

## CREATING CHANGE BY Cultivating Talented Leaders

Philanthropy has a long history of cultivating leaders who are able to guide complex change efforts in public health, health care, and health policy. The demand for gifted leaders is growing as health policies become more complicated, health politics become more contentious, vulnerable populations become more marginalized, the organizations designed to serve them increase in number and scale, existing leaders near retirement age, and established institutions work to diversify their boards and staff. Health leaders need to be adept at scanning for threats, opportunities, and synergies; ensuring that their organizations or initiatives are nimble and ready to move on promising ideas; pulling in allies and creating a movement around their missions; and sustaining the momentum and direction of their change efforts. Funders have responded by enhancing efforts to develop new leaders, finding ways to provide respite for experienced leaders, and helping organizations manage the transition from one leader to the next.

Foundations and corporate giving programs have designed, supported, and run leadership development programs for decades. They most often support these programs in order to discover and develop talented individuals; strengthen organizations; and advance social change efforts in a community, region, or field. The identification of new leaders can bring vigor and innovation to a field, and can increase the visibility and power of underrepresented groups, such as women, people of color, young people, or residents of rural areas. The components of leadership development programs vary, but typically include learning objectives and curriculum, financial support, learning from peers, mentoring and coaching, action projects, technology support, and networking opportunities (Meehan 2003).

While being a leader can be invigorating and fruitful, it can also be difficult and draining. Even leaders known for their energy and vision find themselves in need of respite and reflection after years of service. Funders have learned, through personal experience and from their grantees, that providing overextended, underappreciated leaders with recognition, financial support, and opportunities for renewal is essential if they are to continue the work of social change for the long term (AECF 2001).

Still, leadership transitions are inevitable, and becoming more frequent in the nonprofit sector. A 1999 study of over a hundred nonprofit executive directors in California – of whom two thirds were in their first executive director role – found that only 20 percent anticipated taking on another such job, reflecting the difficulty of the position and forecasting a major hiring challenge in the future. The sector is also challenged by a

scarcity of middle managers and identifiable career ladders, mainly due to the relatively small size of so many nonprofit organizations. Increasingly, grantmakers are seeing leadership transitions as powerful and underestimated opportunities to strengthen the mission, direction, and vision of organizations (Adams 2004).

### LEADERSHIP PROGRAMMING TIPS

#### *Planning*

- Be clear about the outcomes you want to accomplish.
- Consider funding an existing program.
- Be prepared to make a long-term investment.

#### *Implementation*

- Build internal support for your program.
- Pay attention to diversity.
- Invest in an alumni component.

#### *Evaluation*

- Align learning expectations with evaluation funding.
- Consider conducting longitudinal evaluations.
- Try to capture and document learning across programs.

Sources: Meehan 2003; Development Guild 2002

### OPPORTUNITIES FOR GRANTMAKERS

Grantmakers are using a number of different strategies to develop and encourage new and seasoned leaders in health-related fields.

#### ► *Building the skills and networks of local activists* –

The Boston Foundation's *Boston Community Building Curriculum* offers grassroots leaders and resident activists training to strengthen their social networks and increase the impact of their community work. The curriculum includes a series of free workshops designed to introduce and strengthen specific skills, tools, and techniques that build the capacity of people who are working to create healthy, stable, and resilient communities. The foundation believes that most resident activists have already achieved a great deal through sheer will, self-taught skills, and hard-won wisdom, and the curriculum builds on their experiences. The curriculum is available in both English

and Spanish, through the Interaction Institute for Social Change, based in Cambridge, Massachusetts.

- ***Strengthening and sustaining leaders of community-based programs*** – *The Robert Wood Johnson Community Health Leadership Program* honors outstanding individuals who overcome daunting odds to expand access to health care and social services to underserved and isolated populations in communities across the United States. Each leader is awarded \$120,000: \$105,000 for program support and \$15,000 as a personal stipend. Nominees must be mid-career (5 to 15 years in the field of community health) and working to improve effective community-based programs that are struggling to grow and respond to emerging challenges. Selected community health leaders receive support from Third Sector New England to develop their programs into national models of community-based health care solutions. For example, 2001 community health leader Gina Upchurch is the founder and director of Senior PHARMAssist (SPA), which has helped more than 2,600 individuals on limited incomes obtain necessary medications and has educated more than 800 older adults about proper medication use. SPA also works closely with doctors and other health care providers to ensure that the often-numerous medications taken by seniors are as safe and effective as possible. In a 2000 study conducted at the University of North Carolina-Chapel Hill and published in the *North Carolina Medical Journal*, Upchurch found that emergency room visits and hospital stays dropped by approximately one-third among seniors who were SPA clients for at least one year. The SPA model is now in use in several other parts of the state.
- ***Giving underrepresented groups access to power structures and decisionmaking tables*** – The Henry J. Kaiser Family Foundation established the *Barbara Jordan Health Policy Scholars Program* at Howard University to honor the legacy of former foundation trustee and Congresswoman Barbara Jordan and to expand the pool of students of color interested in the field of health policy. The program places talented Latino, African American, Asian and Pacific Islander, and American Indian and Alaska Native college seniors and recent graduates in congressional offices to learn about health policy. Through the nine-week program scholars gain knowledge about federal legislative procedure and health policy issues, while further developing their critical thinking and leadership skills. In addition to full-time work in a congressional office, scholars participate in seminars and site visits to augment their knowledge of health care issues. They also write and present a health policy research memo.
- ***Providing sabbaticals for nonprofit executives*** – *The California Wellness Foundation Sabbatical Program* is managed by CompassPoint Nonprofit Services and provides \$30,000 grants to organizations to cover their leaders' salaries and expenses during sabbaticals, which last a minimum of three months. The program is funded by the foundation to

support nonprofit leaders and seeks to improve the long-term effectiveness of nonprofit organizations by providing their executives with the rest they need. In addition to the \$30,000 sabbatical grant, each organization receives up to \$5,000 for the professional development of the managers who will take on extra responsibilities in the absence of the sabbatical recipient. Most sabbatical recipients have served in the nonprofit sector for more than 20 years and have worked in their current roles as lead executives of health service organizations for many years without a significant break.

- ***Helping organizations move successfully through executive leadership transition*** – A decade ago, the W.K. Kellogg Foundation funded the Neighborhood Reinvestment Corporation (NRC) to increase nonprofit executive director retention. Part of the NRC's successful strategy included providing executive transition management (ETM) consultation to boards during the hiring process and providing training to newly hired directors. Since that time, further investments by The David and Lucile Packard Foundation, The James Irvine Foundation, the Evelyn and Walter Haas, Jr. Fund, and others have allowed the development and testing of a promising range of ETM services, most notably in the San Francisco Bay area. This support has enabled two local management support organizations – CompassPoint Nonprofit Services and The Management Center – to serve more than 200 nonprofit organizations since 1997. In Baltimore, the Baltimore Community Foundation, The Annie E. Casey Foundation, and six other local foundations – Goldseker Foundation, Straus Foundation, Blaustein Foundation, Francis and Marian Knott Foundation, France-Merrick Foundation, and William Baker Memorial Fund – have pooled resources to support a replication of the NRC/CompassPoint service model through the Maryland Association of Nonprofits. In 2001, 15 nonprofit organizations received assistance. In 2002, demand for executive transition services in Baltimore doubled, so the Maryland Association of Nonprofits has adapted a variety of lower-cost variations on the CompassPoint approach to expand the number of organizations served.

*This article is part of GIH's portfolio, Agents of Change: Health Philanthropy's Role in Transforming Systems. Each article focuses on an approach grantmakers are using to promote systemic or social change. The entire portfolio is available on GIH's Web site [www.gih.org](http://www.gih.org).*

## SOURCES

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