

# Leadership Development in the Social Sector: A Framework for Supporting Strategic Investments

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## Introduction

Current economic conditions have increased pressure on foundations to optimize their investments. This article offers a tool for doing this in an area of high leverage: leadership development. It offers a framework for assessing a foundation's current approach in this area that reflects the rising significance of collective leadership. This article is based on an in-depth review of leadership development practices carried out by one of the authors in three sectors – government, business, and social – as well as in the emerging multistakeholder sector. It reflects as well another of the authors' experiences evaluating leadership development programs and initiatives that have vastly different purposes, and co-creating with funders and evaluators a framework for assessing leadership investments that can guide program and evaluation design.

## The Value of Investing in Leadership Development

The value of investing in leadership has been well established in all sectors. For example, a comprehensive review of leadership development found that “investing in leadership development adds value, giving the organization a competitive advantage” (National Academy of Public Administration, 1997, p. 38). And a review specific to the social sector concluded that “there are ample reasons to invest in nonprofit leadership development,” citing a “convergence of factors – expectations for performance, senior-level retirement

## Key Points

- While much of the research on leadership and leadership development has historically studied private sector settings, recent work has begun to build knowledge about leaders in public and community settings.
- New models of leadership, including collective leadership, are being developed and implemented by foundations.
- A framework for identifying the level of intervention (individual, team, organization, network, or system) and the level of impact (individual, team, organization, community, or field of policy and practice) is proposed as a tool for more strategic investing in leadership development.

and turnover, competition for talent, increasing service and management demands – that have highlighted the importance of developing leadership within the sector” (Hubbard, 2005, p. 9). A rationale for investing in leadership development that is more specific to foundations is that doing so can contribute to the effectiveness of programs to which the foundation is already committed. Such was the experience of many U.S. foundations, which discovered through experience that a powerful route to organizational capacity building is through investments in leadership development (Hubbard, 2005; Enright, 2006). In addition, capacity-building interventions often fail without good leadership in place (Enright, 2006, p.1); the president of the Agnes E. Meyer Foundation, which has invested heavily in working with

leaders for some time, observed: “Over the years we’ve come to believe more and more in the link between strong executive leadership and effective organizations” (p. 9). The study that reports this found that “time and again, foundations’ executives spoke of a ‘growing understanding,’ ‘dawning realization,’ or an ‘increased appreciation’ of how leadership makes a difference. Equally important, many talked about the importance of connecting leadership development and organizational performance” (p. 10).

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Historically, most of the research on leadership development has been conducted through studies in the private sector; within the past 15 years, however, there has been steady growth of research on social-sector leadership as well. The Ford Foundation undertook one of the earliest studies of social-sector leadership based on its program to “scout and train America’s grassroots leaders” from 1966-1977, and told the story in the publication *Left-Handed Fastballers* (Nevin, 1981). David Chrislip studied collaboration in communities and wrote his groundbreaking book (with Carl Larson) on civic leadership based on experience with the American Leadership Forum in the 1980s (Chrislip & Larson, 1994). The W. K. Kellogg Foundation studied its leadership investments beginning in the mid-1980s and published reports on its 20-year national leadership program (Markus, 2001), the development of leadership in an international context (Millet, Reinelt, & Weber, 2001), and leadership directions

in the new millennium (W. K. Kellogg Foundation, 2004). It also supported the work of the Burns Academy of Leadership, which published reports such as *Boundary-Crossers: Community Leadership for a Global Age* (Peirce & Johnson, 1997). More recently, the Annie E. Casey Foundation has contributed research on neighborhood leadership development (Ahsan, 2009), network development (Jordan, 2006), and results-based leadership development (Annie E. Casey Foundation, 2006).

Investments in leadership development in the social sector have also increased. There are a number of reasons why interest in leadership development has expanded in the social sector, including:

- the complex and challenging problems addressed by this sector;
- the greater demands on the sector at a time when government support is waning and economic uncertainty deepens;
- the expected transition in leadership over the next five to seven years as the baby boomer generation retires; and
- the changing demographics of leadership as communities and society become more multi-cultural (Hubbard, 2005).

If the value of leadership – and leadership development – has been demonstrated under favorable economic conditions, it can be assumed to be of even greater value in times of scarce resources, when tough choices must be made in strategic ways. Ironically, under these conditions investors are at even greater risk than usual of making choices to invest in leadership development that is episodic, not strategic. In a climate of severe economic constraint, foundations may be tempted to scale back investment in leadership development when it is needed more than ever. Or they may be tempted to favor those investments that have the clearest measurable outcomes in the short term, require little collaboration, and ignore the long-term capacity needs that are critical for systems change. Thus there is reason to bring more than usual reflection to the choice of investments.

### The Emergence of Collective Leadership

What might strategic investments in leadership development in the social sector look like? Studies of best practices consistently point to the value of collaborative and collective approaches in civic and community initiatives (Jordan, 2006; Northwest Area Foundation, 2006; Center for Ethical Leadership, 2009). Many practitioners find that the individually oriented, “heroic” model of the leader is limited in its capacity to cope with the challenging conditions that are becoming typical within and across sectors (Hubbard, 2005). Peter Vaill calls these conditions “whitewater” (Kramer, 2007). The U.S. Army has developed an acronym for them: VUCA – volatile, uncertain, complex, and ambiguous (Hesselbein & Shinseki, 2004). Under such conditions individuals lack not only the ability but often the credibility to develop unilateral solutions to problems, which often intersect with multiple sectors. Similarly, the benefits of investing in leadership development with an emphasis on collective rather than individual leadership has been well documented (Enright, 2006; McGonagill & Pruyn, 2009). Pace-setting leadership development programs have shifted away from developing individual leaders out of context and toward the development of shared and collective leadership within context – e.g., organizations, communities, or fields – for a variety of reasons:

- Leaders singled out for training frequently do not return to their original organizations, or burn out when they do (Enright, 2006).
- Developing leadership one person at a time often requires more than what a single leader can achieve; it is also too slow for achieving the scope and scale of leadership needed to transform communities and influence policy (Enright, 2006).
- Teams of leaders can support one another in dealing with a culture not supportive of what they have learned when they return to their organization (Enright, 2006).
- Communities full of leaders enable more shared leadership as people assume civic leadership roles as their interests, needs, and circumstances change (Ahsan, 2007).
- Networks of leaders provide peer support that increases risk-taking and creative problem solving (Plastrik & Taylor, 2006).

- Leadership development that aligns multiple stakeholders across sectors around a shared goal can yield measurable results (Annie E. Casey Foundation, 2006).

As a consequence, foundations are increasingly investing in community leadership, network leadership, boundary-crossing leadership, and movement leadership (Hubbard, 2005; Jordan, 2006; Northwest Area Foundation, 2006; Plastrik & Taylor; The California Endowment, 2006; W. K. Kellogg Foundation, 2006).

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Grantmakers for Effective Organizations, the Leadership Learning Community, and, more recently, the Monitor Institute are all leading explorations about how to build network and community leadership capacity for social change and problem solving. Each of these organizations convenes funders and consultants in learning circles to enhance capacities to support leadership development in the context of collective work, networks, communities, and social movements. Diverse, culturally inclusive learning circles are a microcosm for working across differences and learning first-hand how to prepare individuals and groups to lead collectively with others whose cultures and practices differ from their own (Meehan & Reinelt, 2006; Reinelt, Yamashiro-Omi, & Meehan, 2010).

### Collective Leadership Theory

The emerging emphasis on collective leadership – evident to some degree in every sector – finds support in the realm of theory as well as practice. James MacGregor Burns, author of the seminal

book *Leadership* (1978) and often considered the father of the leadership development field, was asked in a recent interview about the next frontier for the field of leadership. Without hesitation, he answered, “We need to better understand leadership as a collective process.”<sup>1</sup> Collective leadership recognizes that wisdom can reside within a group. Under a number of conditions, groups have been shown to make better decisions than individuals (Surowiecki, 2004). And there is growing support for the idea that an intelligence can emerge in groups that transcends the intelligence of the individual members (Fetzer Institute, 2001; Hamilton, 2004). An increasing number of workshops and websites are devoted to this idea.<sup>2</sup> Peter Russell quotes the Vietnamese Buddhist monk Thich Nhat Hanh on this point: “The next Buddha will be a sangha [community].” Russell goes on to explain: “The next awakening will come through communal breakthrough, rather than the insight of a single being. . . . We’re going to need that sort of collective thinking to solve some of the problems we’re up against” (Shapiro, 2009, p. 33).

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This perspective finds echoes in the thinking of a wide range of scholars. The following perspectives illustrate the redefinition of leadership to emphasize the importance of shared, collective leadership:

- Leadership is an activity, not a role. It can be enacted by anyone in a system, independent of their role (Heifetz, 1994).
- “Heroic” leadership leads to “over-manage-

ment,” defense of turf rather than concern with shared goals, and weak teamwork and coordination; by contrast, shared “post-heroic leadership” releases the potential power of everyone (Bradford & Cohen, 1998).

- Leadership arises within communities of practice whenever people work together and make meaning of their experiences and when people participate in collaborative forms of action across the dividing lines of perspective, values, beliefs, and cultures (Drath, 2001; Drath & Palus, 1994).

Taken together, perspectives such as these suggest that a new paradigm of leadership is emerging. Chrislip and Larson put forth a collaborative premise in 1994: “If you bring the appropriate people together in constructive ways with good information, they will create authentic visions and strategies for addressing the shared concerns of the organization or community.”

Around the same time scholars and practitioners associated with the Center for Creative Leadership (CCL) began pioneering a systematic effort to articulate a new paradigm (McCauley et al., 1998; McCauley & Van Velsor, 2004; Drath et al., 2008; McGuire & Rhodes, 2009). They have elucidated the limits of the tacit existing paradigm underlying most of the previously dominant definitions, which focuses on the relationship between leaders and followers, in pursuit of shared goals. They argue that this paradigm is a special case of a more robust, outcome-oriented paradigm, which leaves open how those outcomes are attained. In their view, the purpose of leadership is to ensure three outcomes: direction, alignment, and commitment. The shift in emphasis from individual competencies to the results of leadership brings into sharp relief the weakness of privileging individual leader contributions. It underscores the need for attention as well to *leadership* capacity, defined as “the organization’s capacity to enact the basic leadership tasks needed for collective work: setting direction, creating alignment, maintaining commitment” (McCauley & Van Velsor, 2004). To be sure, these outcomes can result from the actions of individual leaders in positions of authority, who interact with followers in pursuit

<sup>1</sup> Interview by Deborah Meehan with James McGregor Burns in 2003.

<sup>2</sup> The home of the Collective Wisdom Initiative is at <http://www.collectivewisdominitiative.org>.

of mutually agreeable goals. But they can also result from a variety of other interactions that result less directly from the actions of such leaders, including initiatives from people not in positions of formal leadership, who mobilize others.

### Making the Case for Investing in Collective Leadership Development

Despite widespread support for a paradigm that recognizes the possibility of collective leadership, there continue to be challenges in making the case for investing in collective leadership development. Part of the challenge is the lack of understanding about what collective leadership is. Thought leaders in the field offer the following definitions and descriptions of collective leadership:

- The capacity of a group of leaders to deliver a contribution in service of the common good through assuming joint and flexible leadership according to what is perceived and required (Kuenkel, 2005);
- An approach that embraces the diversity of people and perspectives [and which] unleashes self-organizing and the collective intelligence that exists when people come together to act (Gauthier, 2006);
- Relationships in action that advance justice by trusting shared wisdom and liberating individual gifts (Center for Ethical Leadership, 2009);
- A dynamic process that brings together a diverse community of people around a set of pressing issues in an effort to build broad-based knowledge and participation that leads to constructive change.<sup>3</sup>

There is a need for a definition of collective leadership that integrates these perspectives. There is also a need to specify whether collective leadership is the cumulative result of spontaneous initiatives on the part of multiple individuals, or whether coordination of these initiatives is required, and if so, how that comes about. But efforts to make strategic investments in leader-

ship development that recognize these trends cannot — and need not — wait for this to happen. Frameworks for making strategic investments in leadership development already exist. Below we present a framework for clarifying the different levels at which collective leadership occurs, and the various capacities that it involves, making it possible to consider a wide number of choices when making investment decisions.

### A Framework for Investments in Leadership Development

A leadership development investment framework was first produced by Grantmakers for Effective Organizations (GEO) in 2005. Their report, “Investing in Leadership,” created a matrix that differentiated leadership development investments along three dimensions: individual, organizational, and community. Kathleen Enright, GEO’s president and chief executive officer, reports:

We started by looking at how to develop nonprofit leadership as a means of building organizational performance. We weren’t focused on individual or collective leadership outside of the context of the organization. But understanding that no single organization alone can make significant progress on society’s toughest challenges, we are now exploring how to build network and community leadership capacity for social change and problem solving. That’s where our work is moving. (Personal communication, January 2009)

In 2008, the Leadership Learning Community (LLC) partnered with the United Way of Toronto to adapt the GEO framework to be used as a tool to assist leadership funders in Canada to become more intentional about where they were investing resources, where there were gaps in investment, and how they might work together to maximize the impact of their resources (Gibson & Macklem, 2008). LLC added the level of “fields” to the matrix, and also identified “systems leadership” capacities as an important focus of leadership development investment. LLC was an early pioneer in making the case for investing in collective leadership and continues to work with leadership funders, practitioners, consultants, and thought leaders to illuminate the practices of collective

<sup>3</sup> Maenette Beham, Kellogg Leadership for Community Change evaluator, quoted on the Center for Ethical Leadership website: <http://www.ethicalleadership.org/philosophies/collective-leadership>

leadership development, and to help the leadership field move toward models and practices that are more inclusive, networked, collective, and accountable for population and field-level results (Leadership for a New Era, 2010).

In 2009, the framework was further adapted as part of a study for the Bertelsmann Foundation, aimed at identifying best practices in leadership development in all sectors, including emerging multisector leadership investments (McGonagill & Pruyn, 2009). The dimension of teams and team-building capacity was added to the matrix.

Building on the work just described, we created a leadership development investment framework to assist funders, program staff, and evaluators in making choices about their investments in leadership development. The expanded menu of options that we describe below can be arrayed as a 5×5 matrix that identifies 25 potential leadership-development opportunities. The matrix enables stakeholders to identify patterns in their investment strategies, engage in deeper dialogue about the purposes for investing in leadership, and become more strategic about future investments. Such clarity increases the likelihood of achieving desired results and ensuring that all program stakeholders hold similar intentions as they contribute to program design, delivery, and evaluation.

Determining where and how to invest in leadership development involves choice from an expanded menu of options. Instead of focusing exclusively or primarily on individual leader development, it is increasingly attractive to consider four other levels of leadership. These four levels involve intervening at the team level, the organization level, the community level and the field level. Leadership development programs also have the potential for five types of capacity development that can be catalyzed at each level: individual capacity, team capacity, organizational capacity, network capacity, and systems capacity. In this section we describe those levels and capacities. We then show how this expanded range of options can be organized as a Leadership Development Investment Matrix.

### *Levels of Intervention*

The following levels are particularly relevant for those supporting collective leadership and aspiring for societal change (Waddell, 2005).

- Individual level: Programs that target the individual level focus on development within individuals (e.g., inner work, skills development, and personal mastery).
- Team level: This level focuses on groups or teams as the unit of intervention. Teams may be inside or outside organizations.
- Organization level: Programs targeting this level consider the organization as a whole in fostering leadership development.
- Community level: Intervention at this level can target communities of place (a neighborhood, city, or region); communities of practice, such as networks of organizations and individuals with a shared goal (e.g., enhancing community well-being); or communities defined by some other organizing principle (e.g., ethnicity, youth, immigrants).
- Field level: This level includes professional fields (e.g., public health, early childhood education) as well as any policy domain (e.g., environmental sustainability, reproductive health). Movement coalitions fit here as well.

### *Types of Capacity Development*

- Individual capacity: Capacity development at the individual level focuses on development of qualities such as self-awareness, emotional intelligence, learning to take initiative, and creativity.
- Team capacity: Team capacity focuses on how well people are able to work together in groups and exercise team leadership, either within or beyond organizations. For teams external to organizations, the capacity includes the ability to organize around shared interests and increase capacity for innovation and influence.
- Organizational capacity: Organizational capacity focuses on the ability of the organization to foster internal collaboration and adapt to external challenges. It comprises the ability to respond to needs and opportunities in a sustainable way, while creating internal cultures that support the well-being and development

TABLE 1 Leadership Development Investment Matrix

	Goal of Development Effort				
	Individual Capacity	Team Capacity	Organizational Capacity	Network Capacity	Systems Capacity
Individuals	1. Develop capacity of individuals for self-awareness, ongoing learning, and exercising initiative	2. Develop capacity of individuals to work together in groups and lead teams	3. Develop capacity of individuals to understand and lead organizations	4. Develop capacity of individuals to cultivate and leverage peer relationships	5. Develop capacity of individuals to see the big picture, understand root causes, and influence systems
Teams	6. Develop capacity of teams to develop and elicit the full potential of all team members	7. Develop capacity of teams to define and attain purposes	8. Develop capacity of teams to enhance organizational performance	9. Develop capacity of teams to align their goals and activities across boundaries	10. Develop capacity of teams to prototype systems change
Organizations	11. Develop capacity of organizations to support staff, volunteer, and board-member development	12. Develop capacity of organizations to support effective teamwork	13. Develop capacity of organizations to foster internal collaboration to effectively adapt to challenges	14. Develop capacity of organizations to collaborate with one another	15. Develop capacity of organizational coalitions to lead systemic change
Communities	16. Develop capacity of communities to support reflective learning and engagement of community members	17. Develop capacity of communities to foster and support inclusive group initiatives	18. Develop capacity of communities to sustain organizations that promote community well-being	19. Develop capacity of communities to learn together and align efforts toward common goals	20. Develop capacity of communities to advocate systems change
Fields of Policy and Practice	21. Develop capacity of fields to cultivate innovative thought leaders and practitioners	22. Develop capacity of fields to organize around shared interests and goals	23. Develop capacity of fields to organize and disseminate knowledge and field best practices	24. Develop capacity of fields to find synergies across sectors and disciplinary boundaries	25. Develop capacity of fields to generate policy solutions and transform institutional practices and culture

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- **Individual capacity:** Individual capacity focuses on the ability to understand and influence the individual members of a system.
- **Team capacity:** Team capacity focuses on the ability to form bonds of trust and bridge differences. It also involves the capacity to generate and sustain peer networks across organizations and align interests around a common cause.
- **Organizational capacity:** Organizational capacity focuses on the ability to understand and influence the broader organization that shapes an environment. It entails the ability of members of a system to understand and address root causes in that system and intervene to better adapt to a changing environment and move in new directions. (See Table 1.)
- **Network capacity:** Network capacity focuses on the ability to form bonds of trust and bridge differences. It also involves the capacity to generate and sustain peer networks across organizations and align interests around a common cause.
- **Systems capacity:** Systems capacity focuses on the ability to understand and influence the broader systems that shape an environment. It entails the ability of members of a system to understand and address root causes in that system and intervene to better adapt to a changing environment and move in new directions. (See Table 1.)

### Mapping Programs onto the Matrix

The position of a leadership-development program on the matrix does not imply any statement of value. The appropriateness and effectiveness of an approach depends on its fit with institutional purposes and context. However, our experience has shown that the matrix can help funders reflect on and make choices that are best suited to their objectives, making more strategic choices about how to invest in leadership development.

*There is high value to creating linkages across organizations and among communities to build momentum, alignment, and increased leverage for influencing systems change.*

Historically, there has been a bias in all sectors toward focusing on development of individual leaders. Such programs may well be a good choice in a given situation. However, limiting consideration to this approach would confine choices to only the first row of five rows in the matrix. Our review of best practices has convinced us that there is powerful synergy in integrating leadership development strategies on the other four levels as well. For instance, when leadership development investments seek to influence organizational performance, encouraging attention to strategies in the second and third rows makes sense. Moreover, there is high value to creating linkages across organizations and among communities to build momentum, alignment, and increased leverage for influencing systems change, which makes the fourth and fifth rows and columns potentially attractive.

These more “systemically” oriented initiatives are something that a foundation is uniquely well positioned to undertake. The resulting communities that could evolve from some of these initiatives have the potential to become what Otto Scharmer

calls an “ecosystem of innovation” – a higher-level form or organization that is needed to cope with increasingly complex societal challenges (2007, pp. 323-326).

In the section that follows, we cite a number of programs that we regard as examples of “best practice.” In several cases, we show how these programs might be mapped onto the matrix. We regard our judgments as illustrative rather than definitive. Those with first-hand knowledge of a program might have drawn the map differently. The value of the framework lies in asking the questions more than in codifying the results.

### Capacity Building at the Individual Level

Although leadership development increasingly addresses levels beyond the individual, focus at this level continues to be useful. The Rockwood Institute’s Leadership from the Inside Out program is one example. It addresses the entire first row of the matrix: boxes 1-5. It is designed for executive directors and senior managers of seasoned and successful social-sector organizations with a progressive national and regional policy agenda. The program aspires to create a dramatic shift in participants’ capacity to both lead their organizations and networks effectively and to collaborate across the boundaries of issue area, political and organizing orientation, geography, and background. The program is by invitation only and includes training retreats, coaching sessions, personalized assignments between sessions, ongoing dialogue and support, and peer coaching sessions. The program emphasizes mindfulness, systems thinking/feeling/doing, and sustainable workload management. Like many of the best programs, it requires substantial time commitment: one year (Link, Gauthier, & Corral, 2008, p. 23).<sup>4</sup> (See Table 2.)

Many social-sector programs bring together leaders with the explicit aim of networking and building peer support across organizations. Programs of this kind often have the explicit goal – and in any case the indirect benefit – of nurturing

<sup>4</sup> Further information on this and other programs of the Rockwood Institute is available at <http://www.rockwoodleadership.org/>.

TABLE 2

Rockwood Institute's Leadership Inside Out Program					
	I	T	O	N	S
I	1	2	3	4	5
T	6	7	8	9	10
O	11	12	13	14	15
C	16	17	18	19	20
F	21	22	23	24	25

cross-organizational peer networks. For example, Hawaii Community Foundation's PONO program brings together mid-career social-sector executives for a year-long program of collective learning. Participants design and implement capacity-building projects focused on critical issues in their organizations. The program uses peer-centered learning. In a series of monthly training sessions, the group discusses key aspects of leadership. The goal is to "build a strong group of supports who can get to know each other and coach each other and give feedback" (Enright, 2006, p. 6). The emphasis on individual networking capacity places the program in box 4. However, it develops team (box 9) and organizational (box 13) capacity as well.

An increasing number of programs target individual development in leaders across multiple sectors. For example, Emerging Leaders Innovate Across Sectors (ELIAS) is hosted by the Presencing Institute and the MIT Leadership Center. The purpose of the five-month program is to contribute to the evolution of sustainable global market systems that build human, social, and natural capital as well as financial and industrial capital by building a cross-sector network of high-potential leaders and their institutions working collectively to generate new ideas, prototypes, and ventures. The program brings together 25 of the highest-potential emerging leaders from institutions in the corporate, public, and civic sectors. It uses cross-sector peer-shadowing experiences, learning journeys, deep listening and dialogue tools, reflection practices, and hands-on prototyping to transform potential to lead systems change. ELIAS fellows teach workshops

TABLE 3

Emerging Leaders Innovate Across Sectors					
	I	T	O	N	S
I	1	2	3	4	5
T	6	7	8	9	10
O	11	12	13	14	15
C	16	17	18	19	20
F	21	22	23	24	25

on "presencing" and coach each other and new fellows (Link et al., 2008). It would appear to address boxes 1, 3, 4, and 5. However the goal of contributing to global systems suggests that it could be classified as a systems-level intervention as well (21, 23, 24, and 25). Again, the purpose of mapping programs onto the matrix is not to achieve a perfect fit. Rather, discussion of which of several competing purposes is primary can be of great value to a program sponsor or program leader. (See Table 3.)

Experienced funders in all sectors have learned that the highest payoff tends to come from longer programs (McGonagill & Pruyn, 2009). However, attracting the most senior leaders to such programs is difficult. Thus some programs sacrifice duration of impact for seniority of participants. For example, the Leader-to-Leader Institute's Investment in America Program aims to "strengthen the leadership of the social sector" through a two-day program that brings together leaders from each of the three sectors to "share knowledge and experience in developing values-based, ethically driven leadership." To promote cross-sector dialogue on leadership it jointly hosts with the Conference Board and the U.S. Army a forum at the U.S. Military Academy at West Point that gathers a small, select group of CEOs and presidents from the public, private, and social sectors to examine mutual challenges facing all three sectors and the nation.<sup>5</sup> Thus it fits neatly in box 5. It also enhances one dimension of field capacity building: cross-boundary synergy (box 24).

<sup>5</sup> This program is described at <http://www.leadertoleader.org/ourwork/iap/index.html>.

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### Capacity Building at the Team Level

The first step beyond a focus on individual leader development is to target teams. Studies of social-sector leadership development have highlighted the importance of such a focus for a variety of reasons, as discussed previously. Some team-level interventions target intact teams, while others create less tightly connected teams of people within or across organizations to carry out an action. An example of the former is the Management Sciences for Health Leadership Development Program (LDP), which helps organizations develop managers who lead with vision. Intact teams engage in the program over a period of four to six months. They choose their challenges based on problems they face daily that are preventing them from achieving results. This allows them to immediately apply the leading and managing practices they are learning in the LDP workshops to real-life situations. They discuss strategies and actively address challenges through five types of program activities: senior alignment meetings to generate commitment and ownership of the program results among key organizational stakeholders; workshops on leading and managing; team meetings to transfer learning, discuss strategies, and apply leading and managing practices; team coaching; and stakeholder meetings to enlist resources that support the teams (Lemay & Ellis, 2006). Thus the program addresses all capacities at the team level, covering boxes 1-5. At the same time, it contributes to organizational capacity to support teams (box 12).

By contrast, the Jessie Ball DuPont Fund's Nonprofit Executive Institute brings together representatives from each of a range of organizations who do not constitute a formal team within their respective organizations. This four-and-a-half-day residential program brings together up to 10 "teams" of three – the CEO, a board member, and a staff member – from participating organizations. These teams work on a specific project during the week while attending faculty sessions on management and leadership topics. Each team leaves with an action plan and has the support of a faculty coach for a year as it refines and implements the plan (Enright, 2006, p. 22). The program's center of gravity is development of team capacity (box 7), but it also addresses

two other dimensions of teamwork: individual capacity on teams (6) and the capacity of organizational support for teamwork (9). In addition, it fosters one dimension of organizational capacity: internal collaboration (box 13).

### Capacity Building at the Organization Level

The Andrew W. Mellon Foundation's Orchestra Forum adopted a similar, team-focused strategy as one component of its 10-year, \$50 million initiative to strengthen a select group of symphony and chamber orchestras. It provided support to 15 participating institutions for strategic planning and change, while gathering teams of three from each institution to offer leadership development several times a year.<sup>6</sup> These teams typically consisted of a board member, a staff member, and a musician. The program supported the individual development of team members (box 6). However, individual development was only a means to the larger end of organizational renewal. The forum was designed to provide orchestras seeking artistic and organizational revitalization with opportunities to share their insights into new and effective practices, learn from each other, reinforce each other's experimentation, and further stimulate their own thinking by introducing them to creative leaders from other fields. Thus its primary purpose was building organization-level capacity to adapt to challenges by fostering greater internal collaboration among key stakeholder groups (box 13).

The Center for Creative Leadership is best known for open-enrollment executive education programs that focus on leader development, relying in particular on an array of assessment tools. Organizations sometimes sent several individuals to programs in the hope of catalyzing organizational change. However, CCL came to recognize the limited impact of individual learning on home institutions, even with the participation of multiple individuals. It now offers customized leadership solutions for organizations to blend change leadership and talent development in one integrated process designed to deliver bottom-

<sup>6</sup> More information on the Orchestra Forum is available at <http://www.orchestraforum.org/>.

line impact on the organization's business strategy. The process begins with an exploration with senior executives about the organization's strategic challenges, an assessment of leadership capacity to meet those challenges, and customized leadership-development solutions that combine leadership engagement, developmental activities, and organizational transformation. The end result is a more resilient, collaborative, and effective organization fueled by a strong leadership pipeline (Center for Creative Leadership, 2009). Such programs build organizational capacity by fostering individual, team, and organization development (boxes 11, 12, 13).

The Massachusetts Institute of Technology's Department of Facilities strove to create the culture of a learning organization (Carter, Ulrich, & Goldsmith, 2005, pp. 309-321). It chose the vehicles of a shift in individual mindsets and skills through teaching of the five disciplines of organizational learning (Senge, 1994) (box 11) and introduction of the practices of a Balanced Scorecard (Ulrich, Zenger, & Smallwood, 1999) (box 13) along with other organizational interventions. McGuire & Rhodes (2009), two scholar-practitioners associated with CCL, offer an explicit methodology for introducing culture shifts of this kind. Their approach features accelerating individual stage of psychological development (box 11) and working with the senior team (12), aiming to create a shift in organizational culture (13). They cite six case studies, in which three organizations were successful and three not.

### Capacity Building at the Community Level

The next step beyond a focus on organizations is to view a community as the arena of attention. The Annie E. Casey Foundation's Leadership in Action Program brings together government, social-sector and community leaders for an eleven-month program designed to develop their collective leadership capacity to work on behalf of children, families, and communities (Enright, 2006, pp. 35-36). The program builds skills and capacity to lead large-scale human services reform and community capacity-building initiatives. Each year the program targets a particular focus, such as increasing readiness for school entry. Participants engage in 10 months of intensive

research, learning and dialogue to understand the problem, meeting every six to eight weeks in meetings led by coach/facilitators. The group issued a report at the end of the program, which was endorsed by the state legislature. The program primarily addresses community capacity for joint learning and collaboration (box 19), while also enhancing communities' ability to advocate system change (20). Secondly it contributes to two capacities: networking (4) and systems (5).

Kellogg Leadership for Community Change (KLCC) is a 36-month program that helps communities across the country explore the potential of collective leadership to reshape their futures. Fellows representing different communities learn to share the mantle of leadership across traditional boundaries such as race, gender, culture, and class. They form relationships with each other that enable them to create new visions for themselves and to exercise collective leadership to realize their visions (Center for Ethical Leadership, 2009). The fellows work "to nurture collective leadership within their communities and then use collective action to create systems change" (W. K. Kellogg Foundation, 2006, p. 3). The program primarily cultivates community capacity at the system level (box 19), while also building organization capacity at the organization level in its development of intermediary institutions as a vehicle for the intervention (13). Its contribution to team capacity (7) and individual capacity (1) provides an illustration of a diagonal path through the matrix.

Lawrence Community Works (LCW) has created a MemberLink program for its member-volunteers that provides stipended development programs whereby members take on aspects of the stewardship of the network. There are 30 MemberLink opportunities, which range from fellowships to work with one of the LCW staff departments to internships, a network guides program, neighbor circle facilitators, and a movement city residency program (Traynor, 2009). The MemberLink program develops capacity along all five dimensions of the community level (boxes 16-20).

TABLE 4

Multistakeholder partnerships					
	I	T	O	N	S
I	1	2	3	4	5
T	6	7	8	9	10
O	11	12	13	14	15
C	16	17	18	19	20
F	21	22	23	24	25

**Capacity Building at the Field Level**

The last level of intervention is the field level. It is only here that one can leverage – and transform – the structures and underlying assumptions that form the context for policy and practice. In recent years an increasing number of initiatives are pitched at this level in order to address root causes and multiple layers of complexity.

Multistakeholder partnerships are one new form of leadership development at this level. Generon Consulting used its “Change Lab” methodology to initiate the Sustainable Food Lab, which aspires to make the mainstream global food system sustainable. The Food Lab is now in its sixth year, with increasing participation and projects (Senge et al., 2008, pp. 259-262). Together with Generon, the Synergos Institute (which later joined Generon in support of the Food Lab) created the Bhavishya Alliance (Hassan & Bojer, 2007), which attempted to reduce child malnutrition in India. Evaluations of these initiatives document the formidable challenges associated with taking on such diffuse and complex problems. However, they also point to achievements that validate the potential of partnerships of this kind to open up communication across traditional silos and develop collaborative solutions with representatives of the entire “system in the room.”<sup>7</sup> Although the primary focus of these interventions is on systems capacity at the field level (box 25), it actually addresses all levels in a diagonal fashion (boxes 1, 7, 13, and 19). (See Table 4.)

Some foundations have created new institutions to foster collective leadership development with

the potential to bring about systemic change. For example, the W. K. Kellogg Foundation catalyzed the creation of the Leadership Learning Community, which “connects a diverse group of leadership development practitioners, grantmakers, and thought leaders who identify successful practices, conduct research, evaluate current leadership efforts, and exchange information and tools” (Enright, 2006, p. 33). LLC fosters development of organizational capacity at the systems level (box 23), but also contributes to development of capacity at the individual (4) and community (19) levels.

The Richardson Family Foundation established the Center for Creative Leadership in Greensboro, North Carolina, which has had a huge impact on the field of leadership development (Datar, Garvin, & Knoop, 2008, p. 1). It develops field capacity at the individual level (box 21) and the system level (25), while also building capacity of three kinds at the organization level (boxes 11-13), as described in an earlier section. From a participant or organizational perspective, it can also be seen as addressing multiple dimensions of capacity at the individual level (boxes 1-3).

Some foundations have taken a knowledge-building approach, sponsoring studies that aim to identify patterns of best practice and draw lessons that others in the social sector can learn from. For example, the Evelyn and Walter Haas Jr. Fund and the Eugene and Agnes E. Meyer Foundation supported Grantmakers for Effective Organizations in writing the invaluable two-volume *Investing in Leadership* series on which this study has heavily relied (Enright, 2006; Hubbard, 2005). This knowledge enhances the knowledge available

<sup>7</sup> Learning histories and reports from the Sustainable Food Lab can be found at [www.sustainablefoodlab.org](http://www.sustainablefoodlab.org).

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within the field (box 23), while contributing to evolution of the system as a whole (25).

The Robert Wood Johnson Foundation established the Health & Society Scholars Program to build the field of population health by developing the capacity of scholars who can exercise thought leadership.<sup>8</sup> The program aspires to develop scholars who will change the kinds of questions asked, the methods used to analyze problems, and the range of solutions offered to improve the health of all Americans. They investigate the connections among biological, behavioral, environmental, economic, and social determinants of health. They also develop, evaluate, and disseminate knowledge and interventions addressing these determinants. The program accepts up to 18 scholars each year from six participating universities. The program primarily builds individual capacity at the field level (box 21), although at the same time it develops system capacity at the individual level (5).

### Using the Matrix to Reflect on a Foundation's Approach to Leadership Development

The primary purpose for which we offer this tool is to reflect on and refine a foundation's approach to leadership development. The Leadership Learning Community has supported a number of foundations with this process. LLC convened 25 funders and evaluators through its Funders Circle and Evaluation Circle in October 2008 to consider how the framework could be used to advance their and our efforts to make more strategic leadership investments and increase their impact. The group mapped their leadership strategies, then looked for patterns among the strategies of different funders. For instance, the Northwest Area Foundation staff noted that they invest across the community level. The Blue Cross/Blue Shield Foundation of Minnesota mapped its leadership work in the collective capacity-building domain across different levels. The Annie E. Casey Foundation noted that its leadership investments moved across the diagonal from personal mastery at the individual level to influencing policy and system change at the field level. Clarity around

the purposes of the leadership investment is a critical first step for conducting a useful evaluation. Evaluators have found that when there is clarity of purpose there is also greater clarity in the program design and the desired outcomes.

We believe the matrix also has value for program designers and evaluators. Through a meta-level analysis of leadership development programs, it is possible to identify promising practices associated with each cell or cluster of cells in the matrix and define the most likely outcomes (Leadership Learning Community, 2009). By aligning purpose, activities, and outcomes more intentionally, the value of leadership investments increases significantly. The potential creation of an interactive database based on the matrix might offer the field a powerful resource for sharing and applying learning about how to invest in leadership to increase impact.

### Communities of Practice and the Evolution of Leadership Investment Strategies

Any strategy can and should evolve with experience. Making explicit the assumptions about preferred approaches to leadership development establishes a firm grounding for continued experimentation and learning. Strategies are thus never fully "final" but continue to evolve.

Refining and evolving one's leadership strategies occurs in multiple ways. Sometimes strategies evolve because the goals, priorities, or context for the foundation's work shifts and new approaches are more appropriate. At other times, strategies evolve because the existing approach is not supported by evidence as having the desired effects.

The process of learning and adaptation can be accelerated through communities of practice, and they have been demonstrated to speed up the spread of best practices (Wheatley, 2002). Communities of practice are "groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis" (Wenger, McDermott, & Snyder, 2002). Such communities have existed for thousands of years. What is new is the recognition of

<sup>8</sup> <http://www.healthandsocietyscholars.org/1492/1509>

their potential for managing knowledge in more intentional ways, not only within organizations but among them and across sectors. They differ from networks in their level of intentionality and often in an orientation toward service. One way of understanding such communities is that they are a methodology for leveraging the learning potential of a network, taking it to the next level (Meehan & Reinelt, 2007). By sharing strategies and lessons learned among funders through a community of practice, successful approaches are more likely to be adapted and tried in different contexts. Fostering such communities is one way of exercising leadership at a community, field, or system level.

## Conclusion

In an era of diminishing resources, it is more important than ever for foundations to be strategic in their investments in leadership development and for program designers and evaluators to be rigorous in their choices. This article aims to support reflective practice of this kind by summarizing recent trends in the theory and practice of leadership development, which increasingly feature collective leadership in some form, and offering a framework for considering alternative options in light of the expanded range of possibilities that has emerged. It also encourages ongoing reflection on institutional practices through participation in communities of practice.

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