LEADERSHIP FOR A NEW ERA: "HOW TO" SERIES | SEPTEMBER 2012

# Leadership & Collective Impact

## A GUIDE FOR STRENGTHENING THE IMPACT OF YOUR LEADERSHIP DEVELOPMENT WORK

LEADERSHIP LEARNING COMMUNITY

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The Leadership Learning Community is a national nonprofit organization transforming the way leadership development work is conceived, conducted and evaluated, primarily within the nonprofit sector. We focus on leveraging leadership as a means to create a more just and equitable society. We combine our expertise in identifying, evaluating and applying cutting-edge ideas and promising practices in the leadership development field, with access to our engaged national network of hundreds of experienced funders, consultants and leadership development programs, to drive the innovation and collaboration needed to make leadership more effective.

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It is time to ask ourselves if the countless dollars and tremendous effort on the part of dedicated nonprofit leaders are getting us where we need to be. Many would agree that we are falling short of the mark and are not seeing the progress that is sorely needed on any number of serious, complex social problems. In their seminal article, "Collective Impact," John Kania and Mark Kramer suggest that no single individual or organization can tackle persistent social issues such as the early childhood health outcomes, lowering global carbon emissions or pervasive poverty alone. We need a new way of working together and a new kind of leadership to transcend hierarchical belief systems to bring about a change in how we treat each other as well as our greater global communities and ecosystems.

In 2010 the Leadership Learning Community (LLC) produced the publication, "A New Leadership Mindset for Scaling Social Change," an article describing the need for a new leadership mindset that understands leadership as a process in which change agents align their purpose and actions to have a large-scale impact on critical issues like community well-being and the sustainability of the planet. The article offers compelling evidence of leadership programs that are achieving impressive results in education, the environment, and community development, to show what happens when people come together across boundaries to connect their ideas and resources in ways that transform our future in a positive direction.

As our understanding of leadership becomes more collective, we need to rethink our approaches to leadership development. The W.K. Kellogg Foundation funded LLC to harvest learning from programs that are charting new territory and to answer the question of what leadership strategies will increase the collective impact of leadership development. As a result, we have generated a series of three "how to" guides (based on our research) to help the staff of leadership programs accomplish the following:

- define their social purpose and community benefit results
- utilize action learning to produce those results
- be strategic about cohort composition
- cultivate and activate networks

The how-to guides, which can be read separately or as an interconnected series, offer recommendations that walk you through these key components of the process:

### How to Use Action Learning to Achieve Results

When leadership development efforts are tied to results such as a decrease in homelessness, it becomes clear that what is needed is a diverse group of individuals and organizations connecting and working in new ways. Leadership development programs can be incubators for connecting and developing these skills, through action learning that is tied to making progress on the issue (homelessness, in this example). This guide provides recommendations and tools to help you clarify your program's purpose, identify and map the results your program seeks, and decide on action learning approaches that increase the ability and likelihood of participants to deliver the desired results.

### How to Recruit to Maximize the Value of Your Cohorts

If the goal of your leadership program is to prepare children to be ready to learn when they enter school, your leadership program might recruit teachers, parents, community groups, city officials, health clinic workers, immigrant rights groups, or some combination of these. The choice of who to recruit should be based on your analysis of the issue you are focused on, the larger system of factors contributing to that issue, existing leadership gaps, and your organization's own history, strengths, and values. Deciding what target population will have the greatest impact on your issue is as important to consider as the competencies and curricula of your program.

### How to Cultivate and Activate Your Network

This guide prompts you to think about ways in which you can design your program and curricula to support self-organization, the ability to use network tools, and an understanding of networks and how they work. The guide tackles thorny issues such as whether you should be supporting a closed network of graduates (limited to program alumni) or an open network focused on the issues or passions that connect your graduates and potentially their networks and allies. Recommendations are made about the infrastructure that will optimize the success of your graduate network.

These three guides are part of a larger collaborative research initiative that has engaged people from the leadership field, the racial equity field, and the network development field—all of whom believe that new ways of learning and leading are needed that are more inclusive, networked, and collective. This work is supported by the Leadership for a New Era wiki platform, where you can create a profile, participate in discussion forums, contribute your own research, and learn about webinars that highlight interesting, out-of-the-box approaches to leadership development. We hope you will join us and share your experiences with these tools as well as any recommendations you may have for others who are seeking to increase the impact of their work. For more information, please visit www.leadershipforanewera.org

# TABLE OF CONTENTS

# How to Use Action Learning to Achieve Your Results

DEBORAH MEEHAN AND CLAIRE REINELT

Leadership programs and support strategies mentioned in this guide have gained national attention for achieving results that improve community and environmental well-being. A common feature of these programs is that they set their sights high, going after big change. Aspiring to big change calls people to action and attracts them to participate in leadership programs that care about making a difference. Mark Friedman eloquently describes the power of focusing on results:

> *Results provide a common purpose that brings people together. Results can transform processes characterized by blame, conflict, competition, and inaction into processes where people see what they share in common and how working together is in everyone's interest. When so many things divide us—race, class, ethnicity, religion, politics and money—results have the power to unite us.*

If your program aspires to contribute to changes in a community, a field, or a system, your leadership mindset and practice will shift. It is becoming increasingly clear that individual actors and single organizations do not have the resources to get traction on really tough problems. Taking on large-scale change requires moving from a focus on individual leaders to a focus on building social capital and collective leadership capacities. You will start to think differently about individual leadership outcomes and large-scale effects.

Leadership programs that focus on community benefit and population results have demonstrated that when multiple people connect across boundaries and silos, aligning their efforts and developing capacities to collaborate and learn together, they are better able to create large-scale change, build innovative solutions, and achieve the desired results. This guide shares lessons from these pioneering efforts.

**What to expect:** This guide offers practical advice with examples as it walks you through three critical components of designing your leadership program to achieve high-impact results:

1. **Clarify your purpose.**
2. **Identify and map your desired results.**
3. **Design for results with a new take on action learning.**

## 1. Clarify Your Purpose.

### Start by defining your purpose and the results you want to see.

It is not uncommon for leadership programs to think first about who to serve and the skills they will need to be more effective, and only later consider their larger social purpose and the specific resulting changes they hope will occur. Often programs assume that building the capacity of individual leaders to lead more effective organizations will in turn produce community or social benefit. But community and social benefit are often not measured, because they are ill-defined or because the program is of limited duration and the community impacts are too far in the future. In fact, the bias toward focusing on short-term outcomes has limited what the field knows about longer-term leadership outcomes.

The Leadership Development Matrix below has been used as a tool for funders and leadership program staff to help them characterize the results they hope their program will produce. A group of more than 30 funders and program staff attending a national meeting identified their program purpose by putting the results they were seeking into the appropriate boxes in this matrix. Most of the results mapped into the boxes of individual- and organizational-level changes (shaded in the matrix). The lack of programs that focus on community- and field-level changes or on developing network and systems capacities means that sustainable, large-scale change is unlikely to occur.

| Change level targeted | Individual capacity | Organizational capacity | Network capacity | Systems capacity |
|---|---|---|---|---|
| Individual level | | | | |
| Organization level | | | | |
| Community level | | | | |
| Field level | | | | |

### Put your stake in the ground.

Your program purpose should be connected to the change you want to see in the world. If your purpose has been to build stronger individual and organizational leadership (as indicated in the upper quadrant of the Leadership Development Matrix), it may be helpful to step back and ask yourself what change you believe stronger organizational leaders will produce. If your answer is that the organizations your graduates run will be stronger, you might then ask how those organizations could be more beneficial to a specific population of people or the community as a whole.

In answering these questions you are getting closer to the primary purpose of your program—the one that will most inspire and motivate you and your participants to create the level of change you want. Having a shared understanding of why you are investing in leadership, and what capacities need to be developed, creates a strong foundation for designing an innovative leadership program that can make a difference in communities, fields, and systems. More information on how to use the Leadership Development Matrix toward this end can be found in *A Guide to Using the Leadership Investment and Evaluation Framework*.

The Leadership Development Matrix was designed to help foundation staff think strategically about the leadership investments they make, and to help leadership program staff clarify their primary and secondary program purposes. The matrix  provides a framework for assessing shared purpose and the desired level of impact. In an article in *The Foundation Review*, Grady McGonagill and Claire Reinelt map different leadership programs using this matrix to show how funders can use it to make strategic investments in leadership development.

### Increase your time horizon.

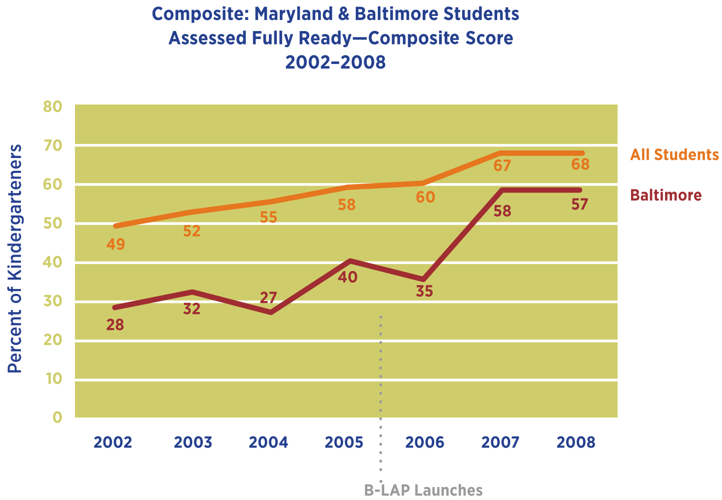
Expanding the time horizon for when you can expect to achieve your goals is a critical step in promoting meaningful long-term systems change. The reason most programs focus on individual change is because it is what they believe they can measure and report on in the 1- or 2-year cycle of funding. A commitment to societal impact that requires time is often difficult because grant applications and evaluation criteria encourage linear thinking and attempt to tackle issues in isolation, ignoring the interconnections and complexity of changing systems. Leadership programs that focus on the long term cultivate the ground for long-term systems change. For example, the Switzer Foundation, which has funded and supported environmental activist scientists for 25 years, has created a robust network that bridges across fields and funding streams and is coming up with innovative solutions to complex social and environmental problems.

## 2. Identify and Map Your Desired Results.

### Identify the measurable results you want to achieve.

When you clarify your program purpose and articulate an aspirational result, such as the energy network RE-AMP's goal of reducing carbon emissions 80% by 2050, you will need to identify indicators that will let you know whether you are on the right track—for example, reduced auto emissions as a result of new emissions standards or the halting of new coal plants. The Annie E. Casey Foundation has been a leader in designing programs for results. An article by Tory Read and Bruno Manno in *The Foundation Review* describes how the authors have used a results-based accountability framework to help grantees in their K-12 education portfolio understand how their work contributes to the overall core result that "young people in tough neighborhoods will graduate from school prepared for adult success and well-being in the worlds of work, family, and citizenship."

To identify specific results that you want to see in the short term and in the long run, you can start by asking questions like whose life will be better as a result of your work, and what will success look like? Two ways in which leadership programs supporting community or public benefit identify measureable results are as follows:




- **Program-driven results:** Your program's overarching purpose may be broad, like improving the health outcomes of children in your city, or it could be more pointed, like decreasing the number of uninsured children in your city by 50%. It is important to have some measure of the change you hope to produce and many leadership programs spend time clarifying their results. Some leadership programs, like the Leadership in Action Program, partner with funding or accountability partners to put a stake in the ground and make a visible

### Leadership in Action Program

The Annie E. Casey Foundation's Leadership in Action Program was designed around turning the curve on measurable indicators of well-being. For instance, in Baltimore the measurable indicator was the number of children entering school ready to learn. Coupled with a high-level call to action by a collaborative body (including the governor and state education officials) that creates and sustains the performance demand, the program recruits 40 to 50 "leaders in the middle" who are already working on the issue, and equips them with a set of collaborative skills and a container to help them move to high action and high alignment. Leaders from government, nonprofits, business, and communities focus their attention, align their actions, and hold themselves accountable for moving to action and making measurable improvements in the well-being of children and families in one measurement cycle.

The Leadership in Action Program is based on the Theory of Aligned Contributions being developed and prototyped by Jolie Bain Pilsbury and her colleagues at the University of Maryland. The theory articulates the conditions necessary to bridge the gap between desired results and current realities. It predicts the acceleration of population results when leaders from multiple sectors, equipped with specific skills and a sense of heightened urgency, make an unequivocal commitment to be publicly accountable for a result for a specific population and work together to take aligned actions at a scope and scale sufficient to make measurable progress toward the result.

The Leadership in Action Program has had dramatic results. Two years after the program was initiated in Baltimore, the number of children entering school ready to learn had increased from 35% to 58%. A variety of actions were taken that collectively produced this result. For more information, see Donna Stark's presentation on the program, "Strengthening Leaders, Accelerating Results."

commitment to creating and sustaining change toward achieving the desired result. This call to action is used to attract those already working on the issue to align their efforts and take actions that will produce the result. The Leadership in Action Program focused on the result of increasing the percentage of children (especially children of color) who enter school ready to learn.

- **Participant-driven results:** Some programs with a purpose of tackling a large issue like poverty, health, or energy may decide that the people they recruit should be the ones to define the measurable result that they are most passionate about. The downside of this approach is that you are not able to be as targeted in your recruitment of people who are most able to have an impact on that issue. However, some research indicates that people who are closest to the problem are the ones best able to identify appropriate strategies and solutions. If the specific results are not identified as a recruitment strategy the participants should be supported in a collective process to clarify the desired results. In the case of RE-AMP, people who cared about energy issues were engaged in a process of identifying the specific results (such as stopping coal plants) that they believed would have a huge impact on the quality of life in their region.

This guide demonstrates that both approaches have led to significant large-scale effects and that what is most important is a process by which the program clarifies its purpose and sets a target.

### Map your results to guide the design of the program and the evaluation.

Being clear on results will lay the groundwork for your evaluation and continuous learning. *EvaluLEAD: A Guide for Shaping and Evaluating Leadership Development Programs* was designed as a planning and evaluation tool for leadership programs so that program staff and funders could focus their collective attention on the results they wanted to see. The EvaluLEAD guide is a useful tool for thinking about the multiple levels and types of results that leadership programs seek, from the more tangible (improved performance, increased collaboration across organizations or sectors, and an environmental improvement) to the more intangible (new personal insights, shifts in organizational values, and shifts in community norms).

Results may be immediately known or may take time to unfold. EvaluLEAD characterizes results by type. *Episodic* results occur in close proximity to the program. *Developmental* results unfold over time; seeds are planted during program participation but the full growth potential may not be known for many years. *Transformative* results demonstrate significant shifts in viewpoint, vision, organizational direction, or societal or political changes. A transformative societal result for a youth leadership program in sexual and reproductive results, for example, might be a decrease in the rate of adolescent pregnancy in communities served by leaders in the program. All desired results are articulated in a Results Map.

The CAYL Institute used EvaluLEAD to map its desired results and guide the evaluation of its early care and education policy leadership program. The program set out to build collaborative team capacities and a network of community-based change agents with the skills to engage in and influence the policymaking process on behalf of young children. The ultimate beneficiaries are children in low-income communities and communities of color who will have the opportunity to grow into educated, productive, healthy adults. CAYL used the EvaluLEAD framework to guide the design of program activities and to prioritize evaluation learning across a spectrum of results that included changes in individuals, organizations, and networks, in addition to changes in early care and education policies, resource allocation, and human capacity building in all communities.

EvaluLEAD has also been used by The California Endowment and eight leadership grantees to develop a Results Map for a leadership initiative designed to improve the capacity of communities to lead across boundaries, especially boundaries of race and class. An example of a Results Map and a description of the learning partnership created through this initiative can be found in an article in *The Foundation Review*, "Learning-Circle Partnerships and the Evaluation of a Boundary-Crossing Leadership Initiative in Health." Grantees and funders who engaged in a co-learning process became a community of learning and practice, accelerating and promoting boundary-crossing leadership to improve health and well-being across the whole spectrum of a community.

## 3. Design for Results with a New Take on Action Learning.

### Espouse a theory toward action learning.

The choices you make about the design elements to include in your program should be informed by a framework or theory about what leadership supports will bring about desired changes. Two theories of leadership and change that are relevant for large-scale results and collective impact are Theory U and the Theory of Aligned Contribution. These theories emphasize the importance of recruiting participants who want to work together on a specific issue or problem, and of designing a collective leadership curriculum and supports that enable small groups and networks to be successful. (See the LLC report *An Evidence Based Approach to Leadership Development* for a detailed description of these theories and their implications for leadership program design.)

Most leadership programs are designed around principles of adult learning that recognize that people learn best by doing, and many programs do this by incorporating *action learning* projects. Theory U and the Theory of Aligned Contributions push the field's thinking a step further by illuminating examples where the emphasis is less on new projects for the purpose of learning and more on what can be accomplished when individuals and groups connect their current efforts and leverage new and existing relationships for greater collective impact. In other words, the focus is on new ways of working.

### Align action learning with your desired results.

People learn more and have greater collective impact when they can engage in projects or processes that leverage the knowledge they have and the work they are already doing. At the heart of action learning is the assumption that working on real-world problems provides rich opportunities for learning from action, and that in the process teams become stronger and more aligned in their efforts to increase their collective effectiveness and impact. According to action learning specialist Donna Dinkin:

> *Action learning is a process (often coach-supported) involving a small group of people solving real problems while at the same time focusing on what they are learning and how their learning can benefit each group member and the organization and community as a whole.*

Consider the following two leadership development approaches to maximizing action learning and getting the most benefit, both for participants and for the greater good:

- The *projects* action learning methodology identifies a leadership project that participants (a subset or the entire cohort) apply their skills toward accomplishing as part of their leadership curriculum—for example, participants in a program might apply and develop their skills while implementing a project to eliminate fast foods from a school lunch program.
- The *collective design processes* methodology develops and supports a diverse group of people as they come together to envision a joint future they want and take action to get there together. The emphasis is on common purpose and the potential for multiple actions to have a collective impact.

### How to get the most out of action learning projects

#### Scope the project with an eye toward maximum and sustained community benefit.

Too often leadership program participants identify projects that provide limited benefit because they focus on what they can accomplish in six months to a year, or because they do not have the financial or human resources to sustain the work. For example, a cohort of leadership program participants might organize a park cleanup event rather than a park cleanup committee or a partnership between residents and the city that would provide ongoing park maintenance. A leadership team might develop a strong policy plan without having the resources to implement the plan. Sometimes greater emphasis is placed on creating an experiential learning opportunity than on having a significant community benefit. In assessing potential projects and processes, look at how they can make a significant contribution to the community benefit purpose of your leadership development work.

#### Structure a process for team formation at the outset of the program.

Another approach, used by The Robert Wood Johnson Foundation's Ladder to Leadership program, is to facilitate an "open space" process at program launch to support participants in finding project areas and partners they want to work with. Participants pitch the topics they are passionate about and invite others who share that passion to join them.

After a series of rounds, clusters form around ideas and topics that the groups want to work on. Throughout a two-year program, participants engage in a shared process of learning how to design and carry out a project together, along with a community coach and mentor. Open-space practices cultivate self-organizing skills and greater awareness of others' interests and passions that can spark potential collective action.

### Support projects with action learning coaching and peer assists.

The Sierra Health Foundation, ZeroDivide, Blue Cross Blue Shield of Minnesota Foundation, and the Ladder to Leadership program all use staff or external coaches to support participant collaboration. Action learning project groups are coached in topics like group process, awareness of power, conflict resolution, goal development, planning, and leadership, all in the context of their project work. The Disparities Leadership Program creates peer groups among projects with a similar focus; individuals present their particular projects and get advice and feedback from others in their peer group.

## How to utilize an action learning collective design process that leverages the existing work of participants for collective impact

### Be strategic about recruiting participants for results.

Leadership programs that focus on outcomes at a community or population level need to pay attention to recruiting and forming cohorts in order to increase the likelihood that the desired results will occur and the program will be a success. These cohorts can provide an opportunity to bring together resources and wisdom from different sectors. For example, if the goal of the leadership program is to increase the number of children entering school ready to learn, the cohort might include librarians, parents, teachers, family support providers, and education agency leaders, to seed relationships and to build collaborative capacity among people who can contribute to addressing the problem. For more on strategic recruitment, see the companion guide in this series *How to Recruit to Maximize the Value of Your Cohorts.*

### Invite teams to apply with a specific project in mind.

Some leadership programs, including Blue Cross Blue Shield of Minnesota Foundation and the Initiative Foundation, ask applicants from different organizations to describe a potential collaborative project as part of their application process. Often these are existing projects that demonstrate strong cross-sector relationships and a network approach to a complex problem. A new project proposal can be a starting point for continued work that will evolve as ideas are generated and integrated into the project, often through connections made during the program. Foundations and leadership programs that want participants to work on a specific issue, such as school readiness or climate change, might explicitly mention this in their recruitment to ensure that they develop a group that has passion for the issue and wants to work collaboratively to make progress in their field.

### Introduce skills and tools for collaboration and civic engagement.

Once you have articulated a core result and have asked yourself what leadership capacities need to be developed to achieve that result, you are likely to realize that individuals and groups need to develop their capacity to work together in new ways that leverage their resources and amplify their impact. For example:

- Blue Cross Blue Shield of Minnesota Foundation's Collaborative Leadership Program introduces community teams to the art of hosting, and to other practices that assist cross-sector teams as they implement projects to address the conditions that produce poor health outcomes in low-income communities.
- The Northwest Area Foundation's Horizons program used "study circles" to engage residents of small rural communities to connect across differences through dialogue and to take action to improve well-being in the community.
- The Initiative Foundation supported a community visioning process through their Healthy Communities Partnership, enabling citizens from diverse races, cultures, and sectors in a community to identify their priority goals and projects.
- Lawrence CommunityWorks supports new members to host NeighborCircles, where neighbors meet and get to know one another over dinner. These events bring together 8 to 10 families with a host and a trained facilitator, to talk about their neighborhood and decide as a group if there is something they can do to improve their community.

### Foster a network mindset among the program participants and their networks.

Often leadership programs think about how to network graduates only as an afterthought. If cultivating a network mindset is part of the leadership program design and intention from the outset, participants develop a better appreciation for the networks they are already part of and a sense of how, as an emerging network, they might tap into, connect, align, and mobilize across their networks to amplify their impact. Leadership programs can help participants understand how to bridge their networks and build movements for social change by supporting self-organizing around passions, interests, and shared purpose across silos, sectors, race, and other boundaries. A companion guide in this series, *How to Cultivate and Activate Your Network*, describes how to design a program with an eye toward increasing the network effects and the likelihood of providing innovative solutions to complex problems.

### Cultivate a systems analysis.

Most issues are affected by multiple factors that cross many organizations, sectors, and even fields. Making sure that children are insured, for example, will involve health professionals, schools, parents, and county government. Leadership requires the ability to understand complex systems and how they can create and perpetuate bad outcomes (Stroh, 2008).

If you read the RE-AMP case study you might not recognize the formation of the network as a leadership story, but it could be important to take another look. Individuals from 17 organizations working on climate issues in the Midwest met on a regular basis over a year, during which they learned about each other's work and mapped themselves as part of a system of organizations working on interconnected energy issues. A facilitator/trainer helped them learn about systems and how to look for levers of change in the system, and they began to recruit other organizations from the system to help work on four identified levers of change. They are now a network of 125 organizations and have stopped the production of 30 coal plants in the Midwest.

Intervening in complex systems and changing the dynamics of the feedback loops is a process that is unknowable and cannot be planned for. Collective design processes, however, can enable teams and networks to adapt, be responsive, and try new things in widely different circumstances to see if they work to change the dynamics or direction of the system.

### Encourage innovative processes and a spirit of trial and error.

The corporate sector has been investing in innovation for centuries. Thomas Edison has gotten a great deal of attention for his inventions, but his greatest contribution may have been the design process, which he described as needing 99% perspiration and trial and error—not to confirm assumptions but to learn from every attempt. If the nonprofit sector has not been getting the results it needs, it is time for a new approach. Some leadership programs have begun to learn to adapt design processes as a way to encourage breakthrough thinking and innovation.

Leadership program participants and developers can learn from the design field. A key element of design thinking is that it is user-centric and participatory, so solutions are designed not with a passive audience in mind but with active audience participation and engagement in the process. For instance, Embrace, an organization dedicated to creating low-cost incubators for the developing world, uses a design thinking approach to help improve the product. According to Jennifer Roberts of the Stanford Graduate School of Business, students of the class out of which Embrace was born "visit their stakeholders to find out if their big idea actually works in the context of people's day-to-day lives."

**The Theory U draws on design thinking to promote innovative solutions by prototyping ideas, trying them out and replicating what works.**

**An example of a leadership program that uses this process is the ELIAS Project, which developed an African Public Health Leadership and Systems Innovation Initiative that focused on transforming the maternal health system in Namibia. A collaboration between the Ministry of Health and Social Services, Synergos, and the Presencing Institute, this initiative assembled key leaders from government and the nonprofit sector (including leaders focused on frontline delivery in clinics and hospitals, transportation systems, and the communities in which women live). The group used assessment, sensing, and learning journeys to better understand maternal health problems and to locate themselves in the system. Through dialogue and systems mapping, they identified key leverage points and created prototypes to address system problems, such as lack of public awareness about maternal health issues, inadequate access to quality maternal health services, and inadequate transportation systems.**

### Learn to use tools and social technologies to support creative thinking and design.

The Design Studio for Social Intervention (DS4SI) shares some tricks for innovative thinking to help groups imagine new possibilities for action. Innovation starts with asking an animating question that focuses people's attention on large-scale impact. For instance, at one of their innovation labs participants were asked, "How do we support and catalyze thousands of leaders with a passion and a vision for whole child development in vulnerable communities?" Each group was given a scenario and asked to come up with a way to support thousands of leaders.

A key to innovation is to free people from traditional thinking so that they can imagine new possibilities. DS4SI invites groups to use tricksters (among other aids) to help with imagining possibilities that are "out of this world" rather than get stuck in thinking only within the limitations of what you believe someone will fund or whether you have the staff to implement the idea. After thinking and triangulating ideas in new ways, groups come back to earth and evaluate how these new ideas can gel into new possibilities. These and other processes to unleash creativity are important supports for cohorts seeking a breakthrough change in the results they hope to achieve.

## Recap and Resources

**1. Clarify your purpose and map the results you seek. What is the purpose or desired results of your leadership program, and how will you define success and measure progress?**

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**2. Make sure that who you recruit matches with your understanding of the problem you are trying to address and what it will take to create a breakthrough. Who needs to be engaged to achieve the desired results? Why?**

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**3. Use action learning approaches to support individuals and groups to work in new ways that will help them achieve collective impact. Does the design of your program encourage and support individuals and groups to find common interests, learn to collaborate, and take action together? Are you using techniques to support groups to build trust, make decisions, and manage group dynamics?**

Leadership Learning Community, *A Guide to Using the Leadership Investment and Evaluation Framework*, Reinelt, http://leadershiplearning.org/system/files/Framework%20Guide.pdf (2009).

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**4. Introduce tools and skills that encourage innovation and breakthrough change.**

Brown, Tim, "Why Social Innovators Need Design Thinking," *Stanford Social Innovation Review*, Stanford Center on Philanthropy and Civil Society at Stanford University, http://www.ssireview.org/blog/entry/why_social_innovators_need_design_thinking (November 2011).

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## Conclusion

As you commit to the part you want your leadership program to play in supporting and promoting large-scale change, start by asking big questions, engaging stakeholders to imagine new leadership possibilities, and clarifying your purpose and the results you seek. The potential impact of your leadership program will be most significant and sustainable when you build on existing relationships and work and engage participants in action learning around the issues they care about. We hope you will share your experiences with others who aim to increase the impact of their leadership development work, by contributing to the Leadership for a New Era wiki at www.leadershipforanewera.com.

# How to Recruit to Maximize the Value of Your Cohorts

DEBORAH MEEHAN AND CLAIRE REINELT

Who you choose to recruit for your leadership development program is as important to your potential impact as the design of the program itself. While a lot of resources and time are invested in program design and curriculum development, recruitment and cohort formation may be treated more as technical tasks than as strategic processes. This guide illustrates opportunities to be strategic in making decisions about recruitment, by providing examples, advice, and resources.

**What to expect:** This guide offers examples and practical advice on the importance of taking the time needed at the front end of designing your leadership approach to increase your potential for collective impact, by taking these five recruitment steps:

1. Tie recruitment to your purpose.
2. Articulate and test assumptions about your target population.
3. Connect your cohort composition to results.
4. Question your assumptions about cohort size and boundaries.
5. Experiment with new approaches to cohort selection and recruitment.

## 1. Tie Recruitment to Your Purpose.

### Start by defining your purpose and decide who needs to be part of that process.

Some programs articulate a general purpose for their leadership program, such as "improving the condition of families and children." For potential participants, a general purpose statement does not set expectations that the program intends to achieve measurable results. When a purpose statement has a clearer result, such as "increase the number of children entering school ready to learn" or "reduce carbon emissions by 80% by 2050," it is easier to recruit leaders who are passionate about that result and to be more strategic about who to engage to make progress on the result.

Some programs and investors prefer a general purpose because they do not believe in prescribing in advance what results a group should tackle. A few programs, such as the Initiative Foundation and The California Endowment's Building Healthy Communities, have developed innovative approaches to inviting groups to self-organize in the application process. The Robert Wood Johnson Foundation provides opportunities for participants in its Ladder to Leadership program to self-organize when they start the program, to help them identify the issue they would like to work on, the partners they need to succeed, and the benchmarks for success.

For more information on defining your purpose and clarifying your results, see the companion guide in this series *How to Use Action Learning to Achieve Your Results.*

## 2. Articulate and Test Assumptions About Your Target Population.

### Make your assumptions about who to recruit explicit, tie them to the result you want, and then test your assumptions.

Consider as an example a foundation that is exploring how to invest in global health leadership and is particularly interested in programs that focus on agency heads. If probed about the reason for that focus, they might elaborate that if they focus their leadership supports on individuals who are highly positioned in health agencies, those individuals will have more authority and resources at their disposal to make rapid progress on health issues in developing countries.

While a focus on senior leaders may seem like a perfectly logical assumption, its validity may depend on many variables, as in these actual programs:

- A leadership program in India run by Synergos found that senior government and NGO officials could not give sufficient time to participation because of the demands of their positions. The program switched its focus to mid-level leaders who were enthusiastic about increased leadership opportunity and were more available.

- The Annie E. Casey Foundation found that mid-management leaders had access to resources and the time and energy to move a change agenda, especially with some coaching on how to lead from the middle.

The assumption about senior global leaders may be correct but, as these two cases illustrate, it is important to articulate, investigate, test, and (if needed) revise your hypotheses about your target population. Note too that although both these programs recruited individuals, doing so was part of a larger strategy that looked at the composition of the cohort as a whole. Assumptions regarding whether to recruit individuals or teams are critical and should be questioned, as discussed later in the section on cohort composition.

### Consider your beliefs about levers of change, your area of expertise, and your values in deciding who should be the focus of your leadership development.

Over the past decades, a number of programs have focused on the important issue of how to create more opportunities for people of color in the nonprofit sector. This is a great example for illustrating different assumptions (below) about who should be the focus of leadership development to achieve maximum impact on the issue.

- Some leadership approaches have focused on building the "pipeline" as a leadership strategy for diversifying leadership of the nonprofit sector. Providing additional skills and credentials to people of color to increase access and opportunity may be the right approach for a program committed to mitigating the impact of structural racism.
- Another program might argue that evidence suggests people of color are underrepresented in the sector not because of lack of skills but because of structural barriers. This program might focus on those trying to advocate for policy change, or trying to change organizational cultures and practices that reinforce discriminatory systems. As an example, PolicyLink expands on the need to develop the policy leadership of people of color under the assumption that we will not make progress on racial equity unless policy is informed by a more race-conscious lens.
- Another approach might even be to choose to recruit people from boards and leadership positions in organizations that are predominantly white, and to introduce a curriculum focused on white privilege aimed at encouraging more inclusive behaviors.

### Leverage your leadership work by connecting with other leadership development providers.

To have an impact on many complex social issues, your program may need to provide leadership support to a broad range of target populations. For example, a place-based initiative like Building Healthy Communities, which is focused on improving health outcomes, may see the need to build partnerships across multiple sectors, increase collaboration among many nonprofit organizations, strengthen the voice of community members, develop more young people, and engage more people of color at policy tables. Such an initiative would most likely require multiple leadership development approaches and providers working with different groups within the target place. Who works with which groups may depend on the providers' experience with a specific population, their values and priorities, or the competencies they believe are most important.

The initiative will be stronger if the funder(s) and leadership development providers have a shared understanding of how their work serving different populations contributes to achieving the broader goals of the initiative. For instance, The California Endowment's Boundary-Crossing Leadership initiative funded separate boundary-crossing leadership programs working with youth, elders, immigrants, and nonprofit leaders, and convened them in a learning-circle partnership. Cross-program learning-circle partnerships are one way to bridge silos that too often have limited collaboration across issues, organizations, and sectors.

## 3. Connect Your Cohort Composition to Results.

### Maximize your change strategy by paying attention to your cohort composition.

Leadership programs that are focused on outcomes at a community or population level are paying more attention to who needs to be connected through the cohort experience to increase the likelihood of change. For example, if the program's goal is to address asthma in children, it might decide that the cohort should include people from health, housing, and education in order to seed relationships and build collaborative capacity among people who could continue the work after the program has ended. The cohort provides an opportunity to bring together resources and wisdom from different sectors.

Consider these examples of specific cohort strategies and the assumptions that different leadership programs made about who needed to be included and why:

- **Organizational change approach:** Some programs, such as Leadership for a Changing World, experimented with recruiting teams rather than individuals because they believed that when several people from an organization participate, the chances are stronger that the organization can integrate lessons learned and make needed institutional-level changes.
- **Community change approach:** The Initiative Foundation supports a community application process designed to identify people with assets that need to be better connected to enhance the quality of community life and create innovative solutions. The foundation lists 20 sectors in their guidelines about who needs to be present, including business, faith, arts and culture, local government, health, safety, environment, youth, and education. Applications are weighted based on the diversity of sectors that are represented.
- **Systems approach:** The ELIAS Project is a leadership program that focuses on systems-level change and asks, "Who is part of the system that is contributing to this problem and needs to be part of the solution?" They target people who bring a depth of understanding from multiple perspectives (as many as 40 or 50) and who can experiment with prototyping different solutions to help the group learn about potential levers for creating a systemic change.
- **Results approach:** The Annie E. Casey Foundation's Leadership in Action Program first identifies a desired result based on an issue around which there is a clear sense of urgency and selects an "accountability partner" to publicly champion the need for action on that issue. It then recruits individuals to work in areas that intersect with the issue. For example, faced with the issue that too many children are entering school not ready to learn, the program partners looked for individuals who had passion for vulnerable children and school readiness, and who were in a position to take action aligned with that passion to positively contribute to improved school readiness.

## 4. Questions Assumptions about Cohort Size and Boundaries.

### Identify the factors influencing your decisions about cohort size.

Most leadership programs define a size for their cohorts based on practical cost considerations, and perhaps some knowledge of group dynamics research on ideal group size. Determining the size of a cohort will be more strategic if it is driven by the program's objectives and assumptions about how to reach those objectives, as follows:

- Programs that want to quickly see systemic or large-scale change may opt for larger cohorts (40 to 60 people)—as in Synergos's country-level leadership strategies. Larger cohorts enable greater diversity, increased opportunity to expand networks, and potential to engage a broader spectrum of stakeholders in the system.
- Programs that want to develop strong peer relationships and focus on interpersonal leadership development may opt for smaller cohorts (12 to 20 people) to provide more intensive opportunities for connection and learning. The Barr Fellowship program takes this approach.

The former Kellogg National Leadership Program balanced the benefits of larger cohorts (45 people) with the benefits of smaller groups by assigning participants to smaller home groups to create space for personal connection and support.

### Think outside the box before deciding on "in/out" program boundaries.

Typically, leadership programs clearly define boundaries about who is in the program and who is not. This strategy works well to support bonding and trust building, but it risks becoming exclusive and insular. Another approach is to think of the cohort as a core group of a larger network that includes other important allies who work on the same issues. Some sessions could be made open, to draw in people from this larger network and distribute training opportunities among a broader group of stakeholders.

Some programs, including the Kellogg Leadership for Community Change (KLCC) and the Annie E. Casey Foundation's Making Connections, recognized that circumstances change for people, especially in vulnerable communities, and that flexibility is an essential element of the program design. KLCC targeted 25 leaders from the local community, leaving it up to the community to decide who would participate (based on people's circumstances). By making the boundaries more porous, KLCC enabled people to choose to participate in different sessions according to their interests or the contributions they could make to the work.

## 5. Experiment with New Approaches to Cohort Selection and Recruitment.

### Weigh the pros and cons of open application and closed nomination processes.

Traditionally, there are two basic approaches to selection and recruitment (with some variations and hybrids): self-nomination and nomination by others. Both approaches for the most part target individuals—a practice that stems from programs operating on the premise that having strong leaders in organizations will produce community benefit. These models will need to evolve to support the strategic recruitment of cohorts, and one step in that evolution might be to innovate with both the open application and the closed nomination processes, as follows:

- **Open application process:** An open application process has both advantages and disadvantages. On the one hand, it attracts people who feel a sense of urgency around the leadership program's social purpose, and who might not otherwise have the connections to be nominated. An open process is also likely to be perceived as more transparent, which builds trust. On the other hand, in an open application process you may not get the mix of people or organizations that would constitute a cohort capable of bringing diverse perspectives and experiences to the problem you are tackling.

  Programs that value transparency in the application process are innovating to address the issue of cohort composition. For example, the National Leadership Academy for the Public's Health invites applicants to put together their own teams based on detailed criteria about the multi-sector mix of teams they are looking for to tackle public health problems.

- **Closed nomination process:** A nomination process typically engages a group of nominators (often critical leaders in their sector or arena of work) to identify who they think are making the most important contributions or who could benefit from the additional supports and skills that the program offers. Nominators can identify people who may not think of themselves as leaders, and nominations give prestige to those selected by confirming the importance of their work and the work of their organization. The nomination process can also promote discussion among nominators about what representation of people across organizations, agencies, and sectors should be targeted for recruitment to secure the best cohort composition.

Without the right nominators, however, nominations are often less transparent and may be less accessible and inclusive. These problems can be addressed by using a nomination process that is more open and invites self-nominations as well. To ensure inclusiveness in the nomination of candidates, your leadership program should have a diverse team that can be seen as part of the program's emerging network of people who care about your mission.

## Recap and Resources

1. **Be clear on the change you are trying to produce through your leadership work. What problem do you believe will be improved or addressed through your leadership development, and why? Your goal should be not just stronger leaders but also a social benefit that better or different leadership can help to achieve.**

   Friedman, Mark, *Trying Hard Is Not Good Enough: How to Produce Measurable Improvements for Customers and Communities*, Trafford Publishing (2006).

   Grantcraft, *Supporting Leadership: A Guide in Progress*, http://www.grantcraft.org/index.cfm?fuseaction=Page.ViewPage&pageId=1382 (2012).

   Grove, John T., Barry M. Kibel, Taylor Haas, *EvaluLEAD: A Guide for Shaping and Evaluating Leadership Development Programs*, http://leadershiplearning.org/leadership-resources/resources-and-publications/evalulead-guide-shaping-and-evaluating-leadership-de (January 2005).

   Grove, John, Barry Kibel, Taylor Haas, "EvaluLEAD: An Open-Systems Perspective on Evaluating Leadership Development," in Hannum, Martineau, Reinelt (Eds.), The Handbook of Leadership Development Evaluation, Center for Creative Leadership (November 2006).

   McGonagill, Grady, Claire Reinelt, "Leadership Development in the Social Sector: A Framework for Supporting Strategic Investments," *The Foundation Review*, http://leadershiplearning.org/leadership-resources/resources-and-publications/leadership-development-social-sector-framework-suppo (2011, vol. 2:4).

2. **Articulate and test your assumptions about why working with the population you have identified will help you produce the change you want. Create a hypothesis that will enable you to test your assumptions. The hypothesis should articulate an if-then relationship—for example, "If we work with X population and provide them with Y, then Z will happen." This will help you identify benchmarks and a time frame for how and when you will test and (if necessary) revise your assumptions.**

   Leadership Learning Community, *Further Reflections on Evidence-Based Practice and Leadership Development: Developing Hypotheses and Case Examples*, http://www.leadershiplearning.org/leadership-resources/resources-and-publications/search/hypothesis (2010).

3. **Investigate who else is doing leadership development work on the problem you are tackling. Even though it will take some time to learn about others doing leadership work in your area, you can potentially learn from their assumptions and results. For example, making progress on complex issues like racial equity requires coordinating multiple strategies that target different populations.**

   Leadership Learning Community, *Leadership and Race: How to Develop and Support Leadership that Contributes to Racial Justice*, Leadership for a New Era Series, http://leadershiplearning.org/page/leadership-and-race-report-additional-information (2010).

   Marsh, Dwayne S., Millie Hawk Daniel, Kris Putnam, *Leadership for Policy Change: Strengthening Communities of Color Through Leadership Development*, PolicyLink. http://goo.gl/A9hnB (2003).

4. **Ask what mix of individuals or groups should be part of the cohort, and talk about why. Many leadership programs focus their selection on the merits of the individual without paying attention to the composition of the cohort. How is your thinking about the cohort mixture tied to a theory of change or clarity about your change strategy?**

   Leadership Learning Community, *"Case Study: Network Development and Catalyzing Collaborative Action on Poverty and Injustice,"* http://leadershiplearning.org/blog/natalia-castaneda/2010-10-21/case-study-network-development-and-catalyzing-collaborative-action (2010).

   The Bhavishya Alliance, "Legacy and Learning from an Indian Multi-sector Partnership to Reduce Child Undernutrition," http://synergos.org/knowledge/12/bhavishyaalliancelegacyandlearning.pdf (April 2012)

5. **Think outside the box when it comes to your leadership program boundaries, rather than default to the traditional approach. Be clear about why to have a tight or a porous program boundary and how it will help you achieve your results.**

6. **Assess the pros and cons of open application and nomination as it relates to your leadership program.**

## Conclusion

Most people who have participated in leadership programs say they have personally benefited and believe they are stronger in some areas of leadership; however, many leadership programs hope that individuals or groups will have a greater impact on complex social problems. Achieving this broader goal requires a purposeful approach that explicitly links your decisions about who to target for leadership development to your assumptions about why that group or composition of people are best positioned to have the impact you are seeking. We hope that after reading this guide you will share your experiences with others who aim to increase the impact of their leadership development work, by contributing to the Leadership for a New Era wiki at www.leadershipforanewera.com.

# How to Cultivate and Activate Your Network

DEBORAH MEEHAN, CLAIRE REINELT, JUNE HOLLEY, AND NATALIA CASTAÑEDA CHAUX

The Arab Spring and the massive mobilization of people and resources in the 2008 U.S. presidential elections are exciting examples of how network strategies and social media tools are amplifying the impact that individuals and organizations are having on major social issues. Innovators in leadership development are seeing the opportunity to work at the intersection of leadership development and network activation to increase the likelihood of producing systemic change that will bring about more tangible improvements on critical issues affecting our lives. Many leadership programs inspired by these examples are looking at how they can strengthen and activate their networks of program participants and graduates around a variety of social causes. It has become clear that early decisions about design, curriculum, communications, and infrastructure can increase the likelihood that your leadership development work will foster the growth of an emerging network.

**What to expect:** This guide offers practical advice with examples as it walks you through these key components of ensuring a vibrant network of your graduates:

1. Start with yourself.
2. Recruit with a network lens.
3. Cultivate network behaviors, engagement strategies, and skills.
4. Invest in a communications strategy and network infrastructure.
5. Imagine the possibilities of an open network approach.

## 1. Start with yourself.

### Learn about networks and how they can advance your leadership development work.

Stories of network success reveal ways of thinking and behaving that depart from the traditional organizational norms familiar to leadership program staff. For example, participants in networks share information openly, make decisions transparently, encourage each other to take action, share leadership, and communicate freely with other participants. These behaviors can be challenging for staff, who may feel that they are giving up control over events, resources, or decisions for which they feel responsible. In their book *The Networked Nonprofit: Connecting with Social Media to Drive Change*, Beth Kanter and Allison Fine provide examples of nonprofit organizations that overcame these challenges to adopt network strategies that have increased their reach and impact.

With large and diverse networks, which is the case with many leadership programs and alumni groups, it is unlikely that the staff of an organization can serve as the only conduit for information and connections among participants. A much more effective approach is to provide practical support, incentives, and resources to encourage participants to connect with one another and mobilize action. An example of a practical support is to develop comprehensive guidelines for staff and participants around social media practices. For instance, the American Red Cross recently published online communications guidelines that include tips and tools to guide participation in social communities on behalf of the Red Cross.

### Model the behaviors and skills you want your graduates to adopt.

You will have a difficult time cultivating a new network mindset among participants if you as staff are not modeling the skills and behavioral shifts you are encouraging. If you want participants to think differently about sharing leadership, letting go of authority, developing trust or openness, or experimenting with new technologies, you should strive to model these behaviors.

## 2. Recruit with a Network Lens.

### Understand the value of a network approach in recruiting.

A companion piece in this series, *How to Recruit to Maximize the Value of Your Cohorts,* discusses how decisions about target population and cohort composition provide an opportunity for you to enhance your leadership program's desired results. Refining your recruitment focus to employ strategies for jump-starting or enhancing networks can further help your program achieve its goals. For example, the Barr Foundation in Boston tested their hypothesis that if nonprofit executive directors were better networked they would find opportunities to support each other and work together to address persistent challenges in the city of Boston. Their program's objective was to foster an authentic network among nonprofit leaders in the city. Even if cultivating a network is not a leadership program's explicit goal, participants and graduates are likely to achieve more during and after the program when they are networked with others working on the same cause.

### Be strategic about cohort composition.

The Barr Fellowship creates the conditions for nonprofit leaders from different sectors and neighborhoods to form authentic relationships with each other, share ideas, and connect their resources, toward the goal of reaching more people with services and having more influence on how resources are generated and allocated for community benefit. Barr explicitly recruited a diverse range of nonprofit leaders in its cohorts of 12 people, and built learning journeys and retreats in their design to ensure that authentic relationships developed across boundaries of race, neighborhood, and sector. Nurturing these connections and relationships led to unusual partnerships among organizations that had previously competed for resources or had lacked access to each other's resources. For instance, a neighborhood nonprofit got 15 museums and cultural institutions to sign on to a Promise Neighborhood planning grant proposal led by the Dudley Street Neighborhood Initiative (DSNI)—an outcome that would have been impossible for the executive director of DSNI without the social connections he had through the Fellowship with the executive director of the Boston Children's Museum.

A strong cohort includes people with shared affinity (individuals working on the same issue) and diversity (people whose intersection with an issue may be less clear or more remote but may bring new resources or perspectives). A recruitment strategy that understands the importance of including this diversity builds a strong foundation for an innovative and sustainable network.

### Use social network maps to inform recruitment decisions.

Network maps can be another tool that programs use to be more strategic about who they recruit to grow a network of people and organizations that are working in the area where the program hopes to have an impact. As network mapping tools and network consultants become more accessible to communities and nonprofit organizations, program designers have an opportunity to understand how people and organizations in their community are connected and where there are gaps (or "structural holes") that can be bridged through recruitment and participation in leadership programs.

Maps can also be used to identify people who are influential in a network, because they bridge between clusters, which means they connect people and groups that may vary in interest and composition. For instance, the CAYL Institute used network mapping to identify gaps in its recruitment strategy, such as those in the media and business community committed to the issues of quality, accessible early care, and education.

### Recruit people inclined toward network weaving.

According to June Holley in her *Network Weaver Handbook*, the idea behind network weaving is that complex issues require a new kind of leadership: one that is more aware of networks and that works to make others more aware as well. Network weavers help connect people strategically and help people build trust so that the work of the network is more effective. Holley points out that many people are natural network weavers, even though they may not use the term. Her handbook includes a Network Weavers Checklist that can help leadership program participants identify their strengths and weaknesses as a network weaver. This checklist could be incorporated into the application and selection process of your leadership program to ensure that the network of graduates gets a good jump start with a solid core of "natural" network weavers eager to use and deepen their network skills to foster emerging networks by connecting and bridging with others.

## 3. Cultivate Network Behaviors, Engagement Strategies, and Skills.

### Promote leadership models that embrace network behaviors.

Leadership programs often have explicit or implicit assumptions about what constitutes effective leadership, and they incorporate curriculum to strengthen skills needed for strong organizational or managerial leadership. However, as we learn more about the development of effective networks, it appears that network leadership requires skill sets that are sometimes very much at odds with the management skills that are useful in organizational contexts. In today's increasingly connected world, leaders need to be adept at both organizational and network leadership, and adapt their skills to the environment in which they are working.

The chart below (adopted from the *Network Weaver Handbook*) illustrates new skills and leadership behaviors that participants in leadership development programs should be encouraged to cultivate and practice in their leadership cohort. For example, leaders will need to know when to be directive and when to facilitate others—that is, when to set a central direction and when to encourage others to take small actions and experiment. Leadership programs need to help participants understand a network mindset and its implications for leadership.

| Organizational Leadership | Network Leadership |
|---|---|
| Position and authority | Role and behavior |
| Few leaders | Everyone a leader |
| Broadcast | Engagement |
| Managers set direction | Many people initiate |
| Control | Facilitation and support |
| Small group in the know | Openness and transparency |
| Directive | Emergent |
| Top-down | Bottom-up |
| Make sure tasks are completed | Group accountability |
| Individual | Small group |
| Evaluation | Reflection: action learning |
| Planning | Innovation and experimentation |
| Provide service | Support self-organization |

### Develop a ladder of engagement.

Leadership is often seen as the domain of the exceptional individual with unique talents or training; however, appreciating leadership as a process offers an opportunity to tap the interests and varied skills of many people who want to make a difference. Networks recognize leadership in anyone and create multiple opportunities for engaging people in the network. It is important to set expectations for participations in the network:

> *Typically this starts as a "low hurdle" (e.g., attend meetings, respond to emails) and as members perceive more value in the network, the hurdle can be "raised" (e.g., pay a membership fee, lead a network project).* (Ehrlichman, David et. al., 2012).

The ladder of engagement could start with activities that invite individuals to participate (attend events, engage in online conversations), then contribute (write a blog post, post a message), commit (collaborate with other participants), and ultimately organize (plan a local event, organize an affinity group). In her blog, Beth Kanter offers examples of organizations and programs that have adopted a ladder of engagement strategy. Participants in leadership programs can expand their thinking about the number of people who care about their issue and how to involve them to support their own work and the work of the network.

### Structure time for peer learning.

Leadership programs may need to shift their own thinking about their participants and how to engage them. Many programs enlist experts and offer training programs that provide exposure and opportunities for participants to learn new skills; however, when the program delivery is predominantly top-down and expert-driven, participants assume a more passive role as recipients and may undervalue the skills and experience that the cohort brings to the table.

Some programs use peer assists, peer consultative sessions, or Emergent Learning Maps to tap the wisdom within the cohort and encourage participants to offer support and leadership to one another. While resources such as experts may be limited when the program ends, the relationships among participants can be an ongoing source of support and learning. Participants also learn about engagement strategies as opportunities arise for taking on increased levels of responsibility within the program.

### Create opportunities for self-organizing.

When programs encourage participants to self-organize around common learning priorities or to implement a project, they are developing self-organizing skills and gaining immediate benefit from their relationships with one another. These experiences can foster commitment and know-how. Participants are more likely to be motivated when they benefit from peer support and learning, and they are more likely to act on their motivation when they have had some self-organizing successes.

Some programs encourage self-organizing in simple ways by requiring participants to find someone to pair up with on a project or by having a special fund to support projects that several participants develop together. As participants become more conscious of these behaviors, they learn about a network mindset and network strategies through their own experiences.

#### Introduce communication tools that support networks.

The opportunity to learn new skills is an important offering of any leadership program. To optimize network strategies, participants need to experiment with new communication behaviors and tools. The skillful and targeted use of social media is critical to engaging and mobilizing effective networks. While a number of emerging leaders have grown up using social media tools, many current and senior leaders are less comfortable with these new and important tools. Leadership programs can provide an environment of encouragement and exploration in which leaders can acquire new skills, buddy up to cross-train, and adopt new technologies to enhance their ability to extend their reach and coordinate the work of more people.

One key channel that offers great opportunities for program participants to interact is Twitter, which allows participants to group together and follow others, find key ideas and questions that others are working on, and participate in interesting conversations. Here are some possibilities to keep in mind:

- Gather the Twitter usernames for program participants and create a Twitter list that includes all of them. This enables others in the Twitter community to follow the group.
- Create a hashtag to “tag” the conversations in the Twitter stream.
- Find, follow, and participate in existing communities on Twitter.

## 4. Invest in a Communications Strategy and Network Infrastructure.

#### Develop a communications strategy to support the network.

Networks have an organic and emergent nature, but they still need nurturing and some basic levels of support to succeed. Many leadership programs do not think about network (or alumni) organizing until after their programs are well underway. Introducing and experimenting with communications channels and opportunities during the course of the program, so that participants themselves create an environment that fits their needs and communication styles, ensures that the network infrastructure will flourish after the formal program is completed.

A first step in determining what type of communications strategy the network needs is to conduct a communications assessment to determine how the leadership program participants are interacting with each other and with the program staff, and how they would like to continue to participate in the network. This assessment can also help with understanding the priorities of the program staff in terms of network participation and with devising concrete strategies for implementing and evaluating the participation.

Most leadership programs have a robust website and have built online channels that connect program participants across content and geographic areas. In some cases the program staff also gathers important feedback about how participants interact with each other, both in person and through online channels such as LinkedIn or Twitter. The programs have an opportunity to take these kinds of channels and information to the next level and encourage members to increase their participation and engagement. Key tactics to keep in mind are as follows:

- **Support self-organizing and affinity groups:** Having an online directory will help participants find others who share their interests, and it can be complemented by an online forum using platforms such as Ning.com, which allows users to create and participate in multiple groups. One cost-effective approach that does not require investing more resources in the website would be to use something like a LinkedIn group to create subgroups and implement strategies for getting the participants to join the subgroups. The program staff could support webinars and orientation sessions to get groups off the ground, with the idea that as the participants find more value in their interactions with each other, they will find opportunities to self-organize.
- **Know where the participants are online:** In surveys, it is important to ask for information about what online forums, communities, sites, and networks the participants are part of. Having a better sense of other forums and communities that are being used can help the program staff see what conversations are resonating, what participation patterns are emerging, and other insights that can inform the engagement strategy.
- **Highlight stories of collaboration:** Share such stories through blog posts, video, podcasts, or other formats.

- **Leverage the wisdom of the network:** Create a community blog and invite participants to organize webinars or trainings around specific areas or to share lessons from consultative sessions and peer assists built into the program.
- **Measure the strategies and adapt:** Track key communications metrics across the different channels, such as comments, blog posts, participation in events and groups. Also consider tracking what themes and types of content seem to resonate better with the participants. Amy Sample Ward has developed standard templates to measure key metrics that can be a great starting point.

### Allocate staffing resources.

As the network grows, it will need network coordinators (who coordinate and convene network participants) and network guardians (who facilitate development of network structures, including innovation funds, social media platforms, and network weaver support). All participants should be encouraged to become skilled network weavers, but the role of network coordinator or guardian will require resources and staffing that should be built into the early planning stages of leadership programs.

### Use network mapping to assess and strengthen networks.

Network mapping processes, also known as a Social Network Analysis (SNA), can be used not just for recruitment as mentioned earlier, but also to assess the strength of the network's connectivity and to design strategies for network weaving. Mapping complex networks requires using software such as InFlow or UCINET. Surveys are used to gather network data on who is talking to whom, who is being sought out for advice, who is collaborating on projects, and who is engaging in peer learning. These maps can tell you where there are strong bonds that create social cohesion in the network and who could be tapped to build connections between strong clusters that may not be talking to each other but could benefit from connecting their ideas and resources.

For example, the Leadership Learning Community (LLC) recently conducted an SNA of the Kellogg Fellows Leadership Alliance and the Central Valley Health Policy Institute participant network. The resulting maps provide information about the strengths of the networks and opportunities for growth. In both cases LLC recruited and trained network weavers to help others in the network identify common interests, connect people strategically where there is potential for mutual benefit, and serve as a catalyst for groups to self-organize.

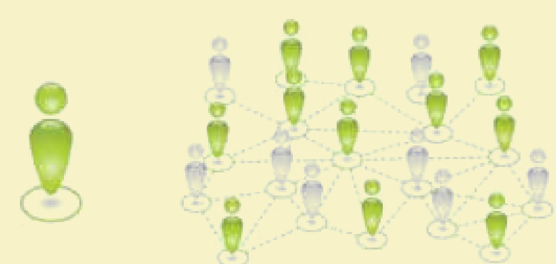
## 5. Imagine the Possibilities of an Open Network Approach.

### Consider the pros and cons of open versus closed networks.

Questions have been raised about whether leadership program alumni networks should be closed or open. Having a closed network means that only program alumni are in the network. One concern about a closed network is that it can pull the program graduates away from other networks they are already part of, instead of helping participants connect not just to each other but to each other's networks.

If you think about the primary function of network leadership as helping others become effective network leaders, it becomes important to consider reframing the boundaries of the network to enable it to expand organically and become more inclusive over time. For example, the RE-AMP network started with 17 leaders who worked closely with each other for a year, deepening relationships and understanding the system they wanted to transform. They identified high-leverage areas in their field, and then, over the next three years, reached out to include 125 organizations and hundreds of new leaders who could contribute to achieving the desired results. This expansive approach enabled the network to have a dramatic impact on the development of energy policies and practices in the target area in a very short period of time.

Applying this design to a leadership program would mean that initially selected participants would be the catalytic core of an emergent network, eventually reaching out to hundreds of people who want to connect and take action to support the network's purpose. This approach would draw significantly more resources and energy into the work by tapping existing relationships and building on existing networks.



Traditional Leadership Mindset

NEW Network Leadership Mindset

## Recap and Resources

1. **Commit to network cultivation as a key strategy for achieving your purpose. Get clear on how an active network of program participants and graduates could increase the impact of your leadership work. To cultivate a strong graduate network, you will need to rethink almost every aspect of your leadership work, including program design, recruitment, curriculum, staffing, and communications.**

   **For a good introduction to network thinking and network weaving, the following resources are a good place to start.**

   Grantcraft, *Supporting Leadership: A Guide in Progress*, http://www.grantcraft.org/index.cfm?fuseaction=Page.ViewPage&pageId=1382 (2012).

   Holley, June, *Network Weaver Handbook: A Guide to Transformational Networks*, Network Weaver Publishing, http://www.networkweaver.com (2011).

   Kanter, Beth, Allison Fine, *The Networked Nonprofit: Connecting with Social Media to Drive Change*, Jossey-Bass (June 2010).

   **The following are inspiring books about the power of social media and its potential to organize and align large groups of people.**

   Carr, David, "How Obama Tapped into Social Networks' Power," The New York Times, http://www.nytimes.com/2008/11/10/business/media/10carr.html (November 2008).

   Ghonim, Wael, Revolution *2.0: The Power of the People Is Greater Than the People in Power, A Memoir*, Houghton Mifflin Harcourt (2012).

   Shirky, Clay, *Here Comes Everybody: The Power of Organizing Without Organizations*, Penguin Press (2008).

2. **Focus on the composition of your cohort, don't just ask what type of individual you want to recruit. If you want to make progress on childhood asthma, for example, you might need a network of people addressing this issue from different perspectives, including air quality, housing, health education, and health care access.**

   Holley, June, "The Network Weavers Checklist," http://www.networkweaving.com/june_files/NetworkWeaverChecklist2.pdf.

   Hughes, Marianne, Didi Goldenhar, "Networking a City: A Case Study of the Barr Fellows Network," *Stanford Social Innovation Review*, http://www.interactioninstitute.org/files/SSIR%20Summer%202012%20-%20Barr%20Fellows.pdf (Summer 2012).

3. **Engage participants as content resources in your leadership development design and delivery. This will demonstrate the value of maintaining peer relationships beyond the program, and encourage participants to self-organize around the topics or skills they are most interested in pursuing. Participants can experiment with collaborative tools such as Google Docs or Google Groups to support these efforts and gain the know-how, confidence, and skills they need to grow their network.**

   Kanter, Beth, Allison Fine, *The Networked Nonprofit: Connecting with Social Media to Drive Change*, Jossey-Bass (June 2010).

   Kanter, Beth, "An Interview with Facebook's Libby Lefler: Facebook and Nonprofits," blog post, http://www.bethkanter.org/category/tips/ (July 2012).

   Knowledge Sharing Toolkit, "Emergent Learning and EL Maps," wiki, http://www.kstoolkit.org/Emergent+Learning+%26+EL+Map Emergent Learning and EL Maps (2012).

   Knowledge Sharing Toolkit,"Peer Assists", wiki, http://www.kstoolkit.org/Peer+Assists (2012).

Scearce, Diana, Gabriel Kasper, Heather McLeod Grant, *Working Wikily 2.0: Social Change with a Network Mindset*, Monitor Institute, http://www.monitorinstitute.com/documents/WorkingWikily2.0hires.pdf (2009).

**4. Be prepared to invest in a communications plan, staffing, and infrastructure to support your graduate network. Network strategies have attracted a lot of attention because they enable groups to reach more people and coordinate more work with fewer resources; however, networks still do require resources.**

Grant, Heather McLeod, *Transformer: How to Build a Network to Change a System, A Case Study of the RE-AMP Energy Network*, Monitor Institute, http://monitorinstitute.com/reamp/ (Fall 2010).

Hoppe, Bruce, Claire Reinelt, "Social Network Analysis and the Evaluation of Leadership Network," *The Leadership Quarterly*, http://link-to-results.com/index.php?option=com_content&view=category&layout=blog&id=48&Itemid=55 (2010).

Kanter, Beth, Allison Fine, *The Networked Nonprofit: Connecting with Social Media to Drive Change*, Jossey-Bass (June 2010).

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Ward, Amy Sample, "Template: Metrics Tracking," http://bit.ly/DIYmetrics (November 2011).

**5. Support open and inclusive networks when possible. The next frontier for leadership programs looking to unleash the power of graduate networks will be to experiment with an open network approach. When your graduates become a core group of network weavers, the network can expand exponentially from hundreds working on your cause to thousands.**

Grant, Heather McLeod, *Transformer: How to Build a Network to Change a System, A Case Study of the RE-AMP Energy Network*, Monitor Institute, http://monitorinstitute.com/reamp/ (Fall 2010).

## Conclusion

With clear attention to recruitment, program design, curriculum, communications strategies, and infrastructure, leadership programs can optimize their potential for supporting a powerful action and learning network of program participants and graduates. A network can achieve greater impact by having a strong communications strategy and by reaching out and mobilizing broad support for the program's cause. We encourage you to consider the critical questions, advice, and resources offered in this guide. We hope you will share your experiences with others who aim to increase the impact of their leadership development work, by contributing to the Leadership for a New Era wiki at www.leadershipforanewera.com.

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### About the Leadership for a New Era "How To" Series: A Guide for Strengthening the Collective Impact of Your Leadership Development Work

As part of the Leadership for a New Era (LNE) initiative, the Leadership Learning Community has generated a series of "how to" guides for leadership program staff. The guides are supported by funding from the W.K. Kellogg Foundation.

The guides, which can be read separately or as an interconnected series, offer recommendations on these important topics:

- How to use action learning to achieve your change results (by Deborah Meehan and Claire Reinelt)
- How recruit to maximize the value of your cohort (by Deborah Meehan and Claire Reinelt)
- How to cultivate and activate your network (by Deborah Meehan, Claire Reinelt, June Holley, and Natalia Castañeda Chaux)

Each guide also includes practical examples of how a wide range of leadership programs think about and implement strategic approaches.

### About the Leadership for a New Era Initiative

Leadership for a New Era (LNE) is a collaborative research initiative launched in 2009 by the Leadership Learning Community. Through this initiative, we seek to promote leadership approaches that are more inclusive, networked, and collective. We believe that the dominant leadership model, which places a strong emphasis on the individual, limits the ability of leadership programs to bring about positive change in our society, so we have joined forces with a diverse group of funders, researchers, practitioners, and consultants in the leadership development field to shift the current thinking. Our research focuses on four areas: Leadership and Race, Leadership and Networks, Collective Leadership, and Leadership Across Difference. For more information, please visit www.leadershipforanewera.org.

Other publications created as part of the Leadership for a New Era initiative are as follows:

- A New Leadership Mindset (2009) http://leadershiplearning.org/new-leadership-mindset-download
- Leadership and Race: How to Develop and Support Leadership that Contributes to Racial Justice (2010) http://leadershiplearning.org/new-publication-how-develop-and-support-leadership-contributes-racial-justice
- Leadership and Networks (2012)

The publications listed above were funded by the Annie E. Casey Foundation, Blue Cross and Blue Shield of Minnesota Foundation, The California Endowment, the David and Lucile Packard Foundation, the Evelyn & Walter Haas, Jr. Fund, the Kansas Leadership Center, and the W.K. Kellogg Foundation.

### About the Leadership Learning Community

We are a national nonprofit organization transforming the way leadership development work is conceived, conducted, and evaluated, primarily within the nonprofit sector. We focus on leveraging leadership as a means of creating a more just and equitable society. We combine our expertise in identifying, evaluating, and applying cutting-edge ideas and practices in the leadership development field with access to our national network of hundreds of experienced funders, consultants, and leadership development programs, to drive the innovation and collaboration needed to make leadership development more effective. We also offer consulting services such as scans, evaluations, and network development to help programs and foundations optimize their leadership investment strategy. For more information, please visit www.leadershiplearning.org

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Deborah is the founder and Executive Director of the Leadership Learning Community (LLC), and has over 20 years of experience researching, advising, evaluating and writing about how to increase the impact of leadership development. Deborah received a Kellogg National Leadership fellowship in 1991. She was also a 2002 Salzburg Fellow and returned to Salzburg in 2007 as a member of the Global Youth Leadership faculty. She is a former board member for the International Leadership Association and is currently on the board of the Blue Cross and Blue Shield of Minnesota Foundation.

Deborah created the consulting services arm of LLC and has conducted evaluations for national and international leadership programs, produced leadership scans and literature reviews, and made program recommendations on behalf of 30 foundations that include a broad range of small, regional, and national foundations. She is currently using social network analysis to help leadership programs activate alumni networks. Deborah co-authored the LLC reports A New Leadership Mindset, Leadership and Race: How to Develop and Support Leadership that Contributes to Racial Justice, and Leadership and Networks. She has a B.S. in Psychology from UC Berkeley and has been a long-time community activist in Oakland, California, where she lives.

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Claire is co-editor of the Handbook of Leadership Development Evaluation (Jossey-Bass, 2007) and co-author of a 2010 article in Leadership Quarterly, "Social Network Analysis and the Evaluation of Leadership Networks." Many of her publications and writings are available on the LLC website. Claire has more than 20 years of experience working in the social sector as an evaluator, facilitator, and consultant. She has a Ph.D. in Sociology from Brandeis University and an M.A. in Anthropology from The University of Texas, Austin.

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As a member of the LLC consulting team, Natalia has conducted communications assessments and developed strategies for various organizations as part of social network analysis projects, including the Robert Wood Johnson Foundation, the Switzer Foundation, the Kellogg Fellowship Leadership Alliance, and the Synergos Institute. Natalia received her B.S. from the University of Colorado at Boulder in Journalism, Advertising track. She is co-author of the LLC publication Leadership and Networks and maintains a blog on the LLC website in which she views a range of leadership topics with a network and communications lens. Natalia has also participated with June Holley in learning communities organized around network weaving skills, and with Beth Kanter in social media monitoring practices.

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**Network Weaver**

June provides consulting, training, and coaching to organizations around the world that are interested in creating healthier networks through a better understanding of self-organization, collaboration, innovation, and learning. She has developed face-to-face and virtual training programs and communities of practice for network weavers, pioneering in the use of the social web to support network efforts.

June is now working with others to organize an international network of consultants and leadership development organizations so that they can more effectively support network weavers. Her Network Weaver Handbook—more than 300 pages of simple activities for network weavers—is available at www.networkweaver.com.

## Get Involved!

Join the Leadership for a New Era Website
This publication is part of the Leadership for a New Era Series, which promotes leadership approaches that are more inclusive, networked and collective. We invite you to visit www.leadershipforanewera.org to connect with peers across the nation, share your ideas, access resources and ultimately, join us in promoting a more effective leadership model.
www.leadershipforanewera.org

## Stay Connected

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