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The Soft Stuff Doesn't Have to Be Hard: Foundation Investments in Grantee Workers Are Necessary, Valuable, and Measurable – With 2024 Prologue

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Keywords: *Capacity, leadership, talent investing, talent justice, nonprofit workforce*

Key Points

- There is an urgent need for funder investments in the ability of grantee nonprofit organizations to support their staff. Such investments, when done well, can yield significant value for individuals, organizations, and fields of work or movements. Furthermore, the value of these investments can be evaluated and communicated.
- This article explores the reasons for and implications of the inadequate response by funders, offers a path forward for designing investments in grantee staff, and documents how funders can capture and communicate the value of these "talent investments."
- Powerful myths serve as barriers to widespread funder investment in grantee staff, and the resulting environment is significantly harmful to wellness, morale, productivity, and equity for organizations and professionals in the social sector. One of these myths that has gone unchallenged is the assumption that it is impossible to assess how investments in grantee staff lead to greater social impact.

Prologue

by Rusty M. Stahl, M.A.

The mission of Fund the People is to maximize investment in this country's nonprofit workforce. That will mean building a new way for funders to think about how they make change.

Grantmakers often start by thinking about results; my article, after all, examines evaluation data. But if you want to enable nonprofits to bring about social change, funders have to start further back in the process. That means looking further back at program design. Then back to organizational strategy and capacity. And that is where most people stop. Our argument is this: We need to go back two more steps. Go back to the people who are behind the work and the systems — and people — that support them to do their best work. This means addressing issues of pay, benefits, organizational culture, wellness, personnel policies, human resources infrastructure, and equity and inclusion.

It took the harsh spotlight of a global pandemic to show what society demands from our "essential workers." Research from the Center for Effective Philanthropy and the National Council of Nonprofits found that recruitment, retention, and burnout have become the No. 1 issue facing the sector. When front-line jobs are vacant in human services organizations, who will hold steady the social safety net? How do we get those people in the door? How do we get them to stay — and to leave well? The field needs funding that works for the people who make nonprofits work.

Funders are waking up to endemic burnout in the nonprofit sector. The overhead myth remains entrenched, but change is beginning to take hold; several major foundations have dramatically increased their indirect-cost rates in recent years. Nevertheless, foundation policies and practices still contribute to the creation of exploitative, inequitable, unsustainable working conditions across much of the sector. And, too often, funders don't have the awareness, knowledge, practices, or political will to change this reality.

So that's where we're at — trying to help funders develop transformative but practical approaches to investing in the people who make nonprofits work and evaluating or documenting the impact of those investments. Toward that end, my article attempts to bridge scholarship and practice to inform the foundation community in a way that builds new knowledge, attitudes, and behavior in the field. And I think *The Foundation Review* has created a great platform for doing that.

Introduction

There is an urgent and immediate need for funders to invest in the staff of grantee nonprofits. Long-serving executives, employees, and prospective recruits are suffering from layer upon layer of secondary and primary trauma, endemic burnout, isolation, and overwhelming stress from working (or not) through the pandemic and through the challenges of recruitment, retention, and transition that have accompanied the Great Resignation. As the National Council of Nonprofits (2021) found, "nonprofits … are reporting significant difficulties retaining staff and filling vacancies. What was initially considered a challenge has now become a workforce crisis in need of immediate remedy" (para 1).

In reporting on the impact of the Great Resignation on the nonprofit workforce, *The New York Times* bluntly showed the linkage between people and programs:

> For many nonprofits …, raising pay isn't an option …. That is leading to a wave of departures and rising vacancy rates as their salaries fall further behind their for-profit counterparts. And it is … making it difficult for them to deliver the services they exist to provide. (Casselman, 2022, para. 3)

The current crisis lies atop the chronically unmet need for resources that will enable nonprofits to invest in their staff. Nonprofits clearly communicate this to funders when given a risk-free opportunity to do so, as shown by these pre-COVID research findings:

- When the Bridgespan Group asked 438 nonprofits about the value of various types of leadership-focused funding, 49% responded that the most needed is "overhead funding for talent management capacity" — and that it is among the least available, with only 7% saying they have obtained such funding. The gap between need and availability for this type of funding was by far the largest gap among all the options (Landles-Cobb et al., 2016).
- When the Ford Foundation supported the full staff of 172 key grantees to work as a group to self-diagnose and prioritize their organizational capacity needs, human resources and organizational culture were ranked the top two needs — well above fundraising or strategy (Babouder-Matta, 2019).
- In a study comparing nonprofit and funder perspectives on how foundations can help strengthen grantees, the Center for Effective Philanthropy found that staffing was one of the areas nonprofit CEOs said their organization most commonly seeks to strengthen — and there may be more need than foundation leaders realize. Nonprofit respondents listed "staffing" as second highest in their top-six list of capacities that most need strengthening. "Staffing" did not appear at all on funders' top-six list of what they think is needed for strengthening grantees (Buteau et al., 2018).

Despite the urgent and ongoing challenge facing the nonprofit workforce, and despite more than a decade of warnings about the need to prepare for a massive number of executive transitions of long-serving leaders (Tierney, 2006; Kunreuther et al., 2012; Landles-Cobb et al., 2015), funding trends do not emphasize investments in nonprofit staff with the same level of urgency that nonprofit leaders articulated well before the current crises of recruitment, burnout, and retention. This article explores the reasons for and implications of the inadequate response by funders, offers a path forward for designing

By avoiding funding compensation and only funding programs (or providing general operating support but focusing every conversation with grantees on programs), funders allow themselves to fund only at the margins — in the relatively narrow band of program expenses.

investments in grantee staff, and documents how funders can capture and communicate the value of these "talent investments."

Why Doesn't Philanthropy Invest in Nonprofit Workforce?

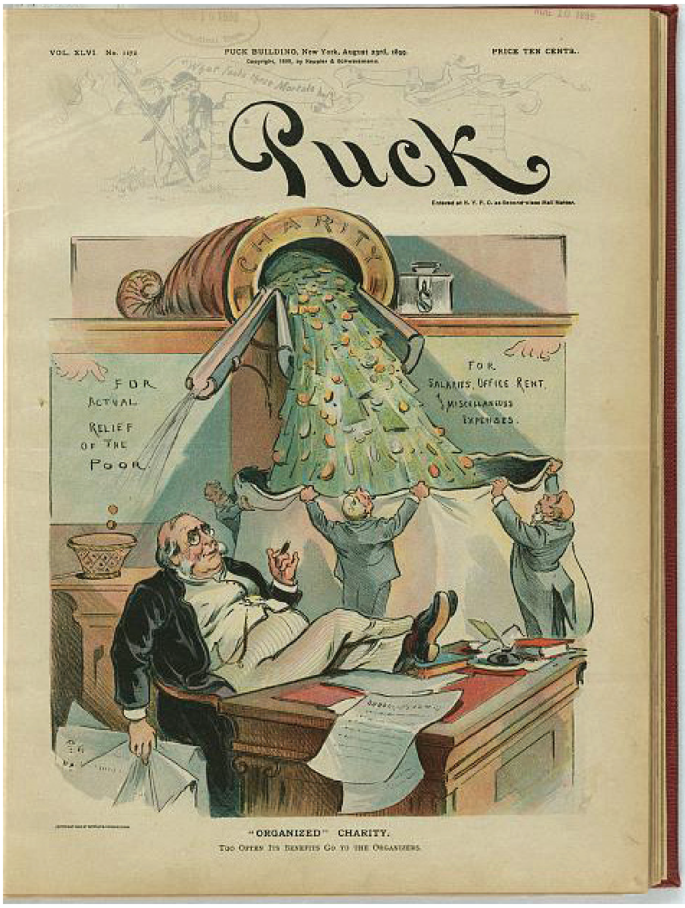
For the last 20 years or so, I've continuously scanned the content of educational programs and texts that orient newcomers to the job of grantmaking. While many of these are high-quality offerings and cover many necessary bases, in my experience they do not adequately educate funders about the part of their job that is investing in grantee staff. These trainings tend to teach "due diligence" that focuses on programmatic health and financial health of grantees, but not the human health of the organizations. For example, the essential text *The Insider's Guide to Grantmaking* (Orosz, 2000) offers "12 Characteristics of a Good Proposal" (pp. 76–82), but nothing in this list refers to the prospective grantee addressing their organization's leadership and staffing capacity to carry out the proposed work. What is not said speaks volumes. This traditional grantmaking education lays the groundwork for foundation folks to look past and deprioritize the needs of workers in the organizations, issue areas, and movements that they support.

Beyond this major gap in training, I hypothesize that four myths (at least) have helped to create a worldview and entrenched practices that keep funders from investing in grantee staff. Like four concrete walls, these mental barriers are so thick that they make it difficult for grantmakers to even imagine what this type of funding might look like.

1. *The Overhead Myth*. We all know people are the greatest assets of organizations, and, appropriately, the costs related to people (e.g., salary, benefits, consulting fees) are generally the largest line items in any organizational budget. By avoiding funding compensation and only funding programs (or providing general operating support but focusing every conversation with grantees on programs), funders allow themselves to fund only at the margins — in the relatively narrow band of program expenses. The Overhead Myth is continuously debunked and nevertheless continuously practiced.

2. *The Dependency Myth*. The irrational fear of dependency keeps funders from investing in nonprofit leaders and staff. There are two sides to the Dependency Myth, offering a stunning double standard. On one hand, it is made clear to nonprofits that they cannot depend on funders for the long term. For example, funders may feel that if they fund all or part of a new or existing staff position in a nonprofit, then that grantee will over-rely on the funder for the ongoing cost of that position. So, rather than co-creating a plan for sustainability and providing funding to establish the new position, funders may avoid funding salaries altogether and plow funds into programs (Buchanan, 2013). On the other side of dependency, funders often feel they should be able to depend on nonprofit leaders remaining in place for the long term. If a funder invests in a leader to the point where that leader leaves the organization to take a more impactful or better job, the funder may feel they have "wasted money" because the funder was depending on the vision and capabilities of that leader at the grantee organization. Funders often avoid investing

FIGURE 1 The Overhead Myth



Deeply entrenched ideas such as the Overhead Myth, depicted in this 1899 cartoon, have limited needed investments in the nonprofit workforce to a trickle.

in sabbaticals or executive transition planning because they are concerned it will expedite the departure of a key executive leader. Thus, this myth leads to funders staying away from dependable investments in grantee staff, rather than investing in needed staff line items and supporting the sustainability of leaders.

3. *The Aim High, Fund Low Myth.* Funders too often invest in relatively modest, individualistic leadership development interventions with a small group of select leaders, holding unrealistic hopes that these efforts will this result in massive social change at an epic scale. Then they assess the impact of their programs at the individual level. Consequently, they are disappointed that the leadership development was not effective. The misalignment between the unit of intervention, the scale of effort, and the assessment approach is self-defeating and reinforces the false notion that talent investments do not yield important results.

4. *The Soft Stuff Myth.* Another major mindset that creates a barrier to talent investing is what I call the Soft Stuff Myth. This belief asserts that a straight line cannot be drawn from investments in the support and development of nonprofit employees (the "soft stuff") to improved program outputs and outcomes

(the "hard stuff"). I will address this misconception later.

The Myths Have Deep Roots

The harmful funding myths and practices described above are not necessarily the fault of current grantmakers or those who train them. The myths have been passed down through received wisdom over hundreds of years, preceding and shaping grantmaking foundations as we know them today. They are embedded in the culture and policy of grantmaking and fundraising in ways that are difficult for any one person to root out. A Twitter thread on the history of the Overhead Myth (Philliteracy, 2020) features a political cartoon with "'organized' charity" routing a few coins into a small bowl "for actual relief of the poor" while a flood of cash pours into a massive sack "for salaries, office rent, and miscellaneous expenses." (See Figure 1.) The cartoon was published in 1899, 122 years ago.

Government has played a powerful role in reinforcing these myths as well. Pratt (2022) offers this historic perspective:

> Gaining equitable federal treatment for the people who work at nonprofit organizations has been at least an 80-year slog, going back to the Social Security Act of 1935. Like farmworkers and domestic servants, work performed in the service of a charitable corporation … was excluded from the definition of "employment".... It took 50 years for nonprofit employees to be completely incorporated into the New Deal's safety net. (paras. 9–10)

The harm is even reinforced by nonprofits, which often feel they must operate within the boundaries established by these myths. This also goes back a long way: In the 1870s, famed reformer and founder of modern nursing Florence Nightingale advised a fundraiser "to add a line on her appeal literature to note that 'the directresses always pay their own expenses'" (Roddy et al., 2018, p. 109), such as dinners, to avoid criticism that funds were being misspent on staff.

It could be argued that these long-standing myths have given us what I call "misanthropic philanthropy" — giving and fundraising for the love of humankind that is dismissive of the very humans who do this kind of work. Misanthropic philanthropy, in turn, seems to have produced an "antisocial social sector" that is remarkable for the harmful ways it treats the very people who carry out its work. When funders fetishize nonprofit programs and obsess over outcomes, it can lead directly to the exploitation of staff and an alienation of nonprofit leaders from their mission and their work (Benjamin, 2012; Baines et al., 2014). Misanthropic philanthropy and the antisocial social sector not only diminish the organizational effectiveness of nonprofits, they actually reinforce inequity in the nonprofit workforce by limiting the supportive and developmental resources available to workers who are starting from a disadvantage based on preexisting conditions of marginalization in society, the economy, and the nonprofit sector.

Talent Investing Is Valuable and Can Be Evaluated

I have argued here that the myths we have inherited have kept funders from investing in the nonprofit workforce. These myths include the notion that investing in nonprofit workers cannot be shown to improve programs and social impact. The resulting lack of investment has created an exploitative social sector. At this point, I share the concept of "talent investing," including the idea of "talent justice," offering foundations a practical alternative to the status quo. I then present data on the significant value that can be created through talent investing, and evidence that this value can indeed be evaluated and communicated.

Investing in the nonprofit workforce has been largely relegated to "leadership development," which in turn has been buried as a bullet point in a lengthy list of "capacity-building" issues. To bring the issue more prominence and to define a more robust and complex application, nearly a decade ago the idea of "talent philanthropy" was introduced in these pages (Stahl, 2013). Since that time, both the concept and the label have evolved. Today, we use the term "talent investing," which Fund the People (2017) has defined as the intentional deployment of capital to support and develop nonprofit leaders and workers. We've built our Funding That Works Framework around this concept. In this framework, talent investing may be practiced in multiple directions and through various roles. For example, funders can integrate a talent-investing lens into their existing approach in a practice we refer to as talent-infused grantmaking. Conversely, nonprofits can build the habits of talent-focused fundraising. Often in nonprofits, people with the least power advocate for this type of investment. But it works best when there is a strong, values-driven commitment at the board and executive levels and alignment about this commitment throughout the entire organization, so that policies, strategic plans, budgets, and management practices align to make talent investing possible.

The principle and practice of "talent justice" is part and parcel of talent investing. It is asserted that racism, sexism, classism, and other biases drive the deficit of investment in the nonprofit workforce. Thus, talent investing must intentionally address racial equity, and do so in an interconnected fashion that both accounts for the prominence of racism and recognizes the many interwoven forms of discrimination. That is the process of working toward talent justice. In a study commissioned by Fund the People, researchers found differences of opinion between white people and people of color, and differences between funders and nonprofits, about how to define the problems facing the nonprofit workforce and about the most useful changes or solutions (Lubin et al., 2019). The need for funders and nonprofit leaders to understand, practice, and assess talent investing and talent justice across lines of race and power has never been more urgent.

Busting the Soft Stuff Myth

This framework was developed to move beyond critiques and analysis of the myths discussed above to the logical next step of providing funders and nonprofits alternative (and healthier) mental and practical models.

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Thankfully, in recent years, serious philanthropic leaders in the field have made valiant efforts to dismantle the Overhead Myth (Taylor et al., 2013; Real Costs Project, 2015), Dependency Myth (Buchanan, 2013), and the Aim High, Fund Low Myth (Knowlton, 2019; Weiss et al., 2021). However, there has not been a strong conceptual response to the Soft Stuff Myth — the commonly accepted idea that a straight line cannot be drawn from investments in employees (the "soft stuff") to improved programs and social outcomes (the "hard stuff"). It is past time to debunk this final myth. Toward that end, below I share compelling data from the for-profit sphere. Then I turn to evidence produced by a set of prominent funders who have invested in the nonprofit workforce and evaluated their interventions. I conclude with an initial set of observations and suggestions.

Evidence From Business

There is ample proof that employers create real value for their institutions when they invest significantly in their employees. The powerful book The Human Equation (Pfeffer, 1998) shows how significant and sustained investments in employees can drive outputs and outcomes. Pfeffer argues that instead of cutting costs to increase profits, companies should focus more on building revenue by relying on solid people-management skills. Through dozens of examples, the Stanford Business School professor demonstrates that successful companies worry more about people and the competence in their organizations than they do about having the right strategy. Pfeffer contends that the strategy part is relatively easy — it is the day-to-day execution that is hard. Execution is all about employees. Companies that understand the relationship between people and profits are the ones that usually "win" in the long run. The book offers seven principles for investing in employees:

1. Employment security
2. Selective hiring of new personnel
3. Self-managed teams and decentralization of decision-making as the basic principles of organizational design
4. Comparatively high compensation contingent on organizational performance
5. Extensive staff training that is deeply aligned with organizational strategy
6. Reduced status distinctions and barriers, including dress, language, office arrangements, and wage differences across levels
7. Extensive sharing of financial and performance information throughout the organization

Through random controlled trials across diverse industries, Pfeffer shows that by committing to three or more of these principles concurrently for an enduring period, companies can yield increases up to 40% in profitability, stock price, value to shareholder, and firm survival rate.

Many of Pfeffer's suggested forms of talent investments could be directly applicable to the needs of nonprofit organizations and employees. In fact, the workplace conditions that are the logical outcome of these principles are described by Christina Maslak as the conditions needed to end burnout in the helping professions — things such as a sustainable workload, choice and control in the workplace, recognition and reward, a supportive work community, fairness and respect on the job, clear value, and meaningful work (Stahl, 2020).

Pfeffer draws the straight line from A to Z, offering evidence that strategic investments in employees can lead directly to improved products, increased revenue, and lengthened sustainability. While the evidence Pfeffer musters makes clear that the value of talent investing can be shown across many completely different industries, all the evidence he cites is from for-profit businesses.

Translating for Nonprofits and Philanthropy

Unlike the businesses discussed above, nonprofits seek not profit, but the public good. Such social goals are more complex to achieve or measure than the single metric of net earnings. Moreover, the management of most nonprofits does not have unrestricted cash and wide discretion over how dollars are deployed. In the nonprofit sector, the organizational systems changes discussed by Pfeffer often take investment and buy-in not just from management, but from funders, boards, and management. They take exactly the type of investment that the Bridgespan Group found is extremely difficult for nonprofits to obtain: overhead funding for talent management (Landles-Cobb et al., 2016).

The only way nonprofits can invest significantly in their employees is if they have incentives, money, time, and infrastructure to do so. For most nonprofits, those resources stem from their funders, whether these be individual donors, foundations, or government. And those dollars are largely dedicated to specific functions (mostly programs) and often restricted down to the level of budget line items.

While all funders should be concerned with talent investments, foundations and similar grantmaking institutions (e.g., giving circles, donor-advised funds) generally have more flexibility than government to engage in such talent investing and more of a stake in organizational development do than individual donors. Of all the funding institutions that support nonprofits, organized philanthropy thus has the strongest incentives, the most enlightened self-interest, and the greatest capability to support grantees through talent investing. Yet very little evaluation data about the results of foundation-based talent investing have been readily shared in the nonprofit world .

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Evaluation Data From the Nonprofit Sector

That is why we set out to collect all the existing evaluation reports we could find and share what we learned from them. My team and I collected as many foundation-commissioned evaluation reports as we could find on the impact of funder investments in nonprofit leaders and workers (Spalti et al., 2023). This research yielded 13 published studies covering roughly 20 interventions, as well as several videos and two unpublished reports. The public reports were published between 2005 and 2017 and produced collectively by 16 funders and a dozen different evaluators or evaluation teams. The funders behind these interventions range from prominent regional family foundations like the Durfee Foundation, which focuses on Los Angeles, to some of the largest international funders, such as the Bill & Melinda Gates, MacArthur, and William and Flora Hewlett foundations. As it happens, most are private, professionally managed national or international funders. It may be that this is because these foundations have the resources to evaluate their work; have the most questions about leadership development and thus see the need to evaluate their efforts at supporting it; or that they are most likely to make such reports available on the internet. The published reports we address in this article are:

- *"Annie E. Casey Foundation Leadership in Action Program"* draft final report, an assessment of a "results-based leadership development" project funded by the foundation and "designed to build the capacity of high- and mid-level public agency leaders and their community partners" (Research Center for Leadership in Action, 2006, p. 3).

- *"Evaluation of the Community Leadership Project: 2011 Evaluation Progress Report"* executive summary, an assessment of a collaborative effort among the David and Lucile Packard, James Irvine, and Hewlett foundations to "strengthen the leadership and organizational capacities of small organizations serving low-income people and communities of color in the San Francisco Bay Area, Central Coast, and San Joaquin Valley" (Yu et al., 2012, p. 1).

- *"Developing Leaders of Color in Low-Income Communities: Promising Approaches and Emerging Outcome Trends,"* the 2011 evaluation report based on the same evaluation as above, which specifically looks at the results of leadership development tactics within a broader array of organizational capacity-building efforts in the Community Leadership Project (Reinelt et al., 2012).

- *"Five-Year Evaluation of the Flexible Leadership Awards,"* a longitudinal study on a grantmaking initiative at the Evelyn and Walter Haas, Jr. Fund "designed to help grantees create and implement leadership development plans geared specifically to advance their organizations' most important strategic objectives" (Ryan, 2013, p. 2).

- *"Brief Assessment of The Irvine Foundation's Fund for Leadership Advancement: Findings* *funders can create significant value when they invest in the workforce of grantee organizations, and this value can indeed be captured and communicated in powerful quantitative and qualitative fashion.*

& Forward-Looking Lessons," an evaluation of a funding stream meant to "increase the Foundation's impact by strengthening the nonprofit organizations and leaders with whom it partners" (Harder + Company, 2011, p. 1).

- *"Ladder to Leadership: Developing the Next Generation of Community Health Leaders,"* an evaluation of Robert Wood Johnson Foundation-funded leadership training for early- to mid-career professionals working with vulnerable populations in eight regions and communities across the United States (Kirk et al., 2013).

- *"Creative Disruption: Sabbaticals for Capacity Building and Leadership Development in the Nonprofit Sector,"* a cross-funder evaluation of sabbatical awards for grantee leaders provided by the Durfee Foundation, Alston/Bannerman Fellowship Program, Barr Foundation, Virginia G. Piper Charitable Trust, and Rasmuson Foundation (Linnell & Wolfred, 2009).

- *"From Creative Disruption to Systems Change,"* a follow-up to the "Creative Disruption" report, looks specifically at Durfee's sabbatical funding program (Linnell et al., 2017).

- *"Creating Broader Impact: The Bush Foundation Fellowships,"* an assessment of how three fellowship programs help individuals contribute to the strength of communities, organizations, and fields of work (Showalter & Itzkowitz, 2007).

- *"Schusterman Fellowship Evaluation,"* an assessment of Schusterman Family Foundation's signature leadership development program for Jewish nonprofit leaders (Learning for Action, 2017).

- *"Leadership Matters,"* an evaluation of six family planning and reproductive health leadership programs funded by the Gates and Packard foundations (Reinelt et al., 2005).

- *"Strengthening Leadership and Advocacy in Population and Reproductive Health,"* a retrospective evaluation of the MacArthur Foundation's Fund for Leadership Development, which aimed to foster new leadership in the population and reproductive health field (Institute for International Education, 2017).

- *"The Pathway to Leadership: Lessons from Clinic Leadership Institute,"* an assessment of Blue Shield of California Foundation's leadership program "designed to prepare emerging leaders to … sustain a strong and vibrant California community clinics system" (Howard et al., 2011, p. 1).

My colleagues and I reviewed the studies, examined related materials, and interviewed 10 of the evaluators to understand what the data say about the value of talent investments. When scanning evaluations across various interventions, time periods, geographies, issue areas, organizations, funders, and evaluation researchers (including many with doctoral degrees in their fields), it became clear that funders can create significant value when they invest in the workforce of grantee organizations, and this value can indeed be captured and communicated in powerful quantitative and qualitative fashion.

It is worth emphasizing that all these interventions and evaluations predate the public health, racial justice, and civic crises of the last seven years. For nonprofits, these crises have dramatically increased organizational instability, personnel loss, and difficulty hiring; inflamed epidemic-level burnout, Great Resignation symptoms, and internal conflicts; and exacerbated all the challenges that come with maintaining or reestablishing in-person programs, services, and workplaces. In the current context, it should be clear to grantmakers that investing in the nonprofit workforce in and beyond grantee institutions is both valuable and urgently needed.

Data on the Value of Talent Investing

We have organized the data based on the various units of change measured in the evaluation reports. Below we discuss the impact of talent investments on individual nonprofit professionals and at the organizational level. Then we share findings at the level of the ecosystem in which the individuals and organizations operate — variously defined as networks, place-based communities, social movements, and fields of work. Finally, we discuss the direct benefit of talent investing for funders themselves.

Individual Nonprofit Workers

Many of the evaluated interventions focused on creating change within or through individual nonprofit professionals. These changes often sought to contribute to organizational and field development as well, and were sometimes structured to do so, for example using cohorts across organizations to build relationships within a field of work. The data show significant growth in leadership skills, career and professional maturity, and openness to innovation. Here are several examples from numerous compelling data points:

- Sabbatical funding significantly improved indicators of well-being, with recipients reporting somewhat or very much improved work/life balance (82%), better connections with family (64%), and better physical health (68%) (Linnell & Wolfred, 2009).

- One year after the implementation of the RWJF's Ladder to Leadership program, evaluators found that 37% of participants had taken on more duties and 29% had received a promotion (Kirk et al., 2013).

- Twenty-four percent of executives in the Irvine Foundation's Fund for Leadership Advancement saw a major improvement in their job satisfaction (Harder + Company, 2011).

- One year after the Blue Shield of California Foundation's Clinic Leadership Institute, 46% of participants assumed a more senior role, 58% reported significant growth in their job responsibilities, and 79% received a salary increase (Howard et al., 2011).

Nonprofit Organizations

Some funders invest in individuals with hopes that participants will use what they've learned to influence their organizations. In other cases, funder interventions are intentionally designed to address staffing issues at a systemic level in order to advance organizational development. Evaluations typically measured at the level of intended intervention. If a program specifically worked with individuals, evaluations measured their interactions within an organization. In contrast, a program interacting with individuals and organizations often measured specific organizational changes such as governance changes. The evaluations found:

- Forty-seven percent of participants in the Blue Shield of California Foundation's Clinic Institute Emerging Leaders Program reported a significant contribution to organizational improvements (Howard et al., 2011).

- Seventy-three percent of MacArthur Foundation program alumni reported enabling their organizations to adopt new approaches to reproductive health based on what they learned during their participation, and 67% reported helping their organizations to secure more funding (Institute for International Education, 2017).

- Eighty percent of participants reported using their training from the Annie E. Casey Foundation's Leadership in Action program on an organizational level (Research Center for Leadership in Action, 2006).

Governance

Boards and board relations can be impacted by tailored programs or executive director sabbatical programs. Irvine's Fund for Leadership Advancement included a consultant, executive coaching, and board development as a part of its intervention. The executive directors reported improved ability to work with board members, improved board effectiveness, and increased alignment on organizational vision among executives, staff, and the board (Harder + Company, 2011).

In the first evaluation of Durfee's executive sabbatical programs, 60% of awardees and 53% of interim leaders reported improvement in board efficacy as a result of the preparation process in advance of the sabbaticals (Linnell & Wolfred, 2009). The second evaluation shows 46% of respondents continued to believe that board efficacy had improved. The report attributes this to boards "stepping up" while their executive directors were on sabbatical. In the same way, 75% of respondents reported the interim leaders were shown to have a "more productive relationship with the board of directors as a result of working more closely with them" (Linnell et al., 2017, p. 20). These reports suggest the planned rest and rejuvenation of an executive director can empower the board and staff of an organization to fill the temporary leadership gap.

Shared Frameworks; Organizational Impact

Several programs foster the development of shared language or frameworks for the organizations or fields they support. The Fund for Leadership Advancement report (Harder + Company, 2011) notes the development of a vision for the organization, while the Leadership in Action program (Research Center for Leadership in Action, 2006) places a value on the importance of identifying a shared goal. This sharing can occur between executive directors and their boards or between colleagues in a cohort that bridges social movements across institutions.

Many of the programs provided multiple mechanisms of intervention, such as seminars, trainings, project work, or coaching. Importantly, the Haas, Jr. Fund's Flexible Leadership Award (Ryan, 2013); the Irvine, Hewlett, and Packard foundations' Community Leadership Project (Yu et al., 2012); and Irvine's Fund for Leadership Advancement (Harder + Company, 2011) provided grantees with responsive, customized, organizational-development interventions such as consultants to help analyze staffing problems or gaps and develop plans to address them.

The Haas, Jr. Fund's Flexible Leadership Awards defined success as the advancement of organizational goals through long-term internal leadership development, echoing Pfeffer's principle of extensive staff training in alignment with organizational strategy. Over a multiyear period, the program supported recipient organizations to identify what staffing and leadership changes were needed in order to accomplish mission-related and organizational development goals; establish related leadership plans to advance their institutional goals; and determine whether their plans and goals were accomplished. They were able to take organizational actions such as developing their senior team or transitioning to a new board of directors. More than 85% of the organizations met or surpassed their leadership goals, and organizations met or surpassed over 92% of their mission-related goals (Ryan, 2013).

These findings indicate the multidirectional connections between investments in human capital (both staff and board) and the strength of organizations. They provide the initial data needed to show that the ability of nonprofits to perform with excellence and achieve significant outcomes are directly tied to how well they support and develop the capabilities of their staff teams.

Communities, Social Movements, and Fields of Work

Network development and creating connections between participants were frequently measured with network maps and through questions about collaborations with colleagues across institutions. According to the TCC Group, as cited by the National Council of Nonprofits, "'Capacity' should acknowledge that high quality connections between an organization and other actors within its network not only help that organization advance its mission, but also support the ability of the network to achieve broad change together" (Chandler & Kennedy, 2015, p. 2). Such network-based capacity was assessed in the majority of the evaluations.

Improved Networks

Networks were viewed as valuable tools for alumni of both fellowship and cohort-based programs. The Blue Shield of California Foundation's evaluation recommends continuing to develop and foster these networks among emerging leaders (Howard et al., 2011).

- The Schusterman Fellowships indicated that 76% of participants use the program's network to access information and resources, and 57% of participants contributed to the network (Learning for Action, 2017).

- One year after participation in the RWJF's cohort program, Ladder to Leadership, 71% of the participants reported leveraging networks to address community health challenges (Kirk et al., 2013).

- The MacArthur Foundation's evaluation reports that 57% of participants networked with public officials and 77% networked with other nonprofits (Institute for International Education, 2017).

Increased Collaboration

Ten evaluations measured the impact of these leadership investments on collaboration, whether on projects or toward a particular goal:

- One year after completing the RWJF's cohort program, 72% of graduates reported participating in the leadership of collaborative community projects (Kirk et al., 2013).

- In the Durfee Foundation's sabbatical program, 80% of participants reported they developed a personal and/or professional bond with other awardees (Linnell & Wolfred, 2009).

[F]unders can create multiple significant levels of value through investing in grantee staff: healthier, better-equipped, well-supported nonprofit leaders; more powerful, sustainable nonprofit organizations; and more robust, cohesive civil society networks able to advance their causes.

- The MacArthur Foundation evaluation finds that 57% of program alums collaborated with one another to increase their knowledge, and 59% collaborated on an activity that tackled a social issue (Institute for International Education, 2017).

Grantee–Grantor Relations

Several of the evaluations show how investing in grantee staff accrues to the direct self-interest of funders themselves. Often, this value seems to result from the close collaboration that customized organizational interventions require. Some evaluations discuss how programs improve the funder–grantee relationship by increasing honesty, goodwill, and trust. Other evaluations showed how talent investments enable funders to develop a deeper knowledge of community need, forge responsive relationships, and improve their own ability to advance the capacity of core grantees.

Working toward culturally appropriate grantmaking also creates learning opportunities for funders. In one case, the Community Leadership Project discusses the high level of engagement between grantors and grantees due to their

> hands-on and "in the trenches" approaches with grantees, implementing a range of non-traditional,

> culturally mindful funding practices, acknowledging biases within mainstream philanthropy that sometimes work against smaller organizations serving low-income communities, and recognizing the power differentials inherent in funder-grantee relationships. (Yu et al., 2012, p. 2)

In summary, funders can create multiple significant levels of value through investing in grantee staff: healthier, better-equipped, well-supported nonprofit leaders; more powerful, sustainable nonprofit organizations; and more robust, cohesive civil society networks able to advance their causes. Together, these individuals, institutions, and networks are better able to get results on the social issues that are of primary concern to funders and their grantees. Talent investing can also yield process outcomes that even more directly benefit funders, such as increased grantee trust of funders, improved knowledge of grantees and community needs, and improved power dynamic relations with grantees.

Observations

The following reflections and suggestions are based on our review of these evaluations and analysis from eight years of other research projects and observations.

Talent investing yields tangible value. The review of evaluation data from 13 foundation-commissioned studies documents that talent investing can significantly contribute to increased equity, effectiveness, and endurance among nonprofit workers, organizations, and causes. In addition to these critically important benefits, which accrue indirectly to funders, the reports show that talent investing can yield direct benefits for funders, such as increased trust between grantmakers and grantees — an issue that continues to grow as an area of concern among funders.

There is a need for clarity of purpose and clear goals. When funders construct interventions in the nonprofit workforce, they often focus on big concepts, such as building leadership, rather than more practical matters, such as ensuring that grantees can hire enough staff to achieve their mission goals, pay living wages, offer staff benefits like health insurance, and support the team in a manner that aligns with their values and strategies. While funders focus on leadership, they sometimes cannot specifically define what they mean by leadership, or what they want to see as a result of leadership (TCC Group, 2018). Getting clear up front on the goals of an intervention is necessary for assessing the effectiveness of the intervention. Starting with a view toward evaluation before the intervention begins can help funders to develop meaningful theories of change for their investments; gather data before, during, and after the intervention, and avoid the inevitable limitations of retrospective evaluations.

Restricted funding can be used strategically. Many funders have become concerned of late with offering multiyear general operating support, using trust-based practices such as streamlining bureaucratic procedures, and being more responsive to grantee needs. As can be seen in the data discussed above, talent investing can be designed in a fashion that is extremely complementary to multiyear general support. It can increase multidirectional trust — the trust funders have in grantees and the trust nonprofits have in their funders. As one experienced funder put it, "There are times when dedicated funding is an important complementary strategy for strengthening organizational leadership" (Wood, 2013, para. 12). Funds that are restricted for talent investing can concurrently compliment funds for general operating support. These talent investments can be proactively restricted to address human capital issues, while — within that context — they can and should remain extremely responsive to the particular strengths, needs, life stage, goals, and operating environment of each participating grantee organization.

Don't skip the organizational level. Many of the funder interventions we reviewed (particularly the fellowships) come from a leadership development approach. They focus heavily on individuals. Some of these have a secondary focus on building networks of leaders at the field level. These approaches largely skip over the organizational level. Yet most funders provide the bulk of their grants to organizations, not individuals or networks. Even as they skip over the organizational level, many funders want to see their talent investments yield organizational change — this contradiction results in disappointment that may minimize future investment opportunities. Alternately, the funders who develop talent-investing strategies based on the capacity-building approach tend to focus on the organizational level and are less focused on individual or field levels. While particular people come and go, people and institutions are irreconcilably intertwined. Individual leaders need organizations to drive change, and organizations need teams of leaders to function. There's an important opportunity for funders to blend the leadership development and capacity-building approaches to design interventions that address the individual, organizational, and field levels.

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Ground equity efforts in talent justice. Many organizations are struggling to address internal issues of diversity, equity, inclusion, belonging, and justice. Too often the conversations get abstract and intellectual. Yet often staff members are advocating on practical, tangible issues such as wages or benefits. Often the missing ingredient in these processes is talent justice — that is, talent investing done with an intersectional equity lens. Efforts toward DEI should engage not only program and executive staff, but human resources and fundraising staff as well. In order to be successful, they should make the link between racial equity and working conditions. This will help to develop policies and practices that advance the mutual interests of employees and their organizations.

Comparative data are often lacking. Like most foundation evaluations, the studies we reviewed do not rise to the level of experimental or semi-experimental in nature — nor should they have to. Rather, many of the reports are limited to self-reporting surveys of fellowship participants after a training or cohort experience. The more robust evaluations gather data through multiple methods (e.g., interviews, focus groups, primary source documents); longitudinal study (e.g., collecting data before, during, after, and a year later); and gaining 360-degree perspectives from stakeholders (e.g., supervisors, peers, and direct reports of individual participants). There is also often a lack of comparison data, both comparing change before and after an intervention, and comparing organizations that receive or participate in an intervention with those organizations that do not receive or participate in the intervention. Most funders are only providing talent investments to a small portion of their grantees, so there would not necessarily be any harm done by using the same survey instrument with participating and nonparticipating grantees over time to see if changes mirror one another or diverge.

Results may take time. Like our experiences with higher education or professional development, investments in nonprofit people can take time to bear fruit, as does the social change they are working to bring about. Talent investing has compounding benefits and ripple effects across organizations, individuals, and networks that are not always linear. These results often take longer to become visible than a one- or two-year grant-reporting cycle. Philanthropic foundations are one of the few kinds of institutions in our society that can act based on a long view, rather than quarterly earnings or election cycles. Yet, often to their own disadvantage, foundations end up creating internal incentives for program officers or other grantmakers to take the short-term view of relatively brief grant cycles. Interventions and evaluations that take the long view, and use a longer timeline, are more likely to bring about and observe the impact they seek.

Capture and communicate value. There is clearly a need for more data and messages about the value of philanthropic talent investing in the nonprofit sector. The Haas, Jr. Fund was so intentional about sharing with other funders about what it learned from the Flexible Leadership Awards that other funders — who saw the need in their own grantees but were not sure where to begin — asked if their grantees could participate in the program. This led the fund to spin off and rebrand the awards as The LeadersTrust, which is now composed of six funders, including the Irvine and Packard foundations and the Haas, Jr. Fund itself.

Conclusion

These days, there are clearly multimedia methods of communicating the value of talent investing, inclusive of both hard data and compelling storytelling, that may or may not be connected to formal evaluation data. Once again, the Evelyn and Walter Haas, Jr. Fund offers an example by complementing its evaluation report with a series of very brief video clips that feature the evaluator, foundation president, program officers, grantees, etc. The videos all help to illuminate and supplement the written evaluation report. Another example is the Foellinger Foundation (2020), a local independent foundation in northern Indiana, which produced a 30-minute online documentary film, also housed on its website, that tells the story of four nonprofit executive directors during their yearlong journey in one of Foellinger's leadership development cohort programs.

Capturing and communicating the value of talent investments may or may not include a formal evaluation process. Nowadays there are so many ways to share what we are doing and learning, and the meaning that talent investing offers to the nonprofit people, organizations, and causes who are boosted by these interventions. It's time for funders to stop being shy about sharing these impactful stories even if they are not backed by scholarly studies. Now more than ever, as the nonprofit workforce strains under the mounting pressures it faces, funders must openly discuss the real need for — and real value of — investing in the nonprofit workforce.

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