



A DESCRIPTIVE STUDY:

National Philanthropic Support for Human Services and Human Services Leadership Development

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Introduction

Ongoing work by the Robert Wood Johnson Foundation has sought to better understand the human services sector and its relationship to healthcare and public health in addressing overall population health and improving the lives of millions of Americans.¹ Work underway at Northeastern University and the Urban Institute focuses on the uniquely critical role that state and local governments play in facilitating — or impeding — the alignment and effective delivery of human services.

This paper describes the contributions of national philanthropy to the human services sector in general and to sector leadership development in particular. It provides descriptive answers to three questions:

Based on interviews with key leaders in the human services field, this paper additionally identifies a series of recommendations. Supporting information is contained in the appendices.

1

Which national foundations support public and private human services?

2

How do leading human services funders support or invest in human services?

3

To what extent and in what ways do these foundations support the human services sector through leadership development investments?

About this project

This project is part of a larger research grant funded by the Robert Wood Johnson Foundation (RWJF) and led by Jean McGuire at Northeastern University entitled *Advancing Alignment through State Government Practices: Studying public-sector administrative, regulatory, and procurement practices to help achieve successful alignment of health care and human services*.

Faculty at Northeastern University and collaborators at the Urban Institute investigated state government structures and practices related to human services delivery and management as well as the intersection with human service-related community-based organizations and their statewide networks. Several reports are forthcoming. Analytic work by the investigators and input from the grant's advisory board identified the need to better understand the role of national philanthropy in shaping the wellbeing of this sector, particularly in the leadership arena.

¹ McGuire, et al. (2019) *A Review of Healthcare and Human Services Engagement: Developing guiding principles and a strategic framework for grant-making that influences the healthcare-related human services sector*. Princeton, NJ: Robert Wood Johnson Foundation.

Background on US Private Foundation Investment in Human Services

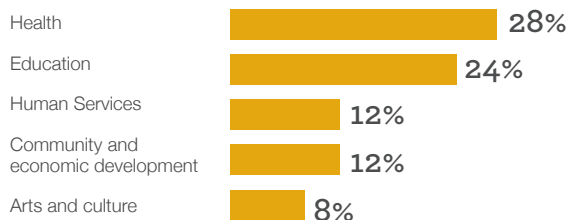
Philanthropic organizations provide various kinds of much-needed support to the human services sector: financing and capital development; operations and program implementation; research, evaluation, and learning; collaboration development and support; fiscal and management capacity development; and policy, advocacy, and systems change. This paper focuses on national foundations that support the primarily nonprofit organizations providing the human services. A snapshot of Key Facts on U. S. Nonprofits and Foundations, from candid.org in April 2020:²

- Foundation giving represents 18% of all giving (individual gifts total 68%).
- 120,000 U.S. foundations hold \$1.2 trillion in assets and distribute \$82 B in grants annually.
- Human services is the primary focus of about 27% of the 1.7 M U.S. nonprofit charities; three-quarters of all nonprofits are small, with less than \$100K in annual revenue.
- Independent grantmaking foundations — which include most of the largest national foundations — make up about 70% of all annual giving. Operating foundations — which run their own programs and may also make grants — and corporate foundations make up the balance.
- Human services represent the third largest area of investment by all U.S. foundations, at 12% of total dollar amount, following health (28%) and education (24%).
- One-third of all foundation funding — including that going to human services — is focused on economically disadvantaged people, followed by children and youth (23%), women and girls (7%), ethnic and racial groups (7%), and people with disabilities (3%).
- 41% of all funding supported program development as a strategy, followed by general support (20%), research and evaluation (15%), policy, advocacy, and systems reform (10%) and capacity-building and technical assistance (8%).

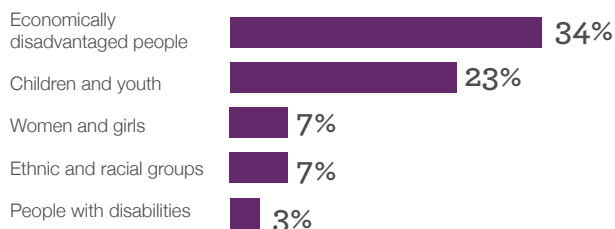
Taken together, U.S. private foundations invest about \$10B annually in Human Services, with about \$7B coming from large independent national foundations.

What do foundations fund most?

Top 5 subject areas by dollar amount



Top 5 populations by dollar amount



² Candid. (2020). Key Facts on U.S. Nonprofits and Foundations. DOI: 10.15868/socialsector.36381

Methods

Inclusion Criteria

The large independent national foundations constituted the basis of a further selection process that identified those entities providing support in the five human services domains represented in the Urban Institute's framework developed under the over-arching RWJF grant.³

- | | | | |
|---|---|---|--|
| 1 | Workforce Development and Financial Well-being Services | 4 | Child, Family and Community Services |
| 2 | Aging and Senior Services | 5 | Disability and Independent Living Services |
| 3 | Cash and In-kind Benefits | | |



³ The Urban Institute. (2022). *What are Human Services?* (forthcoming). Washington, DC.

An extensive literature review, key informant interviews, and website analysis of qualifying national foundations further narrowed the project focus to those philanthropic entities that were recognized as thought leaders in this arena. Additionally, in response to other questions emerging from the overall grant, the project sought to specifically characterize how these foundations invest in public and private human services leadership development, especially in the arenas of policy, advocacy and systems change.

Literature Review

This paper reflects a review of existing scholarship regarding foundation support for human services and the extent to which that support has resulted in increased capacity for public- and private-sector human services leadership. Appendix E includes a select list of relevant materials.

Foundation web site reviews

Working from the Urban Institute human services framework, the authors searched for national foundations whose websites indicated a significant organizational commitment in these arenas. 20 foundations were presented to key informants for verifying completeness and identifying national philanthropic thought leaders in the human services arena.

Key Informant Interviews

Review of publicly available foundation documents and existing scholarship shaped eight key informant interviews with human services leaders, including three national association executives and five human service organization leaders and consultants. Among other things, these interviewees were asked: Which national private foundations do you think of as thought leaders in the human services space? Their responses were synthesized and informed the identification of ten national foundations which became the “study foundations” because of their primary interest in and role as thought leaders in the human services arena. Ten foundation executive and program staff were subsequently interviewed. Finally, two national association executives participated in a “sense-making” exercise to review and comment on the overall findings and conclusions. The list of interviewees is included in Appendix A.

The ten study foundations were not necessarily the largest funders of human services. Seven other national foundations, notable for their financial support to human services but not included in the study group, are described in Appendix B. It is possible that the selection process missed potentially different contributions that may have come from these larger foundations and may suggest the need for future analysis.

QUESTION 1:

Which national foundations support public and private human services?

To answer this question, key informants were asked: *Which national foundations do you consider to be a thought leader or significant funder of human services?* The responses revealed a distinction between very large foundations with a diverse domestic and international portfolio inclusive of human services funding, and a second group of foundations

characterized by their primary and domestic focus on one or more of the human services as depicted in the Urban Institute framework. These cohorts differed in their primary mission and relative expenditures on domestic human services and, relatedly, in their roles as thought leaders in this arena. While funding for human services in large foundations, like Gates or Ford, is vast and varied, it constitutes a small part of their overall strategy.

Table 1. Brief Profile of the Ten Study Foundations

PRIORITY HUMAN SERVICES CATEGORIES

Study Foundation	Endowment / Annual Grants as reported on their web sites	Workforce Development & Financial Well-being Services	Aging & Senior Services	Cash & In-Kind Benefits	Child, Family, & Community Services	Disability & Independent Living Services
		WORK	AGING	CASH	CHILD	DIS
Arnold Ventures	\$2.3 B / \$409 M			X	X	
W. K. Kellogg Foundation	\$8.8 B / \$377 M	X		X	X	
Kresge Foundation	\$4.3 B / \$130 M			X	X	
Casey Family Programs	\$2.4 B / \$111 M				X	
Annie E. Casey Foundation	\$3.6 B / \$104 M	X			X	
Doris Duke Charitable Foundation	\$2.6 B / \$63 M				X	
Marguerite Casey Foundation	\$813 M / \$27 M				X	
John A. Hartford Foundation	\$644 M / \$18 M		X			
W. T. Grant Foundation	\$405 M / \$18 M				X	
Milbank Memorial Fund	\$81 M / < \$1 M		X			

Key informants characterized the second group of foundations by virtue of the larger role human services had in their overall mission and the extent to which human services was more holistically and strategically addressed, even if the entities did not explicitly self-identify as human service funders. This second group of ten national funders are the focus of this paper (collectively referenced as the “study foundations”). They share the status of “thought leaders” as identified by our key informants. They are diverse and provide annual grants that range in size from the hundreds of millions to less than one million dollars. Within these ten study foundations, investment strategies vary widely, but they all focus on human services as described above. The table on the next page lists these study foundations, their endowment size, and which of the five human services categories they support.

The larger and more diverse national foundations excluded from the study group do address at least one of the five domains of human services. Unlike the study group foundations, it was difficult to ascertain the percentage of resources directed to human services as a proportion of overall grantmaking for these larger and more diverse foundations. Nonetheless, the paper notes their considerable contributions to human services in Appendix B.

The **Robert Wood Johnson Foundation** (RWJF) deserves special attention within this group of large and influential institutions. While not named in interviews as a thought leader in human services, key informants recognized RWJF for its work in healthy communities and alignment of health care, public health, and human services. Given its size and commitment to an equity-driven Culture of Health, RWJF might have been also recognized for their support of human services were they not more closely identified with investments in healthcare system transformation and population health.

QUESTION 2:

How do leading human services funders support or invest in human services?

This paper sought to identify those national foundations that include grantmaking to support and advance the public and private human services sector, and to understand the degree to which their strategies include strengthening public and private leaders to engage in human services policy and systems change. Within the ten study foundations, investment strategies vary widely, but all of them focus on operations and grantmaking that reflect The Urban Institute’s five human

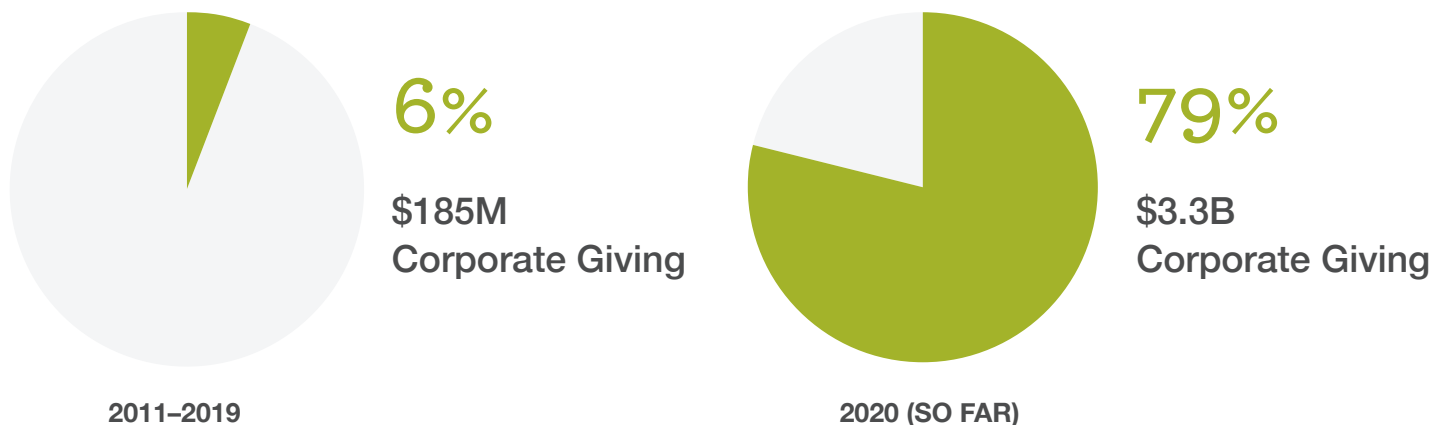
service domains. Appendix C describes these foundations in detail: their size in terms of endowment and annual grants, funding by each human services category, and other notable priorities and program approaches, especially those related to race and equity. Selected highlights are described below.

The **Kresge Foundation** (\$130 million in annual grants) is the most explicit in its commitment to human services, by naming “human services” as one of eight program areas. Kresge describes human services as “expanding opportunities in American cities by centering racial equity to advance social and economic mobility for families and communities.” In addition to their structural commitment to human services, key initiatives such as “American Cities” and the Detroit Program include support for human services, as does their social investment practice.

Although the **W. K. Kellogg Foundation** (\$377 M) does not use the term “human services” in its formal communications, they are frequently described by others as a human service leader, with an explicit focus on “Thriving Children, Families, and Communities,” as well as support of food access and stable, high-paying jobs. Though many foundation staff described categorical siloes within their organizations, Kellogg staff, among others, described intentional mechanisms to bridge the different content areas in a bid to act holistically across their related funding activities. Kellogg is an example of a phenomenon experienced across the study foundations. Most of them do not explicitly say “we fund human services,” but conversations with foundation staff make clear that they see their focus on different sub-sectors within human services as connected to an interdependent whole.

Each of the ten study foundations concentrate on at least one of the five human services areas described above. *Child, Family and Community Services* are the most frequently funded human service category, but priorities and relative investments vary widely. “The Caseys” were frequently mentioned, individually and collectively. **Casey Family Programs** (\$111 M) is an “operating foundation,” which operates its own programs and may also offer grants, focused on child wellbeing by improving the foster care system and those it serves, by providing direct services, consulting, research and analysis, and data for public policy change. The **Annie E. Casey Foundation** (\$93 M) is a grant-making foundation that focuses on improving the lives of abused and neglected children by improving the child welfare systems that serve and protect them. Their work also addresses economic opportunity, juvenile justice and other community change initiatives. **Marguerite Casey Foundation** (\$18 M) focuses on community organizing as a strategy for power-based community change, supporting community leaders in their fights for social and economic justice.

Share of funding for racial equity by corporate foundations and giving programs



Other study foundations are also addressing children, families, and community. The **W. T. Grant Foundation** (\$18 M) funds research focused on improving youth outcomes, in their own grantmaking and in concert with other study foundations. The **Doris Duke Charitable Foundation** (\$63 M) calls their focus “child well-being” and supports intergenerational programs that strengthen families and children that might otherwise become enmeshed in the child welfare system.

Aging and Senior Services are the named focus of two study foundations: **John A. Hartford** (\$21 M) and **Milbank Memorial Fund** (less than \$1 M). **Milbank**, the smallest foundation identified as a thought leader, is also notable in its explicit embrace of state human services policy investments, which will be further addressed below. At the other end of the size spectrum, **Arnold Ventures** (\$409 M in annual grants) is a strong funder and advocate for change in juvenile justice, addressing policing, pretrial justice, public defense, and reintegration of returning citizens as well as a number of other human services related areas.

Funding to address racism and health equity

In addition to their commitments to human services, or indeed, perhaps because of them, these foundations also make significant investments to address racism and injustice. With its focus on community organizing and power-building, the **Marguerite Casey Foundation** has been on the forward edge of funding community representation for leadership. In January 2019, **Arnold Ventures**⁴ launched “a new strategy focusing on achieving policy change in our core areas of Criminal Justice, Health, Education, and Public Finance using Research, Evidence and Advocacy as our tools.” **W. K. Kellogg** released their Racial Equity 2030 initiative⁵ and report that their commitment to racial equity is embedded in all their activities. **W. T. Grant** follows a programmatic focus on reducing inequality, and the **Doris Duke Charitable Foundation** supports leaders of color.

⁴ “Our Approach to Giving.” Arnold Ventures. Accessed on June 3, 2022. arnoldventures.org/grants.

⁵ “Racial Equity 2030.” Racial Equity 2030. Accessed on Jun 3, 2022. racialequity2030.org

In the wake of the police murders of Breonna Taylor, George Floyd, and Ahmaud Arbery, and the associated racial justice uprising, many funders made major commitments to racial justice.⁶ Many large investments and new initiatives come from foundations identified in the selection process but excluded from the study group. These include **MacArthur's** \$80M Equitable Recovery Grants;⁷ the **Hewlett Foundation's** \$150M commitment to address racial justice;⁸ and the **RWJF's** increasing commitment to racial equity and engagement of persons with lived experience of injustice. While a focus on human services may naturally lend itself to a racial justice perspective, this attention to racial equity is especially present in these foundations' human services leadership development portfolio. Because a commitment to racial equity is common in the study foundations, this emphasis on social justice may provide common ground for engagement across the study and non-study foundations.

QUESTION 3:

To what extent and in what ways do these foundations support the human services sector through leadership development investments?

Foundation leadership investments can be understood through their operations and priorities. For the first, foundations operate leadership development programs through two mechanisms:

- providing grant funding to organizations that in turn provide leadership development to selected participants in the public and private sector

- direct operation of their own leadership development programs themselves, which may be directed towards a cohort defined by roles or places or towards existing grantees and in support of their existing priorities.

As an example of the first, the **W.K. Kellogg** grants database documents that over 2,500 of their nearly 23,000 programs since 2008 reference "leadership," and 1,000 are tied to "leadership development." For example, descriptions from these entries reference grants support efforts towards "developing and building a network of leaders," "leadership and organizational development needs of leaders of color," and building "local residents' leadership capacity to self-organize and advocate."

As an example of the second, the **Kresge Foundation's** Leadership and Infrastructure Funding Team (LIFT) operates two leadership programs which it offers to its grantees. Kresge launched the Fostering Urban Equitable Leadership (FUEL) program in 2016 with a specific focus on racial equity to address grantees' talent and leadership development needs. **Kresge**, along with **Annie E. Casey**, **Kellogg** and others, funds the **Prolinspire Leadership Institute**, a nonprofit dedicated to developing social-sector leaders at all levels, providing leadership development training for a diverse group of rising leaders within Kresge's partner organizations. The foundation-operated leadership programs are described in Table 2.

Foundations leadership programs are also differentiated by their priorities across domains: population of interest, whether focused on the private or public sectors, the presence of a specific policy agenda, or whether targeted to participants with affinities of race, gender, maturity, or some other demographic consideration. These priorities are detailed in Appendix D and will be discussed in more detail below.

⁶ "What does Candid's grants data say about funding for racial equity in the United States?" *Candid.org*. Accessed on August 12, 2022. blog.candid.org/post/what-does-candid-grants-data-say-about-funding-for-racial-equity-in-the-united-states/

⁷ "Equitable Recovery — MacArthur Foundation." *MacArthur Foundation*. Accessed on July 20, 2022. macfound.org/programs/equitable-recovery

⁸ "New steps to address systemic racism." *William + Flora Hewlett Foundation*. Accessed on June 14, 2022. hewlett.org/new-steps-to-address-systemic-racism/

⁹ "Grants — W. K. Kellogg Foundation." *W. K. Kellogg Foundation*. Accessed on July 10, 2022. wkkf.org/grants

¹⁰ "Fostering Urban Equitable Leadership (FUEL)." *Kresge Foundation*. Accessed on July 10, 2022. kresge.org/initiative/fostering-urban-equitable-leadership-fuel/

Table 2. Highlighted Leadership Programs among the Ten Study Foundations

Leadership programs operated and supported by the Study Foundations are further described in Appendix D.

FOCUS	KRESGE FOUNDATION	ANNIE E. CASEY FOUNDATION	W. T. GRANT FOUNDATION	MILBANK MEMORIAL FUND
Leadership Program	Fostering Urban Equitable Leadership; ProInspire Leadership Institute	Children and Family Fellowship; Results Count	William T. Grant Scholars	Fellows Program; Emerging Leaders
Population	Grantee partners	Individual leaders; Organizational networks	Young people ages 5–25	
Programmatic	Private social impact organizations	Public, private, and philanthropic orgs in the social sector	Academics	Legislative and executive staff working in Population health
Career Level	Senior- and mid-level staff; rising leaders	Executives	Early career researchers	Executive; future executive
Equity	FUEL focused on racial equity	“Path to Equity” skills development	Reducing Inequality is one of two focus areas	None stated
Policy		Systems change capacity; Policy goals from CHLN		State leadership, primary care, aging, and HC costs
Relationship of members to each other	Individual Cohorts	Cohort and Alumni Network; Network hubs	Individual Cohorts	Cohorts and two state-focused networks

Three types of leadership development programs

Reviewing the current and evolving leadership programs supported by both study and other foundations suggests three distinct but overlapping types of programs:

These first two types of programs employ similar mechanisms in support of participants, including group and individual learning plans and projects, group convening, mentoring and professional development, and learning collaborations.

Further, they often support alumni networks to strengthen skills and relationships after the program has ended.

1

Those focused on **investments in individual people for their own growth**. Recent examples include newer programs focused on the development of people of color, such as **Doris Duke's** Diversity, Equity, and Inclusion Capacity Building Program¹¹ and **Marguerite Casey's** support to early career BIPOC academics.¹²

2

Investments in cohort-related core leadership development skills for role orientation or operations, usually targeted towards a specific sector or level of career advancement. Examples include convening state agency executives in a particular sector, such as the Center for Health Care Strategies' work with Medicaid Directors (funded by the **Robert Wood Johnson Foundation**)¹³ or the National Association of Public Child Welfare Administrators convened by the American Public Human Services Association.¹⁴ **Milbank's** Fellows and Emerging Leaders program¹⁵ and **Kresge's** previously mentioned LIFT initiatives are examples of programs targeting public and private sector human services leaders, respectively.

3

These approaches are informing a third type of leadership program that is more responsive to a changing landscape for policy development: **Investments for social change or towards specific policy outcomes**. In these emerging models, leadership development is understood as increasing individual capacity for strategic policy change approaches by focusing on the tools for effective systems change leadership.

¹¹ "DDCF Announces Diversity Equity and Inclusion Capacity Building Program." Doris Duke Charitable Foundation. Accessed on May 4, 2022. ddcf.org/news--insights/articles/ddcf-announces-diversity-equity-and-inclusion-capacity-building-program-grantees/

¹² "Marguerite Casey Foundation — Freedom Scholars." Marguerite Foundation. Accessed on April 29, 2022. caseygrants.org/freedom-scholars

¹³ "Medicaid Leadership Institute — Center for Health Care Strategies." Center for Health Care Strategies. Accessed on March 19, 2022. chcs.org/project/medicaid-leadership-institute/

¹⁴ "NAPCWA | Affinity Group | APHSA." American Public Human Services Association. Accessed on April 12, 2022. aphsa.org/NAPCWA/

¹⁵ Erawan, Alessa. "The Emerging Leaders and Milbank Fellows Programs' 2021–2022 Class Launch." Accessed on April 17, 2022, milbank.org/news/the-emerging-leaders-and-milbank-fellows-programs-2021-2022-class-launch/

Leadership development programs among the ten study foundations

Programs at the ten study foundations are changing to meet current needs and opportunities. For example, the **Doris Duke** Fellowships for Child Wellbeing has expanded into the **Child Well-Being Research Network**, leveraging 120 former fellows from the first ten years of the fellowships, and elevating applied research to inform policy and practice while adding more partners for new cohorts of leaders. This alumni network approach is reflected in the **Milbank Memorial Fund's** State Leadership Network, which is open to past participants in Milbank's existing state leadership programs and the bipartisan group of states that made up the Reforming States Group for over 25 years.

Annie E. Casey's **Results Count** program — which is focused on measurable policy change related to uninsured children — is one of two that appear to focus on general skills-building for social change. Their second is the **Children and Family Fellowship**, which hones the ability of participants in “making data-driven decisions; developing effective strategies; understanding systems; leading through complexity and ambiguity; and collaborating.” In the field of children's health and well-being, **Annie E Casey**, along with the Packard Foundation and Atlantic Philanthropies, launched the **Children's Health Leadership Network** (CHLN). The Network is intended to build on the separate work of these funders to develop public and private sector leaders in policy, advocacy, and strategic communications to “inform policy and implementation.” Founded in 2015 and reflecting Casey's “Results Count,” CHLN participants “select an overarching result that guides their work toward specific, measurable improvements for large numbers of young people and families.”

The other study foundations do not currently operate their own programs, though **Kellogg** and **Doris Duke** fund grantees that offer leadership development programs. **John A. Hartford Foundation** currently funds one grantee to support career development for professionals of color, and previously funded several leadership development programs,

including aging policy focused fellowships. **Marguerite Casey Foundation** provides “unrestricted support to leaders in academia whose research can provide critical insight to social justice leaders and whose ideas encourage all of us to imagine how we can radically improve our democracy, economy and society.” As an operating foundation, **Casey Family** does not describe a specific leadership development program on their website. However, one interviewee noted that their approach to leadership development is unique among these study foundations: “they make long term support commitments to organizations and leaders together. They don't fund towards foundation-established priorities but reverse the power dynamic to build relationships with leaders and orgs and provide them with the support” they identify as being needed.

Challenges facing human services sector philanthropic support

Through this analysis of the study foundations and in interviews with foundation and sector leaders, numerous challenges affecting the well-being of the human services were identified by the interviewees in terms of their related impact on philanthropic strategies in the sector.

Human services are inadequately funded

Human services have been estimated to be under-financed by 25–30%. Additionally, unlike healthcare, human services is overwhelmingly dependent on government financing.¹⁶ Furthermore, human services, for the most part, does not benefit from the entitlement and shared state and federal financing associated with Medicaid, creating tremendous burdens when need and utilization increase, especially in economic downturns and emergency situations. Finally, there is an absence of meaningful private payment or investment. Financial challenges create difficulties in the organization, management and delivery of human services and, as noted by interviewees, translate into considerable pressure for philanthropic support to focus on gap-filling and operational support instead of system and leadership development.

Human services are misunderstood and stigmatized

Inadequate resources also exacerbate a core challenge of the human services sector: the extent to which its services — and the people it serves — are largely invisible and often stigmatized. Interviewees lamented that the sector is “unloved, unrecognized and not fully understood,” in spite of the extent to which human services have been proven to improve the wellbeing of individuals, families and communities. They noted that resource limitations, among other things, “create a communications and marketing problem” for the sector, further exacerbating the lack of public appreciation of “the impact of human services.” They believe that public understanding of and value placed on human services is a key driver of resources available for the sector. Participants also worried that increasingly, human services are “valued primarily as a handmaid of health care,” including by philanthropy; they are concerned that potential new revenue from the healthcare connection also brings distortions and doesn’t address underlying problems in the sector.

Delivery systems are categorically funded and siloed

Within the field of human services, increasing attention is being paid to “whole-person care” approaches, particularly as the sector faces rising expectations to impact health

and healthcare. While there is a long history of efforts to align human services delivery, the sector is burdened by its siloed administrative structures and categorical funding. Interviewees identified a dissonance between the intention to address whole people, families, and communities and a financing and regulatory system structured around individual categories of services. “All of these funders talk about whole person care and person-centered approaches and yet their funding is primarily categorical. We can’t talk about the social determinants of [any domain] without talking about them all together.”

Race, gender, and economic inequities and disparities are increasing

The foundations themselves recognize these structural impediments — and their own maintenance of them — as part of the problem. Foundation executives admitted that even though they do collaborate, “we are still siloed. Efforts to move towards integrated models are incipient and unrealized.” Alignment of these services has been identified as an important tool for better addressing community needs and improving equity. Here too, one executive noted the challenge of philanthropic decision-making: “Our desire to address racial injustice and engage persons with lived experience is at odds with systems largely led and driven by persons of privilege.”

¹⁶ “Morris G, Roberts D, Leis H, Mehring A, Cederberg C, Shahid N, Dreyfus S, Absar R, Evans TW, DeSilva G, MacIntosh J, Cavagnero J. (2018). *A National Imperative: Joining Forces to Strengthen Human Services in America*. Oliver Wyman, SeaChange Capital Partners, Alliance for Strong Families and Communities, American Public Human Services Association.

Conclusions and Recommendations:

Considerations for philanthropic support of human services and human services leadership development

The eighteen interviews with foundation leaders and program staff, national association leaders, and other human services constituents resulted in many suggestions for philanthropic funding of human services related policy, advocacy and systems change. Collectively, interviewees championed three sets of interconnected recommendations:



Expand the collaboration and coordination of activities between national foundations which support human services

During the interviews for this paper, there was widespread agreement that there was no single foundation that was seen as the sole champion for the human services sector. The **Kresge Foundation** was the most frequently cited thought leader in the field, and “the Caseys” taken as a whole and **Kellogg** were also commonly mentioned. Still, the sector is vast and diverse, and no single foundation identified for this paper is currently funding all five of the service areas represented by the Urban Institute framework. However, given the sector’s challenges in addressing whole people, families, and communities, there is a great need and opportunity to connect and coordinate the support provided by many foundations to public and private human service entities, as in the example of different collaboration and coordination mechanisms shown below.

Foundation staff described existing successful funder collaborations, including those already mentioned, such as the Children’s Health Leadership Network and the Child Well-being Network. They also pointed out that many larger organizations and initiatives are funded in common across these foundations — through, for example, associations like APHSA, Social Current and through leadership initiatives like ProInspire and the Aspen Institute — although, without coordination in either funding application or expectations for outcomes.

The **BUILD Health Challenge** is a particularly good example of multi-foundation cooperation addressing cross-sector alignment, inclusive of human services. Founded by five foundation partners in 2015, BUILD has continued supporting local multi-sector collaborations through three cohorts, and now includes eleven foundation partners, including Kresge, Kellogg and RWJF. A powerful call for this kind of philanthropic collaboration in relationship to human services is contained in the “A National Imperative,”¹⁷ a report co-commissioned jointly by the national public and private human service organizations, the American Public Human Services Association and The Alliance for Strong Families and Communities (now known as Social Current). The report lays out a vision for human services delivery transformation, founded, in part, on improvements in foundation approaches to the sector.

Lever for Change represents a policy-focused approach to multi-funder partnerships. Lever for Change helps donors make major investments in solutions to “the world’s biggest problems — including issues like racial inequity, gender inequality, access to economic opportunity, and climate change.” Although Lever for Change is an affiliate of the John D. and Catherine T. MacArthur Foundation, its primary mechanism is as a grant facilitator, aggregating and distributing the resources of foundations and individuals that have a similar interest in disruptive change. Its challenge grant system, with donor commitments of at least \$10 million, allows for awards of substantial size.

Different Collaboration and Coordination Mechanisms



¹⁷ Morris G, Roberts D, Leis H, Mehring A, Cederberg C, Shahid N, Dreyfus S, Absar R, Evans TW, DeSilva G, MacIntosh J, Cavagnero J. (2018). A National Imperative: Joining Forces to Strengthen Human Services in America. Oliver Wyman, SeaChange Capital Partners, Alliance for Strong Families and Communities, American Public Human Services Association.

Among the strategies for improving inter-foundation collaboration suggested by interviewees was the development of a human services counterpart to **Grantmakers in Health**. GIH has as its mission “to foster communication and collaboration among grantmakers” addressing the health of all people. Foundation interviewees acknowledged that no such organization exists, and that there were benefits to be gained from greater collaboration. They suggested that policy and systems change was a rich area of possible collaborative action, because of the degree to which current investments focused on programmatic operations. Other roles for a cross-foundation effort could include common training and technical assistance and a shared learning collaboration. This could also be a way to engage the very large foundations not currently considered human services philanthropic leaders, by giving them an avenue to leverage and link their investments with other more sector-focused foundations. While they stopped short of an outright endorsement of the creation of “Grantmakers in Human Services,” there was widespread recognition that a need for coordination exists.

Expand and evaluate leadership development programs for strategic impact

Repeatedly, key informants reflected the need for more philanthropic investment in leadership development for both public and private sector human services with a particular focus on strategic policy, advocacy, and systems change skills. They reflected what the literature suggests — that there is insufficient attention to building transformative capacity in the sector and that that capacity is particularly important in the face of ongoing fiscal constraints, the need for regulatory relief, and the obligation to build a more whole person approach to care and support. Crossing administrative, fiscal, and service delivery boundaries requires innovation and strategic policy development and implementation skills. Participants felt philanthropy could play an important role here.

Across the 17 key informant interviews, interviewees discussed several different and innovative possibilities for leadership development. These suggestions — in whole or in part — could serve as aspirational standards to develop greater strategic capacity for leaders for systems change and to fill gaps unaddressed by existing, primarily management-focused leadership development programs. Key informant interviews identified this non-exhaustive list of possible

features that could increase individual and cohort capacity for strategic policy change approaches by focusing on the **tools for effective systems change leadership**:

- Focusing on specific policy outcomes that are determined according to foundation priorities or in concert with leadership program participants
- Identifying and including participation from all levels of career development
- Attempting to address practice, research, and policy together as elements of a whole field of study and practice
- Bringing together both public and private sector leaders rather than focusing on one or the other
- Including a networked approach to cohort development and alumni engagement; and
- Providing an intentional focus on current issues of race, equity, and engagement of persons with lived experience.

Interviewees also identified a nuanced set of leadership **skills for policy change and advocacy** that include behaviors that connect subject matter expertise, relationship development, persuasion and empathy, and the ability to describe and generate a shared value proposition. These competencies include knowing:

- How to operate within a fractured political landscape;
- How to identify potential partners and opportunities and reach across political divides to reach like-minded peers;
- How to develop porous boundaries;
- How to differentiate between the administrative barriers that can be relieved and those that have to be maintained;
- How to leverage political or social urgencies to relax barriers to partnership development; and
- How to share staff and resources across categorical funding or service delivery streams.

The limited resources for strategic human services leadership development requires prioritizing effective approaches and building useful evaluations. In general, as a mechanism of philanthropic investment, leadership programs and their impacts, including those in human services, have not been well evaluated.¹⁸ New investment strategies would benefit from a closer examination of existing human services

¹⁸ Kellerman, Barbara. *The End of Leadership*. HarperCollins, 2012.

leadership development efforts, potentially using some of the recommended components noted above to identify useful evaluation approaches. (A select list of existing programs is included in Appendix D).

While the author found little formal scholarship on the efficacy of leadership development programs in human services, two recent studies in other sectors offer possible strategies to inform evaluation efforts. Joel Njah, et al identified as a serious limitation in their review of global health leadership program evaluation the focus on short-term individual-level outcomes; there was little attention to long-term societal impact.¹⁹ They recommend a Theory of Change approach focused on long-lasting societal impact of participating leaders, including sustainability, organizational changes, and changes in implementation of policy and practice. Lamm, Sapp and Lamm's 2018 evaluation of change leadership²⁰ within the Land Grant University System also emphasized a longitudinal approach — focusing on three successive cohorts of leaders and illustrating the value of that model for better evaluating the effects of leadership development.

Explore initiatives to address the financial, political, and cultural position of human services in American society

In their 2018 report, Reframing Human Services,²¹ the National Human Services Assembly laid out the core challenge — to human services and to philanthropy — that was amplified in the key informant discussions:

In the end... these leaders believe that success requires a new public conversation about the intrinsic value of — and the need for investment in — the human service sector, both for the growing number of socioeconomically disadvantaged Americans and for the building of healthy communities.

The absence of public understanding has created an under-resourced and under-appreciated sector that is constrained in terms of its ability to meet its basic obligations of addressing equity, building social and economic mobility, and assuring individual, family, and community wellbeing. These realities also shape the opportunities and challenges philanthropy faces in supporting the sector.

Interviewees stressed the importance of the viability of the human services sector in terms of its own roles and responsibilities, and as a partner to other sectors, including healthcare and public health. They noted fiscal, leadership, communications, and strategic investment concerns. “If the human services sector is to play the role it should play, there really is a need to build its capacity and the capacity of its leadership to own the importance of the work that they do and be more sophisticated and strategic about how to speak up for themselves.” Further, it was noted that the impact on health and overall wellbeing is considerable — and, invisible in its preventive effect “... investments in the human services system are more effective, preventative rather than remedial”, and, as a result, these “...investments that support families and community health are having an impact on wellness.”

Thought leaders for this paper were supportive of a more strategic approach to leadership development, but also described some tension between supporting existing leaders and a “moral” imperative to address equity and achieve the transformation that will require new leaders. They suggested human service system developments that embrace:

- **an ecosystems approach** focused on the critical role of human services in addressing, with other sectors, the many interrelated factors that drive social, economic, and health outcomes for individuals, families, and communities;
- **a deeper commitment to racial equity**, including the recognition that historic and current human services systems have both contributed to racial inequities and led efforts to address disparities. Future efforts must include expanded investments in organizations and leaders from black, indigenous, and people of color communities.
- the lessons from the COVID pandemic that show the **power, resilience and critical expertise** present in community members and in the human services sector itself that are ready-made for future deployment; and
- an emphasis on **resolving the limitations** of categorical program and funding structures that contribute to the “wrong pocket problem” and prevent the development of whole person, family, and community approaches.

¹⁹ Njah J, Hansoti B, Adeyemi A, Bruce K, O'Malley G, Gugerty MK, Chi BH, Lubimbi N, Steen E, Stampfly S, Berman E, Kimball AM. Measuring for Success: Evaluating Leadership Training Programs for Sustainable Impact. *Annals of Global Health*. 2021; 87(1): 63, 1–10. DOI: <https://doi.org/10.5334/aogh.3221>

²⁰ Lamm K, Sapp L, Lamm A. A Longitudinal Evaluation of Change Leadership within a Leadership Development Program Context. *Journal of Leadership Education*. 2018. DOI:10.12806/V17/I3/R7

²¹ National Human Services Assembly. (2018). *National Reframing Human Services Initiative*. Washington, DC.

In summary, the findings and recommendations documented here are, in some sense, obvious to all who have been working in the field of human services for decades. As one thought leader said, "... what we need to do next is not unknown." What differentiates this review is the particular focus on the existing and potential roles of national philanthropy in stabilizing and building the human services sector of the future, with a particular emphasis on the importance of strategic leadership development and cross-philanthropic collaboration. There is an opportunity for foundations to comprehensively address the root causes of the social issues facing the country, and to build structures of support for current and emerging human services leaders.

Appendices

Appendix A: List of interviewees

The following thought leaders were interviewed between January and April 2022.

Foundation

1. Blue Shield of California Foundation (TC Duong)
2. Doris Duke (Rumeli Banik)
3. Doris Duke (Sam Gill)
4. Fidelity Charitable Trust (Tony Bowen)
5. Kellogg Foundation (Robb Gray)
6. Kresge Foundation (Joelle Jude-Fontaine)
7. Milbank Memorial Fund (Kate McEvoy)
8. Packard Foundation (Katie Beckmann)

Association

9. American Public Human Services Association (Tracy Waring-Evans)
10. Funders Forum (Jeff Levi)
11. Social Current (Jody Levison-Johnson)

Others

12. Ignatius Bau, consultant
13. Allison Hamblin, Center for Health Care Strategies
14. David Hansell, former New York State government official (now with Casey Family Programs)
15. Catherine Patterson, de Beaumont
16. Katherine Browne, consultant

Sense-making review

17. Tracy Waring-Evans and Jody Levison-Johnson

Appendix B: Selected large national funders who fund human services

The list below includes many of the largest philanthropies in the United States who fund human services. The list is representative, not comprehensive; it focuses on domestic institutions from a 2022 list compiled at Candid.com of “highly transparent” foundations. It does not include corporate foundations, regional foundations, nor those focused primarily on other sectors, such as higher education or healthcare. The figures for endowment and annual grantmaking are the most recent available from Candid, from 2017–2021. The sub-sector within human services follows the Urban Institute framework for Human Services described in the “Methods” section in the main body of the paper.

FOUNDATION	ENDOWMENT / ANNUAL GRANTS	FOUNDATION PRIORITIES	SELECTED DOMESTIC HUMAN SERVICES INVESTMENTS
Gates Foundation	\$49.9 B / \$5.8 B	Gender Equality, Global Development, Global Growth & Opportunity, Global Health, Global Policy & Advocacy, US focus on Education and Washington State initiatives	Workforce Development and Financial Well-being: Economic Mobility and Opportunity
Ford Foundation	\$14.2 B / \$520 M	Civic Engagement and Government, Creativity and Free Expression, Gender, Racial, and Ethnic Justice, International Cooperation and Global Governance, Natural Resources and Climate Change, Technology and Society	Workforce Development and Financial Well-being: Future of Work(ers); Disability inclusion
Robert Wood Johnson Foundation	\$11.9 B / \$434 M	Health Care Coverage and Access, Health Care Quality and Value, Public and Community Health	Human Services: Healthy Communities; Healthy Children and Families
The Conrad N. Hilton Foundation	\$8.5 B / \$339 M	Healthy Early Childhood Development, Sustainable Livelihoods for Youth, Support Youth Transitioning out of Foster Care, Housing and Services for People Experiencing Homelessness, Safe Water Access, and Promote Work of Catholic Sisters	Cash and In-kind Benefits: “individuals living in poverty”; Child, Family and Community Services
The David and Lucille Packard Foundation	\$8 B / \$371 M	Fighting Climate Change. Advancing Reproductive Health and Rights. Ensuring a Better Future for People and the Ocean. Empowering the Next Generation of Scientists & Engineers. Gaining Knowledge Through Science. Protecting and Conserving the North American West. Helping Farmers Protect our Planet and Nourish the World. Organizational Effectiveness.	Child, Family and Community Services: Child Well-being
The John D. and Catherine T. MacArthur Foundation	\$6.5 B / \$308 M	Chicago Commitment, Climate Solutions, Criminal Justice. Journalism & Media, MacArthur Fellows, Nuclear Challenges, On Nigeria	Child, Family and Community Services: Criminal Justice
The Rockefeller Foundation	\$4.9 B / \$416 M	To end energy poverty, achieve health for all, nourish the world, and expand economic opportunity	Workforce Development and Financial Well-being: Equity and Economic Opportunity; in Cash and In-kind Benefits: Good Food for All

RWJF, William + Flora Hewlett Foundation (\$11B endowment, \$355 M annual grants), and MacArthur have made significant investments in racial equity: health and racial equity, racial justice, and equitable recovery, respectively.

Appendix C: Study Foundations and their investment priorities

These national foundations named in project interviews as thought leaders in funding human services, including Urban Institute framework sub-sectors documented in the Methodology section as inclusion criteria. Also included is information regarding Equity and Race priorities, and other identified priorities. Information comes from interviews, foundation web sites, and candid.org. Financial information reflects the most recent available, between 2018–2021.

W. K Kellogg Foundation, \$8.8 B endowment, \$377 M annual grants

- **Workforce Development and Financial well-being services:** Stable high-quality jobs
- **Children, Family and Community Services:** Thriving Children, Working Families, Equitable Communities
- **Other notable priorities and program mechanisms:** interventions focused, with equity, leadership dev, capacity building, policy delivered by all grantees
- **Equity and Race:** Truth, racial healing and transformation; Racial Equity 2030 challenge

Arnold Ventures, endowment amount unavailable, \$2.3 B endowment, \$409 M annual grants

- **Children, Family and Community Services:** Criminal Justice reform
- **Other notable priorities and program mechanisms:** Evidence-Based Policy, Contraceptive Choice & Access, Research on Gun Violence, Policing, Complex Care, Drug Prices, Higher Education

Kresge, \$4.3 B endowment, \$130 M annual grants

Only Human Services Lead Foundation to explicitly name “Human services” as a priority

- **Cash and in-Kind Benefits:** People with low incomes
- **Other notable priorities and program mechanisms:** American Cities; Arts & Culture; Detroit; Education; Environment; Health; Social Investment Practice

Casey Family Programs, \$2.4 B endowment, \$111 M annual grants

- **Children, Family and Community Services:** Child Welfare, direct services
- **Other notable priorities and program mechanisms:** Consulting, direct services, public policy, research; leadership in five sectors — government, business, nonprofit and faith-based, philanthropic and the community members themselves — working together

Annie E. Casey Foundation, \$3.6 B endowment, \$104 M annual grants

- **Workforce Development and Financial well-being services:** Employment, Education and Training
- **Children, Family and Community Services:** Child Well-being
- **Other notable priorities and program mechanisms:** Foster Care; Community Development; Economic Opportunity; Equity and Inclusion; Evidence-based practice; Juvenile Justice
- **Equity and Race:** Learning community for state leaders + People with Lived Experience
- Leadership Development; Research and Policy

Marguerite Casey Foundation, \$813 M endowment, \$27 M annual grants

- **Children, Family and Community Services:** Community Organizing
- **Other notable priorities and program mechanisms:** building power for communities that continue to be excluded from shaping how society works and from sharing in its rewards and freedoms.
- **Equity and Race:** Support to academics of color

John A. Hartford Foundation, \$644 M endowment, \$18 M annual grants

- **Aging and Senior Services:** Older adults
- **Other notable priorities and program mechanisms:** Age-friendly health systems; Family Caregiving; Serious illness & End of life

W. T. Grant Foundation, \$405 M endowment, \$18 M annual grants

- **Children, Family and Community Services:** Child Welfare
- **Other notable priorities and program mechanisms:** Reducing Inequality; Improving the Use of Research Evidence
- **Equity and Race:** Reducing Inequality

Doris Duke Foundation, \$2.6 B, \$63 M annual grants

- **Children, Family and Community Services:** Child Well-being
- **Other notable priorities and program mechanisms:** Performing Arts, Medical Research, Environment, Child Well-being, Building Bridges (working with U. S. Muslims), African Health initiative
- **Equity and Race:** Leaders of color

Milbank Memorial Fund, \$81 M, < \$1 M annual grants

- **Aging and Senior Services:** Health of Aging Populations
- **Other notable priorities and program mechanisms:** State HS policy; State Health Policy Leadership; Primary Care Transformation; The Health of Aging Populations; Sustainable Health Care Costs

Appendix D: List of Leadership Development Programs

This is a non-exhaustive list of current and past leadership development programs focused on human services professionals, as discovered during this engagement.

Leadership Development Programs in the Study Foundations

W. K Kellogg Foundation, \$377 M annual grants

- **Leadership development programs:** By grantees
- **Population focus:** Thriving children, working families, equitable communities
- **Public or private focus:** public, private, community leadership
- **Sector focus:**
- **Policy focus:** Named as focus
- **Career focus:** executive transition support
- **Equity + Race focus:** Embedded within all we do are commitments to advancing racial equity and racial healing, to developing leaders and to engaging communities in solving their own problems.

Kresge, \$130 M annual grants

- **Leadership development programs:** Next Generation (two-gen approach); Leadership Infrastructure and Funding Team (LIFT), Fostering Urban Equitable Leadership (FUEL)
- **Population focus:** grantees
- **Public or private focus:** private
- **Sector focus:** Human Services
- **Policy focus:**
- **Career focus:** mid-level and senior
 - + Strengthen HS sector to advance social and economic mobility.
 - + Integrate racial equity by dismantling racist institutional and structural barriers.
 - + Leverage identified adjacent sectors.
 - + Support meaningful career pathways and wealth-building.
- **Equity + Race focus:** included above

Casey Family Programs, \$111 M annual grants (operating foundation)

- **Leadership development programs:** Support to cohorts of leaders and orgs
- **Population focus:** children and families
- **Public or private focus:** private organizations
- **Sector focus:** Foster Care
- **Policy focus:** Nonpartisan resource for federal and state policymakers: Data, advocacy, partnerships
- **Career focus:**
- **Equity + Race focus:**

Annie E. Casey Foundation, \$93 M annual grants

- **Leadership development programs:** Children and Family Fellowship; Casey Fellows Alumni Network; Children's Health Leadership Network
- **Population focus:** children, young people and families
- **Public or private focus:** public and private, and philanthropy
- **Sector focus:** more child- and family-serving professionals the confidence and competence to lead major system reforms and community change initiatives
- **Policy focus:** State-level policies and systems reforms also have a significant role to play in strengthening child and family well-being. Promising state-level reforms include extending foster care services to youth beyond the age of 18, adopting community-based alternatives to juvenile justice involvement and offering a local Earned Income Tax Credit."
- **Career focus:**
- **Equity + Race focus:** Learning community for state leaders and PLE

Marguerite Casey Foundation, \$27 M annual grants

- **Leadership development programs:** Freedom Scholars
- **Population focus:** low-income families
- **Public or private focus:** private, community leaders
- **Sector focus:** Community organizing
- **Policy focus:** system change and cross system change
- **Career focus:** Academics of color
- **Equity + Race focus:** Support to academics of color

W. T. Grant Foundation, \$18 M annual grants

- **Leadership development programs:** Grant Scholars for early-career researchers
- **Population focus:**
- **Public or private focus:** academic
- **Sector focus:**
- **Policy focus:** measurement to reduce inequality
- **Career focus:**
- **Equity + Race focus:** Research to reduce inequality

Doris Duke Foundation, \$15 M annual grants

- **Leadership development programs:** Fellowships for Child Wellbeing — Child Well-being Research Network
- **Population focus:**
- **Public or private focus:**
- **Sector focus:**
- **Policy focus:**
- **Career focus:** Executive; mid-career
- **Equity + Race focus:** Leaders of color

Milbank Memorial Fund, < \$1 M annual grants

- **Leadership development programs:** Fellows program; Emerging Leaders program; state leadership network for all alums
- **Population focus:**
- **Public or private focus:** Public
- **Sector focus:** human services, healthcare costs, aging
- **Policy focus:** State Health Policy Leadership, Primary Care Transformation, The Health of Aging Populations, Sustainable Health Care Costs
- **Career focus:** mid-career
- **Equity + Race focus:**

Leadership Development Programs identified in the key informant interviews

American Express

- + Leaders of color program

Annie E Casey

- + Executive Leadership Institute
- + Race to lead, nonprofit leadership

Ascend Fellowship, Children and Families

American Public Human Services Association

- + Affinity groups

Ashoka

Blue Shield of California

- + All In for Kids, collaboration for HS for ACES and trauma-informed
- + Futures without Violence

Casey Family

- + Urban child welfare leader meetings, with state and local CW

Catalyst collective for leaders of color

Centers for Disease Control and Prevention

- + Presidential Fellows
- + PHPS for early career

Commonwealth Fund

Doris Duke Charitable Foundation

- + Fellowships for child wellbeing (managed by Chapin Hall)
- + Leaders of color in high-level positions
- + Also, grantees with resident leadership development programs
- + Boston and Dallas Fed, on community leadership development, with Boston more engaging the community to develop the program
- + Leaders for equitable local economies

Fidelity Charitable Trust

- + Institute for nonprofit practice, early leaders and leaders of color
- + Proinspire
- + The Management Center, for leadership

Ford Foundation Fellowships

Harkness Fellows

Indian Collective

MacArthur “Genius” Fellows

Milbank

- + Fellows Program
- + Emerging Leaders Program

National Black Child Development Institute

- + Policy Fellowship Program

NDN Collective Changemakers Fellowship

Packard, NASHP for state Medicaid directors

Proinspire

Rockefeller

RWJF

- + Culture of Health Prize
- + Health Policy Scholars
- + Mid-career HC policy fellows

SOAR program for women, trauma and story development

Leadership Development Programs identified in unpublished research by a foundation in preparation for developing their own leadership development program, 2015

Annie E. Casey Children and Family Fellowship

Ascend/Aspen Institute

Ashoka Fellows

Barr Foundation

Center for American Progress
Leadership Institute

Center for Curatorial Leadership

Foster America

Foundation for Child Development Young Scholars Program

MacArthur Fellows

Soros

National Conference of State Legislatures Early Learning Fellows

SRCD Policy Fellows

Skoll Awards for Social Entrepreneurship

Robert Wood Johnson Leadership for Better Health Programs

Insight Data Science Fellows Program

Stoneleigh Fellowships for Social Change

W.T. Grant Foundation — Young Scholars Award

Strengthening the link between Research and Policy

- + Stoneliegh Foundation Fellowship
- + National Poverty Fellows Program, U of WI (research)
- + Spencer Foundations Fellows (NAEd)
- + Doris Duke Fellowship for the Promotion of Child Well-Being
- + William T. Grant Scholars
- + William T. Grant Distinguished Fellows
- + OPRE Head Start Research Scholars
- + OPRE Child Care Research Scholars
- + OPRE Family Strengthening Scholars
- + SRCD Congressional Fellowship
- + SRCD Executive Branch Fellowship
- + RWJF Health Policy Fellows

Appendix E: Additional References

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Northeastern
University