Leveraging Social Sector Leadership

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Foreword

GEO is pleased to partner with Laura Callanan, Nora Silver and Paul Jansen of the University of California, Berkeley to share research that documents what social sector leaders say they need to support and sustain them — and ways grantmakers can help. The team's findings reinforce many of the ideas the GEO community has been talking about for years, and their report offers clear direction for grantmakers who want to ensure that their investments in leadership have true impact for their grantees. This publication features examples of how GEO members are supporting nonprofit leadership as well as direct feedback from social sector leaders who were part of the survey.

We hope the following pages strengthen your commitment to investing in leadership and offer insight on how you can tailor your investments most effectively. Together, we can help build a stronger sector where leaders have the support they need to deliver effective programs that achieve meaningful results.

— Kathleen P. Enright, president and CEO, Grantmakers for Effective Organizations

Introduction

"Leaders in all arenas-the corporate world, the military, government and politics, nonprofit organizations and sports teams-play a determinative role in whether human endeavors prosper, fail or flounder. When an organization soars to greatness, we credit the leader. When it goes down,we usually blame the leader. We want our leaders to succeed. We need them to succeed. When they do,we trust them and follow them willingly. They inspire us to go the extra mile-to take our performance far beyond what we dreamed possible."[1]

- Tim Irwin, Impact: Great Leadership Changes Everything

Developing leaders is a key lever foundations can use to help social sector organizations succeed. Leadership development not only strengthens new leaders and keeps leaders vigorous for the long haul — it also improves organizational performance across multiple dimensions. According to the Center for Creative Leadership, "Studies show that investments in leadership development improve bottom-line financial performance, attract and retain talent, drive a performance culture and increase organizational agility," especially in challenging times.[2]

In this publication, we introduce results from a study that looked at two key questions:

- What do social sector leaders say they will need in the coming years to be successful?
- What role can grantmakers play in developing leaders across the social sector and throughout the country?

We worked to find answers to these questions by assessing where foundation funding for leadership is going, what the published literature says about leadership development in the social sector, what programs and resources are available for leaders and what leaders say is most important to them.

Based on our research, we conclude that grantmakers are uniquely positioned to invest in and realize significant gains from supporting leadership development. One reason this is such a powerful opportunity for philanthropy is the pronounced lack of leadership development capacity among most social sector organizations. They simply do not have the resources or the expertise to do this on their own. Leadership development therefore is a high leverage point for foundations looking to improve outcomes both for individual organizations and for the entire sector.

Another reason leadership development is an important focus for philanthropy is because grantmakers increasingly are paying attention to sector-wide challenges that impede the ability of organizations and movements to achieve their goals.

This is why a growing number of foundations have embraced the cause of nonprofit effectiveness and supported various forms of capacity building in recent years.

As part of their efforts to build stronger, more sustainable nonprofits, some grantmakers are now ramping up their investments in developing leaders. One example is the Durfee Foundation, which focuses its grantmaking on the Los Angeles area.

Durfee's investment in leadership development evolved organically over time. Concerned about burnout of nonprofit leaders in Los Angeles in the late 1990s, Durfee Executive Director Claire Peeps and President Carrie Avery sought to keep key leaders in their positions. As Avery described it, the foundation wanted leaders to stay "in the marathon" so that the sector would benefit from experienced, long-term nonprofit leadership. But high turnover among executive directors was causing problems for local nonprofits. "Leaders were leaving because it was the only way to get a break," Avery said. To try to reduce turnover and keep high-performing executives in the sector, the grantmaker created the Durfee Sabbatical Program for key leaders. The program provides a no-work time for executive directors to refresh and renew. Leaders return restored, reenergized and recommitted, and their organizations emerge with increased bench strength, a result of management staff having assumed leadership during the sabbatical.

Peeps and Avery soon recognized another opportunity to help these leaders so they could tackle larger challenges beyond their organizations.

With Durfee's Stanton Fellowship, they set out to foster breakthroughs on key issues in Los Angeles. The fellowship provides leaders with two-year grants to tease out solutions to complex problems that challenge the future of the city.

Even as Durfee implemented its sabbatical and fellowship programs, it continued to fine-tune and strengthen its leadership investments. Recently, for example, Peeps and Avery noticed that chief operating officers, who often served as interim executives during their executive directors' sabbaticals, were undersupported in their own leadership journeys. The foundation subsequently launched a program that allows COOs to gain specific expertise through short-term residencies at another organization and return to work with new ideas and an enhanced network of colleagues.

Peeps said that Durfee's leadership development programs target a specific type of leader. "In each of our programs, we look to support innovative, ambitious leaders, not sole crusaders," she said. "We focus on people who most deeply know the community, people who are highly networked and uniquely positioned, and people whom others look to as thought leaders. We want to identify people who have a unique set of gifts to build a movement, help dig them out from under day-to-day operations and give them serious thinking time so they can achieve more."

The Durfee Foundation understands that great organizations depend on strong leaders — or, as Jim Collins put it, "The number-one resource for a great social sector organization is having enough of the right people willing to commit themselves to the mission."[3]

Leadership Development in the Social Sector Lags

Investment in leadership development creates a virtuous cycle. According to the Center for Creative Leadership, "Leadership development creates a magnet for high performers and fosters a high-performance organization. This is why the organizations that are 'built to last' have strong histories of leadership development. Great leaders attract, hire and inspire great people."[4]

The private sector understands the predictable costs of underinvesting in leadership, as well as the benefits of leadership development for organizations. That is why businesses invest in leadership at a significantly higher rate than the social sector.

Underinvestment in leadership also creates a cycle, a vicious one. Poor leadership development contributes to a range of mutually reinforcing problems: an inability to attract great employees, loss of employees, costly turnover, gaps in leadership (through poor transition management and succession planning), and burnout due to stress and the inability to do a job well. As a result, strong leaders are lost at a time when the sector needs them most.

Our research suggests that the private sector invests $120 per employee per year, compared with the social sector's $29 per employee per year.[5] Hard-nosed organizations driven primarily by the bottom line invest four times as much per employee in developing their staff as do social sector organizations with equally complex missions and funding models.

An obvious explanation for the social sector's underinvestment is a lack of philanthropic resources dedicated to leadership. Foundation Center data show that from 1992 to 2011, **annual foundation support for leadership development was just 1 percent of overall foundation giving,** or $400 million in 2011.[6]

A concurrent study by the Talent Philanthropy Project examined foundation support for staff development and training and affirmed that philanthropic support for leadership was one percent of total grants.[7]

To be sure, foundation grantmaking does not capture all nonprofit spending on leadership development. But the fact is that social sector organizations have few flexible resources available for investing in their current and future leaders above and beyond targeted foundation support. Among the reasons: Individual donors prefer to support nonprofits with low overhead ratios; governments want to pay nonprofit service providers only for success; and foundations restrict 76 percent of grants to specific projects.[8]

Meanwhile, some foundations are strongly investing in a small subset of social sector leaders at the expense of focusing more broadly on leadership development. Over the past 20 years, funders, the media and MBA programs have devoted considerable attention to a rising class of "social entrepreneurs." These paradigm-shifting, market-loving, status-quo-challenging leaders have made doing good cool. They have brought important energy and attention to vital causes in areas ranging from education to the environment. But their numbers remain small relative to all social sector leaders. Although there are no clear tallies on how many organizations are led by social entrepreneurs versus other social sector leaders, it appears that for every 99 social sector leaders, at best there is one social entrepreneur.[9]

Social entrepreneurs appear to be the social sector's "1 percent" — and at the same time that they have attracted special attention and significant resources, the sector has massively underinvested in the rest of its leaders.[10]

Lagging support for leadership development affects not only those currently in executive positions but also those who aspire to hold them. Numerous studies have shown that a generation of young, emerging leaders is looking to move up or into the sector.[11] Such new leaders enter the labor market with the desire to create social impact, but many are ambivalent as to which sector they should work in to do good, and there is strong competition for their talent. Young professionals seek mentors and coaches, peer networking, training and development opportunities, fast-tracked advancement and a job that does not consume their whole lives — and they will seek out organizations that provide these things. According to the Young Nonprofit Professionals Network, in "Stepping Up or Stepping Out: A Report on the Readiness of Next Generation Nonprofit Leaders," the three main reasons young social sector leaders leave the sector are burnout, lack of career advancement and job-related stress. Our research suggests that good leadership development can ameliorate all three of these threats.[12]

What Leaders Seek for Success — Survey Findings

One of the authors of this report, Laura Callanan, worked with a team at McKinsey & Company on a study[13] of 196 CEOs and senior leaders at nonprofits, foundations, social enterprises and impact investing funds based in the U.S.[14] The 2013 study asked social sector leaders what attributes they believe they need to be successful, how they acquire them, and how they and their peers are faring when it comes to leading their organizations.

The study found that most leaders believe they lack the coaching, networks and training they need to lead effectively. At a time when foundations, academics and commentators on the social sector regularly tout the benefits of collaboration, using terms like "ecosystem-level change" and "collective impact," the majority of leaders in the sector admit they are not walking the talk of working across organizations. Similarly, as trends such as pay-for-success and management toward outcomes gain new attention and adherents in the sector, most leaders say they lack opportunities to reflect upon and reimagine how they might improve themselves, their organizations and their missions.

Attributes of Effective Leaders

Leaders Prioritize Collaboration and Effectiveness

The survey offered 33 leadership attributes to choose from; we asked respondents to pick the five they considered most important for social sector leaders in the next five to 10 years.

Three of the top five attributes leaders told us were important relate to collaboration:

- Surrounding self with talented team
- Skilled collaborator, experience bringing multiple stakeholders together
- Place solving the problem ahead of individual or organizational success

The remaining two top leadership attributes focused on innovation and quality:

- The ability to innovate and implement
- Managing to outcomes and for quality improvement

More than 40 percent of respondents selected four of the top five attributes (talented team, skilled collaborator, innovation and implementation, and quality) as their top choices. The attributes ranked five through eight clocked in with approximately a quarter of respondents' votes. Those included places the problem first, participates in collective/ shared leadership, possesses good understanding of ecosystem and operating environment, and is a good user of data and evidence.

We find a notable consistency in what respondents said are the most important skills for social sector leadership; all of the top eight choices are related to being a good collaborator and delivering improved programs. We also see a strong connection between those two areas of strength: Leaders successfully delivering innovation and quality can do so only if they effectively cooperate inside and outside their organizations.

Leaders Are Not Strong in Key Attributes

Of course, recognizing stellar leadership attributes and possessing them are two different things. When we asked whether today's social sector leaders are capable in the key areas respondents selected as most important, the answers were troubling.

Respondents generally do not think they are particularly strong with respect to the five top attributes they said leaders need — and they do not think their peers are either. Indeed, across the five attributes, the percentage of social sector leaders rating themselves as strong ranged from 11 to 32 percent. When we asked respondents to rate their peers on those same five attributes, the range was 11 to 39 percent.

The lowest rating was particularly disturbing. We know from research on movements and network effectiveness that strong leaders build strategies that advance the mission of their organizations even when those strategies do not result in direct benefits for their organizations.[15] Yet only 11 percent of leaders in our survey said that they or their peers are skilled in prioritizing problem-solving ahead of organizational success. Given the complexity of the issues at the heart of the social sector's work, as well as the importance of working with diverse players to address those issues, improving leaders' skills and capacity when it comes to collaboration and seeing "the big picture" is essential.

Six Capabilities of Social Sector Leaders

A New Framework of Leadership Skills

Callanan and the McKinsey & Company team developed a framework of six capabilities for high-performing social sector leaders. The framework is based on McKinsey's experience with clients, interviews with social sector leaders and leadership experts, a review of 10 years of literature on the topic, and comparable frameworks of leadership capabilities from the business sector. The framework was subsequently validated through the survey of 196 social sector leaders and interviews with leadership funders and other experts in the field, plus analysis by report authors Nora Silver, Paul Jansen and a team of students from the Haas School of Business, University of California, Berkeley.

The framework's six capabilities form the core of successful social sector leaders. The capabilities help to differentiate what is unique about leading in the social sector versus leading in a business setting. We offer this framework for foundations to consider as a guide for investing in leadership development for social sector leaders.

Problem Solver

Leaders in the social sector are focused on solving society's problems — for example, by addressing the needs of poor and excluded people, protecting the planet, perpetuating artistic expression and preserving cultural treasures. In their work, business leaders may also have an impact on social issues, but their primary focus is on increasing the bottom-line for their organizations. So while all leaders solve problems, an effective social sector leader puts solving the problem first, ahead of building one's organization or personal reputation.

Generous Collaborator

While cross-entity collaboration is important in both the social sector and the private sector, the best social sector leaders nurture the growth of external partner organizations, based on a recognition that no one actor can solve a big problem alone. Effective social sector leaders therefore work with their counterparts, collaborating to address complex problems. These leaders see the success of other actors trying to address the same problem as a good thing. Rather than viewing other groups as competitors, strong social sector leaders seek ways to support others' success by enhancing their efforts and sharing resources.

Motivated Mentor

Many business and social sector leaders take the time to be good mentors. Strong social sector leaders recognize that key stakeholders — staff, volunteers and board members — could be spending their time and energies elsewhere but have decided that working in the sector is personally meaningful to them. As a result, these leaders broadly define who is a colleague and whom to support, and they make sure to provide those colleagues with opportunities for growth and learning.

Responsible Steward

Strategic leadership means always looking for opportunities to do better. For social sector leaders, this means making every effort not only to advance the mission of their organizations but also to avoid doing harm through poor decisions or unintended consequences. The scarcity of resources available to marshal progress on social issues places an unusual premium on responsible stewardship. Social sector leaders have a broad set of obligations to be transparent and accountable to an array of stakeholders, from funders and the government to the news media, an organization's clients, its partners and the communities it serves.

Applied Researcher

All good leaders understand that a commitment to learning will contribute to continuous improvement while keeping an organization's culture healthy and refreshed. However, social sector leaders are expected to share their lessons more broadly than leaders in business. When it comes to learning, the goal in the social sector is to try to develop and disseminate knowledge for the sector as a whole. This can mean participating in convenings and conferences, writing for publications and social media, accepting speaking engagements and more. One of the great developments in social sector best practices over the past 20 years has been the focus on data and assessment to guide strategy, program design and program implementation. Social sector leaders are facing an increasing demand to root their decisions in evidence and to apply the latest research to their organizations' strategies and overall approach.

Savvy Networker

All strong leaders focus on nurturing their networks, but the best social sector leaders are motivated by the missions of their organizations to make networking a top priority. These leaders often possess supercharged influencing skills that they use both to manage disparate, cross-sector stakeholder groups and to access untapped resources and opportunities. One of the key ways in which social sector leaders punch above their weight is through networks, using the power of their organizations' mission to win the help and commitment of partners. Social sector leaders recognize that their organizations do not have the resources, contacts or capacity needed to address complex social problems on their own.

What Leaders Want

Despite a near-universal understanding that social sector leaders need specific skills and capabilities to be effective, these leaders generally do their jobs without a lot of training and preparation. When asked what types of professional development resources they accessed to help them do a better job, respondents to our survey painted a picture of making do and getting by.

Specifically, respondents identified "on-the-job experience" (both in the social sector and elsewhere) and "exposure to challenges or moments of transition" as the most useful resources. Leaders also said their cross-sector networks were a big help. And despite the finding that respondents had received minimal formal leadership and organizational training, leaders found that support to be beneficial when it was available.

When we asked respondents what top five professional development resources they wish they had, their answers aligned with what they said about the desired attributes of social sector leaders (see above). The emphasis was on resources to support collaboration, innovation and quality improvement. For example, survey respondents asked for stronger networks, coaching and communications training — all key to being good collaborators. They also asked for the time to experiment and innovate, plus sabbatical time to reflect and explore.

Leaders told us they want opportunities to build connections throughout the ecosystem. They want networks that span the social, business and government sectors.

They also want coaching and partnership — chiefly through stronger relationships with those who are committed to their success: board members, funders and investors. The respondents also were open to all types of feedback — from senior mentors, trusted colleagues in their own organizations and professional coaches.

In addition, leaders want to build the skills that are critical to their success, with communication topping the list. They asked for media training, help with public speaking and opportunities to build their social media expertise.

Another critical skill area where they want support is collaboration. Social sector leaders inherently recognize that collaboration is both a mindset and a skill set. As anyone who has participated in a multi-stakeholder partnership knows, aligning interests and creating the right conditions for collaborative success require real skills and strategies. Winging it won't work.

Collaborating effectively requires strong skills across six areas. A successful collaboration starts with leaders recognizing that they cannot go it alone and beginning to identify what types of partners they need. Scoping the ecosystem then allows leaders and their organizations to identify potential collaborators with the necessary skills and assets to complement their own.

Honestly assessing an organization's capabilities and those of its partners is another key step, followed by a process of negotiating the partners' relative roles and responsibilities and devising mechanisms to hold one another mutually accountable. Through goal setting, partners articulate clear objectives for the collaboration and define deliverables. Perhaps the most important skill of all is giving and receiving feedback through difficult conversations.

The commitment to collaboration is necessary, but not sufficient, for a collaboration to succeed. A good partner builds trust through patience and consistency, uses a range of problem-solving and learning techniques, and respects differences among organizational cultures and approaches. The six aforementioned collaboration capabilities form only the foundation; they provide a framework for understanding what makes collaborations tick.

In our survey, we asked social sector leaders how their colleagues perform against these six capabilities. Their answers are concerning. Thirty-seven percent of respondents agreed or strongly agreed that social sector leaders are often poor managers and collaborators due to the lack of incentive or the lack of funding. The survey asked respondents to write in additional comments about factors they thought were affecting social sector leadership.

Alarmingly, many of the comments focused on how the practices of funders actually discourage collaboration among organizations:

> "[There is a] need for collaboration among social sector partners — and also among philanthropic funders and foundations."

> "There is the opposite of collaboration where fundraising is concerned. It is viewed as a zero-sum game. All donors are fiercely guarded and disinformation is often given."

> "Social sector leaders are often more focused on the financial concerns of their organization than on addressing the needs of their clients. This interferes with collaboration because the potential collaborator is viewed as a potential competitor for resources."

> "Donors have the power to cause collaboration and partnerships among different sector players. They should expect/require this behavior."

Our findings suggest that foundations have an opportunity to realign incentives for strong social sector leadership and collaboration. Social sector leaders are clearly attuned to foundation behavior. When foundations promote and reward strong leadership and collaboration, social sector leaders will respond.

What Foundations Can Do — Lessons from the Field

Foundations can and have supported leadership development for social sector leaders. To date, most foundation resources for this work have gone to leadership development organizations whose programs have trained many social sector leaders. Yet leadership development remains a fragmented field. Our analysis of 150 U.S.-based leadership resources shows that access to such programs varies, and not all opportunities are open to or suitable for everyone.

In fact, almost half of the resources we examined are not available to all social sector leaders. Adding to the problem, programs have a limited number of slots, and most require application or nomination. This limited access is sometimes compounded by "creaming" participants, as the programs are only open to already accomplished or proven leaders. As a result, whereas some leaders participate in many programs, emerging leaders tend to lack access to any.

How can foundations better support leadership development so that high-quality options are available for all leaders? In a follow-on to our survey of social sector leaders, Nora Silver interviewed a sample of foundation leaders who have developed robust leadership development programs over time. We asked them to describe their programs, how those programs came about, and what advice they would give to other foundations about how best to support leadership development.

Three major themes emerged as we set out to understand the critical mindsets and promising practices from the field:

- **Invest:** Develop talent and the talent pipeline
- **Engage:** Focus on collaboration
- **Imagine:** Be attentive to white space, blue sky

Invest: Develop Talent and the Talent Pipeline

The foundations we interviewed often started small in their leadership development work, taking time to identify precisely whom they were trying to help, engaging in conversation with the intended beneficiaries and co-designing programs designed to meet their needs. Programs then evolved organically over time.

Take the Greater New Orleans Foundation. Joann Ricci, vice president of organizational effectiveness, joined the foundation to launch its first organizational effectiveness initiative in 2011.

The goal: to help leaders and their boards develop good management and governance practices. For the first 90 days, Ricci focused externally to understand the needs and requirements of social sector leaders in the New Orleans area. Said Ricci, "I went to every meeting I could, always listening." To make sure she was customizing the program to meet the needs of local leaders, she put together a design team of nonprofit leaders who were grantees. The team helped develop a survey that was used to engage about 200 organizations through focus groups and 20 one-on-one interviews, ultimately gaining input from a large percentage of the foundation's grantees.

Building relationships with grantees, in addition to incorporating their needs and suggestions in the program design, was powerful. According to Ricci, "Data is not enough; we would not have succeeded on data alone. People felt heard, and could see we were responding to their needs."

In the first year, the foundation focused on providing coaching sessions for any executive director. Ricci had experience as an executive coach, and she was booked solid for six months of coaching within 24 hours of announcing that it was available. That same year, the foundation also offered three workshops on the basics of nonprofit leadership for 60 people. By year four, it was offering leadership workshops for more than a thousand. Workshop topics included leadership development, financial management, fundraising, evaluation and board governance. As it continued this work, the foundation realized that there was a shallow pool of qualified consultants to work with local nonprofits on these topics, so it created a master training for consultants, with the understanding that newly trained consultants would provide training pro bono to the foundation's grantees.

Our interviews with foundation leaders indicated that foundations that embrace leadership development as a priority realize a number of gains in addition to strengthening the leadership of their grantees and other social sector organizations.

Among the key ancillary benefits: Foundations change how they are perceived by grantees and also change how social sector leaders view leadership development. For the Greater New Orleans Foundation, providing leadership development changed the foundation's relationship with its grantees. "People came to us and told us things they never said before," Ricci said. Claire Peeps of the Durfee Foundation added: "There is a larger effect on nonprofit leaders, beyond the individuals who participate. Because even if you are not the one applying for a [leadership program] now, knowing that foundations value and support it can create added buy-in."

Young, aspiring leaders in particular will appreciate a foundation's investment in their future. The Young Nonprofit Professionals Network's "Stepping Up or Stepping Out" study noted: "Funders need to partner with executive directors in recognizing that developing top staff and future leaders is actually an investment in sustained program quality and organizational sustainability. Providing funds to support talent development emphasizes the importance of succession planning for executive directors and demonstrates to younger staff that the sector will invest in their careers — making it more likely that they will stay."[15]

One grantmaker that has made the development of emerging leaders a priority is American Express. According to Richard Brown, vice president of philanthropy, it looks for emerging leaders who are high performers, and provides leadership development to increase the leaders' capacity to lead while supporting their organizations' mission and goals. Organizations identify emerging leaders to participate in the company's Leadership

Academy, now operating in New York, Tokyo, London, Fort Lauderdale, Phoenix, Mexico City and Toronto, and soon in Dakar, Nairobi and Hong Kong. The rationale for the Leadership Academy is that by investing in leaders, the company ensures its other investments pay off. It is a clear case of "enlightened self-interest," Brown said. The Leadership Academy, which can vary from program to program, offers a host of critical learning modules that provide the participating leaders the opportunity to hone their leadership and influencing skills while offering them the chance to leverage a new and expanding network of like-minded social leaders. The Academy program focuses on emerging leaders, those perceived to be high-potential or high-performing leaders in their organization or in the sector. Executive directors are invited only if they are new to the position; the focus is solidly on next-generation leaders.

American Express also works hard to make sure each cohort in the Leadership Academy reflects the demographics of the U.S. population. "Forty percent of the millennial generation is people of color; the next generation is even more diverse. If we are not deliberate about involving and developing young leaders of color, we are not doing a service to the nonprofit sector," Brown said.

Results have been noteworthy. American Express commissioned an independent study of the outcomes of the first five years of its flagship Leadership Academy in New York for internal purposes. In all, it heard from 224 of the 407 alumni. American Express' goal is to be known as the company training the next generation of nonprofit leaders, and the study explored how the Academy had furthered graduates' leadership and careers. The study found that 93 percent of alumni were still in the sector and 70 percent were promoted or had taken on more responsibility post-Academy.[16]

Similarly, Blue Shield of California Foundation has tracked the first five years of its Clinic Leadership Institute's Emerging Leaders program. A final evaluation report is due in mid-2015, but early indications are that the program has been a success, based on the foundation's focus on multiple levels of change. First, at the individual level, participants have posted higher rates of promotion, pay increases and entry into the C-suite of their organizations. In addition, 88 percent are still in the field. Second, the program has had impact at the organizational level because leaders contribute a project to their organizations as part of the training. Participants have implemented plans for moving to electronic medical records, strengthening patient engagement activities and improving staff satisfaction. Third, at the field level, participants have become leaders in health care reform, influencing conversations about the safety net and leading large-scale, sector-wide initiatives.

Said Brenda Solórzano, chief program director at the foundation, "When we started, this was a pipe dream." Solórzano's recommendation to other grantmakers: "Think about success and evaluation and invest in it."

A final note about investing to develop talent and the talent pipeline: Investing in leadership development may not be forever, and it may not be for everyone. Solórzano said that Blue Shield of California Foundation has strengthened the field it set out to develop and may not continue its program forever. Claire Peeps of the Durfee Foundation cautioned that it is important for each foundation to assess its own tolerance for risk. Leadership development is a long-term proposition, with ups and downs and a long horizon. "If you are shooting for a quick sure bet, it is not this," Peeps said.

Engage: Focus on Collaboration

At the same time that they are investing in talent development, foundations should consider how to do so in a way that strengthens collaboration skills in the social sector.17 Our research has revealed five ways in which foundations can make collaboration a focus of their leadership development investments: by supporting programs that emphasize collaborative capabilities, by modeling collaboration in the design and support of various programs, by building cohorts, by supporting coaching with a focus on collaborative skills and by connecting generations.

Supporting Collaboration Capabilities

The six capabilities of a social sector leader framework outlined earlier is a good starting point from which to design or assess the content of leadership development opportunities. To what extent do programs or experiences foster these qualities? More specifically, if you are considering investing in a leadership development program, does it emphasize the "generous collaborator" capability? Does the program prioritize innovation and implementation? Does it cover communication skills? These are the capabilities that social sector leaders believe will be needed in the next five to 10 years. Grantmakers can help ensure that leadership development programs respond by monitoring available offerings and supporting those that meet leaders' real-world interests and needs.

MODELING COLLABORATION IN PROGRAM DESIGN AND SUPPORT

Collaboration is not just an important focus for leadership development content; it is also a smart way to design and build a leadership development program. Richard Brown, vice president of philanthropy at American Express, emphasized the power of partnerships in the development and growth of the American Express Leadership Academy.

From the beginning of the program in 2008, American Express set out to access the training and curriculum development expertise in the field and to form collaborations with key entities that could help it broaden the reach and impact of its Academy program. The Leadership Academy was conceived in partnership with the Center for Creative Leadership, which developed the early curriculum. This includes important components from its own research-proven training program as well as additional elements such as the use of American Express senior executives and senior social sector leaders as content facilitators. Other Academy partners include Ashoka Changemakers, the Thunderbird School of Global Management, the Points of Light Foundation, Arizona State University's Lodestar Center for Philanthropy and Nonprofit Innovation, the Aspen Institute, the Community Foundation of Broward, Common Purpose UK, and ETIC and JPA in Japan. Clearly, collaboration is critical to the company's philanthropic strategy for success.

American Express also expands its reach beyond its own Leadership Academy program by funding other leadership development organizations and programs, including CompassPoint Nonprofit Services, LeaderSpring, Atlas Corps, Coro New York, Echoing Green, the Latino Policy Institute, Leadership Education for Asian Pacifics, the National Urban League, the League of American Orchestras, Public Allies, the Young Nonprofit Professionals Network, the Presidio Institute, Acumen and many more.

The American Express example illustrates how corporate foundations are often uniquely attuned to the importance of supporting leadership development. Noncorporate foundations, in fact, might want to consider teaming up with corporate grantmakers in the design and implementation of leadership development offerings. One possible benefit of such partnerships is that they could open the door for senior social sector leaders to join executive corporate leadership training sessions. Mark Tercek, president of The Nature Conservancy and former manager of Pine Street, Goldman

Sachs' leadership development program for managing directors, said he regularly invited nonprofit leaders to join the Goldman Sachs training programs. Tercek said he found that leaders from both sectors gained perspective from participating in the program together. He added that philanthropy can and should play a role in encouraging corporations to hold more training slots in their development programs for social sector leaders. The result can be a win-win as corporate and social sector leaders form cross-sector networks.

Building Cohorts

Cohort building leverages the power of collaboration by connecting and activating a network of leadership development participants to work together to support one another. Kevin Jennings, executive director of the Arcus Foundation, is a proponent of the cohort model of leadership development, based on his belief that "a movement is only as strong as its leaders." Two years ago, the grantmaker launched the Arcus LGBT Leadership Initiative, which combines peer-to-peer support and a coaching network. Jennings said the impetus for the initiative is a belief in the power of problem-solving with someone who has been in the same shoes. Through the initiative, participants, who are often first-time executive directors, get counseling, help and coaching from veteran colleagues. Feedback from the first cohort in 2014 reflected enthusiasm for the cohort approach and how it helped cement organizational relationships as well as personal connections.

In the same way that social sector leaders benefit from cohorts, so too can foundations. Working together to expand leadership development offerings for social sector leaders allows grantmakers to share costs, mitigate the risk of investing in leadership and share what they are learning. Natural partners include other foundations working in the same field, with the same populations or in the same region or neighborhoods.

Supporting Coaching with a Focus on Collaborative Skills

Executive coaching by professional coaches can be a key leadership development strategy. According to Richard Brown of American Express, executive coaching is "the most transformative part" of the grantmaker's Leadership Academy program. Most of the foundation's development programs for emerging leaders have some level of executive coaching built in, he added. While describing a Leadership Academy in New York, Brown said, "The level of enthusiasm spikes because participants spend one and a half hours with executive coaching — a session with someone with no interest at the other end, who provides unbiased feedback." Participants in the program can add three coaching sessions after the formal training — and some individuals and organizations have extended the coaching relationships from their own budgets. Brown said he feels so strongly about coaching that the foundation has funded other organizations to add executive coaching to their leadership development programs as an enhancement.

Brenda Solórzano, chief program director at Blue Shield of California Foundation, concurs about the value and impact of coaching. "We have a great didactic program, but coaching is what has made a real difference. It's about candid feedback without judgment, and honest conversation about growth areas and how to move forward," Solórzano said.

Despite the enthusiasm of these grantmakers, philanthropy still has a ways to go to realize the powerful potential of coaching.[18] In GEO's 2008 survey *Is Grantmaking Getting Smarter?*, only 27 percent of grantmakers who supported leadership development in the previous two years said they provided grants for coaching; 24 percent reported supporting coaching through direct assistance within the same period.

Connecting Generations
Creating collaboration between generations of social sector leaders — seasoned executives and emerging leaders — is promising territory for strengthening leadership overall in the field.

The slowly progressing tide of baby boomer retirements means that experienced leaders who stay put or disengage over many years may inadvertently stifle new leaders seeking to step forward. This has produced real concerns that the sector will lose top talent, as young leaders seek rewarding careers elsewhere. In addition, if members of Gen X and Gen Y do not feel they are being invested in and do not see opportunities to grow where they are already working, they may start their own organizations, contributing to the social sector's fragmentation. Adding to the threat, individuals with MBAs, M.D.s and other advanced credentials now have opportunities to decamp to the private sector or government that were unknown to prior generations of social sector professionals.

There are solutions available short of showing seasoned and effective baby boomers the door. Whether boomers remain in their current posts for financial, professional or social reasons, foundations can honor their achievement, provide them with new challenges and help develop the next generation of leaders. Social sector organizations across the country are experimenting with the naming of "master executives," seasoned baby boomers who mentor younger leaders before entering retirement. This strategy keeps boomers involved and engaged even as it creates opportunities for young leaders. Another benefit: These mentorships create intentional cross-generational teams and foster learning that facilitates successions and eases new leaders into senior positions. In addition, these arrangements can serve to reignite boomers' passion for the work of social change. As John Gardner noted, "Vitality at middle and lower levels of leadership can produce greater vitality in the higher levels of leadership."[19]

Imagine: Be Attentive to White Space, Blue Sky

Philanthropic investment in leadership needs to rise across the board. Most foundations considering how to increase their investments will likely focus on some of the areas explored in the previous pages of this report, from expanded training in collaborative skills to coaching and cohort-based programs. At the same time, there are some promising areas where few foundations think to fund. They include providing time away from day-to-day work for social sector leaders to reflect, imagine and dream.

Software company CEO Jason Fried wrote a provocative *New York Times* op-ed in August 2012 titled "Be More Productive. Take Time Off." He described what happened when everyone in his company was given one month to work on whatever they wanted: "It wasn't vacation, but it was vacation from whatever work was already scheduled. We invited everyone to shelve their nonessential work and to use the time to explore their own ideas."

Fried described the results as "ultra-productive" and a "big morale booster." He decided that the time investment was worth the innovation payoff, and he wrote that he planned to make these months off from work a periodic occurrence throughout the year.

What Fried's company did seems like a simple way to incubate innovation: Give folks a period of time and let them spend it how they see fit. This "time off" approach can lead not only to innovation but also to rejuvenation. The Leadership Sanctuary, which is supported by The Morris & Gwendolyn Cafritz Foundation and has received support from the Eugene and Agnes E. Meyer Foundation, shows the power and the potential of this approach in the social sector. "The *actions* of leadership and *being* a leader take time, focus and awareness on key practices. Unfortunately, many neither have the time nor the place to step back and set intentions, assess and learn practices and share challenges with peers. The Leadership Sanctuary gives leaders this opportunity," according to the Leadership Sanctuary website.

The Leadership Sanctuary calls itself "a refuge for leaders." It gathers 10 to 12 leaders who meet monthly for a total of 10 months under the guidance of a trained executive coach and facilitator. The program is 40 percent structured leadership practice and 60 percent learning from peers. The Leadership Sanctuary has served more than 200 leaders to date.[20]

Of course, the Leadership Sanctuary is just one example of a program that pulls leaders out of their day-to-day environment to reflect, learn and grow. Other examples include sabbaticals, mini-sabbaticals, "staybaticals" and board service for other organizations.

Sabbaticals
A few foundations have been supporting sabbaticals for selected leaders of grantee organizations for some time. "Creative Disruptions: Sabbaticals for Capacity Building and Learning"[21] documents the outcomes of sabbatical programs launched by five foundations across the country: Barr Foundation (Boston), the Durfee Foundation (Los Angeles), Virginia G. Piper Charitable Trust (Phoenix), Rasmuson Foundation (Alaska) and Alston/Bannerman Fellowship Program (national).

According to the report, "Sabbatical time is one of the more valuable investments a nonprofit and its funders can make when it comes to organizational capacity and effectiveness. It not only benefits sabbatical-takers, allowing them to recharge their batteries and gain fresh perspective on the organization's mission and work, it also tends to strengthen the organization's internal capacity, ability to collaborate and governance. Funders often benefit from the stronger relationship with the grantee that invariably follows and the fresh insights the organization's leader is able to apply to its work."[22] The report notes that most leaders who take a sabbatical recommit to their leadership roles post-sabbatical, with only 13 percent looking to move to another job within three years.

So why are sabbaticals not more common in the social sector? Our survey revealed that most leaders in the sector do not know how to access sabbaticals. Either they do not know where to find them, or the resources are too expensive. In addition, without support and encouragement from one's board and funders, the typical social sector leader is not sure how to fit a sabbatical into an already demanding schedule.

The Durfee Foundation values sabbaticals. "The dividend is creative restored leadership," said Executive Director Claire Peeps. In response to the common complaint that sabbaticals may be too costly, Peeps said, "People go on family leave all the time; it's the cost of a salary."

Suggestions for sabbaticals from the Durfee Foundation:

- **Be selective**. The Durfee Foundation provides six sabbatical grants every two years. People have to be at a level of accomplishment and readiness, and their organizations have to be at the right moment — not in a capital campaign or building a new building.

- **Prepare**. Sabbaticals are not something to drop willy-nilly on an organization. It needs to prepare for the leader's absence and clarify roles and responsibilities so it gets the maximum benefit of shared leadership.
- **Introduce succession planning**. Planning for a sabbatical can prompt the organization to broach the topic of succession planning. The sabbatical also offers time for an organization to explore what it needs in an executive director, while allowing a deputy director or COO to try on the CEO role for size. Durfee's program is not for the purpose of immediate succession planning, but the CEO's sabbatical often sparks useful reflection by board and staff on a topic that is ideally addressed many years before it needs to be activated.
- **Expect reengagement**. The foundation should be explicit that it expects leaders to come back. In virtually all cases, Durfee has witnessed leaders returning "revved up."

Mini–Residencies

Gratified by the results of its executive director sabbatical program and noticing the dearth of programs for social sector organizations' second-in-line executives, the Durfee Foundation launched a mini-residency program for COOs. "Most COOs do not go on to become CEOs. They don't know where to go next; they are isolated, not on the conference circuit," said Peeps.

Peeps referred to the mini-creative leave program, called the LEAD Residency opportunity (Leadership Exploration and Development), as a "busman's holiday." The idea is to give the COO an opportunity to take paid time off to "sit in on another organization in the cohort and see how another group approaches a task, such as youth organizing or human resources management." Peeps said the residency has delivered some of the same benefits for participants as the foundation's larger sabbatical program. "We have seen significant impact on secondary leadership. They come back recharged, with a new collegial network," she said. As of early 2015, 10 COOs have participated in the program.

Staybaticals

A staybatical is an *in situ* sabbatical along the lines of what Fried described. The social sector leader still goes to the workplace but takes time to focus on creative questions that rise above an organization's day-to-day reality. Whereas social sector leaders may struggle to get their heads around how they would take an extended sabbatical out of the office, a staybatical can seem doable. But everyone involved needs to respect the boundaries and the "rules of the road" so the leader can use the time for new ideas, not just to catch up on things or do regular work. One can imagine variations on the "staycation" theme where the leader carves out a day a month from the routine. This sort of mini-break may or may not allow for the level of rejuvenation and exploration that can lead to real breakthroughs, but it may be a start. One way to make these shorter spurts meaningful is to connect the time to pursuing new ideas and opportunities — such as mapping the organization's ecosystem.

J McCray, a member of the leadership team at GEO, piloted a one-week staybatical. Far in advance, he calendared the week off to think about a big-picture question that had been needling him for a few years. Wrestling with the question in a concentrated time frame allowed him to dig into the problem in a way that he was unable to do in short isolated segments from time to time. He found the exercise productive and hopes to repeat it. The key, he says, is the planning beforehand.

The Durfee Foundation has pioneered something similar with its Stanton Fellowship. Stanton fellows work on local problems in Los Angeles. These are tough problems related to, but beyond the scope of, their leaders' organizations' day-to-day operations that demand deep thinking about possible solutions. Fellows design their own projects and plans and use the grant funds for domestic or international travel, conferences, support for research assistants or consultants, or a writing retreat. The goal is to enable these leaders to expand their knowledge, hone professional skills, form strategic alliances and bring new perspective to the work of their organizations about how to take on seemingly intractable challenges. Stanton is a two-year program that requires fellows to pass on their regular responsibilities for planned segments of time. In total, the program supports them for three months of "off time" in blocks of two weeks or more. Stanton fellows have used the time to do impressive things. One captured the financial cost of dropping out of high school and secured $12 million in federal funds to bring dropouts back to school. Another went on to run for elected office after using the fellowship time to build a strong cross-sector leadership network.

Board Service

It is not often considered a form of leadership development, but serving on the board of another organization (whether in the social sector or the private sector) can be an enormous learning and growth experience. Board service places executive and emerging leaders at the strategy and governance level of an organization, providing new perspective and enhancing their networks and skills. Organizations, for their part, can benefit in a big way when new board members from across the social sector bring new perspectives and skills to their boards.

Yet despite the benefits of board service, leaders across the social sector often express skepticism and concern about the loss of focus and the competing time commitments that can result when staff members serve on the boards of other organizations.

Professor Sonia Ospina of the Research Center for Leadership in Action at the New York University Wagner School of Public Service said the lack of opportunities for social sector leaders to temporarily step away from the day-to-day of their organizations — whether through sabbaticals, board service with other organizations or other activities — is a loss for the sector as a whole. "It is unfortunate that the possibility of engaging in reflection on one's practice — of being able to step back and look at the intricate details of a given situation to then locate these within the bigger picture — is perceived as a luxury that social sector leaders cannot afford," Ospina said.

Ospina continued, "And yet what is precisely needed in the social sector is the opportunity for leaders to participate in learning spaces, to engage in cycles of action and reflection, and to exchange experience with peers. Such spaces can help social sector leaders develop the strategic, results-oriented and mission-driven approach to the work that will produce organizational success."

Conclusion

Investing in leadership is a powerful lever not just for supporting individual growth but for supporting the growth and advancement of the social sector as a whole. The key to success is to strengthen the leadership development system in the sector so it responds to the real interests and needs of today's and tomorrow's leaders.

Social sector leaders have weighed in on the leadership attributes they deem most important: collaboration, innovation and effectiveness. These leaders want to develop their ability to put problems ahead of personal or organizational success. They want to be skilled collaborators, bringing stakeholders together. They want to develop their ability to innovate and implement. And they want to be better at managing to outcomes and making continuous quality improvements.

Grantmakers can create incentives and provide resources to encourage social sector leaders to develop these skills. Foundations also can support and create high-quality leadership development programs. As this report has shown, some foundations are already well down the road to exploring what works. They offer promising models and practices for others to consider.

The question now is this: What might we accomplish if we grew foundation funding for leadership development from 1 percent to 2 percent, 5 percent or even 10 percent? Similarly, what if grantmakers joined together to build a strong leadership pipeline across the social sector and throughout the country?

In the coming years, the social sector will continue to see a new generation of emerging leaders assuming leadership positions with organizations and networks. Will those leaders be prepared with the skills of collaboration, innovation and effectiveness that will be key to their success? We certainly hope so, but it will not happen unless foundations start thinking about and investing in leadership development in new and different ways. We look forward to the day when the next study of leadership in the social sector can report that leaders see themselves and their peers as confident and capable collaborators, innovators and implementers — and they credit grantmaker support with their leadership success.

Acknowledgments

GEO is a diverse community of more than 500 grantmakers working to reshape the way philanthropy operates. We are committed to advancing smarter grantmaking practices that enable nonprofits to grow stronger and more effective at achieving better results. The GEO community provides grantmakers with the resources and connections to build knowledge and improve practice in areas that have proven most critical to nonprofit success. We help grantmakers strengthen relationships with grantees, support nonprofit resilience, use learning for improvement and collaborate for greater impact. For more information and resources for grantmakers, visit www.geofunders.org.

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9. The U.S. is home to 1.1 million public charities, one-quarter of which, or 275,000, have budgets of more than $500,000, according to Independent Sector (http://www.independentsector.org/scope_of_the_sector). According to the organizations' websites, since inception there have been 600 Echoing Green fellows, 187 Ashoka USA fellows, 31 Skoll Award for Social Entrepreneurship winners, 24 Schwab social entrepreneurs and 35 Draper Richards Kaplan Foundation grantees, all based in and focusing on the U.S. No attempt was made to eliminate double-counting of entrepreneurs recognized by more than one of these funders. Adding benefit corporations and low-profit limited liability companies accounts for a maximum of another 2,000 organizations that can be considered as led by social entrepreneurs. This means the total of social entrepreneurs in

the U.S. is less than 3,000, although there are close to 300,000 leaders of midsized nonprofits.

10. We are concerned that the emphasis on social entrepreneurs over the past 20 years has persuaded funders, partners and workers in the social sector to believe that a single charismatic individual alone can make the difference. We believe that the social sector's human capital is its most important asset but that the problems are so vast, dynamic and complex that no one person or organization can address the need alone. For us, the best social sector leaders have all the good traits of the best social entrepreneurs — but succeed in being collaborative and actively share the leadership role in a way few social entrepreneurs seem to do.
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14. U.S. social sector leaders. This report builds off that original work, augmented by examples of best practices from interviews with foundation leaders.
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