



Next Generation Leaders of Color 2010 Initiative Pilot Key Evaluation Findings Report

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integrating information for impact

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Executive Summary

PROGRAM DESCRIPTION

In 2009, CompassPoint Nonprofit Services received a grant from The California Wellness Foundation to develop the Next Generation Leaders of Color (NGLC) leadership development program. NGLC focused on two of the critical content areas that pose significant challenges for many community-based managers and leaders:

- To supervise, develop, inspire, and influence people.
- To develop business acumen with an emphasis on financial strategy, comprehension, and literacy.

In 2009-2010, NGLC pilot participants came together for a series of twelve in-person seminars. Topics alternated between leadership content and management content. To support the development of culturally competent leadership, the seminars utilized a framework that examined cultural dimensions in managing people and financial literacy. Prior to the seminars, participants completed a 360-degree assessment which was debriefed with a coach and an individualized professional development plan developed based on the results. Executive coaching and technical assistance was available to participants during the program to support their individual leadership and professional development goals. Additionally, facilitated peer coaching groups met at the end of each in-person seminar to reinforce learning and provide real-time problem solving and peer support.

HIGHLIGHTS OF KEY FINDINGS

Overall value for participants was reflected in participants' comments regarding their personal and professional development during NGLC and further demonstrated by the lack of participant attrition. All sixteen participants remained with the program for its entire twelve-month duration.

NGLC Seminars were effective in meeting learning objectives, and were appreciated for their overall design and facilitation, including opportunities to tackle personally and professionally challenging situations and concepts with a peer group with whom strong connections were formed.

Facilitated peer-coaching groups were highly valued and important in developing the space for participants to explore ways in which they began to apply their learning and skills. Participants unanimously described these as 'excellent' in enhancing their learning during their last two seminars, and comments were gathered to describe specific personal and professional development that the groups fostered.

Coaching and Technical Assistance improved several participants' awareness of leadership style and leadership skills, planning and fostering of career next steps, and development in other important skill areas, including recognition of the importance of self-care.

Participant Outcomes, described in their stories and comments during the mid-course check-in and final presentations, indicate the success of the combination of modalities – seminars, peer-coaching groups, and one-on-one coaching – in transferring the understanding and skills gained into practices, both personally and professionally, and influencing the health and development of their organizations.

Short-Term and Interim Outcomes – Knowledge and Skills

NGLC's logic model described a continuum of growth from increased awareness and knowledge to improved skills related to NGLC's critical content areas including aspects of leadership, people management, peer coaching, non-profit finance, and multicultural frameworks.

1. Executive Summary

Throughout their NGLC experience, participants reported that NGLC's objectives, described in the short and interim outcomes of the NGLC logic model (See Figure 2 on page 9) and assessed through post-seminar evaluations, were achieved. Nearly every seminar objective received an average rating of 3.0 or higher. Furthermore, the highest rated learning objectives listed below spanned the critical content areas and included the use of a multicultural framework.

Highest Rated Learning Objectives

- *Made commitments to self and staff using a supervision vision statement and personal framework, mean = 3.82*
Seminar 7 - Supervision Part 2: Applying the Multicultural Framework
- *Were able to explore personal strategies for managing change, mean = 3.67*
Seminar 9 - Managing Change
- *Understood how a strengths approach can support and reinforce multicultural leadership, mean = 3.64*
Seminar 4 - Strengths Based Leadership
- *Determined their organizations' immediate financial strengths and weaknesses, mean = 3.64*
Seminar 8 - Financial Leadership: Strategies and Considerations
- *Understood the four foundational coaching skills, mean = 3.60*
Seminar 1b - Coaching Skills for Managers and Directors
- *Understood what coaching is, what it is not, mean = 3.60*
Seminar 1b - Coaching Skills for Managers and Directors

Interim Outcomes – Applying Skills in Their Organization

As participants concurrently experienced NGLC and continued in their positions within their organizations, they recognized the impact of the program as they applied the content in their organizations. While the transfer of learning into practice will be further explored in a follow-up survey in the coming months, participants' comments indicated that changes were occurring both personally and professionally that influenced their work and the culture of their organizations. For example:

"When I took the adaptive leadership assessment, I gave my organization zero [ratings]. But then we started talking about it. About our power and how to change and they were open to my suggestions! Now we're getting along really great. Now you'll hear them saying things like, "You know, I'm a relater..."

1. Executive Summary

"I am being promoted to overseeing five programs – it's a huge role! A year ago I was offered this same position and I turned it down. Through this program I realized that I'm ready for this! I want to be able to change people's thinking and use power in leadership. Be inclusive and give people opportunities to say what they are thinking, to influence how management sees and values staff, and not to have a deficit model."

"Financial leadership vs. survival: I didn't know I was in survival mode. I didn't realize I could be a financial leader. I am able to go back to the organization and ask better questions, get better budgets, do better monitoring. It made a big difference for them and for me."

Background & Overview

INITIATIVE BACKGROUND AND DESCRIPTION

In 2009, CompassPoint initiated Next Generation Leaders of Color (NGLC). The Initiative was a response to the findings from CompassPoint's national research report, *Ready to Lead! Next Generation Leaders Speak Out* released in 2008. With a sample size of more than 6000 respondents nationwide spanning the full range of non-profits, this report provided a timely and unique snapshot of the demographics, needs, and trends of leaders in the field. The three key findings that led to the conceptualization and development of NGLC were the following:

1. 28% of all respondents were identified as people of color and there were even fewer people of color among senior managers and directors.
2. People of color expressed a greater need to gain management skills to prepare for executive leadership than white respondents. Furthermore, among people of color who were actively seeking a job outside their organization, they were twice as likely as whites to leave the nonprofit sector for their next job.
3. Of the preparation needs cited, the need to further develop external connections and networks ranked number one. This was closely followed by the need to further develop technical management skills and the need to develop leadership capabilities.¹

CompassPoint translated these findings into nonprofit leadership, management and sector challenges (i.e., people of color in the sector's leadership pipeline, managing people and managing money) and an overarching frame (multicultural framework) that would provide deeper relevancy and produce greater impact in terms of increasing nonprofit leader capacity and competency. Consequently, NGLC focused on two critical content areas that pose significant challenges for many community-based managers and leaders:

- To supervise, develop, inspire, and influence people.
- To develop business acumen with an emphasis on financial strategy, comprehension, and literacy.

By focusing on these two areas, NGLC hoped to not only deepen the management and leadership capabilities of the individual participants, but also to increase the overall health and sustainability of their current and future organizations of employment. NGLC used a framework that examined cultural dimensions in managing people and financial literacy, fostering culturally competent leadership in these areas.

PARTICIPANT PROFILE

Next Generation Leaders of Color pilot was a 12-month program delivered to a cohort of 16 individuals. All participants remained in the program for its duration. The candidate profile was a person of color currently in a mid-level manager position (or equivalent experience), and working in a health and human service social change organization in the San Francisco Bay Area. Participants could be any age and demonstrated a commitment to a career in the nonprofit sector and an aspiration towards professional advancement. During the application process, candidates were assessed on a variety of dimensions including their eligibility, ability

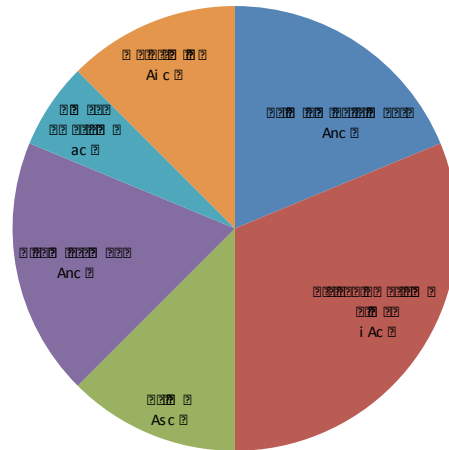
¹ For other findings and additional detail, see *Ready to Lead? Next Generation Leaders Speak Out*, by Marla Cornelius, Patrick Corvington and Albert Ruesga, published by CompassPoint, 2008.

2. Background and Overview

to articulate how they saw their work in social change, how they thought about their career in this context, and their readiness to participate in this intensive program.

NGLC participants were diverse in their race/ethnicity. Among the 16 participants, the largest number, approximately one-third (33%), identified as African-American/Black, followed by Hispanic/Latino (19%) and Asian Pacific Islander (19%).

Figure 1. NGLC Participant Race/Ethnicity



While there was some variation in individual nonprofit and supervision experiences, on average, participants had been in their current position for 2.5 years and held a little over five years of experience in nonprofit management. Participants reported an average of almost six years of experience supervising staff; they had an average of 4.5 direct reports at the time of enrollment in the program. The organizations' participants varied in their staff and budget sizes. For example one organization engaged in advocacy, had a total budget of \$400,000; whereas, the largest budget was \$770,000,000 for a county-level department of health. As organizational budgets varied, so did the budget amounts overseen by NGLC participants. These ranged from approximately \$100,000 to just over three million dollars.

Table 1. NGLC Participant Nonprofit and Supervision Experience

| Participant Experience N = 16 | Average Across Participants | Minimum | Maximum |
|--|--------------------------------|---------|---------|
| Years in Current Position | 2.47 | .08 | 8.00 |
| Years of Experience in Non-Profit Management | 5.37 | 1.50 | 18.00 |
| Years of Experience Supervising Staff | 5.83 | 1.50 | 12.00 |
| Current Number of Direct Reports | 4.56 | 1.00 | 15.00 |

Table 2. Current Organizational Budget and Staffing for NGLC Participants

| Org. Budget and Staffing Description N = 16 | Median | Minimum | Maximum |
|---|-------------|-----------|---------------|
| Current Organizational Budget | \$3,032,000 | \$400,000 | \$770,000,000 |
| Budget overseen by NGLC Participant | \$412,941 | \$103,000 | \$3,032,000 |
| Organization paid-staff FTE | 24.5 | 2.6 | 3500 |

CORE COMPONENTS AND SEMINAR TOPICS

360 Degree Assessment Tool

The assessment occurred at the onset of the program. It provided participants an insight into the way others perceived their performance based on their workplace behaviors. Participants were provided coaches to debrief the assessment results and to work with them to develop their individualized professional development plans based on the results.

In-person Seminars

Participants gathered monthly over the course of the 12-month program for highly interactive learning sessions. The seminar topics incorporated a multicultural framework that examined cultural dimensions and alternated between leadership content and management content.

Facilitated Peer Coaching Groups

Each participant was assigned a facilitated peer-coaching group. Peer groups met at the end of each in-person seminar and were designed to reinforce learning and provide real-time problem solving and peer support.

Leadership/Executive Coaching

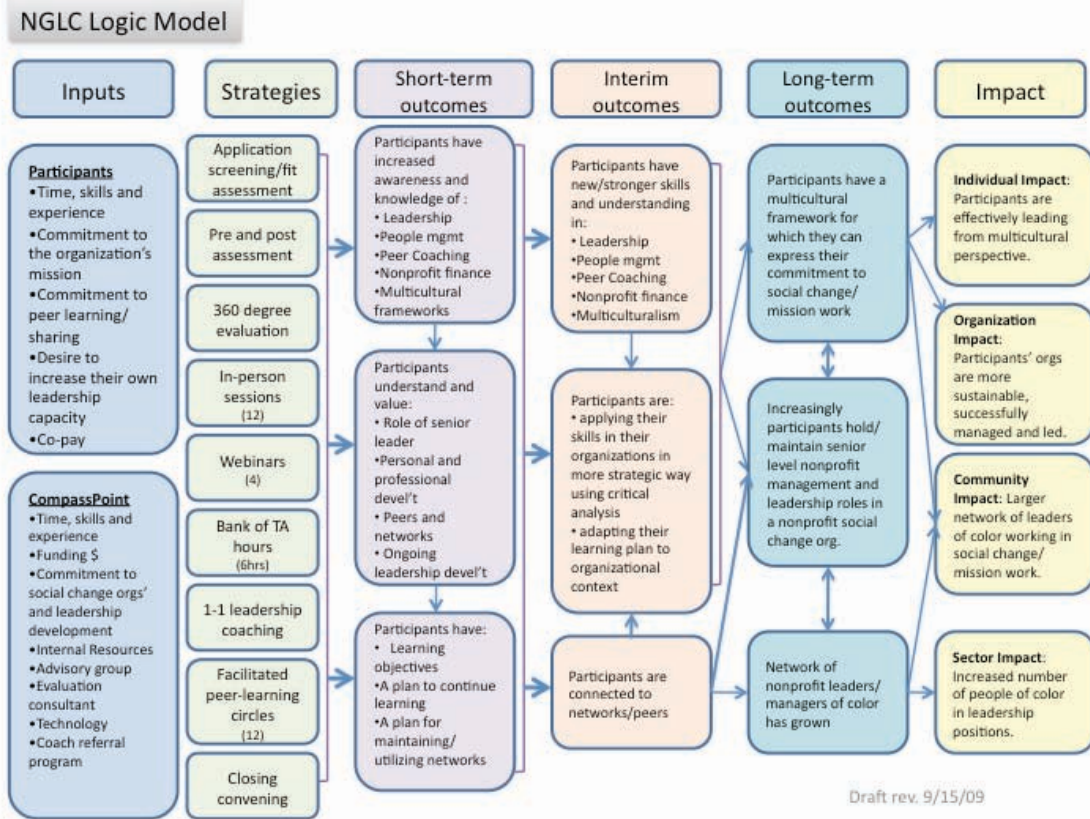
Additional one-on-one executive coaching was made available to each participant to help them with leadership and professional development goals. Coaching was optional and coaches were matched with participants based on interest and need.

Final Cohort Gathering

To encourage and support a network of next generation leaders of color, the last in-person seminar was a celebration of accomplishments and an opportunity to deepen the new relationships among participants. Future final gatherings will include alumni from past NGLC cohorts.

2. Background & Overview

Figure 2. NGLC Logic Model



2. Background & Overview

Table 3. Seminar Schedule

| Seminar Focus | |
|---------------|--|
| K | Two-Day Kick-Off |
| 1 | Coaching Skills for Managers and Directors |
| 2 | Introduction to Leadership Frameworks |
| 3 | Introduction to Nonprofit Finance |
| 4 | Strengths-based Leadership |
| 5 | Budgeting for Programs, Grants, and the Organization |
| 6 | Supervision Part 1: Helping People Achieve Results |
| 7 | Supervision Part 2: Applying the Multicultural Framework |
| 8 | Financial Leadership: Strategies and Considerations |
| 9 | Managing Change |
| 10 | Final Cohort Gathering |

2. Background & Overview

EVALUATION METHODS AND DATA SOURCES

CompassPoint engaged jdcPartnerships to design and implement an evaluation plan for NGLC. As a pilot initiative, the evaluative activities focused on understanding NGLC's effectiveness with this initial cohort in order to inform its ongoing development, both during the piloting and for subsequent cohorts. Additionally, jdcPartnerships was engaged in work with CompassPoint to support the organization's evaluative capacity. As such, evaluative activities undertaken during NGLC were designed to strengthen systems for ongoing evaluative inquiry by CompassPoint by supporting reflection and decision-making across initiatives and exploring opportunities for internal data collection, analysis, and decision-making.

Working from NGLC's logic model and an initial set of seminar specific-learning objectives, CompassPoint staff led NGLC's piloting and jdcPartnerships collaboratively refined these frameworks and developed a matrix crossing learning objectives with the initiative's intended outcomes. This matrix is available in Appendix B beginning on page 31. The extent to which NGLC's seminar-specific learning objectives were met was assessed at the end of each cohort gathering. The effectiveness of facilitated peer-coaching groups, components of the seminar (e.g., overall format, materials, logistics), and participant comments about the seminar value and suggestions for improvement were also included in post-seminar evaluations. jdcPartnerships data-entered and analyzed the evaluations following each seminar, providing a summary report for each to NGLC to inform ongoing seminar refinements. jdcPartnerships also facilitated a mid-project check-in with the team to support reflection of the team itself, review findings to date, and apply relevant learning to the balance of the initiative program year. The evaluation form, analyses in Excel, and the formats for reports were designed to be transferrable to CompassPoint internal staff as NGLC continued.

Post-seminar evaluations and additional quantitative and qualitative data sources were analyzed and synthesized in compiling this report. Following is a summary of the purpose and information provided by each data source:

Seminar Evaluations

Following each seminar, participants were asked to complete an evaluation form to assess the extent to which key learning objectives were met, the effectiveness of peer learning groups in enhancing their learning, and the effectiveness of the seminar components (e.g., overall format, materials, logistics). These evaluations were summarized by jdcPartnerships following the seminars and the reports were provided to NGLC to inform ongoing seminar refinements.

Mid-Course Check-in Discussion Notes

Midway through the seminars, NGLC facilitated a check-in with cohort members to reflect on progress to date, challenges, and ways in which NGLC could continue to foster growth and development through the remainder of the program.

Coaching and Technical Assistance Summary

A summary of themes from coaching sessions and technical assistance was provided by CompassPoint staff which provided insights on what elements were most meaningful and effective with cohort participants.

End of Program Participant Presentations

During the final gathering, participants gave presentations to celebrate, reflect on, and share their learning and visions for what's next in their leadership journeys. Notes taken during the presentation and available presentation materials were included in qualitative analyses.

3. Seminar Findings

Seminar Findings

This section provides an overview of findings from the nine in-person seminars that followed the two-day program kick-off^{2,3}. Following each seminar, participants were asked to rate on a scale of 1 to 4—where 1 = strongly disagree and 4 = strongly agree—their agreement with statements describing the extent to which the session was effective at meeting its objectives. Participants were also asked to rate the effectiveness of seminar components (the overall format, the materials, exercises, discussions, etc.) and the effectiveness of facilitated peer coaching groups in enhancing their learning. The figures and tables that follow in this section display the mean (average) ratings, which provide a sense of the degree to which participants, as a group, experienced gains in awareness and understanding and found value in the seminar facilitation and format. Mean ratings highlight aspects of content and format that were particularly successful and provide insights into those areas where improvements can be made to ensure that seminars are successful for all participants. For the session-specific learning objectives in Figures 3 and 4, the seminar number is indicated in parentheses.

SESSION OBJECTIVES - PARTICIPANT LEARNING

Overall, participants' reported increased awareness and understanding of key skills, strategies, and frameworks that are outlined in the short-term outcomes in NGLC's logic model.

The single highest rated objective was *making commitments to self and staff using a supervision vision statement and personal framework* (mean = 3.82). This objective was associated with Seminar 7- Supervision Part 2: Applying the Multicultural Framework.

The next highest rated objectives further reflected the success of NGLC in providing concrete tools as well as opportunities to apply a multicultural framework in exploring larger ideas and concepts related to leadership and supervision. Participants reported that as a result of the seminars they:

- *Were able to explore personal strategies for managing change*, mean = 3.67
Seminar 9 - Managing Change
- *Understood how a strengths approach can support and reinforce multicultural leadership*, mean = 3.64
Seminar 4 - Strengths Based Leadership
- *Determined their organizations' immediate financial strengths and weakness*, mean = 3.64
Seminar 8 - Financial Leadership: Strategies and Considerations
- *Understood the four foundational coaching skills*, mean = 3.60
Seminar 1b - Coaching Skills for Managers and Directors
- *Understood what coaching is, what it is NOT*, mean = 3.60
Seminar 1b - Coaching Skills for Managers and Directors

Overall, participants' average ratings indicate that NGLC was effective to highly effective in meeting its objectives across the critical content areas. Figures 3 and 4 display the average ratings for the objectives that NGLC was most effective in meeting—that is, the objectives which received average ratings of 3.4 or above.

² Given the focus and nature of the last seminar, findings are presented separately in Section 5. (See page 22.)

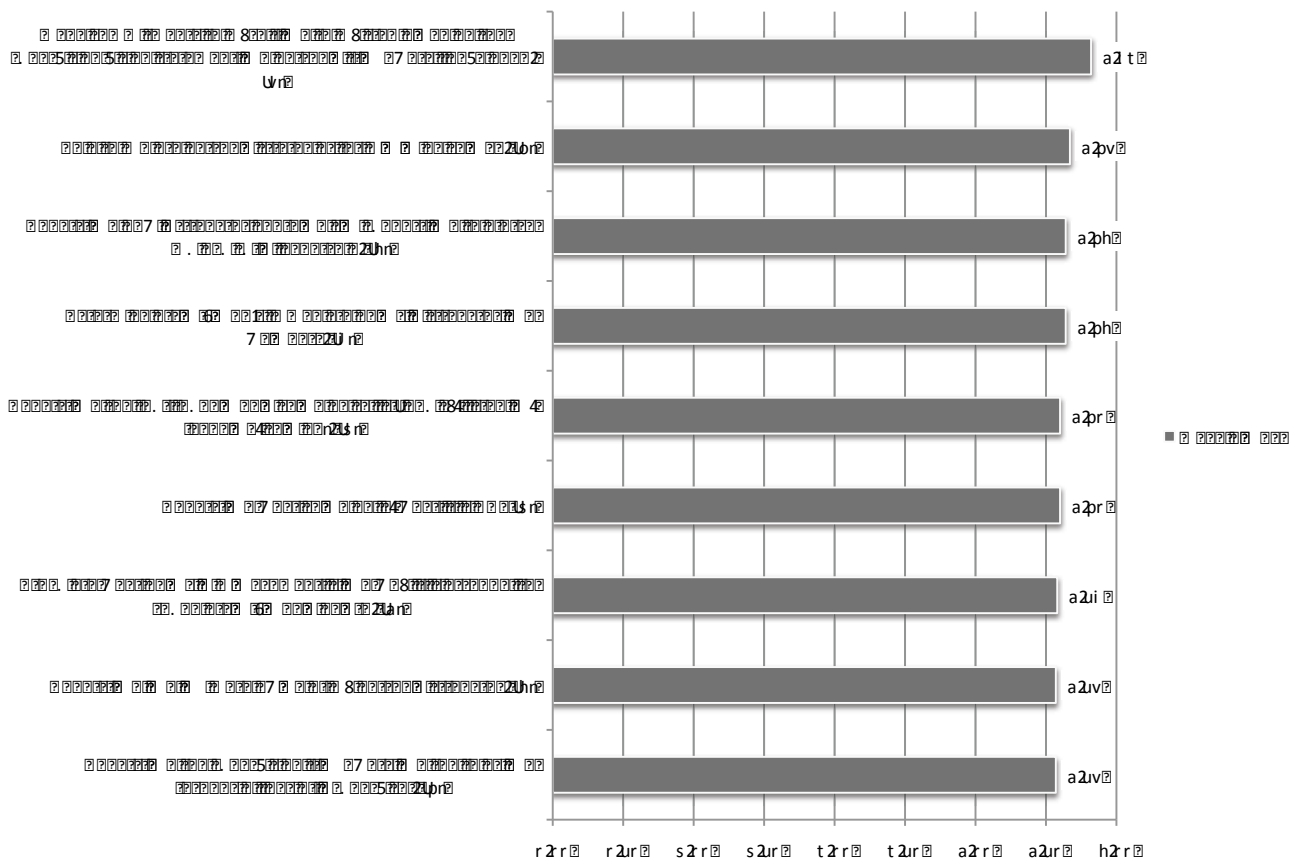
³ Objectives for the two-day program kick-off are included with the full list of learning objectives and mean ratings in Appendix A beginning on page 28.

3. Seminar Findings

The seminar associated with each objective is indicated by the number in parentheses. (See Table 3 for a listing of focus topics by seminar on page 10.)

Nearly every seminar objective received an average rating of 3.0 or higher. The objective areas that were more challenging or varied across the participants sometimes related to understanding and application of the multicultural frameworks. However, it is important to note that several objectives related to the understanding of a multicultural framework received high ratings, suggesting that there might be exercises, materials, and/or other facilitation processes that better supported learning. A full list of learning objectives and mean ratings is in Appendix A beginning on page 28.

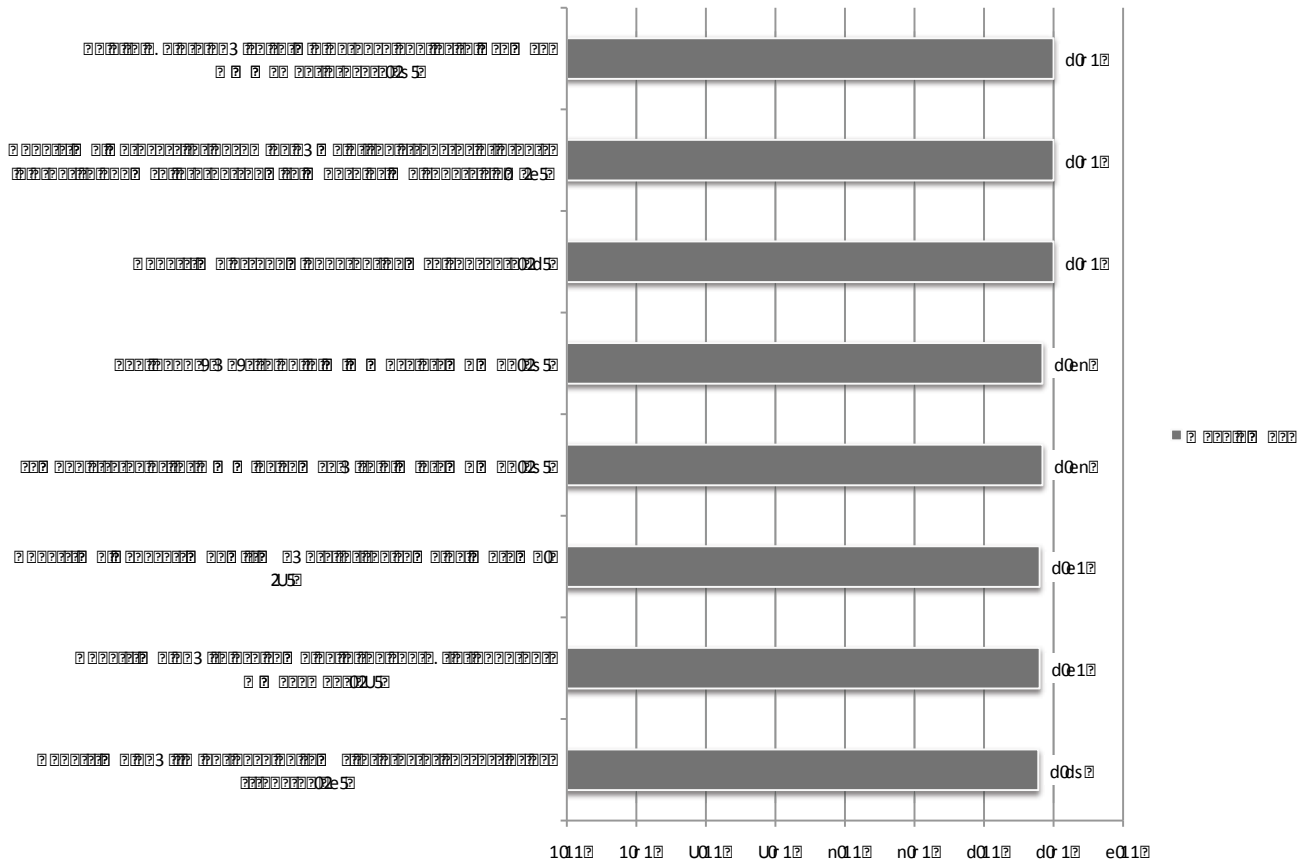
Figure 3. Learning Objectives NGLC Most Effectively Met (Mean Ratings = 3.6 – 4.0)⁴



⁴ Seminar numbers for each objective are indicated in parentheses. See Table 3 for a full listing of focus topics by seminar.

3. Seminar Findings

Figure 4. Learning Objectives NGLC Most Effectively Met (Mean Ratings = 3.4 – 3.5)⁵



CROSS-SEMINAR: EFFECTIVENESS OF SEMINAR COMPONENTS

Participants were asked to rate the effectiveness of various components of each seminar using a 1 to 4 scale where 1 = poor; 2 = fair; 3 = good; and 4 = excellent. Each component received average ratings of good to excellent.

Participants consistently valued the effectiveness of *exercises and discussions* that occurred during the seminar (aggregate mean = 3.69) and reported that *materials and handouts* were effective in supporting their learning (aggregate mean = 3.68). *Opportunities to connect with colleagues* received an aggregate rating of good to excellent (aggregate mean = 3.52) and was consistently mentioned in participants’ comments regarding what they found valuable during the seminar.

⁵ Seminar numbers for each objective are indicated in parentheses. See Table 3 for a full listing of focus topics by seminar.

3. Seminar Findings

Among the individual seminars, Seminar 8 - Financial Leadership: Strategies and Considerations received the highest ratings across components. The variation across other seminars and components throughout the piloting of NGLC likely related to the individual learning styles of participants, content, and training methods and approaches of facilitators. More information is needed across additional cohorts to be able to ascertain if there were other underlying factors which were affecting the variation in ratings.

Table 4. Effectiveness of Seminar Components

| Component | Usefulness of exercises / discussions | Materials / Handouts | Overall seminar | Format / Organization of the seminar | Opportunity to better connect with colleagues |
|---|---------------------------------------|----------------------|-----------------|--------------------------------------|---|
| Mean Across All Seminars | 3.69 | 3.68 | 3.63 | 3.63 | 3.52 |
| 1 Coaching Skills for Managers and Directors | 3.47 | 3.67 | 3.60 | 3.33 | 3.40 |
| 2 Introduction to Leadership Frameworks | 3.56 | 3.31 | 3.44 | 3.31 | 3.81 |
| 3 Introduction to Nonprofit Finance | 3.75 | 3.67 | 3.92 | 3.83 | 3.17 |
| 4 Strengths-based Leadership | 3.58 | 3.83 | 3.67 | 3.67 | 3.75 |
| 5 Budgeting for Programs, Grants, and the Organization | 3.55 | 3.73 | 3.56 | 3.55 | 3.18 |
| 6 Supervision Part 1: Helping People Achieve Results | 4.00 | 3.62 | 3.58 | 3.83 | 3.67 |
| 7 Supervision Part 2: Applying the Multicultural Framework | 3.64 | 3.82 | 3.55 | 3.64 | 3.70 |
| 8 Financial Leadership: Strategies and Considerations | 4.00 | 3.91 | 3.91 | 4.00 | 3.60 |
| 9 Managing Change | 3.70 | 3.60 | 3.45 | 3.55 | 3.40 |

3. Seminar Findings

FACILITATED PEER-COACHING GROUP TO ENHANCE LEARNING

Each participant was assigned a facilitated peer-coaching group. Each group was comprised of 5 or 6 participants who were grouped based on their position type, level of experience and organization mission type.

"The piece that meant the most to me – my peer group! They were extraordinary. I have never received so much support...they had a huge influence on my success."

— NGLC Participant, 2010

Peer coaching groups met monthly at the end of in-person seminars and via the phone. They were designed to reinforce program learnings and to provide real-time problem solving and peer support.

Using a 1 to 4 scale—where 1 = poor; 2 = fair; 3 = good; and 4 = excellent—participants were asked to rate the effectiveness of peer groups in enhancing their learning. **Peer coaching groups were consistently viewed as a positive and effective component of NGLC**, and received unanimous ratings of excellent (4.0) in the last two seminars in which they occurred. The benefits of the peer coaching groups and *opportunities for sharing with colleagues* were also frequently mentioned in post-seminar comments. (See page 17 for a selection of participant stories from a mid-course check-in and the final gathering about the role of their peer-coaching group.)

Table 5. Effectiveness of Peer Learning Groups

| Peer Learning Group | Mean Across All Seminars | 1 Coaching Skills for Managers and Directors | 2 Intro to Leadership Frameworks | 3 Intro to Nonprofit Finance | 4 Strengths-based Leadership | 5 Budgeting for Programs, Grants, and the Organization | 6 Supervision Part 1: Helping People Achieve Results | 7 Supervision Part 2: Applying the Multicultural Framework | 8 Financial Leadership: Strategies and Considerations | 9 Managing Change |
|-----------------------------------|--------------------------|---|-------------------------------------|---------------------------------|---------------------------------|---|---|---|--|----------------------|
| Peer learning group effectiveness | 3.68 | n/a | 3.53 | 3.42 | 3.45 ⁶ | | | 4.00 | 4.00 | |

PARTICIPANT STORIES RELATED TO THEIR PEER-COACHING EXPERIENCES

During the mid-course check-in discussion and final gathering⁷ presentations, participants described ways in which their coaching experiences enhanced their personal and professional development. Key impacts of the peer coaching groups participants described included:

- Deeper self-awareness
- Fostering actions in self-care
- Problem solving
- Decision making related to their career trajectory
- Negotiating employment status as they returned to their organizations

⁶ Variations in the scheduling of coaching sessions during this period led to small numbers responding to this item across these sessions, so the ratings were combined.

⁷ Additional findings from the NGLC's Final Gathering are provided in Section 5 beginning on page 22.

3. Seminar Findings

While further inquiry is needed to understand the particular content and/or facilitative methods that best supported these impacts, participants described the group process as supportive. This was a place where their ideas could be challenged, clarified, and affirmed, which translated into participants taking action.

Peer coaching taught me about **work life balance**. This summer I took off Friday afternoons and I planned to take vacations. I also discovered a side benefit: when I was getting ready to leave on vacation I delegated work to my staff and then when I came back...I didn't take the work back!

My peer group – having that attention just for me was so supportive. It helped me with **work-life balance**. I learned it's hard but possible.

I reduced my schedule. My peer group was way more supportive than the people I work with...**they propelled me to take care of myself and put my needs into the equation.**

My peer group made me see I was in a bad abusive relationship with my job. My conversations with the ED led her to have an epiphany...she began inviting me to management team meetings. **I've used what I learned here and became a change agent.**

Power of peers – meant the world to me. My group rocks! **They challenged me, provided clarity and were reaffirming.** Silence and reflection and humility and learning. They brought wisdom and insight and taught me to envision possibilities... there is strength in being vulnerable [participant gave each of her peer group members a rock with their names engraved on them].

My peer group...when we would meet face to face you could see people's faces and their expression. On the phone, when you are listening **you could actually hear people talk themselves through it.** You worked your way through without anyone having to jump in. I started to ask myself, like the Jesus sticker, "What would my group do?" and this got me through. I would work through it on my own.

My peer-coaching group helped me see that I questioned what my value at work was. I often found that the group acted as a reflection; found some modeling which was unlike past experiences. **[I] used the group as a leapfrog mechanism to move to the next level.**

I LOVE peer coaching. No more complaining, it's not about that! What could have been a terrible journey [being laid off] wasn't...**I found out who [I am].** The peer coaching was more valuable than I knew.

3. Seminar Findings

PARTICIPANT POST-SEMINAR COMMENTS

Participants' comments following each seminar illustrated their continued enjoyment of the sessions, finding the overall content useful in building key skills and effective in developing their identities as leaders and managers in dynamic environments. In offering suggestions for improvement, participants mostly elaborated on the benefits of the time spent processing key ideas and constructs in large and small groups, and suggested these opportunities be extended.

Key themes about the value of seminars that emerged were evident across the critical content areas:

Met Key Objectives

- Useful and effective in developing identities as leaders and managers in dynamic environments
- Useful and effective in increasing self-confidence
- Useful and effective in developing sense of financial leadership

Content and Tools

- Content built on prior experiences and learning
- Value in the strengths-based framework
- Value in using a multicultural framework
- Exercises supported learning
- Tools provided were practical and immediately useful
- Valuable and stimulating models, tools, and frameworks

"CompassPoint facilitators brought knowledge to the table, but they also brought themselves to it. They were real and vulnerable and mirrored for me how to be vulnerable and move forward."

— NGLC Participant, 2010

Format and Facilitation

- Balanced and engaging facilitation that provided space for participants to make sense of new information
- Appreciation for including small group work
- Appreciation for the facilitators
- Value in opportunities to problem-solve with peers
- Value of peer-coaching groups in supporting seminar learning

4. Coaching and Technical Assistance

Coaching and Technical Assistance

Coaching and Technical Assistance was made available to each NGLC participant to help with leadership and professional development goals. Coaching was optional and coaches were matched with participants based on interest and need.

COACHING & TECHNICAL ASSISTANCE – FOCUS AND IMPACT

All 16 members of the NGLC pilot cohort participated in one-on-one coaching, averaging almost nine hours per participant. While these engagements were personalized based on interest and need, common learning goals related to:

| Learning Goal | % of Participants |
|---|-------------------|
| • Work-life balance | 69% |
| • Self-advocacy and confidence | 63% |
| • Continuing Education and Career Exploration | 38% |
| • Supporting and Empowering Staff | 31% |
| • Leadership | 25% |

“My coach helped me to ask, ‘How would I have this conversation if I had no fear?’”
 — NGLC participant, 2010

Over the course of coaching engagements, nearly all included aspects of defining ones leadership style and approach. Work-life balance and handling conflict were present in approximately one-half or more. The strategies employed during these sessions often included role-plays, goal setting, challenging perspectives, and brainstorming.

To extend seminar learning and enhance coaching, cohort participants had opportunities to request specific technical assistance. One cohort member noted during a mid-course discussion that she began making more suggestions and as a result, her organization “asked me to do things that are really out of my comfort zone, so I’m using the TA hours to help where before I would have backed off and said I’m not the person to do it.” Ten cohort members utilized a total of thirty-one hours of technical assistance related to:

- Additional coaching hours
- Budgeting and nonprofit finances
- Supervision strategies
- Planning tools (logic models, work plans)

Coaches and participants reported similar impacts (the coaches via their logs, and participants during their final presentations), namely, improved awareness of leadership style and leadership skills, planning and fostering of career next steps, and development in other important skill areas, including recognition of the importance of self-care. (See page 21 for a selection of participant stories from the final gathering about the role of coaching.)

The benefits and challenges of the coaching and technical assistance experiences will be further explored in a follow-up survey of NGLC cohort members in the coming months.

4. Coaching and Technical Assistance

Table 6. Primary Focus of Coaching Sessions

| Topic | % of Coaching Engagements |
|--|---------------------------|
| Defining Leadership Style and Approach | 81% |
| Work-Life Balance | 56% |
| Having Difficult Conversations and Handling Conflict | 44% |
| Developing Personal Values | 38% |
| Job Exploration | 31% |
| Succession Planning | 25% |
| Effective Communication | 19% |

Table 7. Strategies Used in Coaching Sessions

| Coaching Strategies | % of Coaching Engagements |
|-----------------------------|---------------------------|
| Role Plays | 44% |
| Goal Setting | 44% |
| Challenging Perspectives | 31% |
| Brainstorming | 31% |
| Acknowledging | 25% |
| Accountability Practices | 25% |
| Assistance with Championing | 25% |
| Powerful Questions | 25% |

4. Coaching and Technical Assistance

PARTICIPANT STORIES RELATED TO THEIR COACHING EXPERIENCES

During a mid-course check-in discussion and during their final gathering⁸ presentations, participants described ways in which their coaching experiences had enhanced their personal and professional development. While participants varied in their individual learning goals, their comments reflected the role of the coach as a facilitator, listening and questioning, to foster the reflection and analytical thinking within the participants that empowered and supported their ability to make progress towards their varied goals.

My coach was **instrumental in helping me get perspective**. She said it's reasonable to expect errors. Finally, she helped me answer this question and see what I wanted to do. I realized I want to be an internal consultant to my organization! She asked if there was middle ground between "it sucks and I am the best." She asked what would be my dream job and I said the "internal consultant".⁹

The coach was great! She listened, comforted, and questioned me all the time – every transition **she fostered my own thinking**. I tried everything we talked about...and it was scary. She was with me every step of the way and challenged me to be bolder. She assisted me with continuously developing 4-5 things that would push me forward to take the next step. She even assisted me with role-plays around meeting my new staff of 19 and helped me to walk through how I would get up, talk, and move around during my initial meeting.

Coaching was a new approach for me. I learned we don't have to fix it; we empower each other to design the solutions to our own lives. **Coaching unleashed my internal voice**. I confronted my fears and now I am designing my life.

My coach became a thought-partner and helped me shift my perspective. I'm getting to a place of finding confidence and bringing that to the organization.

I connected with the coach and now I have goals. It's great timing because I'm at the height of every possible change in my life, and **now I get to make a date for myself to just think about me and focus on my professional development**.

Having **[the support of peer coaching] and having the individual coach during this time has really, really helped me make a transition** really great. I realized during the process that I had to learn how to say *no*, so it was uplifting and revealing to figure out that the *no* is something difficult to do and the peer and individual coaching helped me to do that.

My coach has **helped me change the conversation about myself**; the coach helped me get to the next steps of where I want to go. Having someone saying you are on the right track and **talking about issues from needs rather than a problems perspective**.

The fit was different than I expected, and it turned out differently than I thought it would - it turned out better than I thought it would. **It was nice to have a space where someone was constantly asking me questions**, and it was a good feeling to be in the spotlight.

⁸ Additional findings from the NGLC's Final Gathering are provided in the next section (5) beginning on page 22.

⁹ Participant has since moved into this role.

Final Gathering – Celebration, Reflection, Sharing

To encourage and support a network of next generation leaders of color, the last in-person seminar was a celebration of accomplishments and an opportunity to deepen the new relationships among participants. Future final gatherings will include alumni from past NGLC cohorts. To describe the impact of their experiences, participants were provided a set of guiding questions to foster reflections on their NGLC experiences to be presented to fellow participants. Each cohort member presented using a variety of tools and mediums for expression including PowerPoint visuals, poster boards and collages, video, original stories, music, and poetry.

PARTICIPANT RATINGS FOR FINAL GATHERING OBJECTIVES

Participants were asked to rate on a scale of 1 to 4—where 1 = strongly disagree and 4 = strongly agree —their agreement with statements describing the extent to which the final gathering met its key objectives: celebration (4.00), reflecting on the year and sharing learning (4.0), and sharing their leadership frameworks and vision for what’s next (3.90). Participants also provided unanimous ratings of ‘excellent’ for each of the final gathering’s components (e.g., overall format, usefulness of exercises/discussions, opportunity to better connect with colleagues).

Figure 5. Rating for Objectives of the Final Gathering

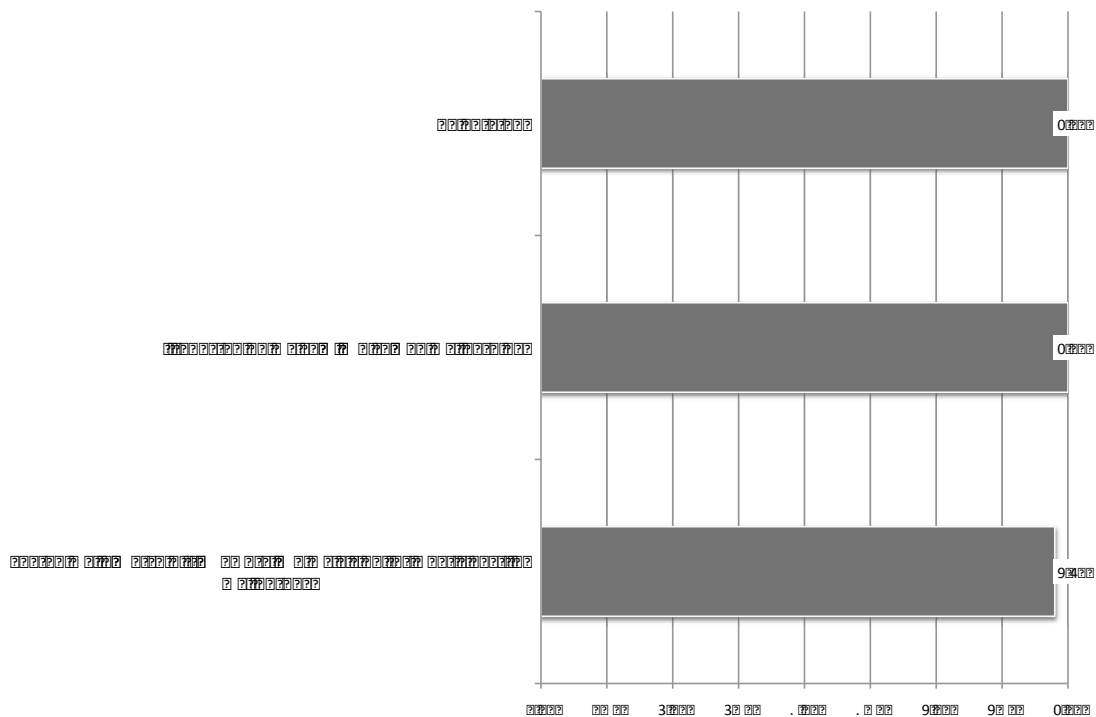
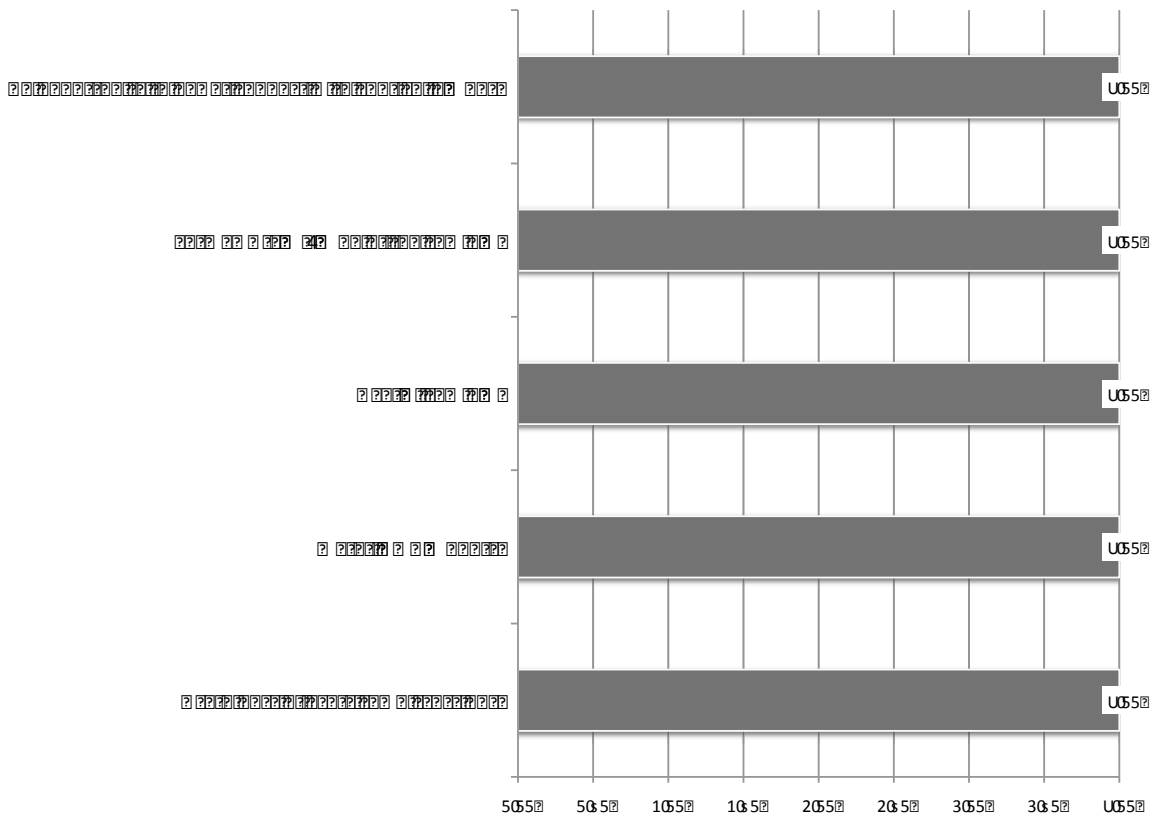


Figure 6. Rating for Seminar Component for Final Gathering



PARTICIPANT PRESENTATIONS

As described above, the key objectives of the final gathering were met through presentations from each participant that included a variety of tools and modalities for expressing the impact of the NGLC experience. Notes captured during the final gathering documented participants' verbal presentations and were thematically analyzed using NGLC's stated short- and interim- outcomes as framing. Examples of these comments are provided below to illustrate the ways in which participants experienced their development towards interim-outcomes related to the application of new skills and putting understanding into practice.

Further exploration of participant outcomes will be addressed in a follow-up survey in the coming months.

LEADERSHIP

"When I took the adaptive leadership assessment, I gave my organization zeros. But then we started talking about it. About our power and how to change and they were open to my suggestions! Now we're getting along really great. Now you'll hear them saying things like, "You know, I'm a relater...""

"I am talking to colleagues at work about developing our own leadership program. I am more effective in my agency and with my family. This program builds future leaders too – we are all role models now."

"What do I stand for? Shared leadership, we all have a role in it and can change the harmony and sound of music."

"Now I'm not fearful of speaking up and voicing my opinion or thoughts – even if they are different from the majority. I feel comfortable asking for more responsibility. I know these things now, I can take the risk now, I can see it as part of my leadership. And I'm comfortable saying no at the same time."

"How I come across to my team at work, how I am self-aware about my strengths...I am more aware of leading myself and leading others and seeing how different people have different learning styles."

NONPROFIT FINANCE

"I am on a board and they asked me to be co-chair because of the skills I learned here – particularly the finance skills."

"The financial leadership content, I called it my boot camp. I now ask [my organization's CFO] questions about our financial health. I wouldn't have been able to know what to ask before, or how to understand our financial health."

"Financial leadership vs. survival: I didn't know I was in survival mode, I didn't realize I could be a financial leader. I am able to go back to the organization and ask better questions, get better budgets, do better monitoring. It made a big difference for them and for me."

MULTICULTURAL FRAMEWORKS

“Thinking about power and privilege made me who I am. I felt empowered to be surrounded and accepted by you as a group. At management team they asked me to talk about NGLC and I was able to talk about this. These lenses that I now carry and can see are part of who I am.”

“I am being promoted to overseeing five programs – it’s a huge role! A year ago I was offered this same position and I turned it down. Through this program I realized that I’m ready for this! I want to be able to change people’s thinking and use power in leadership. Be inclusive and give people opportunities to say what they are thinking, to influence how management sees and values staff and not to have a deficit model.”

“This program was a platform for me to uncover my awareness: Humility, Equity, Celebration, and Inclusion. Social justice, peace, giving and receiving. Hope, faith, and love in building multicultural alliances.”

PEER COACHING

“If I could give myself an ideal job title right now, it would be “Change Manager.” I’m excited by the prospect of helping individuals initiate, manage, and evaluate critical changes in their organizations.”

Recommendations & Next Steps

The NGLC pilot demonstrated effectiveness according to the experiences of participants, and CompassPoint staff continuously reflected upon and integrated learning and findings throughout this process. As such, NGLC is poised to continue to positively impact participants in gaining skills and supporting the initial application of those skills to 1) the benefit of their own personal professional development, 2) the health and success of their organizations, and 3) the broader sector, as individuals and networks initiated continue. High level highlights of findings and recommendations for moving forward are provided below.

EVALUATION CONCLUSIONS AND RECOMMENDATIONS

Finding

NGLC Seminars are effective in meeting learning objectives, and are appreciated for their overall design and facilitation, including opportunities to tackle personally and professionally challenging situations and concepts with a peer group with whom strong connections are formed.

Recommendation

Overall findings are highly positive; thus the existing model should continue to inform seminar design. As future cohorts enter NGLC, revisit seminar-specific findings to build on what was most successful and consider any specific content or format changes to address the few challenges in meeting learning objectives across participants. This might include:

1. Framing for the integration of a multicultural framework
2. Clarifying and managing expectations with participants on the design of individual seminars and the degree to which time is built in to them for in-person networking and relationship building.

Finding

Facilitated peer-coaching groups are highly valued and important in developing the space for participants to explore ways in which they begin to apply their learning and skills. Participants unanimously described these as ‘excellent’ in enhancing their learning during their last two seminars. Comments describe specific personal and professional development that the groups fostered.

Recommendation

Continue to include this component and consider what might be needed to address scheduling or other challenges. The increase in rating may reflect an anticipated deepening of relationships over time; however, checking in on processes and ensuring clarity about the intent and anticipated outcomes of the peer-coaching group at the outset may also be important.

Finding

Coaching and Technical Assistance improved several participants’ awareness of leadership style and leadership skills, planning and fostering of career next steps, and development in other important skill areas, including recognition of the importance of self-care.

Recommendation

Continue to include this component and further explore the benefits and challenges of coaching experiences, including utilization of technical assistance, in a follow-up survey to inform ongoing refinements.

Finding

Participant Outcomes, described in their stories and comments during the mid-course check-in and final presentations, indicate the success of the combination of modalities – seminars, peer-coaching groups, and one-

6. Recommendations & Next Steps

on-one coaching – in transferring the understanding and skills gained into practices, both personally and professionally, and influencing the health and development of their organizations.

Recommendation

Continue to include these formats for sharing individual stories and further explore opportunities to systematically collect qualitative narratives from participants that explore the relationships between modalities in support of outcomes.

NEXT STEPS

1. Post-cohort follow-up survey administered in the coming months to assess the overall experiences and impact of NGLC.
2. Additional interviews and/or focus groups to further explore findings related to participant experiences and outcomes.
3. Full evaluation report incorporating findings from interviews/focus group and post-cohort follow-up survey.

Appendices

APPENDIX A

| SEMINAR LEARNING OBJECTIVES | | Mean Rating | Seminar |
|------------------------------------|---|-------------|---------|
| As a result of today's seminar, I: | | | |
| 1 | Made commitments to myself and to my staff based on the supervision vision statement and personal framework I developed. | 3.82 | 7 |
| 2 | Understand how today's lessons will be used as touchstones for the program. | 3.79 | K |
| 3 | Understand the core ideas and beliefs in a multicultural framework. | 3.69 | K |
| 4 | Am able to explore personal strategies for managing change | 3.67 | 9 |
| 5 | Can determine organization's immediate financial strengths and weaknesses. | 3.64 | 8 |
| 6 | Understand how a strengths approach can support and reinforce multicultural leadership. | 3.64 | 4 |
| 7 | Deepened my awareness and practice of communicating respectfully and effectively in multicultural settings. | 3.63 | K |
| 8 | Understand what coaching is, and what it is not. | 3.60 | 1 |
| 9 | Understand the four foundational coaching skills: inquiry, listening, feedback, sharing. | 3.60 | 1 |
| 10 | Can articulate what financial management is and why it is essential to sound organizational health. | 3.58 | 3 |
| 11 | Understand the supervision framework and the roles and responsibilities of a supervisor. | 3.57 | 6 |
| 12 | Understand and am more aware of my personal strengths. | 3.57 | 4 |
| 13 | Understand essential nonprofit finance concepts. | 3.50 | 3 |
| 14 | Understand a process for becoming aware of the strengths of others in order to enhance interpersonal relationships and supervision. | 3.50 | 4 |
| 15 | Am able to explore how cultural difference applies to a change management process | 3.50 | 9 |
| 16 | Was able to uncover my personal values. | 3.50 | K |
| 17 | Identified ways that I can advance along my leadership journey by applying multicultural frameworks. | 3.44 | K |
| 18 | Learned strategies for managing change within an organization | 3.42 | 9 |
| 19 | Can identify ways to build an adaptive organization. | 3.42 | 9 |
| 20 | Understand how to use coaching in the context of nonprofit management. | 3.40 | 1 |

| SEMINAR LEARNING OBJECTIVES | | Mean Rating | Seminar |
|------------------------------------|---|-------------|---------|
| As a result of today's seminar, I: | | | |
| 21 | Understand a conversational framework for the coaching approach. | 3.40 | 1 |
| 22 | Understand how I might develop teams for greater success using strengths. | 3.39 | 4 |
| 23 | Can anticipate an organization's long-term financial strengths and weaknesses. | 3.36 | 8 |
| 24 | Can apply the principles of nonprofit financial leadership. | 3.36 | 8 |
| 25 | Have developed a supervision vision statement and personal framework to use while working with current and future staff members. | 3.36 | 7 |
| 26 | Can identify and interpret key organizational financial statements. | 3.33 | 3 |
| 27 | Can discuss different leadership frameworks and identify leadership characteristics to integrate into my leadership framework. | 3.31 | 2 |
| 28 | Can identify those practices and principles which will support my leadership development. | 3.31 | 2 |
| 29 | Know how to set and communicate expectations that are aligned to individual performance as it is related to organizational performance and mission impact. | 3.29 | 6 |
| 30 | Have a basic foundation to develop a personal development plan that will be used throughout the program. | 3.29 | K |
| 31 | Have a grounding in who I am as a supervisor of color. | 3.27 | 7 |
| 32 | Know how to adapt and align different leadership styles to individuals' skill developmental needs. | 3.25 | 6 |
| 33 | Can identify ways to apply the framework throughout the NGLC program. | 3.25 | K |
| 34 | Understand when to coach and when to use other management practices. | 3.20 | 1 |
| 35 | Understand how to apply a cultural lens to leadership and can identify the limitations and challenges of leadership in different domains, promising practices to employ, and specific work contexts where my leadership can be applied. | 3.19 | 2 |
| 36 | Understand that cultural differences impact financial management issues. | 3.18 | 8 |
| 37 | Can understand an organization's business model. | 3.18 | 8 |
| 38 | Am more aware of frameworks that enhance learning application. | 3.18 | 8 |
| 39 | Am more aware of multicultural frameworks and principles and practices that enhance my learning in the workplace, in community, and in other settings. | 3.08 | 9 |
| 40 | Can articulate my career aspirations. | 3.07 | K |
| 41 | Can articulate core leadership domains. | 3.03 | 2 |
| 42 | Am more aware of multicultural frameworks that enhance my learning principles and practices in the workplace, in community, and in other settings. | 2.93 | 1 |
| 43 | Understand how a coaching model might be used differently depending on cultural background and context. | 2.87 | 1 |

APPENDIX B

NGLC LEARNING OBJECTIVE LOGIC MODEL CROSSWALK

X - strongly contributes x - related to, contributing

| Program Section | | Learning Objectives | | | Outcomes | | | | | | | | |
|--|---|---------------------|---|---|----------|------|------|---------|------|------|------|------|------|
| | | | | | Short | | | Interim | | | Long | | |
| | | | | | ST 1 | ST 2 | ST 3 | IO 1 | IO 2 | IO 3 | LT 1 | LT 2 | LT 3 |
| Kick-Off | Participants will: <ul style="list-style-type: none"> Uncover personal values. Identify leadership competencies Provide touchstone for program. Understand the principles of action learning and how they are applied in a peer-coaching setting. Understand the process of participating in a peer-coaching group, the accountability expectations of each member to the group, and the respective roles of members and facilitators. Understand how peer coaching supports professional development and self-reflection towards changed behavior and problem solving. | X | X | X | | | | x | | | | | |
| Leadership Journey Discussion | <ul style="list-style-type: none"> Articulation of career aspirations Provide a foundation to develop a personal development plan that will be used throughout the program | X | X | X | | X | | | | | | | |
| Leading and Learning Using a Multicultural Framework (Steve) | Participants will: <ul style="list-style-type: none"> Understand the core ideas and beliefs in a multicultural framework and identify ways to apply the framework throughout the NGLC program. Deepen awareness and practice of communicating respectfully and effectively in multicultural settings. Be aware of frameworks that enhance their learning and application of leadership principles and practices in their workplace, in community, and in other settings Identify ways that they can advance along their leadership journey by applying multicultural frameworks. | X | | X | X | | X | X | | | | | |

Appendices

| Program Section | Learning Objectives | Outcomes | | | | | | | | |
|--|---|----------|------|------|---------|------|------|------|------|------|
| | | Short | | | Interim | | | Long | | |
| | | ST 1 | ST 2 | ST 3 | IO 1 | IO 2 | IO 3 | LT 1 | LT 2 | LT 3 |
| Coaching Skills for Managers and Directors (Michelle) | Participants will understand: <ul style="list-style-type: none"> What coaching is, what it is NOT, and how to use it in the context of nonprofit management. The four foundational coaching skills: inquiry, listening, feedback, sharing. A conversational framework for the coaching approach. When to coach and when to use other management practices. Understand how a coaching model might be used differently depending on cultural background and context. | X | | | X | | | | X | |
| Coaching Groups | <ul style="list-style-type: none"> Reinforce learning of training seminars Reinforce skill sets developed during training seminars Understand how coaching groups support professional development and self-reflection towards changed behavior and problem solving | X | X | | X | X | X | | | |
| Introduction to Leadership Frameworks | Participants will be able to: <ul style="list-style-type: none"> Understand the distinction between management and leadership. Articulate core leadership competencies. Discuss a framework for leadership and identify characteristics of strong leadership. Apply the principles of adaptive leadership to their own organizational goals and challenges. Identify those practices and principles which will support leadership development. | X | X | | X | X | | | X | |
| Introduction to Nonprofit Finance (Marissa) | Participants will be able to: <ul style="list-style-type: none"> Articulate what financial management is and why it is essential to sound organizational health. Understand essential nonprofit finance concepts. Identify and interpret key organizational financial statements. | X | | | X | | | | X | |
| StrengthsFinder (Marla) | Participants will have: <ul style="list-style-type: none"> An understanding of the Strengths framework as it relates to personal and staff/team development. An understanding of their own strengths. An understanding of how to manage their weaknesses. | X | x | x | x | X | | x | X | |

Appendices

| Program Section | Learning Objectives | Outcomes | | | | | | | | |
|---|---|----------|------|------|---------|------|------|------|------|------|
| | | Short | | | Interim | | | Long | | |
| | | ST 1 | ST 2 | ST 3 | IO 1 | IO 2 | IO 3 | LT 1 | LT 2 | LT 3 |
| | <ul style="list-style-type: none"> An awareness of the strengths of others they work with. An understanding of how to use strengths in supervision contexts. Discussed the application using cultural lenses, limitations and challenges, promising practices, and specific work contexts. | | | | | | | | | |
| Budgeting for Programs, Grants, and the Organization (Marissa) | Participants will be able to: <ul style="list-style-type: none"> Identify the steps in the budgeting process. Estimate costs and forecast income. Create an organization’s “financial story” for the next fiscal year. Communicate to internal and external stakeholders the importance of a budget. Monitor an organization’s financial performance. Discuss how cultural differences impact financial management. | X | | | X | X | | | X | |
| Strategic Staffing: Alignment of staffing to organizational needs (Marla) | Participants will be able to: <ul style="list-style-type: none"> Articulate a process for assessing the needs of their organizations. Identify the positions and corresponding competencies requires for a job. Understand how to use behavioral interviewing to select the appropriate candidate. Understand how cultural differences impact staffing. | X | | | X | X | | | X | |
| Supervision: Establishing goals, objectives, and staff performance and professional development plans (Marla) | Participants will be able to: <ul style="list-style-type: none"> Articulate their role as a supervisor and how it relates to their organization’s impact. Effectively communicate performance expectations with their staff. Understand the importance of giving positive and constructive feedback. Develop staff performance goals, objectives, work plans, and professional development plans. Discuss how cultural differences impact supervision. | X | X | X | X | X | | | X | |

Appendices

| Program Section | Learning Objectives | Outcomes | | | | | | | | |
|--|--|----------|------|------|---------|------|------|------|------|------|
| | | Short | | | Interim | | | Long | | |
| | | ST 1 | ST 2 | ST 3 | IO 1 | IO 2 | IO 3 | LT 1 | LT 2 | LT 3 |
| Financial Leadership: Strategies and Considerations (Marissa) | Participants will be able to: <ul style="list-style-type: none"> Review the principles of nonprofit financial leadership Understand an organization’s business model. Determine an organization’s immediate financial strengths and weaknesses. Anticipate an organization’s long-term financial strengths and weaknesses. Understand how cultural difference impact financial management issues. | X | X | | X | X | | | X | |
| Managing Change in a Recession (Marissa) | Participants will be able to: <ul style="list-style-type: none"> Learn strategies for managing change within an organization. Understand an organization’s financial story in this economic downturn. Identify ways to build an adaptive organization. Identify potential strategies to enhance an organization’s sustainability. Explore personal strategies for managing change. Explore how cultural difference applies to a change management process. | | | | | | | | | |

| Outcomes | | |
|--|--|--|
| Short-Term | Interim | Long-Term |
| <p>ST 1: Participants have increased awareness and knowledge of:</p> <ul style="list-style-type: none"> • Leadership • Peer Coaching • Nonprofit finance • Multicultural frameworks | <p>IO 1: Participants have new/stronger skills and understanding in:</p> <ul style="list-style-type: none"> • Leadership • Peer coaching • Nonprofit finance • Multiculturalism | <p>LT 1: Participants have a multicultural framework for which they can express their commitment to social change/mission work</p> |
| <p>ST 2: Participants understand and value:</p> <ul style="list-style-type: none"> • Role of senior leader • Personal and professional devel't • Peers and networks • Ongoing leadership devel't | <p>IO 2: Participants are:</p> <ul style="list-style-type: none"> • Applying their skills in their organizations in more strategic ways using critical analysis • Adapting their learning plan to organizational context | <p>LT 2: Increasingly, participants hold/maintain senior level nonprofit management and leadership roles in a nonprofit social change organization</p> |
| <p>ST 3: Participants have:</p> <ul style="list-style-type: none"> • Learning objectives • A plan to continue learning • A plan for maintaining/utilizing networks | <p>IO 3: Participants are connected to networks/peers</p> | <p>LT 3: Network of nonprofit leaders/managers of color has grown</p> |