aligned with their leadership development agendas. In a 2009 survey, the EDs strongly agreed that FLA had helped them develop a clearer sense of their organization’s priorities. These priorities, initially envisioned as an input to the FLA work, ended up instead as important outputs.

## INDIVIDUAL READINESS

Although FLA eschewed the ‘Heroic ED’ model, there was no way around the fact that the stance of an ED alone could profoundly shape her organization’s prospects for successful leadership development. At the outset, most EDs welcomed the Program eagerly. Others were curious, but uncertain about its value. And a few, by their own subsequent admission, were more interested in the prospect of a grant than in the leadership development it would fund. Taking all of the EDs’ experiences into account suggests individual readiness appears to rest on a combination of *attitude* and *insight*.

In keeping with FLA’s participatory learning approach, at various points Plan Consultants, EDs themselves, and the coaches and consultants working with them reflected on the question of individual readiness. Their conclusions are unsurprising but no less important. The ideal candidate to lead an organization through an ambitious leadership development initiative has a distinctive attitude, with a blend of:

- Openness to change;
- Curiosity (and a lack of defensiveness) about his own strengths and weaknesses, as well as the organization’s;
- Candor, with one’s self, colleagues, and consultants; and
- Willingness to serve as champion who motivates others to join in the leadership initiative.

When asked what advice they would give a peer considering whether to join a similar program, the EDs emphasized openness and candor most, noting the importance of probing and disclosing their own and their organization's weaknesses. As one said:

*“Share your real problems and fears. Being open will enable your consultants to give you the help and guidance this program was designed for.”*

This ideal attitude is in turn partly a product of insight into the value of leadership development. Without a belief in that value, a leader is unlikely to take on challenging work in earnest, whether it be self-examination or mobilizing others in a change effort. This presents a conundrum: Some of the leaders who would benefit most by leadership development have little appreciation for its value.

FLA offered several striking cases in which EDs lacked—but eventually gained—the insight needed for the work, suggesting there are ways around the conundrum. One of these described her thinking when invited to participate in FLA.<sup>3</sup>

*‘I thought I was a perfectly fine leader, and the idea that I could learn something sitting in a conference room with a bunch of other executive directors or working with a consultant who did management training or development seemed like a real waste of time, frankly...The last thing I wanted to deal with was leadership. We were just doing the [programmatic] work, so I really just wanted to say “no” [when offered the leadership award].’*

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<sup>3</sup> The Fund has created a video case study of this organization and its ED—Kate Kendell of the National Center for Lesbian Rights—which is available at [www.haasjr.org/case-studies/nclr](http://www.haasjr.org/case-studies/nclr).

Reflecting on the organization's subsequent gains, particularly in creating its first senior management team, she said:

*'When you don't know what you don't know, you're going to fall over yourself and make mistakes, and that's what we [had been] doing. There's now a team that shares a whole range of responsibilities with me that I had not utilized before or even recognized the utility of before.'*

It is not clear exactly what produces this kind of shift. Neither the EDs nor Plan Consultants readily identify a decisive turning point in these stories like the one recounted above, though several factors may play a part. It may be the overall conditions created by FLA, more than a single decision, that were helpful. EDs were encouraged to take stock of their situation in multiple settings: with Plan Consultants; with executive coaches; and with their peers at meetings. Taken together, these provided many opportunities for them to hear how others approached and valued leadership development. FLA also created a safe place for inquiry and learning: The Program encouraged grantees to take note of gaps in their leadership, but favored assessment and understanding over judgment. Finally, the Program was patient. Just as FLA permitted organizations time to formulate their strategic goals before launching into leadership work, it may have provided enough time, early on, for EDs to acquire new insights and arrive at new attitudes.

Still, the question of exactly how long to wait for shifts in attitude and insight, and how much to spend trying to induce it, is a judgment call. While the ED described above led her organization through significant gains, other EDs in the portfolio struggled more with insight and attitude, realizing only modest gains.

*When you don't know what you don't know, you're going to fall over yourself and make mistakes, and that's what we [had been] doing. There's now a team that shares a whole range of responsibilities with me that I had not utilized before or even recognized the utility of before.*

At a technical level, funders could quickly convert some of the FLA lessons into a rubric for assessing grantee readiness. But the more important question is a strategic one: What should funders do if the findings indicate a grantee is *not* ready? One response is to use a readiness assessment as a screen. Lack of organizational or individual readiness would be a disqualifier, and funding would go to those ready for the work. Another response is to use the findings not only to determine whether an organization is ready, but to figure out how to support it if it isn't. This was FLA's stance. For grantees with low organizational readiness, it invested heavily in strategic planning. And for EDs with low individual readiness, it made a bet that, once immersed in the work, they would begin learning and become motivated. This stance, of course, fits with the Fund's strategy. It wanted to improve the capacity of organizations it already deemed important and was heavily invested in, not just reward the ready.

Reflecting on their experiences, FLA leaders have adopted a new approach in subsequent versions of the Program, which now has two phases. The first phase gives participants an opportunity to tackle some of their leadership work while also revealing their readiness for a more ambitious initiative. Those with strategic clarity, as well as leaders with the right mix of insight and attitude, are invited to participate in the second, longer phase with more funding.

## **ABSORPTIVE CAPACITY**

An organization's need for help and its ability to make effective use of that help—sometimes called its 'absorptive capacity'—are not necessarily the same. Competing priorities, limited time and resources, shallow management structures, and inexperience in

managing consulting projects might all affect the amount of help an organization can absorb in a given year. In the case of FLA, the amount of money grantees invested in capacity building work and the amount of time it took them to do it can serve as a proxies for absorptive capacity, on the theory that they will buy as much help as they can handle but no more, and take as long as they need but no less.

*An organization's need for help and its ability to make effective use of that help are not necessarily the same.*

So how much help could FLA organizations absorb? Although the Program started with the assumption that it would make three one-year grants of up to \$100,000 each, grantees on average actually spent

about \$45,000 per year. And in almost every case, organizations found it took longer to complete the capacity building work they outlined in their annual plans. On average, it took grantees about 17 months to complete one year's work as outlined in the plans.

Considering the grants relative to the grantees' budgets provides another view of absorptive capacity. The average annual grant represented a 2.5 percent share of their budgets. (The low and high were 0.5 and 7.8 percent, respectively.) For all practical purposes, the grantees could have spent as much as they wanted in a given year: On average, they did not come close to the \$100,000 maximum. Given that, the 2.5 percent figure reveals how much help they could really absorb, rather than how much was available to them. It is not wise to generalize from the small number of organizations under study here, but that figure offers one suggestive, order-of-magnitude sense of how much help a nonprofit can actually handle.

Surprisingly, absorptive capacity among FLA grantees was not related to organizational size (as represented in annual budget terms). To illustrate the point by taking the two extremes: The largest organization, with an annual budget of over \$11 million, spent on average only \$6,700 more per year than the smallest organization, with an annual budget of \$686,000. This finding may be explained by the types of work the organizations undertook. For example, it may take as much absorptive capacity to improve a board of 15 members governing a huge organization as it would to do the same for a board of the same size governing a small organization. The same may be true of working with senior management teams, whose size and challenges might not vary by organizational budget. And, of course, there is only one ED to develop at any organization, regardless of its size.

While absorptive capacity did not differ by organizational size, it did differ by ED tenure. On average, it took the eight new FLA EDs 51 months to complete the work outlined in their three annual plans, as compared to the 64 months it took their incumbent counterparts. One might have expected the opposite: How could the new EDs lead multiple change initiatives in an organization they barely knew? In fact, they often used FLA as an onboarding strategy. All of them quickly had to determine how to organize and motivate their senior teams; form effective partnerships with their boards; take stock of the organization's strategy options; and, of course, take up their new roles, especially important for the eight who were first-time EDs. They used their grants to fund all of these activities.

## WHOM DID GRANTEES INVEST IN?

Exhibit L depicts the allocation of leadership development resources within the FLA organizations and offers one particularly revealing figure: Only 10 percent of the resources went to the ED, arguably the most important leader in any organization, and usually the principal beneficiary of leadership development programs.

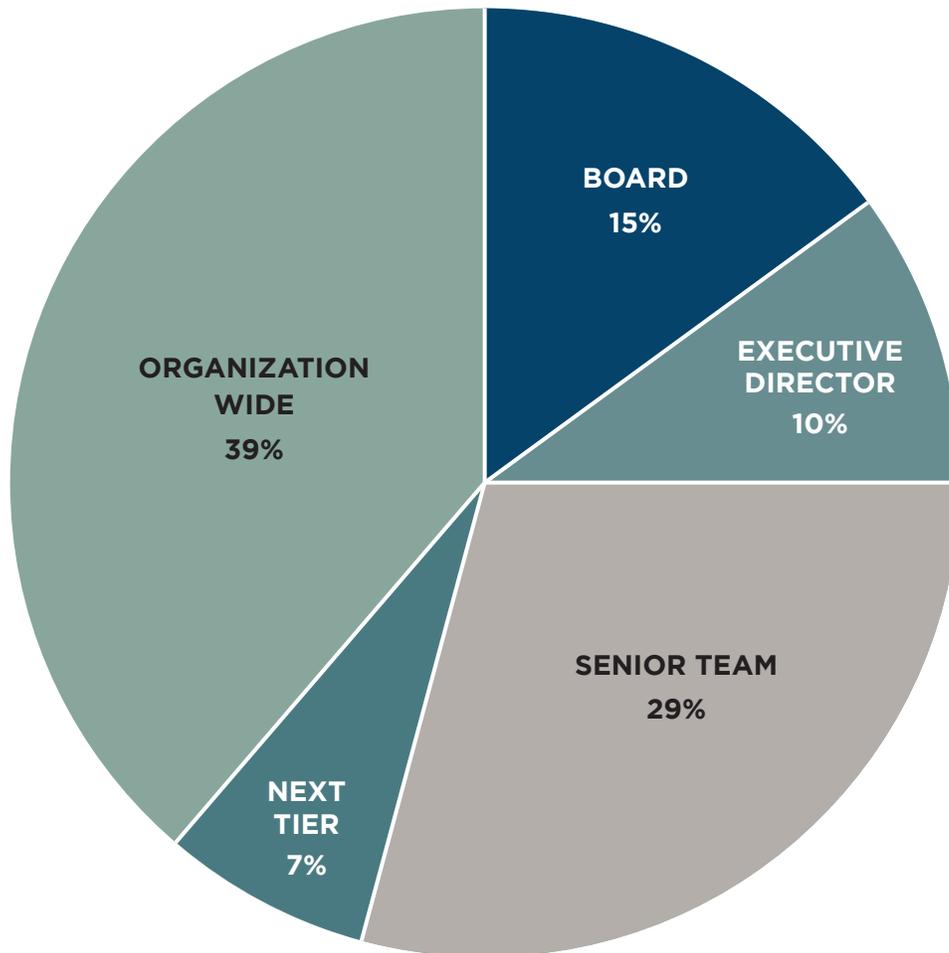
*Only 10 percent of the resources went to the ED, arguably the most important leader in any organization, and usually the principal beneficiary of leadership development programs.*

That relatively meager share is consistent with a shift in thinking—both at the Fund and across the sector more broadly—about the ED role itself. In a 2007 peer convening, the FLA EDs expressed frustration at the multiple,

sometimes conflicting expectations attached to the role. Particularly vexing was the tension between their internal and external duties. Internally, they were to be skilled managers who could run a tight ship while motivating often over-worked staffs in underfunded organizations. Externally, they were to be the face of the organization, vigorously competing for funds and fighting for their cause. And beginning in 2006, a series of national surveys conducted by Compass-Point for its “Daring to Lead” research project revealed similar frustration with the role. It was in this context that the FLA program design encouraged leaders to think beyond the ‘Heroic ED Model’ to the benefits of more distributed leadership, a move that also resonated with the inclusive values of many nonprofits.

**EXHIBIT L**

**WHOM DID GRANTEES INVEST IN?**



For the FLA organizations, the response to these role problems was not only to invest in the ED but also to invest in the organization’s senior management teams, which were allocated close to one third of the leadership development resources. The EDs and senior team members alike have testified to the benefits in a number of interviews. For most EDs, the “deeper bench” has eased their role-overload, with more time available, particularly for external work. In the most striking case, a highly regarded ED disclosed that she had been contemplating an exit from the job before the team improvements made it more tenable. EDs,

team members, and consultants consistently reported that the improved teams advanced other goals as well—promoting values of inclusion in the work place; enriching the organization’s thinking by bringing complex tasks to a group with multiple perspectives; and creating and holding an organization-wide view, in which team members place the needs of the organization as a whole above those of their department or function.

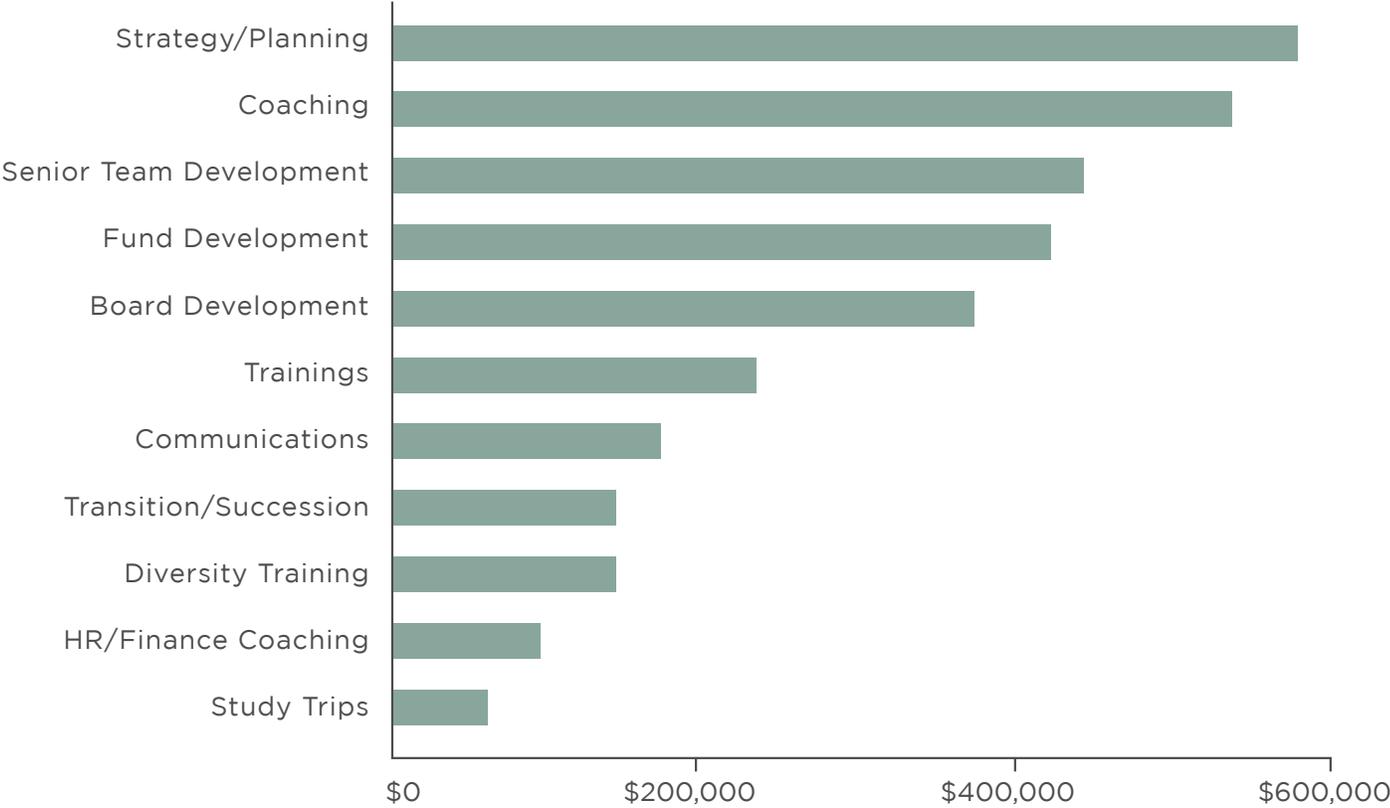
The resource allocations depicted in Exhibit L also speak to the importance of board development, where the goal attainment findings reported earlier indicate significant, sometimes transformational gains. Investments in ‘next-tier’ staff were generally intended to delegate authority and develop leadership more broadly than even teams could. The ‘whole organization,’ garnering 39 percent of all investments, funded strategic planning, fund development, and communications, as well as, in a few cases, all-staff training on topics like cultural competence and diversity.

## **WHAT DID GRANTEES INVEST IN?**

Exhibit M shows spending by type of leadership development activity across the FLA portfolio. Spending on several activities—coaching, strategic planning, and fund development—are highlighted below for their striking prevalence and for questions they raise about the nature of leadership development. The other activities are described briefly in Exhibit N.

**EXHIBIT M**

**WHAT DID GRANTEES INVEST IN?**



Although **coaching** was presumed from the outset to be an appealing resource for the leaders, its prevalence was striking. All but one of the organizations included coaching in their leadership plans, for a total cost of about \$575,000. The organizations used coaching in various configurations, including for the ED alone; for senior teams (both as a group and for individual members); for a number of mid-level program managers; and various combinations of all these. In both confidential interviews conducted for evaluation purposes and in public reflections on their coaching experiences, grantees described coaching as particularly powerful in improving their effectiveness. They credit the personal insights

they gained from the ‘soft’ work of coaching for enabling ‘hard’ results in advancing their organizational goals. Reflections by several of them are available online at the Haas, Jr. Fund’s “Power of Coaching” web site, and the evaluator’s discussion of five of the coaching engagements is included in “Coaching Practices and Prospects: The FLA Program in Context.”

**Strategic planning** was the only resource used at all 14 organizations in the portfolio. By a strict reading of FLA’s original logic, it should not have been included in grantees’ plans: Improving an organization’s strategy might be useful, but is not the same as improving its leadership, which was FLA’s purpose. But as explained in detail in ‘Readiness’ (page 45), Plan Consultants discovered in their first conversations that many of the

organizations needed assistance sharpening or refreshing their strategic goals before they could create a leadership development agenda in support of them. This largely accounts for the extensive use of strategic planning.

*Grantees described coaching as particularly powerful in improving their effectiveness.*

## EXHIBIT N

### LEADERSHIP ACTIVITIES IN BRIEF

In addition to the leadership development activities described elsewhere in this section of the report, participating organizations also invested in the following:

- **Board development** pursued at 13 of the organizations focused on clarifying the board's role, deepening its engagement both in governing and advocacy, and improving its capacity to function as a team, in several instances to transformational effect.
- The investments in **senior teams**, at 13 of the organizations, are discussed above in "Whom did the Grantees Invest in?" (page 53)
- The investment by six organizations in **ED transition and succession** activities is discussed (page 21) as part of the broader story of the how the new FLA EDs fared in the Program.
- Investments in **training** enabled 13 organizations to introduce leadership frameworks and practices to a broad cross-section of their staffs through on-site and off-site workshops.
- Coaching on **HR/Finance** enabled two organizations to help managers in these functional areas improve both their technical and leadership skills.
- The **study trips** enabled 4 organization's staff and board leaders to learn from the leadership strategies of successful peer organizations.
- Five organizations invested in training and consultation on **diversity and cultural competence**, focused both on aligning their workplace practices with their values and on enabling their leaders to engage or mobilize more diverse constituencies.

Another widely funded activity has an arguably tenuous fit with FLA's leadership logic: **Fund development**, which was used by 12 of the organizations at a total cost of about \$400,000. Like strategic planning, fund development capacity would seem to be an organizational, not leadership attribute. But as they explored grantees' needs, the FLA team challenged that premise by viewing fund development through a leadership lens. Many of the grantees were repositioning fund development in their organizations. Rather than the technical work of a siloed fundraising department, they saw it as a challenge that leaders across the organization needed to attend to. This required new awareness and skills for individuals, and a shared set of commitments for senior teams, arguably making the fund development work a leadership activity.

The character of the fund-development consulting engagements lends additional support to the case for including this work in a leadership program. In many cases, the consultants took a developmental approach to their work. Rather than serving as technical problem-solvers to whom the non profits outsourced their challenges, a number of the consultants were credited for helping their clients think about fund development in new ways. They emerged with plans they could implement but also new insights into the nature of fund development that would help them sustain their organizations' effectiveness in this area over time. (This developmental stance by FLA consultants is described as 'consulting as coaching' and is discussed in more depth in "Coaching Practices and Prospects.") This same logic extends to FLA's support of **communications** work, which seven organizations included in their leadership plans. As with fund development, grantees shifted communications from a technical function to a leadership one, and developed not only plans but also individuals' communications acumen.

## CONCLUSION

This study has explored two questions: *How did the FLA grantees fare?* And *How did the FLA Program work?* Both explorations offer encouragement to those considering investing in leadership development. The successes of the grantees, and FLA's role in supporting them, offer one instance where investing in leadership development has apparently paid off with gains that are helping grantees advance their missions. The description of the Program offers future investors guidance on a number of key design points. Taken together, they suggest that investing in leadership is worth doing and, given the complexities involved in doing so, also worth understanding better. This report is offered in that spirit.

# APPENDIX A

## **FLA GRANTEES**

Asian & Pacific Islander Wellness Center  
Chinatown Community Development Center  
Coleman Advocates for Children and Youth  
CompassPoint Nonprofit Services  
East Bay Asian Local Development Corporation  
East Bay Asian Youth Center  
Gay-Straight Alliance Network  
Girls Inc. of Alameda County  
National Center for Lesbian Rights  
Northern California Community Loan Fund  
Oakland Community Organizations  
San Francisco Organizing Project  
The Unity Council  
Youth Radio

## APPENDIX B

### LEARNING AND EVALUATION STUDIES

The Fund’s ongoing learning and evaluation program featured the following studies and participant-learning events. Those that are publicly available are noted in **bold** type.

**“Case Study: An Inside Look at the National Center for Lesbian Rights.”** Video case study with companion resources documenting the experience of one FLA grantee, including personal reflections by the ED.

*<http://www.haasjr.org/case-studies/nclr>*.

**“Coaching Practices and Prospects: The Flexible Leadership Awards Program in Context.”** May 2009. A review of trends and best practices in the emerging field of coaching, which provides the context for considering the FLA’s approach to coaching and its efficacy, as revealed by surveys and debriefs with FLA EDs.

“Exit Interviews.” December 2011. Videotaped interviews with FLA EDs capturing their reflections about leadership and leadership development, as well as their advice to funders and non profits considering such programs. Online versions forthcoming.

**“The Power of Coaching.”** A set of resources for EDs and funders considering investing in coaching, including the accounts of FLA EDs who have benefited from coaching and an toolkit for funders, non profits and coaches.

*<http://www.haasjr.org/programs-and-initiatives/video/power-coaching>.*

“Progress and Prospects: Girls Inc. of Alameda County and the Flexible Leadership Awards Program.” October 2009. In-depth case study of the first grantee to complete the FLA program.

“Quick Assessment of the FLA Program.” September 2006. An initial review of the program’s design and offerings based on interviews with participating EDs.

“FLA Participants on Leadership and Leadership Development.” October 2007. Highlights about the EDs’ role and leadership challenges, based on convenings (separately) of EDs, Plan Consultants, and Coaches and Consultants.

“FLA Executive Director Survey.” March 2009. Findings from survey about program effectiveness and satisfaction.

# APPENDIX C

## LEARNING EVENTS

### BAY AREA CONSULTANTS MEET UP

After FLA convened many of the consultants and coaches retained by the participating organizations, it helped them form this community of practice to share their learning. It now meets approximately three times annually, with events hosted by the Fund.

### CONSULTANT AND COACH CONVENINGS

Two convenings [dates] of coaches and consultants retained by FLA grantees focused on better understanding the FLA context of their work and identifying the conditions and factors that support the best outcomes for their work.

### EXECUTIVE DIRECTOR CONVENINGS

These half- or day-long meetings were held twice annually from 2005-2010 and usually included segments designed to generate themes and findings that would inform the Fund's management of FLA or contribute to evaluation studies. Two of the meetings involved board members from the participating organizations.

### PLAN CONSULTANT MEETINGS

These half- or day-long meetings, supplemented by occasional conference calls, were each focused critical questions concerning the Plan Consultant role and the leadership challenges of EDs.



**[WWW.HAASJR.ORG](http://WWW.HAASJR.ORG)**

The Evelyn and Walter Haas, Jr. Fund is a private family foundation established by Evelyn D. Haas and Walter A. Haas, Jr. that has awarded more than \$441 million in grants since its founding in 1953. The Fund is located in San Francisco, California. The Haas, Jr. Fund strives to contribute in meaningful and effective ways at the local, state and national levels to create a just and caring society where every person deserves the chance to live, work and raise their families with dignity.