

FERTILE GROUND:



Reflections on Grassroots Leadership Development

Written by MDC Inc.
on the Southern Grassroots Leadership Development Learning Program
| *February 2003*

THE MARY REYNOLDS BABCOCK FOUNDATION

MARY REYNOLDS BABCOCK FOUNDATION

The Mary Reynolds Babcock Foundation funded the *Southern Grassroots Leadership Development Learning Program*. Located in Winston Salem, North Carolina, the Foundation concentrates on assisting people in the Southeast to build just and caring communities that nurture people, spur enterprise, bridge differences, foster fairness, and promote civility. The Foundation is deeply troubled by the debilitating impact of persistent poverty and racism on the human spirit and on community life in the region; therefore it seeks demonstrable progress in areas where poverty prevails and race divides.

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MDC INC.

MDC Inc., a nonprofit based in Chapel Hill, North Carolina, managed the *Southern Grassroots Leadership Development Learning Program*. MDC's mission is to advance the South through strategies that expand opportunity, reduce poverty, and build inclusive communities. The organization analyzes trends to identify challenges that impede progress for the South and its people and addresses those challenges from multiple angles. Core strategies include developing responsive public policies; designing and demonstrating effective programs; building institutional and community capacity for progress; and informing the public dialogue.

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PROJECT TEAM

Julie Thomasson Mooney managed the Learning Program for MDC, with the able teamwork of David Dodson, MDC President, and Jehan Shamsid-Deen, all of whom helped write, shape, and/or contributed to this report, as did MDC's Leah Totten and Nova Henderson. Tara Kumar, now in graduate school, was integral to MDC's Program team for two years. Gayle Williams and Gladys Washington of the Mary Reynolds Babcock Foundation provided thoughtful feedback throughout the life of the Program that contributed to the lessons discussed in this report. We are grateful to Leslie Takahashi-Morris, who consulted with us on the conceptualization and drafting of this report.

PREFACE

This report provides a greater understanding of the work of grassroots leadership development (GLD) by summarizing the lessons learned and challenges encountered during the Mary Reynolds Babcock Foundation's Southern Grassroots Leadership Development Learning Program. The report is organized into four parts:

> **INTRODUCTION.** This section discusses why grassroots leadership development matters and what organizations doing GLD need to know. For those wanting to do or support this work, the points here may help you in your advocacy for its support. This section also discusses organizational principles and capacities necessary to engage in grassroots leadership development. For practitioners, this section can help you prepare to get involved in GLD. For funders, this section may help you make better-informed investments in organizations that are ready and able or in developing the capacity of those that are not. For groups that have been involved in grassroots leadership development

and (inevitably) struggled organizationally with what is required to be successful, this section may help you understand the sources of your struggles.

> **TEN TENETS OF GRASSROOTS LEADERSHIP DEVELOPMENT.** GLD isn't just training, isn't just mobilizing people for a meeting, and isn't just encouraging people with good ideas. It is complex, multifaceted work. This section spells out 10 basic tenets for what it takes to do the work, offering analytic questions, lessons, challenges, and resources for each. This section includes some stories from Learning Program participants to breathe life into concepts.

> **AFTERWORD.** The Southern GLD Learning Program produced results by increasing the effectiveness of grassroots leaders and the community programs training and supporting them as they work to make a difference, and their communities are already seeing the difference. This section discusses some of the specific questions that remain and provides some insights for the field of GLD in general and for potential funders in particular.

> **APPENDICES.** Appendix A includes a brief description of each participating organization. Appendix B lists the Design Team that assisted in developing the Program's structure. Appendix C includes a detailed description of the nuts and bolts of the Program's structure. Appendix D includes a description of the levels of leadership, and Appendix E includes an assessment tool developed by Learning Program participants and referred to in Chapter 8.

Throughout the report, you will find the words of grassroots leaders — real people facing tough community challenges. You will also find quotes that inspired us along the way: at the program's Learning Institutes, participants created "walls of inspiration" — blank space onto which participants could write quotes and thoughts that keep them going. This report

includes some of these statements, always labeled: **FROM THE WALL OF INSPIRATION.**

INTRODUCTION

From the Wall of Inspiration:

“The greatest learning occurs through struggle, and the greatest struggle is the struggle for justice.” — Myles Horton

The list of problems facing Southern communities — particularly economically distressed communities — is growing: lack of affordable housing, inequitable education, environmental degradation, and plenty more.

Nonprofit, grassroots organizations working on these issues know that better solutions are found when those closest to the problems are involved in shaping the response. Yet, local leaders share some familiar challenges as they try to address these problems: “The same people show up at every meeting.” “We can’t get people involved.” “We need more diverse leaders.”

So how can communities address their challenges under these circumstances? The Mary Reynolds Babcock Foundation and MDC have a common response:

Invest in the development of grassroots leaders and the organizations in low-wealth communities that do the work of grassroots leadership development.

WHO ARE GRASSROOTS LEADERS?

The Foundation defines grassroots leaders as *people who are engaged in building just and caring communities in low-wealth communities and who are accountable to a broader base of people in those communities.* They are distinguished from “mainstream leaders” — people in positional leadership roles in the community (elected, appointed, or running key organizations) and who have ready access to human, organizational, or financial resources.

The Mary Reynolds Babcock Foundation’s

mission is to build just and caring communities. In the late 1990s, the Foundation decided that to further its mission it would invest heavily in grassroots leadership development (GLD). Launching the Southern Grassroots Leadership Development Learning Program was one of several of the Foundation’s strategies.

Specifically, the goal of the Program was *to strengthen the effective grassroots leadership development efforts of seventeen organizations throughout the Southeast.** A secondary goal was to advance the field of grassroots leadership development with new knowledge and practice developed through peer learning.

PARTICIPATING ORGANIZATIONS

AFFORDABLE HOUSING COALITION, ASHEVILLE, NC
BUILDING OPPORTUNITIES FOR NEIGHBORHOOD SUCCESS, MONTGOMERY, AL
CENTER FOR COMMUNITY ACTION, ROBESON COUNTY, NC
CHATHAM COUNTY HEALTH DEPARTMENT, PITTSBORO, NC
COAL RIVER MOUNTAIN WATCH, PICO, WV
DOWN EAST PARTNERSHIP FOR CHILDREN, ROCKY MOUNT, NC
EL CENTRO HISPANO, INC., DURHAM, NC
EMPOWERMENT, INC., CARRBORO, NC
FORWARD IN THE FIFTH, BEREA, KY
THE JEREMIAH GROUP, NEW ORLEANS, LA
JUBILEE PROJECT, SNEEDVILLE, TN
KENTUCKIANS FOR THE COMMONWEALTH, LONDON, KY
NORTH CAROLINA JUSTICE & COMMUNITY DEVELOPMENT CENTER, RALEIGH, NC
PARENTS FOR PUBLIC SCHOOLS, GREENVILLE, NC
SOUTHERN EMPOWERMENT PROJECT, MARYVILLE, TN
VOICE OF CALVARY MINISTRIES, JACKSON, MS

WHY DOES GRASSROOTS LEADERSHIP DEVELOPMENT MATTER?

If there are too many problems in a community and a perceived sense of too few leaders, then grassroots leadership development (GLD) is an important part of the remedy. There are at least six other good reasons for investing in the cultivation of grassroots leaders:

**One organization dropped out of the program in the first year.*

GRASSROOTS LEADERS KNOW WHAT THE PROBLEMS ARE.

Many people in communities view it as their job to address local problems, but too often they do not have a deep understanding of the complex sources of those problems. Grassroots leaders live and breathe the challenges facing their communities, and they can unearth, through personal experience and reflection, the root problems and the solutions.

YOU GET BETTER SOLUTIONS WHEN YOU INVOLVE THE PEOPLE AFFECTED BY THE PROBLEMS. Research has documented over and over that programmatic responses are better designed and more responsive to the real issues when local people are involved in the solutions. Through grassroots leadership development, community and neighborhood leaders develop the confidence and the skills to be thoughtful participants in the solution. They also learn how to hold themselves and other leaders accountable to their communities

GLD DEVELOPS SKILLS AND KNOWLEDGE NECESSARY TO BRING ABOUT CHANGE. Grassroots leaders already lead many efforts to build just and caring communities, and while their basic knowledge of issues is strong, they often need more skills and knowledge to make change happen. Building their skills and knowledge improves the effectiveness of their work in communities.

EFFECTIVE LEADERSHIP DEVELOPMENT FORGES IMPORTANT CONNECTIONS. Grassroots leaders often do not have the connections and relationships that provide access to information and peer support that mainstream leaders take for granted. Grassroots leadership development programs can close these gaps.

DEMOCRACY AND INCLUSION ARE CORE VALUES OF GLD. Even if nothing else were true, equipping grassroots leaders to engage in tackling community problems is good for the sake of democracy. In many communities, America’s ideal of effective democracy is threatened. Engaging grassroots

leaders in the work of change builds their knowledge of why civic engagement matters and yields a more informed and engaged public.

ONLY UNITED COMMUNITIES CAN SUCCEED. This basic truth drives much of the work of MDC and the Foundation. Communities continue to falter because of divisions across lines of race and class, among other things. Relationships are key to bridging racial and class differences. When grassroots leaders work as equals with other leaders on local issues, everybody learns new respect, skills, and perspectives that help bridge differences.

From the Wall of Inspiration:

“Injustice anywhere is a threat to justice everywhere.” — *Martin Luther King, Jr.*

WHAT KINDS OF ORGANIZATIONS OUGHT TO BE DOING GRASSROOTS LEADERSHIP DEVELOPMENT?

The Learning Program taught us that all kinds of organizations can do grassroots leadership development effectively, as long as they understand the work’s complexity and can assemble a staff and volunteer team who function at multiple levels. Some participating organizations had worked on behalf of local people, some had worked with them, and some had provided services to them. The organizations ranged widely in size and scope, mission, and issue focus, including:

- > A housing advocacy organization;
- > Organizations that offered programs or services (e.g., housing, family counseling) for low-wealth people;
- > Community organizing groups;
- > A local government agency — specifically, a county health department;
- > A community development corporation (CDC) concerned with business and housing development; and
- > Education advocacy organizations.

WHAT IS REQUIRED FROM THE ORGANIZATION?

Organizations in the Learning Program structured their GLD work in a few different ways. Some had a formal training program with an application process and a curriculum or series of lesson plans; some offered developmental activities through a less structured program; some incorporated aspects of development or training into their organizing or advocacy work with local people. The Learning Program discovered that regardless of their approach, organizations working on GLD benefit from a set of philosophical and cultural orientations:

COMMITMENT TO LEARNING. Since no magic formula for effective GLD exists, organizations need a culture that allows them to engage in learning and to see themselves as learners as well as teachers or experts.

WILLINGNESS TO TAKE RISKS. Absolute right answers do not exist in this work. Organizations and funders taking on this work need to be aware that it is sometimes a “one step forward and two steps back” process. Organizations also need to be prepared to let go of old paradigms that may value the perspective of professionals more than citizens.

COMMITMENT TO SHARING POWER. Respect for grassroots leaders is essential. An organization that espouses shared leadership, building bridges across lines of race and class, and yet keeps grassroots leaders separate from the workings of the organization is not walking its talk; and eventually grassroots people will recognize the contradiction. Organizations have to be willing to share some power with people they are developing.

WILLINGNESS TO WRESTLE WITH ISSUES OF RACE AND CLASS. “If we never touch the real issues like race and class and how they affect our organizations and root them out, then we are just perpetuating oppression,” one Learning Program participant

observed. Doing GLD work requires being the kind of organization that poor people and people of color can trust — and that requires tackling racism or classism within the organization.

A SPIRIT OF PARTNERSHIP WITH THE COMMUNITY. The relationship between an organization sponsoring a GLD strategy and the people who the organization hopes to involve in that strategy must be strong. Organizations cannot view themselves as expert and the people they want to “serve” as what Paolo Friere calls “empty vessels.” Rather, the organization should be viewed as an ally, a source of knowledge and information, a trusted friend to the community members it wants to help develop.

CHATHAM COUNTY HEALTH DEPARTMENT: WHEN IS AN ORGANIZATION READY?

WHY WOULD A COUNTY HEALTH DEPARTMENT TAKE ON THE EXTRA BURDEN OF GLD? BECAUSE IF PUBLIC HEALTH, DEFINED BROADLY, IS ABOUT A HEALTHY COMMUNITY – IN TERMS OF GOOD JOBS, QUALITY HOUSING, RECREATIONAL OPPORTUNITIES, ETC. – THEN IT TAKES INVOLVEMENT BY GRASSROOTS PEOPLE TO DEVELOP THAT KIND OF COMMUNITY. BY SETTING UP A STRUCTURED PROGRAM TO IDENTIFY AFRICAN AMERICAN AND LATINO LEADERS, THE CHATHAM COUNTY HEALTH DEPARTMENT, IN RURAL NORTH CAROLINA, AIMED TO INCREASE ITS POOL OF CANDIDATES FOR THE MANY BOARDS AND COUNCILS TO ENSURE THAT ITS WORK IS MORE RESPONSIVE TO THE NEEDS OF THOSE IT SERVES.

“THIS PROGRAM HAS PROVIDED US WITH THE OPPORTUNITY TO FURTHER OUR WORK IN ‘WALKING THE TALK,’” VANESSA JEFFRIES OF THE HEALTH DEPARTMENT SAID. “A KEY PRINCIPLE OF PUBLIC HEALTH IS INVOLVING THE PEOPLE MOST AFFECTED BY THE PROGRAM IN THE DESIGN AND IMPLEMENTATION OF SOLUTIONS.”

FROM THE START, THE HEALTH DEPARTMENT’S LEADERSHIP “LEARNING TEAM” CONFRONTED THE TOUGH

QUESTION OF HOW TO BECOME A GOVERNMENTAL AGENCY THAT THE COMMUNITY COULD TRUST AND WITH WHICH THE COMMUNITY WOULD WANT TO BE ENGAGED. AS VANESSA EXPLAINED, “ONE OF OUR INTERMEDIATE GOALS HAS BEEN TO CREATE A CULTURALLY COMPETENT ORGANIZATION.” AS THE DEPARTMENT EXPLORED WAYS OF DOING THIS, IT RECOGNIZED THE CRITICAL ROLE THAT THE GRASSROOTS LEADERS CAN PLAY IN ADVISING THE DEPARTMENT ON RELATED POLICIES AND PROCEDURES.

THE LEARNING PROGRAM

Instead of just providing funding to its grantees to do grassroots leadership development, the Mary Reynolds Babcock Foundation provided an opportunity for grantees to develop their understanding of and ability to conduct GLD work. Through the Learning Program, grantees were able to deepen their work and strengthen their capacity. MDC, as the managing partner, worked to create a culture of learning across and within each organization. While the Southern Grassroots Leadership Development Learning Program’s goal was to strengthen the work of organizations, learning had to occur at additional levels. The Program supported learning at the individual level, the interpersonal/team level, the organizational level, and the broader community level. (*See Chapter 3 for a description of these levels.*)

To help people develop each of these levels, the Learning Program was multifaceted so that they could gain new ideas and inspiration in different ways. These included: annual learning institutes; smaller learning clusters focused on specific aspects of grassroots leadership development; small implementation grants to try out new ideas; coaching to allow for the necessary guidance when setting about change; and a technical assistance pool to allow people to draw on experts in particular areas. These vehicles made for a rich and deep learning experience. For more information on how the program encouraged learning, see *Promoting Grassroots Leadership Development: The Role of a Learning Program*, by Prue Brown of Chapin

Hall and available through the Mary Reynolds Babcock Foundation.

TEN TENETS OF GRASSROOTS LEADERSHIP DEVELOPMENT

Developing grassroots leaders is hard and complicated work. Yet so many organizations set out to do GLD with the assumption that there are two or three key ingredients to a good program and that it can be pulled off with limited staff. The truth is, the human dynamics (developing another person), resource constraints (funders impatient with the long view) and socioeconomic challenges (partnering with people and organizations who have been on the short end of the stick in the past) make the work of GLD exceptionally demanding.

The Learning Program has, through collective work and reflection, framed 10 essential tenets of good GLD practice:

1. Understand How Change Happens.
2. Recruit Strategically.
3. Build Skills, Knowledge, and Attitudes.
4. Respect Adult Learners.
5. Provide Individual Coaching and Support.
6. Maintain Adequate Staffing.
7. Cultivate Organizational Culture and Commitment.
8. Assess Progress and Results.
9. Learn Continuously.
10. Work for the Long Haul.

These 10 tenets are *not* a recipe but rather a framework. Within each tenet, dozens of approaches can be pursued, but a conscious application of these 10 can yield more effective work. This report explores each of these tenets in a systematic way. First, it introduces and defines the concept. It poses some of the *Questions* organizations need to address about the particular aspect of GLD *before* they dive in and offers *Lessons* from across the Learning Program. Related sidebars offer stories about how participants in this Learning Program grappled with ques-

tions or learned lessons. Each chapter includes information on *Resources* that were particularly useful in this Learning Program.

Finally, a disclaimer: Grassroots leadership development is art, not science. As an art, it is hard to transmit all the factors that make this sort of approach an effective and authentic vehicle to giving voice to those who have been silenced in our communities. This report is not a recipe book or a step-by-step description of how to do grassroots leadership development, but rather an effort to share important questions to ask and things to think about before and during this work. We hope it helps.

1. UNDERSTAND HOW CHANGE HAPPENS

From the Wall of Inspiration:

“Where there is no VISION the people PERISH”
— *Proverbs 29:18*

People drawn to doing GLD work are usually strong-willed, firm in the belief that what they want to do is right, and more than anything, do-ers, rather than theorists. The trouble is that assembling the right set of practices and approaches is not possible without a clear theory about what you want to achieve and how you believe change best occurs.

A “theory of change” is simply a thoughtful analysis of how an organization believes change happens and of the ingredients that will provide desired results. Our work and observations through the Learning Program suggest that when organizations are grounded in a theory of change, they are better able to develop smart and coherent programs. Another term for this is a logic model. The main components of a theory of change or logic model are:

> *A statement of the problem that a program plans to address* (e.g., neighborhood decline, lack of affordable housing, power imbalances), sometimes articulated as an organizational mission and grounded in organizational values;

- > *The context for change* (e.g., political or economic climate, other policies and programs);
- > *Inputs* — the factors that the organization will manage in order to produce the desired results (grassroots leaders equipped with particular skills, knowledge, and attitudes);
- > *Activities* — the practices and approaches the organization will use to develop grassroots leaders (e.g., through a formal training program, through community organizing);
- > *Outcomes* — the results — for the grassroots leader personally, the organization, and the community.

A theory of change allows for a clear integration between plans, implementation, and evaluation. It reduces the mismatch between activities and effects. It keeps stakeholders focused on outcomes, increasing accountability on everyone’s part. It ensures more clarity about how to choose between competing opportunities and allow for priority setting for allocating resources. Last but not least, it helps an organization develop a shared language and shared vision for community change.

QUESTIONS TO ASK

To flesh out the “problem”:

- ? What issues or conditions keep us from being a just and caring community?
- ? Which one(s) will our program address?

To develop a strategy that accounts for the context for change:

- ? What are the political, economic, historic, racial forces that our leadership development approach must comprehend?

To determine the types of “inputs” we believe are most important and the activities that will be used to develop grassroots leaders:

- ? Which grassroots leaders do we need involved to make the change we wish to see? Recognized leaders? People in particular positions? People with a following?

? What relationship do we want to develop between our organization and the leaders? Should it be a membership organization? Should our GLD work be a “division” of our organization?

? What do we believe about how change happens at a personal level? Do people develop through training alone, or is experience “on the job” required?

? What do we believe about how change happens in our community? Given the future we envision, do we need to build political alliances with elected leaders? Do we mobilize large numbers to force them to change policies? Do we need new programs or policies?

? What are the core values of the organization that are fundamental to the work of GLD and that need to be clarified and transferred to new and emerging leaders?

? What skills and areas of knowledge do grassroots leaders need to provide effective leadership in our community?

To determine the outcomes that will result in achieving our vision:

? What are the end results we wish to see?

? What indicators will tell us we are becoming a more just and caring community?

LESSONS

A THEORY OF CHANGE CAN SERVE AS A COMPASS. Without this grounding in assumptions about change, work is often left undone, questions about purpose and goals continue to surface, and programs and strategies can fall short of their potential. By codifying their theory of change, *Forward in the Fifth* recognized a disconnect in their approach. They knew that school change to benefit low-income kids must involve low-income parents, yet their local affiliates did not include these parents. Seeing this disconnect helped them create a more effective approach to their challenge.

GLD PROGRAMS MUST BE ROOTED IN VALUES. Grassroots organizations’ leadership development efforts tend to grow out of a concern for community hopes and needs. To develop a program aligned with its mission, an organization must first acknowledge the values that are the foundation for GLD work.

ALIGNMENT BETWEEN BOARD AND STAFF IS ESSENTIAL. One organization, *BONDS*, struggled with the fact that there was not alignment *within* the staff and thus *between* the staff and the advisory board for their leadership program. Some work stalled in the absence of clear choices about direction. By raising the hard questions that a theory of change forces, *BONDS* was able to clarify its point of view and determine how staff should spend their time.

WITH A THEORY OF CHANGE IN HAND, TRAINING CONTENT CAN BE DETERMINED MUCH MORE EASILY. Too often, organizations envision a set list of generic skills that “all leaders” need and then build a training approach around those skills. In the Learning Program, organizations that thought through the alignment of desired outcomes and the skills, knowledge, and attitudes needed by leaders to get these outcomes came up with the most effective training.

QUESTIONS ABOUT VALUES, MISSION, AND VISION ARE BOUND TO SURFACE SOONER OR LATER. IT IS A LOT EASIER TO DEAL WITH THEM SOONER. Raising these questions up front prevents the backtracking and confusion that can arise when the purpose of a program has not been thought through from the start. The vision is the compass that helps the organization keep sight of “true north” even amid a blizzard of challenges and opportunities.

GLD TAKES TIME AND ATTENTION. Working to develop grassroots leaders is one thing. Creating the time for the disciplined work of reflection about what seem like heady, conceptual issues is another. When critical issues are facing the

community, the do-ers in this line of work are inclined to race to DO, rather than think about the logic of what they are doing. For folks whose neighborhoods are crumbling or whose streams are being filled with polluted runoff, taking time to consider “vision,” “values,” or “theory” can feel like stalling.

CENTER FOR COMMUNITY ACTION: UNDERGIRDING THEORY WITH VALUES

AFTER A NUMBER OF SUCCESSES GAINED THROUGH ORGANIZING CAMPAIGNS, THE CENTER FOR COMMUNITY ACTION IN LUMBERTON, NC, DIVERSIFIED THE ELECTED LEADERSHIP IN A TRI-RACIAL COUNTY. BEFORE CCA'S WORK, THE COUNTY WAS LED MOSTLY BY EUROPEAN-AMERICANS. “WE QUICKLY REALIZED THAT WINNING REPRESENTATION THROUGH ELECTED OFFICE CREATED A NEW SET OF CHALLENGES,” THE CENTER'S MAC LEGERTON RECALLS. “THE POLITICS OF INCLUSION WERE MORE COMPLICATED THAN THE POLITICS OF EXCLUSION.”

THE CENTER RECOGNIZED THE NEED FOR A NEW APPROACH AND ESTABLISHED THE COMMUNITY ORGANIZING RESOURCE EDUCATION PROGRAM (CORE). ITS GOALS ARE TO ORGANIZE 10 MEMBERSHIP “CLUSTERS” (GEOGRAPHICALLY BASED “CHAPTERS”); TO PROVIDE ONGOING TRAINING AND DEVELOPMENT FOR LOCAL LEADERS THROUGH THESE CLUSTERS; AND TO OFFER A COUNTY-WIDE LEADERSHIP INSTITUTE FOR THE KEY LEADERS OF THESE CLUSTERS.

IN REFLECTING ON THE SKILLS AND KNOWLEDGE WITH WHICH CCA WOULD EQUIP GRASSROOTS LEADERS, THE CENTER STAFF AND BOARD RECOGNIZED THAT THEY HAD NOT CLEARLY ARTICULATED THE CORE VALUES THAT HAD TO UNDERGIRD ANY TRAINING. USING AN OUTSIDE CONSULTANT, CCA HELD THREE BOARD RETREATS OF THREE DAYS EACH TO IDENTIFY THE CROSS-CULTURAL VALUES THAT SHOULD GUIDE THE CENTER'S WORK. AS LEGERTON PHRASED IT: “BEING ‘LOVINGLY PROACTIVE’ AND ‘CREATIVELY STRATEGIC’ AS JUXTAPOSED WITH BEING ‘ANGRILY REACTIVE’ AND ‘CONVENTIONALLY STRATEGIC’ IS CENTRAL TO THE CENTER'S NEW LEADERSHIP PROGRAM.”

RESOURCES

Developing a Logic Model or Theory of Change, Bobby Milstein and Tom Chapel. Available through the Community Tool Box, developed by Kansas University. http://ctb.ku.edu/tools/EN/sub_section_main_r1877.

Values-Based Grassroots Leadership Development, by Mac Legerton, Executive Director, Center for Community Action, Lumberton, NC. Available in .pdf format at www.mrbf.org.

2. RECRUIT STRATEGICALLY

From the Wall of Inspiration:

No one is guaranteed an outcome; but everyone should be guaranteed an opportunity.

An organization can know it wants to connect to, reach out to, and develop grassroots leaders, but identifying exactly which people to engage the organization’s work takes a clear strategy. *Each* person recruited for leadership development efforts represents the hopes of a leadership program. Furthermore, each person recruited becomes the focus of a serious investment of time and money. It’s essential that recruiting be done right. It takes many months to do recruitment well, and it should be viewed as an integral part of the program, not just something to get done so the real work can begin. The range of approaches for recruitment depends in part on the type of leadership development effort. Participants in the Learning Program have taken several different approaches:

> **REACHING CLIENTS:** *El Centro Hispano*, an organization serving the needs of the Latino community in Durham, NC, attracts many clients who are women. El Centro has developed a support group for women, and they have then been recruited informally through the support

group for involvement in leadership work.

> **REACHING A BROAD CONSTITUENCY:** For their Grassroots Leadership Institute, *Parents for Public Schools* in Greenville, NC, has reached out through an open invitation to parents concerned about their kids' schooling.

> **TARGETING AREA RESIDENTS:** *Voice of Calvary Ministries*, a neighborhood improvement organization focused on the west side of Jackson, MS, recruited residents who wanted to "fix up" their neighborhood to participate in Voice of Calvary's Grassroots Leadership Institute.

> **GOING THE NEXT STEP WITH MEMBERS:** *Jubilee, Inc.*, of Hancock County, TN, focused on members of cooperatives that Jubilee had already organized. They were already recruited to be part of the co-op, and GLD was a logical next step.

QUESTIONS TO ASK

? Who has the most at stake in the issue requiring attention?

? What are our organization's existing ties to the people we wish to reach? How do they view our organization? How will that inform how we reach out to them?

? How can the organization creatively reach out to people who would not automatically sign up for leadership roles or a leadership program? How does this relate to our vision?

? If we're running a GLD training program: Do we want a "formal" approach to recruitment in which people sign on to attend training and commit to follow-up activities? Or do we want to allow anyone interested at any time to come to training workshops? What are the pros and cons of each approach?

? If we're organizers: Do we look for people with raw energy, or are there other particular qualities we are seeking?

? What sort of commitment will we ask from those in whom we invest our leadership development resources?

LESSONS

IN GLD, WHOM YOU RECRUIT IS AN IMPORTANT PART OF BEING ACCOUNTABLE TO YOUR VISION AND VALUES. A thoughtful strategy for recruiting people can involve struggles about organizational culture and core purpose; how the organization usually does business, and with whom, can make it difficult to work in different ways or with different people. In recruiting, look for people who are rooted in the community and who are accountable to a network of residents within the community. Look for people who have demonstrated leadership abilities through their work within your organization and with other community groups such as schools, service groups, or religious organizations.

RECRUITING IS MORE LIKE COURTING THAN LIKE SELLING.

Good recruiters are able to be candid and open as well as human with those being recruited. They are respectful of people's cultural differences. They engage in the give-and-take of conversation and relationship building, rather than a one-sided presentation. This is the success of the *Industrial Areas Foundation's* "one-on-one" and house meeting strategies. Through dialogue, organizers help potential leaders become aware of their self-interests and offer the chance to channel those interests for the greater good.

FINDING A NEIGHBORHOOD GROUP OR NETWORK TO PARTNER IN RECRUITMENT CAN HELP.

This is particularly true when an organization does not have a history of relationship with grassroots leaders or within a particular community. Because *Forward in the Fifth* is a regional organization, finding community-level partners who are trusted by local people has been key.

WHERE YOU MEET IS IMPORTANT. If people know and like the meeting place and view it as a "safe" place to come, recruitment is easier. Hosting a biracial leadership program, for example, within an institution that is viewed as a

“white” institution or a “black” institution, can create a sense of unease.

STIPENDS FOR PARTICIPATION CAN DRAW PEOPLE IN AND HELP THEM DECIDE WHETHER OR NOT TO PARTICIPATE FURTHER. *Forward in the Fifth* offered \$200 for participants who attended 6–8 sessions of training and \$25 stipends for reunion meetings. This helps compensate participants for the direct costs of attending trainings. “Money can bring people to the table, relationship keeps them there,” says Pat Turner, a Learning Program Design Team member.

MAKE THE COMMITMENT FORMAL, AND STICK TO IT. *Voice of Calvary* learned the importance of asking participants in a formal GLD program to commit at the outset to full participation in each module of training. For structured training programs, consider a formal application and written commitments so that people are clear about what the commitment entails. Do the same for learning goals and job responsibilities when leadership development is more “learning by doing.” For the integrity and effectiveness of the program, it is important to stick to contracts and the consequences if participants do not comply with them.

FORWARD IN THE FIFTH: CONNECTING WITH A NEW CONSTITUENCY
FORWARD IN THE FIFTH (FIF), A SCHOOL REFORM ORGANIZATION SERVING 16 COUNTIES IN EASTERN KENTUCKY, DEVELOPED A LEADERSHIP PROGRAM FOR PARENTS WHO WANTED TO BECOME ADVOCATES FOR THEIR KIDS IN THE PUBLIC SCHOOLS. WHILE CHILDREN FROM LOW-INCOME HOMES OFTEN HAD THE GREATEST NEEDS FOR EDUCATIONAL SERVICES, THEY WERE NOT ALWAYS WELL SERVED. FIF KNEW THAT CERTAIN ISSUES WERE NOT BEING DEALT WITH BECAUSE LOW-INCOME PARENTS WERE NOT INVOLVED.

FIF’S ROOTS, HOWEVER, WERE IN LOCAL AFFILIATES THAT TRADITIONALLY HAD A LARGELY MIDDLE-CLASS CONSTITUENCY. FIF DECIDED THAT TO REACH LOW-INCOME PARENTS, THEY NEEDED TO PARTNER WITH A VARIETY OF GROUPS AND INDIVIDUALS – MIGRANT SCHOOL WORKERS, FAMILY RESOURCE CENTERS, AND THE INFORMAL LEADERS WHO CAN GET OTHER PEOPLE IN THEIR COMMUNITY TO READ AN INFORMATIONAL FLYER – WHO WERE CLOSER TO THEM.

ONE-ON-ONES AND HOUSE MEETINGS, INDUSTRIAL AREAS FOUNDATION-STYLE

THE JEREMIAH GROUP, BASED IN NEW ORLEANS, IS ONE OF THE PROJECTS OF THE INDUSTRIAL AREAS FOUNDATION AND HAS DEVELOPED A HIGHLY SUCCESSFUL RECRUITMENT STRATEGY INVOLVING “ONE-ON-ONES” AND “HOUSE MEETINGS.” THROUGH HUNDREDS OF ONE-ON-ONES, ORGANIZERS MEET WITH AND DRAW OUT THE CONCERNS AND INTERESTS OF POTENTIAL LEADERS. THROUGH DIALOGUE, THEY LINK PEOPLE’S SELF-INTERESTS WITH LARGER CONCERNS FACING THE COMMUNITY. ORGANIZERS INVITE PROMISING RECRUITS TO A HOUSE MEETING, IN WHICH A DOZEN-OR-SO PEOPLE GATHER AT A CURRENT LEADER’S HOME TO DISCUSS THEIR CONCERNS ABOUT THEIR COMMUNITY AND TO LEARN ABOUT JEREMIAH’S WORK AND APPROACH TO CHANGE. ORGANIZERS FOLLOW UP TO LINK ATTENDEES TO THE ORGANIZATION’S WORK IN THE COMMUNITY.

RESOURCES

For more information on the Industrial Areas Foundation’s approach, see *Cold Anger: A Story of Faith and Power Politics*, Mary Beth Rogers, University of North Texas Press, 1990.

Building Community by Design: A Resource Guide for Community Change Leaders. MDC’s Building Community by Design offers strategies and resources for recruiting potential grassroots leaders. Information about how to access this guide is available through www.mdcinc.org.

3. BUILD SKILLS, KNOWLEDGE, AND ATTITUDES

From the Wall of Inspiration:

Go to the People
Live with them,
Learn from them,
Start with what they know,
Build with what they have.

But with the best leaders,
When the work is done,
The task accomplished,
The people will say,
“We have done this Ourselves.”
— Lao Tzu, China, 7000 B.C.

GLD can be carried out through a formal training program with a curriculum or series of lesson plans, or the work can be done informally as part of an organization’s regular work with its constituents. Regardless of the approach, staff, in consultation with leaders, needs to decide on the skills, knowledge, and attitudes that grassroots leaders need in order to be effective at achieving the mission of the organization and/or the outcomes they have for their communities.

Through its work with grassroots organizations, MDC has identified five levels at which leaders need to be aware and skillful. Of these five, the Learning Program focused on the first four levels: individual, interpersonal/team, organizational, and community. This framework provides a useful matrix in thinking about what grassroots leaders need to know to be effective. Organizations can utilize this framework as part of their theory of change and determine which skills, knowledge, and attitudes will advance progress towards the desired outcomes. The levels are summarized below, and a full description is included in Appendix D.

> **INDIVIDUAL: ONESELF IN LEADERSHIP.** People must recognize that, as individuals, they are

each part of the system to be changed. They must be willing to develop a greater understanding of themselves along with new skills to lead change more effectively.

> **TEAM/INTERPERSONAL RELATIONSHIPS: SHARING LEADERSHIP WITH OTHER LEADERS.** All change processes require that people work together. The process usually requires building new relationships with those who have historically been on opposite sides of an issue and reaching consensus on complex issues, requiring a variety of skills.

> **ORGANIZATIONAL: THE BASE FROM WHICH LEADERS ACT.** The work of people in communities must be grounded in an organizational home, and local leaders need the skills and knowledge to strengthen and sustain strong local organizations.

> **COMMUNITY: THE PLACE LEADERS ARE CONCERNED WITH CHANGING.** Community change is complex, and leaders need a range of skills and knowledge about engaging their community and developing solutions to local challenges.

> **SYSTEMS/POLICY: THE SYSTEMS OR POLICIES THAT MUST CHANGE.** Some community development efforts necessitate change in the systems and policies that relate to the community’s goals, requiring particular knowledge and skills.

QUESTIONS TO ASK

? Which levels of leadership are most relevant to the outcomes we are hoping for?

? Given our desired outcomes, what are the skills, knowledge, and attitudes that leaders need in order to effect change, and what is the best approach for teaching them?

LESSONS

ASK THE PEOPLE FIRST. Taking time to carefully assess skills, knowledge, and attitudes pays off. Carrying out a front-end assessment of what leaders know and want to know makes curriculum development more focused and responsive to needs of grassroots leaders. West Virginia’s *Coal River Mountain Watch* has

had to listen hard to people in their remote communities to hear what people want to learn and then line that up with the training they know people need in order to take on big coal companies.

TRIAL AND ERROR IS PART OF THE PROCESS. Each of the above-described “levels” of leadership could take weeks of training to address. Curriculum design is really an art, balancing multiple training needs with a limited amount of time and resources. The right balance is struck only through trial and error, refined through regular feedback from participants.

TIME IS EASILY UNDERESTIMATED: When raising funding to do GLD, too often organizations do not build in funding for the time it takes to do the slow work of curriculum development and design. Constructing a leadership development methodology that is right for one’s organization is a time-consuming process of scanning for resources, testing ideas, and tailoring other methods for one’s own purposes.

FLEXIBILITY IS ESSENTIAL. Not all learners will be at the same level, so it is important to have the flexibility to meet people where they are. Organizations doing GLD need to balance this tension between careful planning and being flexible. Forethought is as important as the willingness to go with the needs of individuals or the group.

**SOUTHERN EMPOWERMENT PROJECT:
ADAPTING TRAINING TO INCLUDE “INNER WORK”
ON ADDRESSING RACISM**

FOR OVER 15 YEARS, SOUTHERN EMPOWERMENT HAS WORKED TO EXPAND THE NUMBERS OF EFFECTIVE COMMUNITY ORGANIZERS THROUGHOUT THE SOUTH THROUGH ORGANIZER-TRAINING PROGRAMS. OVER TIME, SEP RECOGNIZED THAT WITHOUT AN ANALYSIS AND DIRECT REFLECTION ABOUT RACISM AND OTHER “ISMS,” THEIR “THEORY OF CHANGE” WAS INACCURATE. RACISM AND OTHER “ISMS” (SUCH AS SEXISM, CLASSISM, AND

HETEROSEXISM) WERE CLEAR FACTORS SHAPING THE CONTEXT WITHIN WHICH ITS PARTICIPANTS WORKED. TOO OFTEN, IGNORING THESE “ISMS” LED TO WHAT SEP’S JUNE ROSTAN CALLS “THE WRECKING GROUND WHERE MOST ORGANIZATIONS END UP.”

SEP GATHERS DIVERSE GROUPS FROM THEIR MEMBERSHIP TO GRAPPLE WITH THE PERSONAL ISSUES OF POWER AND RACE AND CLASS, CREATING A CHANCE FOR PEOPLE TO FIND NEW UNDERSTANDING. JUNE STRESSES THE IMPORTANCE OF TRAINERS DOING THEIR OWN PERSONAL INNER WORK ON ISSUES OF RACE BEFORE TRAINING OTHERS. “I DON’T THINK THEY SHOULD EXPECT GRASSROOTS LEADERS TO DO THINGS THEY WON’T DO THEMSELVES,” SHE OBSERVED. ANOTHER IMPORTANT ASPECT OF APPROACHING DISMANTLING RACISM IS SEP’S COMMITMENT TO MEET PEOPLE WHERE THEY ARE WITHOUT JUDGMENT OR SHAMING.

RESOURCES

Two *Learning Program participants* have developed formal manuals that can inform other organizations’ work:

- > Down East Partnership for Children: *Community Fellows Coordinator’s Manual*
- > NC Justice Center: *The North Carolina Grassroots Living Wage Campaign Handbook*

Southern Empowerment Project runs a three-week organizer training program to build the skills of volunteer grassroots leaders as well as paid organizers. See www.southernempowerment.org for more information.

BONDS and Down East Partnership both used *Community Voices* training developed by A&T University in North Carolina as the beginning module for their GLD work. They added customized experiences to take participants more deeply into the issues of neighborhood activism or child advocacy. For more information on Community Voices, see www.ag.ncat.edu/extension/programs/comvoc/index.htm.

The People's Institute for Survival and Beyond offers trainings on Dismantling Racism. Based in New Orleans, the People's Institute can be contacted at (504) 241-7472 or at www.thepeoplesinstitute.org.

Learning to Listen, Learning to Teach from Global Learning Partners is a great primer for training design. Several organizations in the Learning Program attended GLP's trainer training and found it invaluable in thinking about how to design effective, respectful curricula for adult learners. See www.globalearning.com.

4. RESPECT ADULT LEARNERS

From the Wall of Inspiration:

Listen, Listen, Listen not to
what we think we hear,
hope we will hear,
want to hear, expect to hear,
fear we will hear; but rather intently,
honestly openly listening
to the words and emotions and
history that those around
us bring forth.

Grassroots leaders are people with enormous experience and wisdom. The best leadership development training is done with the assumption that no one person possesses the whole answer to tough community problems but that each of us is likely to have valuable clues to the puzzle. Successful teaching, therefore, requires a comfort with and a commitment to dialogue, a preference for probing questions over packaged formulas, and the consistent use of open questions to invite engagement of learners. When this happens, learning becomes collective discovery, and the sharp distinctions between teacher and learner blur. GLD needs to validate community and individual wisdom and build community and individual knowledge with new ideas, skills, and expertise.

QUESTIONS TO ASK

- ? What experience does the organization have working with adult learners?
- ? What different educational and learning methods and activities do we want to use in designing training experiences that recognize the full range of learning styles?
- ? Does the organization need further training in this area?
- ? How do we foster a "safe space" where learning and self-discovery can occur?
- ? How can we ensure that the learning process will be respectful and culturally appropriate?
- ? How will grassroots leaders be treated respectfully as partners in learning?

LESSONS

GIVING EMERGING GRASSROOTS LEADERS THE EXPERIENCE OF LEADING IS A VERY EFFECTIVE WAY TO MOTIVATE THEM AS ADULT LEARNERS. At *El Centro*, the philosophy has been to let the organization's operations themselves be a learning laboratory for Latino leaders who can gain skills and experience while doing the work of the organization.

LEARNING IS A TWO-WAY STREET. The organization that offers leadership education must be transparent about the fact that it too is always learning, both from grassroots leaders and about its fields of work. This sets a tone of respect for leaders and reinforces the value of a culture of learning.

CULTURAL SHARING CONTRIBUTES TO CREATING AN ATMOSPHERE OF TRUST, SAFETY, AND JOY THAT MAKES ADULT LEARNING MORE POSSIBLE. The affirmation of the whole person when doing GLD helps create the conditions in which the transfer of information, skills, and knowledge is more likely to occur. The Learning Program aimed to model ways to respect adult learners. At least one evening during any gathering was devoted to cultural sharing, which meant salsa and

line-dancing lessons, square dancing, poetry reading, story telling, singing, and more. Folks from the hills of Eastern Kentucky, the Deep South of Mississippi, the Latino neighborhoods of Durham, NC, and more came to deeply trust one another through having been shown respect as they shared their culture.

DROPPING OLD MODELS IS REQUIRED. Even lively and “fun” training can still be rooted in a model of the “expert” at the front of the room delivering the knowledge that people are “supposed” to have. Some of the most well-intentioned educators can fall into old styles of being the “teacher” with all the knowledge, willing to pour it into the “empty vessels” of participants.

SETTING ASIDE DESIGN TIME IS HARD TO DO. Saying that the ratio of design time to training time is 3:1 is easy; creating the time to really do thorough design work is an enormous challenge.

TRANSLATION RESOURCES ARE HARD TO COME BY. When participants don’t all speak the same language, translation is necessary. The costs of the simultaneous translation equipment can be prohibitive, and good interpreters are scarce, as interpretation requires a great deal of concentration and the ability to listen, analyze, and speak in a different language all at the same time. A related problem is that materials on grassroots leadership already translated into Spanish are few, and it takes time to produce translated documents.

JUBILEE PROJECT: FINDING THE RIGHT SETTING

THE JUBILEE PROJECT IS A MINISTRY PROJECT IN HANCOCK COUNTY, TENNESSEE, AND INCLUDES A CRAFTS COOPERATIVE, A FARMER’S MARKET, A MICRO-ENTERPRISE PEER LENDING COOPERATIVE, A FOOD PRODUCT ENTREPRENEUR PROJECT, AND A YOUTH ORGANIZATION. AFTER REFLECTING ON THE ORGANIZATION’S ROLE WITHIN THE COMMUNITY, THE STAFF RECOGNIZED THAT THEY HAD BECOME “GATEKEEPERS” OF INFORMATION AND RESOURCES

NEEDED BY THE COMMUNITY. THEY DECIDED THEY NEEDED TO ENCOURAGE EMERGING LEADERS TO TAKE ADVANTAGE OF EXISTING OPPORTUNITIES AND TO SPEAK FOR THEMSELVES. THEY ALSO NEEDED LEADERSHIP FOR THE VARIOUS ACTIVITIES OF THE ORGANIZATION AS WELL AS THE PROJECT’S STEERING COMMITTEE. A STRUCTURED GLD PROGRAM SEEMED TO BE THE SOLUTION.

YET AS DIANTHA HODGES, THE LEAD STAFF ON THE EFFORT, SOON DISCOVERED, SUCH A PROJECT DID NOT FIT THE CULTURE OF THE AREA AND THE TOWN OF 1,700 PEOPLE. “OUR PEOPLE DID NOT RESPOND TO WORKSHOPS,” DIANTHA RECALLED. LISTENING TO THE COMMUNITY WAS A CORE PRINCIPLE FOR JUBILEE, AND SO THEY HAD TO TAKE A DIFFERENT APPROACH. INSTEAD OF A “FORMAL” LEADERSHIP TRAINING PROGRAM, THEY INTEGRATED SHORT LEADERSHIP SKILLS AND KNOWLEDGE TEACHINGS INTO THE PROGRAMMATIC WORK OF THE GROUPS THEY SERVE. SO GRASSROOTS LEADERSHIP IS NOW INTERSPERSED WITH THE BUSINESS DEVELOPMENT MEETINGS AND THE DISCUSSIONS OF THE FARMER’S COOPERATIVE KITCHEN.

EL CENTRO HISPANO:

RESPECT THROUGH MULTILINGUAL TRANSLATION

IN THE CHANGING RACIAL AND ETHNIC PICTURE OF THE SOUTH, LANGUAGE IS A KEY CONSIDERATION. AT EL CENTRO HISPANO (ECH) IN DURHAM, NC, LEADERSHIP DEVELOPMENT OF LOW-INCOME AND WORKING-CLASS LATINOS, PARTICULARLY WOMEN, HAS LONG BEEN A KEY STRATEGY TO STRENGTHEN THE LATINO COMMUNITY. INITIALLY, THE ORGANIZATION OFTEN DID BUSINESS IN ENGLISH, BUT THIS ONLY MARGINALIZED THOSE THE ORGANIZATION SOUGHT TO BUILD, AS DID SITTING SPANISH SPEAKERS TOGETHER AND HAVING AN INTERPRETER WHISPER A TRANSLATION. CONSECUTIVE INTERPRETING – IN WHICH THE INTERPRETER REPEATS EVERYTHING EVERYONE SAYS, WITH THE SPEAKER AND THE INTERPRETER TAKING TURNS – DID A BETTER JOB OF INCLUDING EVERYONE BUT DOUBLED THE TIME INVOLVED AND MADE IT HARD TO KEEP EVERYONE ENGAGED. FINALLY, EL CENTRO DETERMINED THE MOST EFFECTIVE APPROACH TO BE INTERPRETING EQUIPMENT – A CLOSED-CIRCUIT SYSTEM ALLOWING FOR REAL-TIME TRANSLATION MUCH LIKE THAT USED IN THE UNITED NATIONS.

RICARDO PARRA-LESSO OFFERS INSIGHT INTO THIS WORK, AS A LEADER WITH ECH: “INTERPRETATION IS NOT JUST ABOUT LANGUAGE. IT IS ABOUT CULTURE, KNOWING AND HONORING EACH PERSON IN THE ROOM, BEING OPEN TO LEARNING NEW THINGS, AND MOST IMPORTANTLY, NOT LETTING ONE LANGUAGE OR CULTURE DOMINATE THE SPACE. IT IS IMPORTANT TO LET LANGUAGE BE WHAT IT IS: A TOOL TO COMMUNICATE OUR FEELINGS AND TO BUILD STRONG ALLIES FOR THE JUSTICE AND PEACE THAT WE ALL WANT.”

RESOURCES

Learning to Listen, Learning to Teach, Jane Vella, Jossey-Bass. This book describes Vella’s 12 principles of effective adult learning.

Southern Empowerment Project offers this training program, *Using Training in Organizing*, to better equip organizers to be good trainers. The course focuses on topics of how adults learn, how and why to use training, methods and techniques of training, preparing plans, facilitation skills, giving feedback, and evaluation. For more information, contact SEP through www.southernempowerment.org.

Interpretation and Translation: Power Tools for Sharing Power in Grassroots Leadership Development, available through El Centro Hispano, in Durham, NC, (919) 687-4635. It can also be downloaded as a .pdf file from www.mrbf.org.

5. PROVIDE INDIVIDUAL COACHING AND SUPPORT

From the Wall of Inspiration:

Never do for others what they can do for themselves. — “*The Iron Rule*” of the *Industrial Areas Foundation*

It is striking that, in spite of the words we use — leadership *development* — so many leadership programs are a series of training workshops, as opposed to a series of developmental activities designed to help people move forward along a continuum toward strong leadership. Coaching and other modes of support to help leaders apply new knowledge and build mastery and self-understanding are important elements of a GLD program.

At the *Down East Partnership for Children* in Rocky Mount, NC, coaching refers to the work that the GLD coordinator does to support Community Fellows. Down East creates an “Individual Learning Plan” to customize each Fellow’s skill and knowledge development. For other programs, the support process is more fluid and refers to the periodic checking-in with training program participants carried out by the staff. At *El Centro Hispano*, the women involved in GLD activities can return to the Women’s Café for regular contact and support from El Centro staff and other women.

BONDS encourages people to become involved with a citywide Gathering of Leaders program as a way for people to stay connected to BONDS staff as well as a peer network of other neighborhood leaders. *Jeremiah’s* organizers think about the developmental stage of each leader and are intentional about matching that leader up with progressively challenging leadership work. Some of Jeremiah’s organizers actually keep a card file on each leader, noting their core interests as well as the responsibilities they have signed up for so far.

QUESTIONS TO ASK

? How can we assess the individual skills and knowledge strengths and needs of grassroots leaders?

? How will individual development needs be addressed?

? What do we do in between and after training sessions to provide opportunities for real-world application of skills?

- ? How do we support leaders in reflection and continued development?
- ? How will individual as well as group progress be measured?

LESSONS

TRUE LEADERSHIP DEVELOPMENT FOCUSES ON THE INDIVIDUAL LEARNER, PARTICULARLY THAT INDIVIDUAL'S SPECIFIC NEEDS FOR SKILLS OR KNOWLEDGE. If leadership development is really about development, then personal attention to the developmental path of each leader is essential. Leaders should be involved in creating their learning agendas, and sound structures are needed for ongoing follow-up, support, and coaching. Coaches need to be able to give a leader honest, critical feedback about what skills and areas of knowledge may need to be built.

ESCALATING CHALLENGES ALLOW PEOPLE TO GROW INTO THEIR LEADERSHIP. This can be done through project activities within a structured program, or as a part of integrating a grassroots leader into the ongoing work of the organization. Providing positive reinforcement along the way makes it more likely a leader will continue to be willing to take on leadership positions and responsibilities.

TRUSTED PEER RELATIONSHIPS CAN PROVIDE POWERFUL SUPPORT FOR LEARNING. Vehicles for peer learning should be structured into a program through small group work, model sharing, site visits, or other approaches. In addition to a coaching relationship, *Down East Partnership for Children* uses monthly potluck suppers to allow for peer support between the Community Fellows.

NEGOTIATING THE ROLES BETWEEN PROGRAM STAFF AND LEADERS INVOLVED IN LEADERSHIP WORK IS ESSENTIAL BUT NOT ALWAYS EASY. If GLD participants will work on a learning plan or receive coaching support in their development, it needs to be clear up front. For some staff, it can seem presumptuous to be in a coaching relationship with other

leaders. At *Jeremiah*, leaders know that their learning is largely through direct engagement in community issues, but that after every public encounter, their organizer will reflect with the group and with individual leaders about what went well and what could have gone better. The leaders look to the organizers for frank feedback.

DOWN EAST PARTNERSHIP FOR CHILDREN: STRUCTURE IN COACHING

THE MISSION OF THE DOWN EAST PARTNERSHIP FOR CHILDREN (DEPC) IS TO IMPROVE THE QUALITY OF LIFE FOR CHILDREN AND FAMILIES IN NASH AND EDGEcombe COUNTIES IN NORTH CAROLINA. IT ACHIEVES THIS BY ADVOCATING AND SUPPORTING QUALITY LIFELONG EDUCATION, FACILITATING A TRUSTED AND COORDINATED SYSTEM OF COMMUNITY SERVICES, AND DEVELOPING GRASSROOTS LEADERS. LAUNCHED IN 1995, COMMUNITY FELLOWS IS AN INTENSIVE THREE-YEAR GLD TRAINING PROGRAM. IN 1999, THE COMMUNITY FELLOWS PROGRAM ADDED COACHING AS A CORE ELEMENT.

AT DEPC, COACHING TAKES PLACE IN A ONE-ON-ONE RELATIONSHIP BETWEEN THE COORDINATOR (THE LEAD STAFF OF THE GLD PROGRAM) AND THE COMMUNITY FELLOWS. TO FORMALIZE THE COACHING RELATIONSHIP, FELLOWS COMPLETE AN ASSESSMENT TOOL CALLED REFLECTION ON SKILLS AND ABILITIES, AND BASED ON THAT, THEY SET GOALS AS PART OF AN INDIVIDUAL LEARNING PLAN. THE PLANS ARE REVIEWED AND UPDATED QUARTERLY. THROUGH REGULAR CONVERSATIONS, THE COORDINATOR HELPS FELLOWS DISCOVER THEIR ASPIRATIONS, IDENTIFY THE NEED FOR NEW SKILLS AND ATTITUDES, AND OUTLINE THE STEPS TO REACH THE POSSIBILITIES THAT EACH FELLOW SEES.

RESOURCES

More on *Individual Learning Plans* can be found in *Assessing Leadership Learning: The Community Fellows Experience*, and more on coaching can be found in *Coaching Grassroots Leaders: The Community Fellows Experience*.

Each of these publications is by Viola Barnes-Gray of Down East Partnership for Children and Meredith Emmett of Third Space Studio. To access a .pdf version, go to www.mrbf.org. To access the Down East Partnership's full training manual, contact DEPC, P.O. Box 1245, Rocky Mount, NC 27802, or call (252) 985-4300.

Another good resource on coaching is *Masterful Coaching: Extraordinary Results by Impacting People and the Way They Think and Work Together* by Robert Hargrove, Jossey-Bass, 1995.

6. MAINTAIN ADEQUATE STAFFING

GLD is complex, intensive work, particularly if organizations do real developmental work as described above. Doing this work on the fly as a small part of someone's job is hard, if not impossible. Nor can it be done entirely by volunteers. A team of thoughtful people is required, to conceptualize the work, keep each other accountable to good principles for adult learning, and to do the required legwork. In the Learning Program, each organization developed a learning team. Typically, only one of these people was a staff person assigned to leadership development work. Others included staff from other areas of the organization, board members, or grassroots leaders willing to help shape a program.

QUESTIONS TO ASK

? Who will be the primary person or people to support this work in our organization?

? What skills, knowledge, and attitudes do those key people bring to the table? What will they need to develop?

? How will those staffing this work continue to learn and grow?

? What percentage of time will individual staff members devote to leadership development activities? Is it enough?

? How will the funding required for GLD be

obtained by this organization initially? Over time?

? Who can serve on a team to support the lead staff with other perspectives, skills, or knowledge?

LESSONS

GLD NEEDS TO BE SOMEONE'S PRIORITY. While it takes a team to do GLD, some staff person has to have enough time to make leadership development a priority rather than just an additional responsibility to be addressed during those nonexistent free moments. This is particularly true if the organization is seeking to provide individual assistance to those being cultivated as leaders.

HIRE LOCAL. Often, great staff can come from the communities that are the focus of leadership development efforts. *Voice of Calvary Ministries*, *El Centro Hispano*, and others have shown the success of this strategy.

THE EXECUTIVE DIRECTOR AND BOARD NEED TO "GET IT" Lead staff needs to understand the complexity of leadership development and the fact that outcomes are longer term. And then they need to work with the board to raise the resources to pay for staff time.

STAFFING SHAPES QUALITY. Without adequate staffing, leadership development activities can be poorly conceived, inadequately implemented, and never evaluated. In such cases, organizations should think hard about whether to take on GLD, because it is not worth doing on the cheap.

WALKING THE TALK IS ESSENTIAL. The way staff members are treated will be used as a barometer of how seriously the organization takes GLD. Those involved in leadership development will be the cousins and neighbors and friends of the organization's employees, who take their daily work experience out with

them into the community. Organizations must treat their staff as they treat their program participants — with a sense of value and respect — or their intentions will be suspect.

KEEPING GOOD STAFF TAKES CONSCIOUS EFFORT. Whether volunteer or paid, people who have the skills and knowledge to help others claim their leadership abilities will be hard to keep. They may also be the ones sought after to help lead the organization, might be pulled away by other organizational priorities, or will burn out, given the demands of the work.

STAFF DEVELOPMENT IS CRITICAL. The field of leadership development is dynamic, with new ideas and resources coming available constantly, and GLD requires a broad skill set — program design, training design, genuine respect for all kinds of people, insights into human development, the ability to gain the trust of a range of people (especially across lines of race), passion for and knowledge about the issues that the organization works on, and on and on. Developing and maintaining these skills is critical to the effectiveness of the program, but it takes time and resources.

BONDS: THE CHALLENGE OF STAFFING

ASK BONDS STAFFER JONATHAN DOW ABOUT WHETHER PAID STAFF IS ESSENTIAL TO GLD WORK. BONDS SUPPORTS NEIGHBORHOOD ASSOCIATIONS, AND THERE ARE MORE DEMANDS THAN THERE IS STAFF TIME. BONDS HAS ONLY ONE OTHER STAFF MEMBER, AND WHEN THEY BEGAN TO DO FOCUSED GLD WORK IN ADDITION TO THEIR OTHER WORK, THEY FELT THE SQUEEZE EVEN HARDER. DEVELOPING THE BUDGET TO INCREASE JON FROM PART-TIME TO FULL-TIME HAS BEEN NECESSARY.

BONDS SUPPLEMENTS LIMITED STAFF TIME WITH THE HELP OF AN INVOLVED VOLUNTEER. SANDRA NICKEL, A LOCAL REALTOR WITH A PASSION FOR HER CITY, SERVES WITH JON ON A “LEARNING TEAM” TO THINK ABOUT THE CONTENT OF TRAINING, AND SANDRA LEADS MANY OF THEIR TRAINING SESSIONS. IN ADDITION, BONDS HAS

AN ADVISORY COMMITTEE OF DIVERSE COMMUNITY MEMBERS WHO HELP CONNECT THE ORGANIZATION AND THE LEADERS WITH WHOM IT WORKS TO RESOURCES AND TO OTHER MEMBERS OF THE COMMUNITY.

7. CULTIVATE ORGANIZATIONAL CULTURE AND COMMITMENT

From the Wall of Inspiration:

Manure turns to fertilizer —
it’s just messy and smelly in the process.

Every organization has its own culture — the manner of approaching tasks and people that determines how the organization feels to different groups of people. To be effective at GLD work, organizations have to have a culture that will be attractive, inviting, and supportive of grassroots leaders, as well as an organizational style of interacting with community leaders that is engaging and inspiring.

A number of organizations entered the Learning Program as primarily white or middle-class-led, espousing their desire to engage and empower low-income people and people of color. After deep reflection, some of them recognized that they could not look and act in ways that were uninviting to the people with whom they wanted to work. Gandhi’s famous words were a perfect fit for the groups willing to tackle the work of aligning organizational culture and constituency: “We must be the change we want to see.”

QUESTIONS TO ASK

? What is the dominant organizational culture of the organization hosting the GLD work? Of the staff? Of the board? Who controls information or financial resources?

? Does the organization make grassroots leaders feel welcome?

? How do the demographics of the staff

and board compare to those in the community we seek to serve? How do they compare to the demographics of the grassroots leaders to be developed?

? What tools does the organization’s staff and board possess for working across racial and economic lines? What tools are needed?

? Will grassroots leaders be empowered to influence or change the organizational culture? Will we respect ideas that come from people who have not typically had a voice in the organization? Are we willing to share power with grassroots leaders?

LESSONS

UNDERTAKING GLD REQUIRES AN ORGANIZATION TO LOOK AT ITS CULTURE THROUGH THE EYES OF THE DESIRED PARTICIPANTS.

It is essential that an organization’s culture and its empowerment strategies be aligned. Organizations seeking greater involvement from grassroots leaders need to have a frank assessment of how race, class, and power play out in the organization. This may involve a close look at the beliefs, attitudes, and behaviors of existing staff or board members.

THE WORK OF ALIGNMENT REQUIRES TAKING RISKS. Raising these issues of race, class, and power can draw an organization into uncharted territory. An organization that raises these issues has to be willing to change. An organization that is not interested in the change that comes when grassroots leaders are engaged as equal partners should reconsider its mission and strategies.

SUPPORT FROM THE TOP IS REQUIRED. Given the potential for dramatic internal change, influencing organizational mission as well as internal policies, active support from the executive director and board is vital. One of the participant organizations in the Learning Program hit a wall on this issue. Lower-level staff wanted to focus grassroots leadership development efforts on low-income people and

communities of color, but resistance from the top staff inevitably meant that no real shift occurred.

CHANGE IS MESSY. Organizations that are realigning their organizational culture to support GLD need careful coaching on how to manage conflict. When one organization decided to undertake work to dismantle organizational racism, the work became dangerous territory — causing more damage than progress — and had to be dropped. In some cases, changing organizational culture in order to do effective GLD work requires not just staffing change, but changes in organizational leadership. One organization lost two board chairs in quick succession when these leaders proved resistant to accommodating a new culture supportive of GLD.

PAYING FOR CHANGE IS A CHALLENGE. Philanthropic support for organizational development is hard to come by. When the focus is specifically on tackling issues of race and power within the organization, funding is even thinner. Many funders don’t understand the value of the work and/or these complex issues of “alignment.” They may point only to whether an organization “looks” diverse, for example, rather than being concerned with how power is wielded or where decisions are actually made.

AFFORDABLE HOUSING COALITION: ALIGNING CULTURE AND STRATEGY

FOLLOWING THE LOSS OF A KEY POLICY BATTLE OVER RENTAL CODES, THE STAFF AND BOARD OF ASHEVILLE, NC’S AFFORDABLE HOUSING COALITION DETERMINED THAT A CHANGE IN STRATEGY WAS NEEDED. WITH THIS LOSS, AHC FACED THE REALITY THAT THE COALITION WAS REALLY JUST A FEW PEOPLE SPEAKING FOR OTHERS, RATHER THAN LOTS OF PEOPLE SPEAKING FOR THEMSELVES AND OTHERS.

THE COALITION STAFF WAS PREDOMINANTLY WHITE WOMEN, SO AN EXAMINATION OF THE HIRING AND

INTERVIEW PROCESS ANALYZED WHAT QUESTIONS WERE ASKED, WHERE POSITIONS WERE ADVERTISED, HOW RESUMES WERE REVIEWED, HOW THE INFORMATION ON RESUMES WAS EVALUATED, AND WHO DID THE INTERVIEWING. CHANGES RESULTED IN THE HIRING OF MANY MORE PEOPLE OF COLOR AS OPENINGS OCCURRED.

COALITION STAFF MEMBERS ALSO EXAMINED THEIR SERVICE PROGRAMS TO SEE IF THERE WAS PREFERENTIAL TREATMENT FOR WHITE PEOPLE SEEKING SERVICES. THE RESULTS ALLOWED THEM TO BETTER SERVE ALL THEIR CLIENTS. FOR EXAMPLE, BY CHANGING THE RACE OF PEOPLE WHO TAUGHT THE HOMEOWNERSHIP CLASS, THEY HAVE BEEN MUCH MORE SUCCESSFUL AT SERVING PEOPLE OF COLOR. TWO YEARS PRIOR TO THEIR SELF-EXAMINATION, 11.5 PERCENT OF THOSE WHO TOOK THE CLASS AND WENT ON TO BUY A HOME WERE PEOPLE OF COLOR: SIX MONTHS AFTER THE WORK WAS UNDERTAKEN, THE RATE WAS 48 PERCENT.

RESOURCES

ChangeWorks is a consulting group that advised several Learning Program participants in their efforts to align organizational culture with a GLD strategy. ChangeWorks helps organizations move along a continuum towards becoming an AntiRacist Organization. Contact Kenneth Jones at Kenneth_j_32250@yahoo.com.

Overcoming Racism: From Inner Work to Action by June Rostan of the Southern Empowerment Project is available for download as a .pdf file online at www.mrbf.org.

8. ASSESS PROGRESS AND RESULTS

The results of grassroots leadership development are hard to measure, and yet it is essential that organizations undertaking this work develop approaches to evaluating what is working and not, for at least two reasons. The first is to improve practice. Careful reflection

on whether leaders have learned anything, used it, and actually made changes in their community ought to influence the design and delivery of leadership programs from year to year. The second is to make the case to funders. Leadership development is “soft,” “fuzzy” work. If an organization can point to results, even at the early stages of what leaders have *learned* or begun to *apply* in their communities, funders then know it is more likely to be making a true difference with their dollars.

QUESTIONS TO ASK

- ? How can we tell if people have *learned* new skills and knowledge?
- ? How can we tell if they have *transferred* new skills or knowledge to their work?
- ? How will we know if these new levels of skills and knowledge led to change in the community?
- ? How will the organization measure the success of GLD efforts and activities?
- ? How will the participants be involved in the assessment process?
- ? What can we measure right away and what will require monitoring over time?

LESSONS

GOOD ASSESSMENT REQUIRES BEING CLEAR ON THE GOALS OF THE LEADERSHIP DEVELOPMENT TRAINING OR WORK. A Theory of Change is a must! (See Tenet #1.)

ASSESS LEARNING, TRANSFER, AND IMPACT. Participants in the Assessment Cluster of the Learning Program drew on the work of Jane Vella and identified three levels at which assessment should occur:

- > learning — the immediate understanding of new ideas within the context of the training program;
- > transfer — the ability to apply ideas relatively soon after training; and
- > impact — whether the training contributed to longer-term community change.

For each of these levels, program staff and participants need to come up with indicators that describe what success “looks like.”

USE ASSESSMENT TO SHIFT DIRECTION. Assessment should not simply occur at the end of a particular GLD activity. Rather, it should be a regular part of doing business. At every Learning Program group gathering, a few minutes were saved to record what people found helpful, what they found unhelpful, and what they might change. This sort of information can be used to refine and make process improvements during and throughout the program.

ACKNOWLEDGING MISTAKES MEANS THEY WILL NOT BE REPEATED ENDLESSLY. GLD staff need to be able to say, “I tried this and it totally failed.” If you expect grassroots leaders to do thoughtful self-reflective work, so should the staff of leadership programs.

THE GRASSROOTS LEADERS IN DEVELOPMENT PROGRAMS SHOULD ACTIVELY PARTICIPATE IN THE ASSESSMENT PROCESS. This is not a “do to” process, but rather a collective conversation about whether learning, transfer, and impact are occurring. As a part of *Down East Partnership for Children’s* Individual Learning Plan approach, when a leader establishes a learning goal, he or she also states the indicators that will mark the achievement of the learning goal as well as the evidence of both *learning* and *transfer*.

DOCUMENTING THE ACTIONS AND STORIES OF GRASSROOTS LEADERS IS A POWERFUL ASSESSMENT TOOL. While formal evidence is compelling, so are stories of the accomplishments of leaders. They should be written down and shared widely.

LONG-TERM CHANGE TAKES LONG-TERM ASSESSMENT. The results of leadership development efforts are measured in years, not in weeks or months. Crafting an approach to assessment that is long-term requires patience and an

understanding that real impact cannot be measured quickly. It’s a tired song, but creating the time and space for assessment design is a huge challenge. *Down East Partnership* managed to do such a thorough job of this partly because they hired a consultant to help keep them on track in this part of the work. It was money well spent.

DISCIPLINE AND FOCUS ARE REQUIRED. As this report has described, the work of assessment should occur at three levels: immediate learning, immediate transfer, and longer-term impact. To capture whether learning has occurred requires integrating its assessment into the curricula design. It is invaluable but difficult and requires real discipline and steady focus. Likewise, to capture whether or not leaders are transferring new learning into practice in their home communities requires a system of documentation.

LENA SESSOMS, DOWN EAST PARTNERSHIP FOR CHILDREN

“ONE DAY I TOOK A GOOD LOOK AT THE CONDITIONS AND THE ATMOSPHERE IN MY COMMUNITY AND I DID NOT LIKE WHAT I SAW,” LENA SESSOMS WROTE IN HER APPLICATION TO THE DOWN EAST PARTNERSHIP’S COMMUNITY PARTNERS PROGRAM. LENA WAS SELECTED TO PARTICIPATE IN THE COMMUNITY FELLOWS PROGRAM AND BEGAN HER TRAINING IN SEPTEMBER 2001. SHE IS NOW TRANSFERRING THE SKILLS AND KNOWLEDGE SHE GAINED TO IMPROVE HER COMMUNITY. AS THE NEW PRESIDENT OF HER COMMUNITY WATCH GROUP, LENA’S GOAL IS TO HELP THE GROUP BECOME MORE ACTIVELY INVOLVED WITH THE CHILDREN AND FAMILIES IN HER COMMUNITY IN NASHVILLE, NC.

USING THE LESSONS LEARNED FROM COACHING SESSIONS AND THE INDIVIDUAL LEARNING PLAN THAT ESTABLISHED GOALS AND ASSESSMENT INDICATORS, LENA CRAFTED A STRATEGIC PLAN FOR HER COMMUNITY WATCH GROUP WITH A VISION, MISSION, AND GOAL FOR 2003. TO EXPAND THE PRESENCE AND AWARENESS OF THE COMMUNITY WATCH PROGRAM IN THE

NEIGHBORHOOD, SHE DISSEMINATED AN INFORMATIONAL LETTER, DEVELOPED A FLYER, LOOKED AT OTHER MARKETING STRATEGIES, AND WROTE A SOLICITATION LETTER TO POTENTIAL SPONSORS FOR CHILDREN'S ACTIVITIES IN THE COMMUNITY.

WHEN THE TOWN COUNCIL BEGAN BUILDING A PARK WITHOUT A BASKETBALL COURT FOR NEIGHBORHOOD YOUTH, LENA AND THE COMMUNITY WATCH MOBILIZED THE CITIZENS TO ADDRESS THE COUNCIL WITH THEIR CONCERNS – PARENTS NEEDED A BASKETBALL COURT FOR THEIR CHILDREN TO PLAY WITHOUT HAVING TO PAY A FEE. THE TOWN COUNCIL SUBSEQUENTLY REASSURED THE CITIZENS THAT THEY WOULD BUILD NOT ONLY ONE BUT TWO BASKETBALL COURTS IN THE NEW PARK DUE TO LENA'S LEADERSHIP AND PERSISTENCE.

RESOURCES

Assessing Leadership Development by the Down East Partnership for Children in partnership with Meredith Emmett of Third Space Studio includes all of DEPC's tools developed for assessment. To access a .pdf file, visit www.mrbf.org. To order a copy of DEPC's *Community Fellows Coordinator's Manual*, which includes this chapter on Assessment, contact DEPC, P.O. Box 1245, Rocky Mount, NC 27802, or call (252) 985-4300.

The Learning Program participants developed a generic *Assessment Matrix* that could be adapted by participating organizations in their design of an approach to assessment. See Appendix E.

Jane Vella's book, *How Do They Know They Know*, which discusses assessing the impact of any kind of educational program, proved helpful to a number of organizations within the Learning Program — particularly those within the Assessment Learning Cluster. Published by Jossey-Bass.

Learning Cluster members also found *W.K. Kellogg Foundation's Evaluation Handbook* to offer helpful frameworks on the major approaches to evaluation.

9. LEARN CONTINUOUSLY

From the Wall of Inspiration:

Wandering in the wilderness
is part of the journey.

Grassroots leadership development doesn't occur in a vacuum; it involves people, communities, economies, and cultures that are all dynamic and changing in nature. While reflection and assessment are critical to improving organizational practice under these conditions, keeping up with developments in the field is equally important. It prevents organizations from wasting time and resources by reinventing the wheel, and it can provide a wealth of new ideas.

The Mary Reynolds Babcock Foundation, instead of just providing funding to its grantees, provided a learning program to deepen the work and strengthen the capacity of participating organizations. MDC, as the managing partner, worked to create a culture of learning across and within each organization. (See Appendix C for details of the program components.) In addition, each organization created a three-person "learning team" with a combination of staff, board, and/or grassroots leaders. Sometimes the team worked as a way for more people to learn more good ideas from different sources and share them with each other. At other times, the team was exposed to the same new ideas, but learning went deeper with multiple perspectives.

QUESTIONS TO ASK

? How will our staff and board continue to learn about GLD? How does our organization stay current in the field of leadership development?

? Who else can help us learn?

? What resources are needed to create the time and space for learning?

? How will we systematically consider the changing context of our community and analyze whether we need to adapt our work or our organization?

LESSONS

A CULTURE OF LEARNING WITHIN THE ORGANIZATION YIELDS BETTER WORK. Organizations with the strongest GLD work thoughtfully examine what's working and what's not — and then seek answers from a variety of sources about how to do their work better or smarter.

PEER LEARNING IS A POWERFUL TOOL. In the Learning Program, organizations with an internal “learning team” that stayed together and met regularly advanced their GLD practice the most. The learning community of the participating organizations also yielded huge benefits; time and time again, participants noted that the insights they had upon learning about the work of others were rich and transformational moments.

PAYING FOR THE TIME TO THINK IS TOUGH. Most grassroots organizations are funded to tackle specific community problems where success looks like change on the ground. Incorporating staff time for learning into tight budgets that are project-focused is sometimes impossible.

RESOURCES

Promoting Grassroots Leadership Development: The Role of Learning Program by Prue Brown of Chapin Hall is the story about how learning

occurred in the Program. It offers multiple examples of how organizations accessed new ideas and resources to strengthen their work. The report is available at www.mrbf.org.

The *field of leadership development* is broad, and learning resources relevant to grassroots leadership development can be found in many, many arenas:

> *Academic programs* — a number of universities are conducting excellent research on effective leadership development;

> *Business leadership development* — businesses offer training resources to develop stronger managers and stronger teams, particularly within companies;

> *Community-based adult education* — many resource books are available offering a range of good tools and resources for popular education;

> *Community leadership development* — many of the hundreds of leadership programs affiliated with the National Association of Community Leadership test and apply thoughtful and creative approaches to leadership education;

> *Spiritual practice* — many tools and approaches are available to help organizations develop a culture to nourish staff spirit in the context of social justice work and can apply to grassroots leadership development;

> *Civic education and/or community building organizations* — the collaboration and community-building fields offer training resources and are another source of good ideas.

10. WORK FOR THE LONG HAUL

From the Wall of Inspiration:

The people — beaten down today, yet rising tomorrow; losing the road one minute but finding it the next; their eyes always fixed on a star of true brotherhood, equality, and dignity — the people are the guardians of our hopes and dreams.

— Paul Robeson, 1952

GLD cannot be viewed as a project with a short shelf life. To do grassroots leadership development is to commit to relationships with people and their communities in a deep way. It is not something that can be accomplished just one time or in a short time frame. For GLD to be truly responsive to the emerging needs of the community, mechanisms to provide it must be established over the long term — though the specific strategies and approaches might change over time, the commitment needs to continue.

For an organization to have an effective, enduring network of grassroots leaders to help further their vision, the organization's staff and board leaders must be committed to doing more than simply running a GLD program. Human empowerment can be woven into the very fabric of how the organization does its daily work.

QUESTIONS TO ASK

? How will the organization raise the resources to sustain GLD efforts in the longer term?

? What steps has the organization taken to ensure that GLD efforts will continue? Does the mission of the organization reflect a commitment to GLD? Does the board understand what is required to sustain the work?

? How are grassroots leaders' perspectives incorporated into the organization's activities?

? If we are an issue-focused organization, how can we keep GLD incorporated into our work?

LESSONS

TACKLE HARD TRUTHS: Organizations that analyze whether their rhetoric about grassroots leadership development matches their daily practice do essential and courageous work.

THE STATED MISSION MATTERS. Greenville's *Parents for Public Schools* dedicated itself to the work of GLD and developed a mission statement to correspond, serving as a motivator and an accountability tool for the board and staff. The new mission is: "to empower *all* parents to work across barriers of race, class, and geography; to engage parents at *all* levels of involvement in order to build quality schools, which provide the knowledge and skills necessary for *all* students to function effectively in a democratic society."

BUILD A BOARD WITH GRASSROOTS LEADERS ON IT. The *Affordable Housing Coalition* has reformulated its board structure to create grassroots representation, and rather than simply inviting these new and less experienced leaders onto the board to fend for themselves, the staff worked to develop these leaders as strong and vocal board members. The *Chatham County Health Department* plans to invite grassroots leaders it has developed onto advisory boards and committees that develop the department's policies and direction.

CELEBRATE VICTORIES. Taking the time to celebrate even small victories is important to maintaining a sense of momentum in the short term as organizations work for the long haul.

RECOGNIZE THAT THE NATURE OF PROJECT WORK CAN YIELD A SHORT-TERM FOCUS. Many issue-based organizations organize their work in the context of issue campaigns or time- or funding-

limited projects. Grassroots leadership development is deep and complex work that ought to be crosscutting within an organization. Avoiding “projectitis” when thinking about GLD is required but can be counter-cultural.

BUCKING THE TREND OF PHILANTHROPIC FADS IS ESSENTIAL. Leadership development comes and goes as a hot topic in philanthropic giving, and sometimes it is funded under a new name. (Recently, “building social capital” has become another name for the same kind of work.) Organizations that rely on foundation support have to find a way to keep their GLD work core in spite of the trends in philanthropy.

KENTUCKIANS FOR THE COMMONWEALTH: POWER IN REFLECTION AND RETRENCHING

FOR 21 YEARS, KENTUCKIANS FOR THE COMMONWEALTH HAS USED DIRECT ACTION TO CHALLENGE AND CHANGE UNJUST POLICIES AND FOSTER DEMOCRATIC INSTITUTIONS ACROSS THE STATE, AND GLD HAS BEEN AN EXPLICIT PART OF THEIR STRATEGY. IN THEIR 20TH YEAR, KFTC UNDERTOOK AN ORGANIZATIONAL STRATEGIC PLANNING PROCESS. AS THE PROCESS UNFOLDED, IT BECAME APPARENT THAT THE ORGANIZATION HAD DRIFTED FROM ITS COMMITMENT TO ONGOING CULTIVATION OF GRASSROOTS LEADERS. KFTC RECRUITED GRASSROOTS PEOPLE TO GET INVOLVED IN ISSUE-FOCUSED “CAMPAIGNS” (E.G., FOR A CLEANER ENVIRONMENT, FAIRER TAX POLICY), BUT INVOLVEMENT DID NOT EQUATE TO LEADERSHIP DEVELOPMENT.

KFTC EMERGED FROM THE PLANNING PROCESS WITH A RENEWED COMMITMENT TO GLD WORK. BURT LAUDERDALE, THE DIRECTOR, SAID THIS WORK WAS “FAR AND AWAY” THE MOST IMPORTANT TO THE ORGANIZATION. THE ORGANIZATION CREATED A NEW POSITION, DIRECTOR OF LEADERSHIP DEVELOPMENT, AND A MULTI-LAYERED GLD STRATEGY THAT ENCOMPASSES THE FOLLOWING APPROACHES:

> FELLOWS PROGRAM: ADVANCED LEADERSHIP TRAINING, FOUR WEEKENDS PER YEAR, FOR A SELECT

GROUP OF 12-20 LEADERS AND STAFF EACH YEAR;
> LEADERSHIP SCHOOLS: SERIES OF TRAININGS OFFERED FOR NEW MEMBERS IN AN INTRODUCTION TO ORGANIZING SKILLS AND THE DEVELOPMENT OF CHAPTERS;
> ISSUE-FOCUSED CLUSTERS: ADDITIONAL SKILLS TRAINING, WITH KFTC STAFF FACILITATING THIS TRAINING;
> ONGOING STAFF DEVELOPMENT IN APPROACHES TO LEADERSHIP DEVELOPMENT SKILLS; AND
> ONGOING DEVELOPMENT OF THE ORGANIZATION'S STEERING COMMITTEE.

RESOURCES

Kentuckians for the Commonwealth's Six Principles of Social Change Organizing These six principles have allowed *Kentuckians for the Commonwealth* to stay in the work for the long haul:

1. We seek to empower individuals and assist them in becoming community leaders.
2. We foster democratic values and the belief that all people are equal.
3. We work to change unjust institutions by addressing the root causes of problems and organizing to bring about a more equal balance of power within our political, economic, and social systems.
4. We seek to address issues that affect the common welfare.
5. We seek to build organizations that can sustain a community and its interest over time.
6. We believe strongly in the need to have fun while we do the work.

For more information, contact Burt Lauderdale, KFTC, London, KY, at 606-878-2161.

AFTERWORD

SO WHAT? NOW WHAT?

The Southern GLD Learning Program has seen results at multiple levels. This report offers insights into the lessons learned about GLD by participants. The most important results by far are the *hundreds of grassroots leaders* throughout the South who are now more engaged in the work of community change, equipped with the motivation, skills, and knowledge to help them build just and caring communities. The stories sprinkled throughout this report offer only a glimpse at these people and their passion. Other results include:

- > *Sixteen organizations* are now deeply thoughtful about what it takes to do the work of grassroots leadership development and have much more capacity to carry it out.

- > *Dozens of staff* within those organizations have been deeply affected by the chance to learn and grow over a three-and-one-half-year period. They relished the chance to connect with like-minded peers and put their hard questions on the table about how to do GLD most effectively. Sweat and tears have been shed in the trial and error, and lots of celebrations of successes have come along the way as well.

- > Finally, through the work of the grassroots leaders engaged in the program, *their efforts are bearing fruit:*

- > Services to the Latino community are more accessible;
- > Environmental regulations against mountaintop removal are more strictly enforced;
- > Schools are more responsive to low-income parents;
- > Children of poor people and people of color are getting a fairer shake in school;
- > Neighborhoods are safer; and
- > Coalitions of grassroots and traditional leaders across communities are stronger.

The Babcock Foundation's mission is building just and caring communities, and the investment in GLD is a powerful contribution to that goal. The Foundation will continue to be concerned with grassroots leadership development, but it needs partners and allies in this effort. Messages to funders about what's needed appear throughout this report, but a few are worthy of special attention:

FUNDING IS NEEDED FOR THE LONG HAUL. Leadership development is slow work. The Down East Partnership for Children found that in order to develop the knowledge needed by leaders, a three-year program serving a limited number of leaders was needed. Funders looking for quick results and big numbers could easily be turned off from GLD efforts. Many of the organizations in the Learning Program face a constant struggle to sustain their investment in this work. Grassroots organizations require funders who believe in the ideal of grassroots leadership development, who take the time to understand its complexity, and who back it with dollars.

FUNDING GLD REQUIRES FUNDING ORGANIZATIONAL CHANGE. As outlined particularly in the discussion of organizational alignment and GLD (Tenet #7), doing the work of GLD often changes an organization. Not one of the participating organizations was spared deep, tough questions about issues such as: the organization's theory of change, needed changes in the mission, implications for the board, allocation of staff, sources for funding, and more. Funders who back the work of GLD need to encourage the deeper organizational change work or risk that the GLD work will be an add-on program, easily expendable.

FUNDING GLD IS A STRATEGY FOR INFLUENCING ORGANIZATIONAL BEHAVIOR. While the Learning Program did not aim to influence the broader network of traditional community leadership programs, doing so is a worthy

goal. In particular, many traditional chamber-of-commerce based programs could do so much more to include and involve grassroots leaders from low-wealth communities in their programs. Funders could help pave the way by insisting on it.

CONVENING IS A POWERFUL TOOL FOR LEARNING. This GLD Program was expensive, in large part because of the costs of gathering people for learning institutes, learning clusters, and other learning events. But the value of peer learning is immeasurable. Without it, organizations would have done good work, but it would have been much less strong and much more isolated than the work that emerged from these organizations. “Every time we would go to a cluster meeting, we would have what we thought was a good framework and we would end up ripping it up,” recalls Jonathan Dow of BONDS. The opportunity to be pushed by MDC and the peer organizations was invaluable. “The Program took us out of our hectic world and let us sit down and share ideas...It gave us the chance to say, ‘Let’s stop and find out what we want.’”

The Mary Reynolds Babcock Foundation and MDC welcome funders interested in exploring opportunities to build on and spread these learnings.

FINDING OUT MORE ON GRASSROOTS LEADERSHIP DEVELOPMENT: OTHER RESOURCES FROM THE FOUNDATION

The Mary Reynolds Babcock Foundation has been investing in the work of grassroots leadership development in a number of ways. A series of resource materials from this work is available on the Foundation’s website: www.mrbf.org. Included in this series is:

> *Promoting Grassroots Leadership Development: The Role of a Learning Program*, Prue Brown, Chapin Hall, 2003.

> *Voices from the Field*, a series of short essays about the work of GLD, written by a number of Babcock grantees who do GLD work.

> *Grassroots Leadership Development/State Policy Program: Lessons Learned*, Brian Kintisch, 2002.

> A series of hands-on pieces on aspects of GLD referenced in this document and produced as part of the Learning Program. They are:

> *Values-Based Grassroots Leadership Development*, by Mac Legerton, Center for Community Action.

> *From Inner Work to Overcoming Racism*, by June Rostan, Southern Empowerment Project.

> *Coaching Grassroots Leaders: The Community Fellows Experience*, Viola Barnes-Gray, Down East Partnership for Children, and Meredith Emmett, Third Space Studio.

> *Assessing Leadership Learning: The Community Fellows Experience*, by Viola Barnes-Gray, Down East Partnership for Children, and Meredith Emmett, Third Space Studio.

> *Dismantling Racism as a Component of Grassroots Leadership Development: Affordable Housing Coalition as Case Study*, by David Schenck, for the Affordable Housing Coalition.

> *Interpretation and Translation: Power Tools for Sharing Power in Grassroots Leadership Development*, El Centro Hispano.

APPENDIX A

LEARNING PROGRAM PARTICIPATING ORGANIZATIONS

AFFORDABLE HOUSING COALITION, ASHEVILLE, NC. The Affordable Housing Coalition was founded in 1991 by area nonprofit agencies that either produced affordable homes or provided services to those who struggled to find or keep their homes. The early goal was to create an organization that could fill two types of needs in our community. The first was to provide direct services to people struggling to find or keep a safe and affordable home. Today our housing counseling, Interlace, and Homebuyer Education programs evidence this. The second effort was to help existing nonprofits in the housing and related arenas find ways to compete for diminishing funding streams in a way that made best use of those dollars. In addition, efforts were made to develop, through the Community Education Program, a strong advocacy arm — one that could address the need for the decision makers to support, on a policy level, the development and preservation of affordable homes.

BUILDING OPPORTUNITIES FOR NEIGHBORHOOD SUCCESS (BONDS), MONTGOMERY, AL. BONDS provides small grants to neighborhood associations and equips grassroots leaders of those organizations with the skills and resources they need to solve the problems facing low- and moderate-income neighborhoods. The philosophy of the program is to work with identified and emerging leaders to support neighborhoods in transition and to develop a civic culture that values the opinions, efforts and strengths of low- and moderate-income grassroots leaders.

CENTER FOR COMMUNITY ACTION, ROBESON COUNTY, NC. The Center for Community Action was formed in 1980 to organize the first, long-range, multiracial, grassroots organization whose

mission was to address the root causes of poverty and injustice in Robeson County, N.C. During a highly participatory, two-year community assessment process, six major issues surfaced as central to mutual problem-solving: race relations and racial justice; access to equitable political representation and opportunity; legal justice, including court and law enforcement reform; public education; community economic development; and land ownership/use and environmental justice. With significant changes forged through struggle and success over the last 20 years in the areas of political and legal reform and racial and environmental justice, CCA has now turned program priorities toward education improvement and school reform, youth empowerment and leadership development, community and economic development, and welfare and service delivery reform.

CHATHAM COUNTY HEALTH DEPARTMENT, PITTSBORO, NC. The Chatham County Health Department exists to provide and encourage the provision of quality health programs that protect and promote health, prevent and control disease, reduce and rehabilitate disability, and establish and maintain healthful lifestyles and a safe environment.

COAL RIVER MOUNTAIN WATCH, PICO, WV. Coal River Mountain Watch is a grassroots organization working to establish social, environmental, and economic justice in the coalfields of Southern West Virginia through the identification and development of community leaders. They organized in response to the fear and frustration of people whose homes, communities, environment, and heritage are being destroyed by mountaintop removal coal mining. The primary purpose is to halt mountaintop removal mining and to ensure that existing damages are corrected to the greatest extent possible and that communities and citizens are fairly compensated for their losses.

DOWN EAST PARTNERSHIP FOR CHILDREN, ROCKY MOUNT, NC.

The Down East Partnership for Children (DEPC) in North Carolina works to make sure every child born in Nash and Edgecombe counties has the best start in life. Located about 60 miles northeast of the state capital of Raleigh, the program serves children in two mostly rural counties. The program's goal is to ensure that children and their families receive the health, education, and social services needed to raise healthy children. To achieve this goal, the DEPC provides services ranging from screening children for lead poisoning to providing money to improve childcare facilities.

EL CENTRO HISPANO, INC., DURHAM, NC. El Centro Hispano is a grassroots community-based organization dedicated to strengthening the Latino community and improving the quality of life of Latino residents in North Carolina and the surrounding area. We accomplish this by developing local grassroots leadership and establishing partnerships with other communities and organizations.

EMPOWERMENT, INC., CARRBORO, NC. EmPOWERment, Inc., is people empowering people to control their own destinies through affordable housing, community organizing, and grassroots economic development. EmPOWERment, Inc., was launched in 1996 to help working families in Chapel Hill and Carrboro reclaim their economic and political power. We have now expanded our services to Orange, Chatham, and Alamance counties. Since our inception we have aggressively promoted a new model of development focused on making real impacts in peoples' lives while helping communities organize for greater self-determination. We are reclaiming our communities by expanding homeownership opportunities, combating gentrification, and organizing to build stronger neighborhoods.

FORWARD IN THE FIFTH, BEREA, KY. Forward in the Fifth's vision is that members of our communities will have the educational opportunities necessary to live full and productive lives. Our mission is to: raise educational levels in the region; encourage lifelong learning by providing opportunities for parents, educators, and community members; and foster partnerships between communities and schools. Forward in the Fifth was created by and is led by people from eastern and southern Kentucky who recognize the specific educational needs of the region.

THE JEREMIAH GROUP, NEW ORLEANS, LA. The Jeremiah Group is an ecumenical, interracial group of 45 congregations, including one synagogue, in the metropolitan New Orleans area. This grassroots organization of churches is affiliated nationally with the Industrial Areas Foundation. The goal of the Jeremiah congregations is to create a strong network of citizens committed to working together across racial, class, and denominational lines to bring about community change. Over the past several years, the Jeremiah Group has been working to strengthen ties among existing members, recruit new churches, and develop its agenda for community change.

JUBILEE PROJECT, SNEEDVILLE, TN. Jubilee Project was begun in 1991 by local United Methodists. Since then, its Board has expanded to include many others in the community. Jubilee Project helps people in the area become organized into a network of grassroots community, youth, cooperative, and small business groups. It is committed to being a democratic grassroots organization that enables people in this part of Appalachia to have greater voice and power over decisions affecting their lives and communities. Jubilee Project's vision is to assist in the empowerment of people in Hancock County Tennessee (especially those with the greatest needs), through enhancement of self-worth, abilities, and opportunities. The goal is an

inclusive, community-based organization, initiated and guided by Christian values and relationships.

KENTUCKIANS FOR THE COMMONWEALTH, LONDON, KY.

Kentuckians for the Commonwealth believes in the power of citizens, working together, to challenge injustices, right wrongs, and improve the quality of life for all Kentuckians. “We are working for a day when Kentuckians — and all people — enjoy a better quality of life. When the lives of people and communities matter before profits. When our communities have good jobs that support our families without doing damage to the water, air, and land. When companies and the wealthy pay their share of taxes and can’t buy elections. When all people have health care, shelter, food, education, clean water, and other basic needs. When children are listened to and valued. When discrimination is wiped out of our laws, habits, and hearts. And when the voices of ordinary people are heard and respected in our democracy.”

NORTH CAROLINA JUSTICE & COMMUNITY DEVELOPMENT CENTER, RALEIGH, NC.

The NC Justice Center aims to reduce and, ultimately, to eliminate poverty in North Carolina by ensuring that low-income working poor and minority individuals and communities have the resources they need to move from poverty to economic security. To achieve its mission, the Justice Center works in collaboration with North Carolina’s disadvantaged individuals and communities employing a multi-forum advocacy model with four primary strategies: litigation, policy research and development; public policy advocacy; and grassroots empowerment/ community capacity building.

PARENTS FOR PUBLIC SCHOOLS OF PITT COUNTY, GREENVILLE, NC.

Parents for Public Schools is a national organization of community-based chapters working in public schools through broad-based enrollment. Invigorated by a diverse

membership, our proactive involvement helps public schools attract all families in a community by making sure all schools effectively serve all children. We believe that quality public education is vital to our democracy and to America’s future.

SOUTHERN EMPOWERMENT PROJECT (SEP), MARYVILLE, TN.

SEP is a multiracial association of member-run, member-based organizations. SEP stands with the oppressed, challenging racism and social injustice. SEP recruits and trains community leaders to become organizers to assist organizations in the South and Appalachia to solve community problems.

VOICE OF CALVARY MINISTRIES, JACKSON, MS.

Voice of Calvary has been serving the west Jackson, Mississippi, community for three decades and is a national leader in Christian Community Development. The organization’s mission is to rebuild people to rebuild their communities through the power of the gospel. Although faith-based, the leadership curriculum is nonsectarian and no participant is required to adhere to any particular creed or dogma.

APPENDIX B

DESIGN TEAM

MDC drew on a talented and experienced Design Team for the planning of learning institutes and input on the general direction of the Program. Four of these members (noted with an asterisk below) also served as coaches for participating organizations, offering guidance about GLD program design, organizational change, sustainability, and more.

Deborah Tyler-Horton, Deputy Director, NC Justice & Community Development Center

*Kenneth Jones**, Principal, K.J. Jones and Associates

*Juan Sepulveda**, President, The Common Enterprise

*Pat Turner**, Director, The Children's Museum of Atlanta

Wendy Johnson, Executive Director, Southern Regional Council (served in first year of the program)

*Kimberley Richards**, CORE Trainer, People's Institute for Survival and Beyond; Co-Director, Southwest Gardens Economic Development Corporation

MDC also enjoyed a strong partnership with the staff of the Mary Reynolds Babcock Foundation throughout the Learning Program, including Gladys Washington, Gayle Williams, Sandra Mikush, Athan Lindsay (now with the Warner Foundation), and William Buster.

APPENDIX C

PROGRAM COMPONENTS

Time Frame

The Southern Grassroots Leadership Development Learning Program was conceived of as a 2 ½-year initiative, with the first half of Year 1 focused on intensive learning and planning and Years 2 and 3 focused on implementing new ideas, learning and replanning. The Program was launched with an Invitation to Apply in January 1999. Organizations were selected in March, and the first kickoff event was held that summer. Sometime in 2001, the Foundation decided that an additional year of support was essential to allow organizations to solidify their learnings; 2002 was the final year of Program support.

Opportunities for Learning

To support learning and change at multiple levels (individual, interpersonal/team, organizational, and community), MDC constructed the Program to offer a range of learning opportunities.

1. LEARNING INSTITUTES: Participating organizations attended a series of four Learning Institutes over the course of three years, in which they came together with each other and outside resource people to reflect on their work, to learn from and teach peers, to stretch their thinking, and to develop plans for advancing their grassroots leadership development work. Institutes were held in May and July 1999, November 2000, and November 2001.

2. LEARNING CLUSTERS: Focused peer learning on a narrow topic can provide a powerful way to strengthen organizational practice. During the first two learning institutes in the summer of 1999 participating organizations identified aspects of grassroots leadership development

about which they felt they had considerable learning to do. Five areas of interest emerged:

A) ASSESSMENT — measuring the impact of grassroots leadership development. This cluster focused on creating a tool to measure changes in individuals, organizations, and the community that captures the actual changes that result from participating in leadership development.

B) COMMUNITY ORGANIZING — exploring and drawing on the models and methods of community organizing in grassroots leadership development work. The organizations in this cluster are examining ways of drawing on principles and practices from the field of community organizing that apply to organizations that do not have a history of community organizing. This cluster connected the field of community organizing to a range of organizations that can benefit from the historic strengths of this strategic approach.

C) CURRICULUM — developing a comprehensive training program for grassroots leaders. Members of this cluster are interested in adding or retooling a specific and identified leadership development training program. Their thinking was grounded in a “theory of change” model so that the curriculum developed focused on the specific outcomes each organization hoped to advance.

D) DATA — determining how to help organizations and grassroots leaders use data for more effective community change work. The cluster identified ways to translate highly technical and intimidating data into clear and valuable information grassroots leaders can use in achieving change in the community.

E) ORGANIZATIONAL DIVERSITY AND POWER SHARING — helping organizations to deal with

race, class, and other lines of division within their own leadership styles and to create more democratic organizations by involving grassroots leaders. Particularly in the South, divisions of race, class, and gender can become obstacles to important community change work. This cluster intentionally analyzed the power structures within participating organizations to ensure that the groups are inclusive in the work that they are doing in communities.

The learning clusters met at least four times over the course of three years with two to three people from each organization participating in one or more learning clusters. Between gatherings, cluster participants furthered the conversation on a limited basis through conference calls.

3. IMPLEMENTATION GRANTS: In the fall of 1999, each organization in the program applied for a grant of up to \$25,000 to seed new efforts developed over the course of the first year’s learning. Use of grant funds included: (1) developing curricula and training manuals, (2) conducting site visits and incorporating on-site learning, and (3) offsetting the costs of hiring new staff to recruit and train leaders. Additional support of \$10,000 was available when the Program extended into 2002.

4. COACHING: After observing organizations work to apply new ideas in 2000, MDC and MRBF saw that organizations would be more effective in applying learnings to practice if they had additional direct support from a “coach” — a consultant who could help them reflect and test out the best ideas. Each site then had access to up to 10 days per year of a coach’s time.

5. TECHNICAL ASSISTANCE POOL: So that sites could access particular TA on complex issues, each site had up to \$2,500 it could spend to draw on external expertise, to visit other organizations,

or to allow for more team members to attend cluster meetings than the Program budget allowed.

APPENDIX D

FIVE LEVELS OF LEADERSHIP

INDIVIDUAL: ONESELF IN LEADERSHIP. People must recognize that, as individuals, they are each part of the system to be changed. They must be willing to develop a greater understanding of themselves along with new skills to lead change more effectively, including:

- > clarity on personal values that motivate community work and alignment between inner beliefs, values, driving forces, and the public self and tasks as a leader
- > an understanding of leadership strengths and weaknesses, as well as an understanding of how the individual is perceived by others
- > the ability to build on strengths and overcome or compensate for weaknesses
- > an understanding of how to be intentional (and reflective) about using personal power to further our organizational goals in public or civic arenas

TEAM/INTERPERSONAL RELATIONSHIPS: SHARING LEADERSHIP WITH OTHER LEADERS. All change processes require that people work together. The process usually requires building new relationships with those who have historically been on opposite sides of an issue and reaching consensus on complex issues, requiring a variety of skills, including:

- > building and maintaining relationships, including those with diverse groups of people
- > building and sustaining an effective group (team, task force, or committee) over time
- > the ability to listen and communicate with those who are different, including the ability to speak forthrightly about personal beliefs
- > the ability to run effective meetings that

facilitate real dialogue and move a group to consensus

- > the ability to create trust across lines of race and class
- > the ability to analyze weak spots in the team or group and compensate for them

ORGANIZATIONAL: THE BASE FROM WHICH LEADERS ACT.

The work of people in communities must be grounded in an organizational home, and local leaders need the skills and knowledge to strengthen and sustain strong local organizations, including:

- > an understanding of what values are key to the organization and the ability to analyze whether those values work with or are in conflict with values we say we want in the community we serve
- > the ability to analyze and help shape our organizational culture and learn from the way things work here
- > the ability to hold other leaders accountable and to be held accountable to the organization's agreed-upon mission and values
- > the ability to undertake an organizational strategic planning process
- > an understanding of the role of the board and the ability to make the board work more effectively
- > basic and critical organizational skills such as management systems, record keeping, accounting, using technology, and fundraising

COMMUNITY: THE PLACE LEADERS ARE CONCERNED WITH

CHANGING. Community change is complex, and leaders need a range of skills and knowledge about engaging their community and developing solutions to local challenges, including:

- > a data-based understanding of the "current reality" in the community and the historic, political, and economic context that will influence our ability to change things

- > an understanding of how power operates in the community
- > the analytic skills to solve problems using principles of sound strategic planning – how to set clear goals, develop strategic options that are based on a community’s assets and are politically and financially feasible, craft a clear plan of action and reflect on and evaluate the product;
- > an understanding of programmatic solutions that can address community needs
- > the ability to build alliances with other groups
- > the ability to identify, develop, and empower other leaders
- > the ability to use the media effectively
- > a commitment to celebrating both large and small victories

SYSTEMS/POLICY: THE SYSTEMS OR POLICIES THAT MUST CHANGE. Some community development efforts require change in the systems and policies that relate to the community’s goals. The necessary knowledge and skills are many, including:

- > knowledge of the institutions and agencies that oversee policies — how they work, how money flows, etc.
- > an understanding of who holds power in our community and how it is wielded
- > an understanding of the political and economic history of the community
- > the ability to create collaborative partnerships based on personal, organizational, and community interests
- > lobbying skills and related skills for effective use of the media
- > an understanding of the policymaking process: how legislation is crafted, how budgets are developed

APPENDIX E

ASSESSMENT MATRIX

Challenge to be addressed:

CURRICULUM		OUTCOMES			
SKILLS, KNOWLEDGE, ATTITUDES	APPROACH TO TRAINING	LEARNING: INDICATORS DURING TRAINING	TRANSFER: INDIVIDUAL CHANGE	ORGANIZATIONAL CHANGE	COMMUNITY CHANGE
			SHORT-TERM:	SHORT-TERM:	SHORT-TERM:
		ASSESSMENT METHODS:	LONG-TERM:	LONG-TERM:	LONG-TERM: