# A Typology of Investments in Leadership Development: A Prototype

Philanthropic funders increasingly recognize that committed and effective leadership can be a powerful vehicle for driving social change. This has led to an increase in leadership development grants and programs that aim to strengthen the leadership capacity of individuals, organizations, networks, and the communities and/or sectors in which they work.[1] Despite an increase in these investments, funders lack a common framework for understanding investments and a common language to talk about this work within their own foundations, with their peers at other foundations, and with partners. This typology is meant to fill that gap. The typology provides funders with a framework to better understand and tell the story of their investments in leadership development. It is our hope that funders will take this typology, test it with their investments and adapt it for wider utility.

Leadership development investments do not all take the same form. In some cases, leadership development may take the form of a traditional grant to an organization. However, investments may also be made through larger programs comprised of multiple grants, or non-grant forms of investments. We have attempted to make the typology "form neutral." In other words, it is our hope that the typology will be able to capture applicable information for a wide range of different leadership investment structures. However, we acknowledge that given the wide variety of investments in the field, there are likely to be cases where different and/or additional elements will be of importance in capturing the leadership story[2].

## Characterizing your leadership development investments can help you understand where you have been and inform where you are going

A systematic look at your leadership investments is a useful way to tell your leadership story. By coding your investments using a standardized typology, you can characterize those investments along many dimensions including size, content, structure, and the type of leaders that have benefited. The typology can help you understand how those investments link to a larger purpose, how they reflect your values and assumptions about leadership, and might also support improved alignment of your future investments with your values.

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[1] In 2011, estimated foundation spending on leadership totaled $400 million, excluding grants to individuals (McKinsey, 2014).

[2] See for example the Foundation Center Taxonomy (http://taxonomy.foundationcenter.org/)

Understanding how well you are reaching the goals that prompted you to invest in leadership development requires ongoing monitoring and evaluation. For further information on leadership development evaluation, please see our evaluation guidance document provided in the citation below.

ORS Impact (2018). *Evaluating Leadership for Social Change*. Available at: http://orsimpact.com/directory/evaluating-leadership-for-social-change.htm

## A common framework can help you share your story and learn from others

This typology also provides a common framework for funders to tell the story of their investments in leadership development. A common language can facilitate improved communication about your investments with both internal audiences (e.g. program teams, strategy teams, boards), and external audiences (e.g. other funders, potential partners, the communities you work with).

**The typology presented** below contains the codes and sub-codes that make up the leadership investment typology. The codes correspond to structural and contextual elements that can be important for creating your leadership investment story. These elements have been grouped together in three buckets, each corresponding to different elements of the leadership story.

1. Characteristics of the leadership development model
2. Characteristics of the leaders
3.  Characteristics of the investment

# Characteristics of the leadership development model

This includes characteristics such as the primary purpose, desired short-term outcomes and curriculum and program elements.

Table 1:  Characteristics of the leadership development model

| Code | Sub-Code | Sub-Code Description |
|---|---|---|
| **Primary purpose of investment** (i.e. long-term goal that leadership development is meant to support) | Strengthening or reforming a sector | Leadership development focused on a specific sector to strengthen capacity generally, reform or improve specific practices, or create a pipeline of leaders for the sector |
| | Advancing an issue or policy | Leadership development efforts designed to advance a specific policy or policy agenda |
| | Increasing community self-determination | Leadership development that is community-based, with a goal of building the capacity of communities to identify and solve problems. Programs focused on increasing community capacity for self-determination often put inclusion at the forefront, seeking to empower and amplify voices that are typically excluded from the negotiating table. |
| | Building a large-scale social movement | Leadership development with a larger goal of fostering or supporting a broad-based social movement to achieve large-scale change |
| **Priority short-term outcomes[3]** (i.e. desired short-term changes that result | Network capacity | Leadership development focuses on building network capacity, including cultivating relationships, aligning goals and resources, encouraging collaboration, and working across differences |
| | Organizational capacity | Leadership development focuses on building organizational capacity, including ability to understand and lead organizations, capacity to enhance organizational performance and sustainability, and capacity to promote effective internal collaboration |

[3] See also McGonagill, Grady and Reinelt, Claire (2010) "Leadership Development in the Social Sector: A Framework for Supporting Strategic Investments," *The Foundation Review*: Vol.2: Iss.4, Article 6.

| Code | Sub-Code | Sub-Code Description |
|---|---|---|
| from leadership development | Individual capacity | Leadership development focuses on building individual capacity, including self-awareness, management ability, and community engagement skills and transformational leadership |
| Curriculum elements (i.e. the skills and topics areas it that leaders learn about and practice during leadership development) | Organizational management | Leadership development activities focus on teaching organizational management skills such as, project management, financial management, fundraising, using data and strategic communications |
| | Interpersonal skills | Leadership development activities focus on teaching soft skills such as communication, conflict resolution |
| | Self-care | Leadership development focuses on developing wellness, balance and/or healing from trauma |
| | Systems thinking | Leadership development activities teach systems thinking, including ability to see the big picture, understand root causes, and other capacities necessary to promote systemic change |
| | Community organizing | Leadership development activities teach skills related to community mobilization and organizing |
| | Advocacy skills | Leadership development activities teach skills related to effective advocacy |
| | Transformational leadership | Leadership development activities focus on teaching the skills, practices and mindsets associated with transformational leadership[4] |
| | Adaptive leadership | Leadership development activities focus on teaching the skills, practices and mindsets associated with adaptive leadership[5] |
| | Diversity, equity and inclusion | Leadership development activities focus on teaching skills related to promoting diversity, equity and inclusion |
| | Network leadership | Leadership development focuses on teaching skills associated with network leadership[6] |

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[4] See for example Rockwood (https://rockwoodleadership.org/fellowships/democracy/)

[5] See for example the Cambridge Leadership Associates (https://cambridge-leadership.com/adaptive-leadership/)

[6] See for example the Center for Creative Leadership (https://www.ccl.org/articles/white-papers/networks-how-collective-leadership-really-works/)

| Code | Sub-Code | Sub-Code Description |
|---|---|---|
| | Evaluative thinking | Leadership development activities focused on teaching the "value of evidence and builds skills such as identifying assumptions, posing thoughtful questions, pursuing deeper understanding through reflection and perspective taking and making informed decisions in preparation for action"[7] |
| Leadership program components (i.e. how leadership development is being delivered) | Leadership program development and planning | Investments that lay the groundwork for future leadership development efforts, such as planning or curriculum development |
| | Repeating/ongoing trainings or long-term engagements | Investments in which the commitment of resources is long-term or enduring. Investments might take the form of ongoing fellowships or leadership cohorts |
| | Limited duration trainings, workshops, convenings or campaigns | Investments that entail offering a training, or series of trainings, focused on a specific topic designed to aid in developing leaders' capacity or to respond to a specific opportunity or threat or fill a specific capacity gap, in which the commitment of resources is short-term, exploratory or temporary |
| | Sabbaticals | Investments that provide support to allow organizational leaders to participate in sabbaticals to build new skills and abilities that will improve their leadership, or to promote rest and rejuvenation |
| | Self-directed research | Investments that provide opportunities for self-directed research |
| | Individualized coaching | Investments that provide individualized coaching to leaders |
| | Organizational consulting | Programs that seek to support the development of systems or capacities that support internal leadership development, including development plans, 360 reviews etc. |
| | Network maintenance and management | Programs focused on maintaining or increasing alumni engagement |

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[7] See for example the following by Thomas Archibald (http://comm.eval.org/communities/community-home/librarydocuments/viewdocument?DocumentKey=d1a4644d-434b-43f4-b8d5-bd6e10bfdd1b)

| Code | Sub-Code | Sub-Code Description |
|---|---|---|
| Level of funder engagement (i.e. the role the funder plays in leadership development) | Funding | Funder's primary role is to provide funding |
| | Design | Funder plays role in design of leadership program, including developing curriculum and program activities |
| | Implementation | Funder staff play a role in implementing the leadership development investment, including by devoting staff to serve as trainers or facilitators |

# Characteristics of the leaders

This includes characteristics of the leaders themselves, including level of experience, role within organization and domain of work.

Table 2:  Characteristics of leaders

| Code | Sub-Code | Sub-Code Description |
| --- | --- | --- |
| Leader level of experience (i.e. the types of leaders targeted) | Emerging leaders | Leaders with little previous leadership experience |
| | Mid-level leaders | Leaders with some but not extensive leadership experience |
| | Experienced leaders | Leaders with substantial previous leadership experience |
| | Youth or college age | Leaders that are under the age of 18 or in college |
| | Mixed | Leaders have multiple levels of experience |
| Role within organization (i.e. the role of leaders within their organization) | Executive level | Leaders hold positions at the executive or board level positions within their organizations |
| | Middle management | Leaders hold positions at the mid-management level within their organizations |
| | Entry level | Leaders hold entry level positions at their organizations |
| | NA | Not applicable because leader does not represent an organization |
| Domain of leader work (i.e. the area of focus of leaders involved in the effort) | Education and early learning | Leadership development targets leaders working in early learning and education |
| | Economic or community development | Leadership development targets leaders working in economic or community development |
| | Health and human services | Leadership development targets leaders working in health and human services |

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| | Environmental conservation | Leadership development targets leaders working on environmental conservation |
| | Arts and culture | Leadership development targets leaders working to promote arts and culture |
| | Global development | Leadership development targets leaders working in global development |
| | Social justice and human rights | Leadership development targets leaders working in social justice and human rights |
| | Women's issues | Leadership development targets leaders advancing gender equality or women's issues |
| | Children's issues | Leadership development targets leaders working on issues effect children and childhood development |
| | Faith based | Leadership development targets leaders from faith or affinity groups |
| | Multi-domain | Leadership investments targets leaders working in multiple domains |
| **Leader organization type** (i.e. the type of organizations from which leaders' hail) | Public | Leader organizations are in the government sector |
| | Private | Leader organizations are in the private sector |
| | Non-profit and grassroots | Leader organizations are non-profits or representatives of a community group |
| | Cross-sector | Leaders come from multiple different organization types |
| **Diversity or inclusion focus** (i.e. do leaders come from groups traditionally excluded from leadership opportunities) | Race and ethnicity | Leadership development targets leaders based on race or ethnicity |
| | LGBTQ | Leadership development targets leaders that are LGBTQ |
| | Women | Leadership development targets leaders that are women or girls |
| | Socioeconomic status | Leadership development targets leaders based on socioeconomic status |
| | Disability status | Leadership development targets leaders with disabilities |
| | Not specified | No explicit diversity, equity or inclusion focus |
| **Location of leaders** | United States-Community | Investments in leaders within the United States within a single community |

| (i.e. where are leaders located geographically) | United States-Regional/Statewide | Investments in leaders within the United States in a single region or state |
| | United States-National | Investments in leaders within the United States in multiple communities, regions or states |
| | Outside United States | Investments in leaders in a single community, area or region outside of the United States |
| | Global | Investments in leaders across national boundaries |

# Characteristics of the investment

This includes characteristics of the investment itself, including amount, duration, the number of leaders included and the type of grant recipient.

Table 3: Characteristics of the investment

| Code | Sub-Code | Sub-Code Description |
|---|---|---|
| Amount<br>(i.e. the amount of the investment) | (report as continuous variable) | Amount of grant or investment |
| Duration<br>(i.e. the length of the grant or investment) | (report as continuous variable) | Duration of grant or investment |
| Number of leaders included<br>(i.e. the number of individuals targeted for inclusion) | (report as continuous variable) | Number of leaders included, or participating |
| Longevity<br>(i.e. the length of financial commitment to the effort) | One-time investment | Investment does not represent a long-term or enduring commitment to the same organization, or group of leaders |
| | Ongoing investment | Investment does represent a long-term or enduring commitment to the same organization, or group of leaders |
| Grant Recipient<br>(i.e. the financial arrangement) | Direct to organization | Grant is made directly to an organization |
| | To an intermediary | Grant is made to an intermediary organization to either fiscal intermediary or a training organization |
| | Other | Investment uses a non-grant structure (e.g. foundation implements program in house) |