BUILDING

LEADERS

FOR CHANGE

An overview of the Annie E. Casey Foundation's Children and Family Fellowship

The Annie E. Casey Foundation

Acknowledgments

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Acknowledgments

The Annie E. Casey Foundation

The Annie E. Casey Foundation

The Annie E. Casey Foundation supports a range of activities in support of our mission to build better futures for millions of American children at risk of poor educational, economic, social, and health outcomes. Our work today is divided into three areas: supporting the transformation of tough neighborhoods into family-supporting communities; reforming public systems; and promoting accountability and innovation in policy, programs, and practice on behalf of poor children and families.

The Foundation has long been committed to helping increase the pool of available leaders with the capacity to initiate and manage complex change efforts, initially in state and local service systems and institutions, but also more recently in communities and neighborhoods. In 1991, therefore, we began investigating whether a structured program for individuals designed to build their leadership capacity could complement the Foundation's existing reform and policy investments and increase these efforts' chances of success. After two years of research and discussion, the result was the Children and Family Fellowship, a full-time, 11-month leadership development program for mid-career professionals.

The Children and Family Fellowship is designed to increase the pool of leaders with the vision and capacity to manage large-scale human services reform and community capacity building initiatives that improve the outcomes for disadvantaged children and their families. Thirty-nine people in four Fellowship classes have already participated in the program. A fifth cohort of Fellows began in January 2001. Our goal for the program as a whole is that three to five years after completing the Fellowship, Children and Family

Preface
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Fellows will be in positions where they will be serving as effective leaders and driving change efforts on behalf of large numbers of children and families. These leadership roles may vary. For example, Fellows may be building a struggling nonprofit or public agency into an important, influential, and mission-driven organization. They may be bringing together diverse stakeholders at a state or city level to accomplish major change. Or they may be creating sustainable bridges between the nonprofit and for-profit sectors in ways that improve the lives of children, youth, and families. Today, five years after the first Children and Family Fellowship class graduated, many Fellows from that initial class (and from subsequent classes) are already directing or playing leadership roles in major reform initiatives for children and families around the country. As new cohorts of Fellows complete the program, we will continue to monitor the career trajectories of these talented men and women.

The development of the Children and Family Fellowship challenged the Foundation to understand and spell out our own view of what leaders actually need to manage large-scale change and community capacity building initiatives. Initially, our discussions with administrators, reformers, academics, and others centered on improving leaders' knowledge base and expanding their repertoire of technical skills. But as we pushed these conversations further and began to probe exactly why various leaders had failed or succeeded, it became increasingly clear that leadership today and going forward depended not simply on technical or content knowledge, but on relational skills as well.

We began to hear that leaders certainly benefited from cutting-edge technical learning—for example, how to capture new funding streams or use data to design better programs. But, as in business, what also determined their success was their self-awareness, their ability to think and relate to others in new ways, their talent for facilitating groups of diverse people across disciplines and sectors and across race, gender, and class lines. Given the rapidly changing and complex environments in which public and nonprofit leaders operate today, this is not surprising. Leaders need to be responsive. Leaders must constantly react to new challenges and opportunities. And given the interdisciplinary emphasis of most (if not all) change efforts, leaders' relational skills—their ability to envision, facilitate, and manage collaborative initiatives among people who view the world differently from each other and themselves—are vital to producing results.

The Children and Family Fellowship set its four primary goals to reflect this balance between the technical and the relational. First, the program seeks to broaden Fellows' vision for change, not only on systemic and societal levels, but along personal and organizational dimensions as well. Second, the Fellowship seeks to enhance Fellows' capacity to lead complex change. It helps to build their technical skills and formal knowledge, expands their ability to think strategically, and promotes self-awareness and personal development. Third, the program seeks to enlarge the networks from which Fellows can draw ongoing information, knowledge, advice, and support. Through its placements and contact with Foundation and seminar staff and with other Fellows, the Fellowship provides exposure to new people, new programs, and new ideas that challenge Fellows to think and act more broadly. Finally,

the Fellowship seeks to build Fellows' confidence, bolstering their courage to take on challenging new career paths and lead significant change efforts on behalf of children and families.

While these goals have remained stable since the program's inception, the Fellowship has evolved with each class as we have continued to refine and enrich our notions of leadership development. Three program directors— Cheryl Casciani, Lynne White, and, now, Donna Stark—as well as our ongoing partnership with Ellen Schall at NYU's Robert F. Wagner Graduate School of Public Service have helped the Fellowship learn, grow, and develop to meet the needs of our Fellows and the needs of the communities and sectors in which they work.

As our fourth Fellowship class has just graduated, it is still early to say definitively how well this approach compares to the broad array of programs designed to develop leaders for change. And similarly, it is too soon to tell how much the Foundation's significant investment in these Fellows contributes to our other change strategies. Still, many people in the public and non-profit sectors are concerned about leadership, and we have learned a great deal about leadership development and about leadership development programs that we would like to share. We present "Building Leaders for Change," therefore, as an interim report, and as a description of a work in progress. "Building Leaders for Change" is also something of a chronicle of the growth and development of the program thus far.

We encourage you to consider the learnings presented here. Our program—framed for mid-career professionals, focused on children and families, and designed to pull people out of place for a year-long intensive experience—has a distinctive niche, which is described in greater detail in Part Five. Nevertheless, we trust the information and conclusions here are applicable in any number of program and organizational settings. We look forward to your response and to your own observations about leadership development and what works in developing leaders in your community. And of course, we are eager to continue the larger dialogue about what leaders need to manage large-scale and community-wide change on behalf of children and families.

Douglas W. Nelson

President

Annie E. Casey Foundation

Part One: Background
Developing the Children and Family Fellowship

In 1991, the Annie E. Casey Foundation began investigating the viability of a leadership development program that would complement the Foundation's large-scale investments on behalf of children and families. After interviews with numerous experts in leadership development and a comprehensive review of leadership development programs, Foundation staff set out several potential models for a Casey leadership program. At one end of the spectrum, these included low-cost strategies with relatively minimal explicit expectations for participants, such as internship-type programs for undergraduate or graduate students. At the other end were high-cost, high-expectation strategies. These would attempt to influence significantly the careers of participants and would strive to have a recognizable impact on the field. These high-end approaches included several kinds of full- and part-time fellowship programs for mid- or advanced-career professionals.

Along with this spectrum of choices, staff also learned two important things. First, they found that there were few existing leadership programs focusing on the reform of youth- and family-serving institutions and systems. And second, they discovered several excellent short-term programs for developing leaders in place, but few off-site, intensive, comprehensive programs. Indeed, there were virtually no programs that would allow participants the time and opportunity to significantly develop their capacity for leading large-scale, complex change efforts. [1]

In late 1991, with guidance from the Casey Foundation's Board of Trustees, the Foundation adopted plans for an intensive, high-expectations program,

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[1] For a more complete discussion of the Children and Family Fellowship in the context of other leadership development programs, please see Part Five, "Defining Our Niche."

in which a group of mid-career fellows would be mentored by senior staff of the Casey Foundation. This framework sought to ensure that the work and development of fellows was linked to the Foundation's goals and investment strategies.

Further and considerable discussion then led Foundation President Doug Nelson, Cheryl Casciani (then a program associate responsible for this planning process), and Ira Cutler (then Director of the Foundation's Planning and Development unit) to choose a full-time, rather than a part-time fellowship. This was not an easy decision. The leadership development literature and the experience of other fellowship programs have demonstrated the benefits of part-time, in-place training that is grounded in participants' current experience, organization, and context. Given the high expectations of the proposed model, the planners reasoned, a full-time, intensive program nevertheless made sense, though not for all talented professionals. The choice of a full-time model pointed the fellowship toward mid-career and senior professionals who aspired to higher levels of leadership and who were at a transition point in their lives and careers. Rather than expect fellows to return to their jobs or positions, the fellowship would let them look up and out and would seek to encourage a quantum leap in their career development.

With these broad decisions in place, Casciani and other Foundation staff moved to design the nuts and bolts of what would be called the Children and Family Fellowship. While the Foundation decided to administer the program internally, responsibility for designing and implementing a series of seminars for the Fellowship was contracted, after an extensive, nationwide search, to

Ellen Schall at New York University. Schall was former Commissioner of New York City's Department of Juvenile Justice and President of the non-profit National Center for Health Education. She had recently accepted a position as Martin Cherkasky Professor of Health Policy and Management at the Robert F. Wagner Graduate School of Public Service at NYU. Just as important, Schall had a practitioner's orientation and a reputation for both a reflective approach to management and an ability to make the complex work of leading change accessible to others.

Schall and Casciani continued the research process for the Fellowship, asking people throughout the public and non-profit sectors and the leadership development academy what it was that prevented leaders from succeeding. Their learnings provided a set of theories upon which a conceptual framework (described in detail in Part Two) for the Fellowship's seminars could be designed. This research also helped to identify several of the components that would eventually make up the program. These included, as the Board suggested, Casey Foundation staff as sponsors or mentors, as well as an Individual Learning Plan and field placements.

In late 1992, the Fellowship, with help from John Isaacson of the executive search firm, Isaacson, Miller, designed its application process and began recruiting its first class of Fellows. First, it sought nominations from a panel of more than 100 esteemed leaders in the human services field, as well as from a broad range of related disciplines. A Selection Committee rigorously considered 75 nominated applicants, and chose 24 to interview in person. (Today, 10 teams of three people consisting of AECF staff, Fellowship

alumni, and AECF grantees or "friends" review these applications.) The two dozen finalists came to the Foundation for interviews with a small panel comprised of Fellowship staff and outsiders knowledgeable about the Fellowship's development. (For subsequent Fellowships, applicants have also met with past Fellows.) Once selected, 10 Fellows began the first Fellowship program in September 1993.

Since the first Fellowship class, we have pursued a similar selection process with each cohort (We added group interviews for the 2001 cohort.), but have broadened our nominating panel to more than 400. The screening process for the first Fellowship class produced excellent candidates in many fields, though many of our first Fellows were interested in important policy, strategic, and advisory posts, rather than high visibility administrative positions at the head of large reform efforts. This larger group of nominators has ensured that the Fellowship today reaches more applicants with significant operational experience and increases our chances, we believe, of producing Fellows looking to take on top management jobs with significant operational components in large systems, organizations, or communities.

The success of the nominating process continues to depend in large part on our commitment to nurturing applications from nominators and actively seeking to reach into the leadership pools of the communities where our Fellows are likely to be working. To this end, we are indebted to Betty Hale at the Institute for Educational Leadership, who has helped to manage the nominating panel for the third and fourth cohorts of Fellows.

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Finally, we have found that our selection process has not only helped us to identify outstanding Fellows, but has also been helpful to applicants themselves. The application asks for a careful consideration of a person's professional history. It has applicants think about "their most significant contribution to their organization, field, community, or state" and describe in detail two critical leadership decisions, as well as an unsuccessful leadership experience, during their careers. Applicants are also required to outline career aspirations and to describe a typical three-day period in their lives.

From time to time, we have heard that, as a result of applying to the Fellowship, unsuccessful applicants now have clearer career goals and a better sense of the kinds of professional experiences they want to pursue next. Most mid-career professionals have not engaged in this kind of professional soul-searching since leaving college or graduate school. From this perspective, the Children and Family Fellowship application provides a helpful and concrete consideration of one's past and potential career. After applying unsuccessfully, one woman even went back to her employer and worked with the organization to create her own learning and development process for the coming year.

While we continue to evaluate the impact the program has had on our successful applicants, our experience with the Fellowship's application process has already revealed that too few people—and indeed the organizations in which they work—place enough emphasis on career development. ★

We hope, therefore, that the Children and Family Fellowship not only serves as a model for other leadership development programs, but that public,

See: Personal Mission Statements and Career Development at the end of this section

non-profit, and community practitioners can find aspects of the Fellowship

that can be used in place to develop the capacity of managers and line staff

to improve outcomes for children and families.

One of the things we have learned about developing leaders is that too few people in public service (and probably in the private sector as well) take an intentional approach to building their capacity and careers. All too often we act intuitively, with under-examined assumptions about our values, our current work, and our futures.   In the Children and Family Fellowship, this self-examination begins first through filling out the Fellowship application, which asks applicants to straightforwardly describe:

- their experience to date;
- their most significant contributions to their organization and community to date;
- two critical decisions concerning career or education;
- their role in a recent activity related to improving outcomes for children and families;
- a leadership failure;
- career aspirations;
- skills or leadership qualities that need to be refined or developed in order for them to realize their vision for improved outcomes for children and families; and
- a typical three-day period in their lives.

While these questions are designed to help the Fellowship consider applicants' qualifications for the Fellowship, they might easily be used to help anybody working for children and families in the government, non-profit sector, or in communities to consider and develop their careers. Our thinking here is that understanding the choices people have made in the past and the context in which they work is more useful than posing hypothetical questions based on current or future scenarios.

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Once Fellows are accepted into the Children and Family Fellowship, a second important tool we use to foster this self-examination is a multi-rater assessment tool or tools. At the Fellowship, we use a 360° instrument designed especially for the Fellowship. Like other multi-raters, this enables the participant to get important feedback from superiors, subordinates, and colleagues (from all around, hence the 360°). We supplement this with a request for role messages to the Fellows from those around them. We also use the more widely available Myers-Briggs assessment, as well as one called FIRO B.

With this kind of information, one can develop a set of strategies for personal/ professional development that will support one's career goals. These can in turn be adapted and formed into an individual learning/leadership development plan, much like the one Fellows must pull together in the Fellowship (See page 3.1).

Of course, a full-blown Fellowship-style learning plan is probably not realistic. For example, developing and testing a personal theory of change, a key component of the Fellowship's learning plan, may be impossible given one's current job and time commitments, but one might develop what Stephen Covey has called a "personal mission statement." Based on a set of core personal principles, this statement becomes a "personal Constitution," something against which one can test important life-directing and even day-to-day decisions. [*] Like the personal theory of change, the personal mission statement provides a way to prioritize, order, and evaluate one's current commitments and future plans.

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[*]   Stephen R. Covey. *The Seven Habits of Highly Effective People*. (New York: Fireside, 1990) 106-144.

And while the Fellowship's field placements are not realistic for most people, one can still get important exposure to different management approaches through job shadowing, short-term job exchanges, and taking on "acting" responsibilities when a superior or colleague goes on vacation or short-term leave. Similarly, identifying mentors, fostering developmental relationships with others in and around your organization, or creating a learning and support group can expand your network and provide important ways to test new ideas and receive guidance and support (these issues are discussed in greater length in the Lessons Learned, a Fellowship publication, Issue 2). Developing a reading list to fill in gaps or develop your knowledge of a particular aspect of leadership or issue area can facilitate important intellectual development. ★

Finally, short-term leadership development programs, like those offered by the Center for Creative Leadership in Greensboro, North Carolina, or the Rocky Mountain Program at the University of Colorado at Denver, provide intense, structured instruction that can improve one's effectiveness and build one's capacity to take on new career challenges.

Part Two: A Conceptual Framework
Goals, Themes, and Notes

The theoretical framework of the Children and Family Fellowship emerged from the three-year process of designing and then running the first Fellowship.   The program's four goals were described in the formative stages of the program's overall design. Professor Schall from NYU then fashioned the learning themes and notes described below for the initial seminar series. After the first Fellowship, Schall and Foundation staff looked particularly at the themes in the context of the Fellowship and developed a set of learning outcomes for the program as a whole.

This focus on goals and outcomes in particular reflects the importance the Casey Foundation places on evaluating all of its initiatives. The Foundation believes that the Fellowship—like all programs for children and families—should be evaluated not only according to how well it runs, but also as to how successfully it affects the people it is meant to serve. The Fellowship's learning outcomes, therefore, set out four areas (vision, capacity, networks, and confidence) in which we can judge the effect of the Fellowship on its participants. ★   In addition, the Academy for Educational Development has conducted full evaluations of the program and its first three cohorts. [2] Plans for subsequent longer-term evaluations are still under consideration.

> **See Appendix A**:
> The Children and Family Fellowship Framework

Four Goals: Vision, Capacity, Networks, and Confidence

Since its inception, the Children and Family Fellowship has had four primary goals. First, the program seeks to broaden Fellows' vision for change, not only on systemic and societal levels, but along personal and organizational dimensions as well. We believe (and many of our conversations

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[2]   Copies of the first three evaluations are available from John Sullivan at the Annie E. Casey Foundation (410-547-6600).

have confirmed this) that talented people often fail to lead successful efforts to transform systems, agencies, or communities because they do not develop a broad enough vision. They are not sufficiently exposed to the bigger picture to imagine what a new system or organization or community-based program on behalf of children and families might realistically look like. Or they do not have a vision of who they must be and how they must grow and change in order to lead this kind of transformative effort. The Fellowship, therefore, sets out a broad range of activities to help Fellows broaden their professional and personal worldviews.

Second, the Fellowship seeks to enhance Fellows' capacity to lead complex change. Along with having vision, managers must first be able to make an accurate diagnosis of where their organizations are and then develop and implement plans to get the organization to where it needs to be. The same is true in developing one's personal capacity. You not only need to know and acknowledge who you are—your current strengths and weaknesses—but you have to have the ability to develop and implement a plan to expand your personal/managerial repertoire. You have to build on your talents and identify strategies to address your challenges (e.g., working with people who have complementary, rather than overlapping, skill sets to yours.). The Fellowship, therefore, builds Fellows' technical skills and formal knowledge, expands their ability to think and act strategically, and promotes their self-awareness and personal development.

The third goal of the program is to enlarge the networks from which Fellows can draw ongoing information, advice, and support. Through its placements and contact with Foundation and seminar staff and with other Fellows, the Fellowship provides exposure to new people, new programs, and new ideas

that challenge Fellows to think and act more broadly. It provides a medium through which to develop a series of important, developmental relationships. ★ ◄ ★ A Fellow can in turn draw on these people and their wisdom as he or she faces new problems and opportunities, both during and after the Fellowship.

Finally, the Fellowship seeks to build Fellows' confidence, bolstering their courage to take on challenging new career paths and lead significant change efforts on behalf of children and families. Our experience in government service, in the not-for-profit world, and in community development work has taught us that leading change is hard, consuming work. Inertia, bureaucracy, and the high penalties for failure make the challenge even more daunting.   In these efforts, confidence, and indeed courage, to take on this work is a crucial ingredient for successfully leading change. Leaders have to be willing to make the fight; that is, they must be willing to make the struggle to move their vision forward. To do this, they have to know they are supported—either by constituents or by members of the political establishment. They have to know that other people around them think they can succeed. The Children and Family Fellowship, therefore, seeks to provide a constructive learning environment and network that energizes Fellows to take on these difficult challenges on behalf of children and families.

Themes: Learning Integrated on Four Levels

To help fulfill these goals, the Fellowship seminar series has identified learning objectives or outcomes organized around four themes: individual learning, organizational development, systems thinking, and societal learning. Subsequently, the seminar series, and later the Fellowship as a whole, developed a set of explicit outcomes for each of these four themes,

See Appendix A:
The Children and Family Fellowship Framework

the skills related to these outcomes, and Fellowship activities or tools that build these skills. A description of these themes, outcomes, and tools can be found in Appendix A. ★

The first theme, **individual learning**, acknowledges the critical role of the leader in the success of any organization or initiative. The Fellowship focuses considerable time preparing Fellows to be self-aware leaders who have the capacity to integrate their experience to date, their learning during the Fellowship year, and new learning as they go forward in their careers. By the end of the Fellowship, for example, each Fellow is expected "to have developed a more effective use of self as a leader for change with increased substantive knowledge in a chosen area." To facilitate this outcome, the Fellowship works to develop a range of skills—from developing the capacity to reflect on and shift goals, assumptions, and actions to fostering the ability to work effectively in groups. More concretely, the Fellowship uses a set of personal assessment tools. This includes a 360° multi-rater instrument developed specifically for the Fellowship, which generates feedback from colleagues, superiors, and subordinates, including "role messages" (i.e., new or different behaviors respondents would like to see more or less of). [3] Most recently, there have been sessions on "productive pairing," which ask Fellows to identify certain skill or other deficits and think through how they might develop leadership teams with other individuals who complement their strengths and counterbalance their weaknesses. The Fellowship also requires that each Fellow develop an Individual Learning Plan. It exposes Fellows to different leadership styles through its placements. And it provides a Reader Pack, which draws on a broad variety of writings on leadership,

race and ethnicity, systems redesign, and other subjects. All of these Fellowship components are designed to help Fellows become more capable individual leaders.

The second theme, **organizational development**, focuses on helping Fellows articulate their vision and increase their capacity to lead an effective learning organization. Here, we place an emphasis on organizational diagnosis and managing the change process. Current literature suggests that the organizations that will survive and thrive in the future are those that can adapt to and take advantage of a rapidly changing environment. The key to this is a leader's ability to create and manage organizations that learn continually and can integrate learning throughout their operations. The Fellowship, therefore, seeks to build group process, negotiation, and facilitation skills and enhance Fellows' ability to read and adapt to environmental changes or challenges. Early Fellowships instructed Fellows in how to use evaluations and evaluators effectively, as well. In the service of these and other organizational learning skills, Fellows in different cohorts have learned environmental scanning techniques, frameworks for results-based accountability, stakeholder mapping, and strategic planning tools and techniques, among others. In the fourth cohort, they have explored the metaphor of a "campaign" to understand the persuasive and opportunistic dimensions of leading change in organizations. Fellows also participate in field placements and do site visits to observe and interact with different organizational structures and strategies.

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3   The Annie E. Casey Leadership Questionnaire is available without charge to people working in the field. Those interested in information about this tool (as well as an IBM-compatible computer program that tabulates its results), should write: Ellen Schall, Robert F. Wagner School of Public Service, New York University, 600 Tisch Hall, 40 West 4th Street, New York, NY 10012.

The third theme, **systems thinking**, is closely tied to the Casey Foundation's vision of developing more effective, flexible, and integrated service delivery for children and their families across systems and communities. This relies on a broader application of the theories surrounding organizational development and change, so leaders must recognize the interrelationship and collaboration of disciplines and organizations in meeting the needs of identified groups and communities. We believe that effective leaders must understand systems and how their underlying structures and interconnections affect their ability to bring about significant change. The Fellowship, therefore, builds Fellows' familiarity with technical issues like funding streams, as well as their ability to map and analyze systems and system breakdowns and move outside their own discipline and specialty. Again, site visits and field placements provide first-hand exposure to a variety of systems and governance structures. Foundation staff provide additional learnings through discussion and analysis of Casey-supported, system-wide and neighborhood-based initiatives. Finally, the seminar series teaches several systems thinking tools and theories that over the years have included systems modeling and simulation, dynamic thinking and idealized design, theories of constraint and co-evolution, Oshry's "top-middle-bottom" system dynamics, and re-engineering tools including work process redesign.

The final theme, **societal learning**, builds on the themes discussed above and focuses on developing leaders' ability to mobilize and drive political will, enhancing their capacity to create a larger environment within which substantial change can take place. Here, the Fellowship helps its participants communicate more effectively to mass audiences, frame issues strategically,

and engage diverse audiences. Much of this skills development comes during the residencies and has included, for example, presentations on lobbying and coalition building, civic engagement, message development, public speaking, and communications.

Learning on all four of these levels is critical to leadership in the public and nonprofit sectors, particularly leadership of large-scale reform, community capacity-building, and neighborhood transformation initiatives. The Fellowship believes it is not enough to learn about systems and organizational change or about broader societal issues. Change requires leaders to change too. They must understand themselves in new ways and practice new behaviors that enable them in turn to manage new organizational and system practices. Similarly, personal development and self-awareness are not enough if leaders do not possess sufficient technical skills or understand the reforms they are trying to press in a broader context. We believe integrating learning across these four levels, therefore, is critical to a leader's ultimate success in confronting the myriad and diverse challenges associated with instigating and managing change.

Three Notes

In addition, the Fellowship periodically sounds three "notes": reflection, renewal, and the need to keep one's focus on real children and their families. Developed initially for the seminars, these now create a tone for the entire Fellowship. We believe they build personal qualities that increase Fellows' long-term capacity to lead.

Reflection concerns the gap between professional knowledge and the demands of the real world. Reflection on actions taken enables the leader to become a researcher of his or her own practice and engage in a continual process of self-education. The "reflective note" appears in many forms during the Fellowship—in each Fellow's Individual Learning Plan, in their development of a theory of change, in journaling, through the experience of the learning group, and sometimes through conversations with one's sponsor or field placement hosts. In the fourth cohort, Fellows broke up into three- or four-person Reflection and Application Groups (RAGs) at the end of each seminar to discuss and get feedback on the personal development issues they were working on that related to the topic of the seminar.

Fellows also use the "critical incident" technique, presented by the Center for Applied Research, which asks them to describe a less than successful event from their respective careers. Fellows then role play the incident, discuss what happened, understand what went wrong (was it in the Fellow's strategy? the diagnosis of the problem? the way the strategy was produced?) and seek alternative modes of action.

Renewal is the commitment to ongoing balance in one's life. Recent literature on how leaders sustain success suggests that renewal is a key to continuous high-level performance. The "renewal note" includes opportunities—such as classes in yoga or even walking—that allow Fellows to investigate ways to achieve personal balance and explore ways to build long-term resiliency into their leadership and into organizational settings. The Fellowship attempted to sound this note more deliberately in the fourth cohort with

mixed results. In the future, we will continue to seek to integrate renewal into the Fellowship's curriculum in ways that allow individuals and the group to benefit and that provide learnings that can be adapted into organizational settings.

The final note ensures that the **reality of children and families** remains present throughout the year. Through the "children and family note," we bring in the voices of real children and families wherever possible during the Fellowship year and attempt to stay focused on the results we are trying to achieve for children and families in our larger work.

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At the Fellowship's outset, we conceived the Foundation sponsor as a kind of mentor. While some of the early pairings developed into meaningful mentor-protégé kinds of relationships, others did not. In retrospect, this is not surprising. As Harvard Business School Professor Linda Hill and others have pointed out, good mentor-protégé relationships are difficult to establish and just as difficult to maintain.* Following Hill's lead, we re-conceived the sponsor as a kind of facilitator, someone who could connect the Fellow to others at the Foundation and in the Foundation's network. This recognized that rather than seeking a single perfect mentor, it was preferable to seek a network of relation-ships that served the developmental needs of our Fellows.

Similarly, in seeking ways to reproduce this aspect of the Fellowship in the workplace, it may be helpful to think about cultivating relationships with a broad range of people in your organization who can provide personal support, feedback on new ideas, and strategies for overcoming obstacles. Indeed, all work relationships can be understood as having the potential to address any number of developmental needs.   Immediate and other superiors can provide coaching, open doors to new opportunities and people, create opportunities for visibility, and set out new challenges. Looking for a single mentor in this regard is often unwise as mentor-protégé relationships may include periods of dissen-sion. Seeking several of these kinds of developmental relationships, therefore, is ultimately more productive. And of course, developing relationships with peers can offer a wide range of personal and professional support, as well. Just as Fellows do for each other in the Fellowship, peers can serve as sounding boards for new ideas, provide honest feedback, and lend emotional support when necessary.

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* Hill, Linda and Nancy Kamprath, "Beyond the Myth of the Perfect Mentor: Building a Network of Devel-opmental Relationships," *Harvard Business School Publishing* 9-491-096 (1991).

Part Three: The Nuts and Bolts of the Children and Family Fellowship

Emanating from the conceptual framework outlined in Part Two, the Children and Family Fellowship Program is a full-time, 11-month experience with eight main components. These include:

- An Individual Learning Plan;
- Foundation sponsors;
- Fellowship faculty;
- Residencies at the Casey Foundation;
- Field placements;
- A seminar series (including five weeklong sessions);
- Skills-based workshops; and
- A final project.

While certain aspects of the Fellowship have evolved through the first four cohorts of Casey Fellows, these components and the broad design of the program have remained relatively stable. A general description of these components and their rationale follows. To understand these components through the calendar year, refer to Part Four, which describes how the year flows in greater detail. ★

Also See: The Fellowship Year at the end of this section

An Individual Learning Plan

At the beginning of the program, Fellows are asked to write an Individual Learning Plan, which is to serve as a "road map" for their Fellowship experience. Centering on developing and testing a "personal theory of change," this plan is updated six months into the program and then revised at the end of the Fellowship to serve as a job search strategy memorandum. Fellows in all Fellowship cohorts have written these plans, but the function of

the Individual Learning Plan expanded significantly during the second Fellowship. It now drives the Fellowship experience—suggesting possible field placements, focusing Fellows on their career aspirations, and identifying areas of personal and professional development that are then addressed through seminars and other Fellowship activities.

The Individual Learning Plan ensures that each Fellow's experience is deliberate, driven by a set of goals and a series of areas of inquiry. The Fellowship is over-rich with learning opportunities and possibilities. Therefore, we ask Fellows to focus, to develop a personal mission or "theory of change" (see below) that drives their decisions around site visits, placements, and a final project. This Fellow-identified, strategic vision creates a coherence for the Fellowship experience and serves as a model for the strategic perspectives on organizational, system, and societal change taught throughout the Fellowship.

The Individual Learning Plan's emphasis on a personal theory of change derives from a set of insights gained during the Foundation's preliminary design process for the Fellowship, from subsequent consideration of the literature around leadership development in the public sector, and from conversations with leaders in the field. Early on we asked what interfered with leaders' capacity to manage and deliver large-scale reform.

During the Fellowship's development process, Foundation President Doug Nelson suggested that leaders too often lacked a theory of change (in some places called a theory of action). That is, they did not have a clear vision of

how and why they believed change for children and families occurred. Without any operating theory, he (and we) reasoned, leaders are often unable to maintain a consistent strategic focus over time. Day-to-day crises can overwhelm a leader and usurp his or her energy and attention. A theory of change drives decisions within the context of the group's larger and longer-term strategy. It helps the leader decide not just what is urgent, but what is important. And it helps the leader ensure that his or her decisions are consistent across the spectrum of the organization's decisions.

To help Fellows articulate and then test their "personal theory of change," the Individual Learning Plan asks them to respond to the following line of questioning:

- What is your theory of change?
- What set of inquiries can you use to learn more about other people's approach to change and to enhance your own theory?
- To what type of professional role(s) do you aspire, either immediately after the Fellowship or longer term, in which you can act on your theory of change?
- What Fellowship activities and learnings would you like to pursue—related to your personal development and to a substantive area—to strengthen your theory of change and to build your capacity to make change? Most particularly, what kind of final project do you plan to produce? And (in the first two drafts of the plan), where will you spend your field placements and why?

This theory of change or theory of action grows and develops from the grist of each Fellow's own experience—before, during, and, we trust, after the Fellowship. It is a way of making sense of the myriad and multi-dimensional

issues managers face each day in the real world. It is also part and parcel of being a "reflective practitioner," able to make sense of complex, interdisciplinary professional challenges. [4] As one Fellow described it, a reflective practitioner develops and uses her or his theory of change "to make meaning out of the mess." For anyone leading a large-scale change initiative with all its attendant complexity—with all its "messiness"—the ability to develop and shape a theory of change, therefore, is vital.

In the workplace a theory of change develops over time. Similarly, in the Fellowship, a second draft of the Individual Learning Plan—written in the sixth month of the Fellowship year—requires Fellows to re-articulate their theories of change. They must provide examples of Fellowship experiences that have influenced their thinking. Fellows also update other sections of the plan to include reflections on learning insights and progress toward career and other goals. Fellows evaluate their first placement and discuss plans for their second placement. They also look ahead, describing their plans for their final project.

Completed in some cohorts during the tenth month of the Fellowship, the final draft of the Individual Learning Plan asks Fellows to devise a job search strategy including reflections on next career moves, the type of role they see for themselves, an ideal job, areas where they would be most effective, and what job search steps they have taken so far.

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4   Donald Schön, *The Reflective Practitioner: How Professionals Think in Action* (New York: Basic Books, 1983) 49-69.

As one Fellow reflected: "My individual plan grew in importance as the Fellowship progressed. It helped keep me focused. Its evolution was also an indication of the growth in my ideas and skills."

Foundation Sponsors

One of the goals of the Fellowship is to build each Fellow's personal and professional networks, to expand the pool of people he or she can turn to for guidance, support, and inspiration. Given the complexity and difficulty of leading large-scale change, we believe these networks are important to a Fellow's subsequent success. In the service of this objective, a member of the Casey Foundation's senior management committee or other senior Foundation staff member serves as a sponsor for each Fellow. Sponsor-Fellow pairings are largely determined by matching the Fellow's area of interest with the sponsor's expertise. A key aspect of the sponsor's role is to provide Fellows' access to the Fellowship's network of grantees, its Making Connections program site teams, technical assistance providers, and, particularly, other Foundation staff. While during the first Fellowship, Fellows' interaction with Casey's network was primarily structured around the sponsor relationship, the second and subsequent Fellowships reconceived this role to view the sponsor as part of a large system of relationships within the Foundation. In particular, sponsors, with the help of the program director, now identify an informal network of three or four Casey staff to supplement the sponsor's advisory role and better connect Fellows to the ongoing work of the Foundation.

In addition to this network-building role, the sponsor orients and grounds Fellows in the Foundation's work and culture, serves as a resource for substantive information, and provides guidance in planning the Fellowship year. In particular, sponsors challenge Fellows to articulate more clearly their Individual Learning Plans and theories of change. They provide counsel and ideas for potential field placements, maintain contact with the Fellows during those placements, and assist with the planning of the Fellows' final projects. They provide access to external resources and contacts. A sponsor may also counsel a Fellow in regard to areas of personal development identified in the Individual Learning Plan, and ultimately his or her job search. But most of all, the sponsor is an advocate for the Fellow, providing support and nurturance as the Fellow makes his or her way through the challenges of the Fellowship experience.

"My foundation sponsors (Doug Nelson, President, and Sandy Jibrell, Director of Community Initiatives)," says Brenda Donald '97, "gave me great insight into the Foundation's philosophy and provided a direct link between the Fellowship and the Foundation. Doug allowed me broad access and exposure to the Foundation "family." And I had Sandy's calendar, so I could sit in on any meetings she was having with people in the field. My relationships with both of them have continued after the Fellowship, and I feel as if I can always call if I have a question or challenge in my ongoing work."

Part Three: The Nuts and Bolts of the Children and Family Fellowship

Fellowship Faculty

From the start, the Fellowship has relied on a variety of academics, experts, consultants, and facilitators to provide support and training. Ellen Schall of the Robert F. Wagner Graduate School of Public Service at NYU conceived and has administered the Seminar Series (see Page 3.11) in each cohort. In the fourth group, the Fellowship made a deliberate attempt to establish a core Fellowship Faculty, who not only run substantive sessions, but also serve as resources to Fellows and to Fellowship staff. In addition to Schall, the Fellowship Faculty for the 2001 Fellowship includes:

- John Isaacson, Managing Director of Isaacson, Miller, who provides expertise on career development;

- Thomas Gilmore and Mal O'Connor of the Center for Applied Research, who specialize in linking strategy and organizational change;

- Jolie Bain Pillsbury, of Sherbrooke Consulting, Inc., who offers the skills building sessions on collaborative leadership and helps facilitate various sessions in the Fellowship itself; and

- Kathy White, an independent consultant, who focuses on individual role and organizational development.

As the Fellowship's curriculum changes, the core faculty changes, as well. In the fourth Fellowship cohort, Rose Miller and George Silcott served on the initial faculty team, providing guidance around the Fellows' group learning. A brief bio of each of the 2001 faculty can be found in Appendix B. ★

See Appendix B:
Children and Family Fellowship Faculty

Part Three: The Nuts and Bolts of the Children and Family Fellowship

During the 11-month Fellowship, Fellows spend three six-week residency periods at the Foundation. In general, these residencies provide a home base for the Fellows, the opportunity to develop their relationships with their sponsors and other Foundation staff, and the chance to learn about and participate more broadly in Foundation activities. One seminar takes place during each residency, as do several skills-based workshops. The residencies also provide Fellows periods of reflection that help them integrate their learnings, contemplate their theories of change, and, at the end of the Fellowship, consider career strategies.

Because all of the Fellows are together, residency periods allow Fellows to build relationships that subsequently enable them to learn from one another in powerful ways. We believe that the Fellowship group itself is an important learning ground within the Fellowship experience. The constitution and practice of this group enables Fellows to learn about leading in a group of leaders. The group provides a "place" for Fellows to understand about how they can effectively lead and participate in diverse group settings, settings that are crucial to managing and instigating large-scale change. It also provides support for their intellectual development. "The other Fellows helped me formulate approaches to various challenges and test their applicability," says Larry Murray '93, now Senior Program Associate at the National Center on Addiction and Substance Abuse at Columbia University. "They helped me hone my thinking before rolling my ideas out in other, more public arenas."

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During each residency period, Fellows do not spend their entire time at the Foundation. Seminars held during the residency periods are held off-site, in New York, Washington, and other places. Fellows make site visits to learn about programs, reform efforts, and leadership styles related to their theories of change. Finally, they travel to conferences and meetings and do research related to their Individual Learning Plans and final projects.

Field Placements

During the course of the Fellowship, Children and Family Fellows spend significant time in two field placements, each approximately three months long. These placements are designed to expose Fellows to individuals and organizations engaged in innovative work that is improving outcomes for children and families. Fellows gain hands-on experience, knowledge, and skills in conceptualizing and implementing change efforts. With help from their sponsors, Fellowship staff and faculty, Fellows choose their placements so they can explore issues raised in their Individual Learning Plans, gain exposure to diverse leadership styles, or experience unfamiliar organizational settings and cultures. A majority (though not all) of Fellows' field placements have been at institutions supported by the Casey Foundation. A brief listing of some of these organizations reveals the breadth of the Fellows' substantive interests. ★

See: Fellowship Field Placements at the end of this section

Once Fellows are on-site, a placement advisor—a senior staff person at the organization, usually the commissioner, CEO, executive director, or deputy director—assumes responsibility for the Fellow's experience and helps struc-

ture the Fellow's activities. These vary widely from site to site. At times, Fellows may shadow the executive director, accompanying him or her to senior management and other meetings. At other times, Fellows may interview agency staff or attend organizational meetings or related forums outside the organization. They may even take on specific project responsibilities and essentially play the role of a temporary staff member. One Fellow, for example, whose site placement was with the Senate Committee on Indian Affairs, staffed a hearing on welfare reform as one of her activities. Another worked with the Chancellor of the University of Arkansas at Little Rock to investigate and fund new efforts to link the University's work to community development initiatives in the area. Still another, a physician, served as a project coordinator for three months on an initiative that integrated the services and funding of five agencies for the relatively small numbers of children in Massachusetts responsible for using the vast majority of these agencies' resources.

In these and indeed all placement settings, Fellows strive to balance their need to test their learnings and practice new skills with the generally felt desire to do "real work" that is valued by the host agency. This is a generally healthy tension, but one that must be negotiated to ensure that the experience is authentic and helpful for both the Fellow and his or her host site.

The impact of each placement varies of course, though some reverberate long after the Fellow returns to Baltimore or even leaves the Fellowship. "My placements were extremely important," relates Trine Bech '95, now

Deputy Director of the Division of Family Services at the Delaware Department of Children, Youth and Families. "Both of my supervisors have continued to be important to my career. Both were women and provided me with powerful examples of leadership styles I could try to emulate, and one even ended up recommending me [five years after the placement] for my current job in Delaware."

For Dolores Briones '93, now County Judge and Chief County Administrator in El Paso County, Texas, her placement on the staff of the House Committee on Education and Labor enabled her to see what work on Capitol Hill was like and gave her the confidence to run (ultimately unsuccessfully) for Congress. Without the Fellowship, she recalls, "I couldn't imagine having an opportunity to work on Capitol Hill and see it from the inside like I did. At any other time, I would have had to get a job, move to DC, and uproot my whole family. The experience allowed me to get my arms around Congress, and see that I would like working there, that I could be successful there."

Seminar Series

In support of the other Fellowship components, the Fellowship seminar series is intended to develop and enhance critical skills by creating an adult learning environment that builds on the experience and expertise of the Fellows. It was designed and continues to be administered and facilitated by Professor Ellen Schall of the Robert F. Wagner Graduate School of Public Service at NYU.

Building from the Individual Learning Plan's focus on a personal theory of change, the seminar series develops Fellows' reflective capacity, that is, their ability to think critically and adjust their actions in the context of a rapidly changing and complex environment. To this end, the series forgoes traditional, didactic approaches to executive education that focus on specific behavioral and technical objectives. Instead, it employs a dynamic approach to learning with opportunities for personal assessment and reflection, where learners are active participants in the learning process. In fact, throughout the seminar series, Fellows take responsibility for designing and/or facilitating individual sessions.

The structure of the seminar relies on three design principles. First, each learning experience is created to be of use to Fellows, not only during the Fellowship, but also after the Fellowship as they take up new leadership roles.   Materials, including background readings and write-ups of techniques for each seminar session, are gathered in notebooks. This allows Fellows to "carry" learnings with them and continue to use them when they leave the Fellowship.

The second principle is that the Fellows play an active part in designing the seminars, particularly as the Fellowship year goes on, both to utilize their experience and knowledge and to provide them the opportunity to learn and develop design skills. "This was an important part of the Fellowship," says Keith Sykes '97. "We had a big say in the programming, identifying what we wanted to learn, planning it out and then making it happen—all in the context of a diverse and accomplished group." Finally, the seminars are created

Part Three: The Nuts and Bolts of the Children and Family Fellowship

with the other aspects of the Fellowship in mind and, where possible, provide learning opportunities not only for Fellows, but also for Casey staff, as well.

Learning in the seminars is organized according to the four themes identified for the Fellowship as a whole—individual learning, organizational development, systems thinking, and societal learning. "Part Four: The Fellowship Experience" describes each weeklong seminar in greater detail.

Skills-based Workshops

Fellows receive skills-based training in several workshop formats. The subjects of these workshops are varied and have included communications and public speaking, program evaluation, and negotiation, among many others. Certain topics, deemed essential to leading and managing change, are covered in each Fellowship, while others change from year to year, as Fellows—based on feedback gleaned from various personal feedback tools at the beginning of the Fellowship—identify workshop subjects they deem necessary to their professional growth and development. Fellows also participate in "content" seminars, such as "The Front Line Worker," some of which vary each year as well. ★ Each of the first four Fellowship classes participated in a two-day seminar on "Undoing Racism" conducted by the New Orleans-based People's Institute for Survival and Beyond. Given that interaction among people of diverse races and classes and different genders is a central aspect of today's comprehensive change efforts, this session reflects our belief that understanding oppression, particularly racism,

The Annie E. Casey Foundation

is critical to leadership for change. This set of workshops provides a framework for understanding how racism operates as a societal construct and enables Fellows to understand the impact of their own cultural context on their ability to lead.

Final Project

Articulated in each successive draft of the Individual Learning Plan, the final project subsequently enables Fellows to integrate their learnings from the Fellowship in a single document. "Your theory of change allows you to pull things together during the Fellowship," says Chet Hewitt '95. "The final project is the end product. It's a way of making your theory actionable."

The final project is also meant to serve as a tool each Fellow can use as he or she moves into a new position or on a new career trajectory. These projects cover a broad range of subjects. Most thus far have examined specific human service systems and/or community issues, applied leadership principles and theories to particular situations or organizations, or studied the role and effectiveness of different governance structures. ★ All the projects are meant to test a Fellow's theory of change and investigate compelling issues that could make a real difference to the larger field. Accordingly, Fellows are also asked to develop a dissemination strategy that will take their project out to audiences that could benefit from the project's learnings.

Part Three: The Nuts and Bolts of the Children and Family Fellowship

At the end of the Fellowship, each Fellow presents his or her final project to the rest of the Fellowship group as well as to Fellowship and Foundation staff.   Some of these papers have received attention from the national media, become the basis of scholarly or professional articles, or served as frameworks for new advocacy efforts. Fellow Wendy Jacobson's '97 project, an article called "Beyond Therapists and Bureaucrats: New Directions for Social Work Practice," for example, was accepted for publication after the Fellowship in the Journal of Social Work.

More recently, the Casey Foundation published Fellow Grant Jones' '00 project, *Developing a Neighborhood-Focused Agenda: Tools for Cities Getting Started*. This guide provides useful information for U.S. cities working on neighborhood issues and offers practical advice about the steps that are key to developing an effective neighborhood agenda. With the help of the Piton Foundation, this publication has been disseminated broadly to all cities with populations greater than 100,000, received positive coverage in news stories in both *U.S. Mayor* and *Nation's Cities Weekly*, and been used in trainings for the National League of Cities and in a wide variety of other local venues. Copies of *Developing a Neighborhood-Focused Agenda: Tools for Cities Getting Started* are also available on the Casey Foundation's web site at (http://www.aecf.org/fellowship).

The following describes the schedule for a typical Fellowship year:

First Residency	**Weeks 1-6**
Individual Learning Seminar	Week 4
Transition	Week 7
First Placement	**Weeks 8-17**
Org. Development Seminar	Week 13
Transition	Week 18
Second Residency	**Weeks 19-24**
Creating a Context Seminar	Week 21
Transition	Week 25
Second Placement	**Weeks 26-37**
Systems Thinking Seminar	Week 29
Transition	Week 38
Third Residency and Closing	**Weeks 39-44**
Closing Seminar	Week 42
Presentation of Final Projects	Week 43, 44

- Computer Training

- Results-Based Meeting and Conference Design Skills

- Interest-Based Negotiation

- Leadership Speakers

- Collaborative Leadership Skills

- Yoga

- Career Development

- Results-Based Accountability: A Framework for Decision-Making and
   Budgeting

- Negotiations Training

- Executive Search Session

- Public Speaking

- Media Training

- Undoing Racism

- The Role of Faith-Based Organizations in Children and Family
   Services and Supports

- The Role of the Corporate Sector in Welfare to Work

- Lessons in Advocacy: Skills and Strategies for the Nonprofit Sector

- Facilitation Skills

- Corporate-Community Partnerships

- Developing a Theory of Change

- Community Organizing

- The Challenge of Leading and Following in Groups

The following list is a partial sampling of the organizations and agencies where Fellows have spent their field placements. Fellows choose these organizations for a variety of reasons, though generally to test an aspect of their developing theory of change, explore issues identified in their individual Fellowship plans, or gain exposure to a new issue area or kind of reform initiative.

United Neighborhood Houses
New York, New York

Texas Health and Human Services Commission
Houston, Texas

Chatham-Savannah Youth Futures Authority
Savannah, Georgia

Local Initiatives Support Corporation
Washington, DC

Office of the Lieutenant Governor
Honolulu, Hawaii

Center for Law and Policy
Washington, DC

Dade County Children's Service Council
Miami, Florida

Ventura County Department of Mental Health
Ventura, California

National Academy of State Health Policy
Portland, Maine

Urban Strategies Council
Oakland, California

Children's Defense Fund (Ohio)
Columbus, Ohio

Governor's Task Force of Human Service Reform
Chicago, Illinois

Bank of America Community Development Bank
San Francisco, California

Children's Bureau, Administration for Children and Families
Washington, DC

The following is a listing of the Fellows' final projects. These projects, which have generally taken the form of written reports (presented orally at the end of the Fellowship), arise from issues identified in a Fellow's Individual Learning Plan. They provide an opportunity for Fellows to express the critical thinking and analytical skills developed during the Fellowship. For some Fellows, they serve as a useful preparation for the leadership positions they undertake after the Fellowship ends.

Yolie Flores Aguilar, '93-'94
Creating a National Voice for Latino Children

Linda K. Asato, '99-'00
Opportunities and Challenges of Technology Tools to Assist in Human Service Accountability Systems

D. Leann Ayers, '99-'00
Comprehensive Community Initiative Lift-off: What Factors Support Pigs Flying?

Sandra Kay Barnhill, '97
Discussion of Ways Existing Systems and Communities Can Work Together to Meet the Needs of Children with Incarcerated Parents

Trine Bech, '95
Decision-Making for Abused and Neglected Children: Neglected Barriers and Proposals for Improvement

Dolores Briones, '93-'94
A Framework for Principled Leadership and Right Use of Power

Dennis Campa, '97
Proposal for Ways Austin City Government Can Work with its Neighborhoods

Edward Chisolm, '97
Strengthening Families, Supporting Children, Rebuilding Communities

Soraya Moore Coley, '93-'94
Front Line Workers: A Token of System Reform?

Carla P. Dartis, '99-'00
Quality Facilities Impact Early Care and Education in Low-Income Communities: A Difference Achieved Through Collaborative Leadership

Final Projects

Brenda Donald, '95
Washington, DC: Stop the Pain and Go for the Gain

Lynn N. Fallin, '95
The New Paradigm: Assets Empower the Disadvantaged

Charles Fishman, '95
Medicaid Managed Care Buyer's Guide

Norma Hatot, '99-'00 and Craig Levine, '99-'00
Joint project: Bi-Racial Pairing as an Effective Leadership Model in Public Systems

Carolyn R. Hayden, '99-'00
Corporate/Community Partnerships through a Systems Lens

Chet Phillip Hewitt, '95
The Role of Locally-Based Intermediaries in the Devolution of Public Systems

Gary D. Ivory, '97
Partnerships Between Public Agencies and Community Organizations

Wendy Jacobson, '97
Beyond Therapists and Bureaucrats: New Directions for Social Work Practice

Grant Jones, '99-'00
Developing a Neighborhood Focused Agenda: Tools for Cities Getting Started

Frances Kunreuther, '97
The Nonprofit Service Sector: Facing the Future

Joe Lam, '95
Leading from the Margin: The Dilemma of Leadership in the Asian Community

Michael C. Laracy, '93-'94
Issues in Ending Welfare As We Know It

Peggy Mainor, '99-'00
Tribal Colleges and Universities Strengthen Families

Kim McGaughey, '93-'94
An Emerging Framework on Leadership

Christine Moody, '95
Tribal Governments are Local Governance Units: Strengths from Within

Helen Munoz, '97
A Conversation on the Challenges for Frontline Practice in Mental Health

Larry F. Murray, '93-'94
Complexity Theory and Local Governance

Thanh Xuan Nguyen-Sutter, '97
Refugees Women's Network 1998 Proposal

Abel Ortiz, '99-'00
Changing the Culture of Child Welfare Agencies: Family Participation in Case
Decision Making

Ken Patterson, '95
Powerful Leadership Tools in Human Services Devolution

Elena C. Pell, '93-'94
Through the Woods and Into the Waters: Training and Technical Assistance in
Complex Systems

Mitchell Salazar, '99-'00
Creating an Integrated System of Alternatives to Incarceration from the Lens of
the District Attorney's Office

Johng Ho Song, '95
Intermediaries Supporting Community-Based Organizations

Michael C. Suntag, '93-'94
A Framework for Community Responses to Violence and its Impact on Children

Keith Sykes, '97
Key Elements of Systems Change for Children and Families

Jane E. Tewksbury, '93-'94
Juvenile Justice in Modern American Society - The Evolution of a Scapegoat

Jean G. Thomases, '97
Examining the Role of TA in Redefining the Relationship Between Foundations
and the Field

Beverly J. Walker, '93-'94
Bridging the Gap Between Top Down and Bottom Up - A Framework for
Changing the Demand Dynamic in Education Reform

Part Four: The Fellowship Experience

With the overview of the Fellowship's components from Part Three in mind, the following section provides a chronological tour through the major pieces of the Fellowship experience. These are organized thematically and include:

- Getting Started (the pre-Fellowship period following selection);
- Individual Leadership (1st Residency at the Foundation);
- From the Individual to the Organization (1st Placement);
- Creating a Context for Change (2nd Residency);
- Systems Thinking (2nd Placement);
- Integration and Application (3rd Residency and Closing); and
- Staying Connected (Fellows Network).

Getting Started (the pre-Fellowship period following selection)

Two months prior to the Fellowship's formal opening, a pre-Fellowship introduction enables Fellows to meet with one another, their Foundation sponsors, and the rest of the Fellowship team. Fellows work through a framework, adapted from the work of William Bridges, that helps them understand the general process of career and other transitions and provides tools and exercises that put their own experience into perspective. The Fellowship wants Fellows to treat the psychological aspects of this transition (and later the transition back into the workplace) intentionally.

During the pre-Fellowship introduction, we stress that a period of discomforting, personal re-orientation may be necessary as Fellows shed their old professional identities and develop new identities as Children and Family Fel-

lows. [5] This includes a period of "letting go" of both the positive and negative aspects of their previous positions. Then comes time in a "neutral zone," between old and new, often characterized by confusion and discomfort, but also an opportunity for creativity, renewal, and development. Finally, there is the "new beginning" as a Casey Fellow, which will demand new commitments and new behaviors. This three-part framework, presented while Fellows are in the neutral zone before the actual Fellowship, provides one way to come to terms with the very real psychological and emotional challenges of leaving colleagues, friends, and family to take part in the Fellowship experience. This understanding of transitions is also helpful throughout the Fellowship as Fellows move among residencies, placements, and back home. We also hope it will be helpful to Fellows as they move out into their next position and indeed, whenever they are in dislocating moments of their careers and lives.

On a practical level, this pre-Fellowship introduction period also familiarizes Fellows with the Casey Foundation environment and allows Fellows and sponsors to meet and begin shaping plans for field placements and ideas for their Individual Learning Plans. Fellows receive a general introduction to the Fellowship experience and a pre-Fellowship Reader Pack that includes a set of readings to complete prior to the beginning of the Fellowship. The purpose here is to develop a common understanding, particularly in two areas that will be critical to the entire Fellowship: leadership and race/privilege.

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5   For this insight and framework, we are indebted to ideas of William Bridges and his two books, *Transitions: Making Sense of Life's Changes* and *Managing Transitions: Making the Most of Change*, both available from Addison-Wesley Publishing Company.

Part Four: The Fellowship Experience

At the formal start of the Fellowship, Fellows receive a broader Reader Pack. ★

This enables them to further develop a common understanding in several areas—the history of social services reform in this country; the effects of race, culture, and ethnicity on systems reform; re-engineering or re-designing organizations and systems; leadership development theory; and children and family policy and content. This Reader Pack also reflects the Fellowship's observation that too few practitioners involved in change efforts read broadly enough and, as a result, they miss important sources of new ideas and technical knowledge. The significant quantity of Fellowship readings, therefore, tries to change this behavior and communicate that a knowledge of history, social theory, and other perspectives on race, culture, and power are prerequisites for leading large-scale and complex change efforts today.

In addition to taking on the pre-Fellowship Reader Pack, Fellows receive a set of personal assessment tools. These have varied from cohort to cohort, but have always included the Myers-Briggs self-assessment, which they fill out, and copies of the Annie E. Casey Leadership Questionnaire, which they complete, subsequently distribute to their supervisors, colleagues, and sub-ordinates, and return. Designed specifically for the Fellowship, the Casey Questionnaire, a 360° multi-rater tool, provides Fellows with feedback on the personal/professional skills necessary for leaders in the children and family policy area. A guide to this multi-rater is now available for other groups' use through NYU. [6]

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[6]   Many of the 360° assessment tools currently available are copyrighted and costly to administer. The Annie E. Casey Leadership Questionnaire, therefore, is not copyrighted and is available without charge to people working in the field. Those interested in information about this tool (as well as an IBM-compatible computer program that tabulates its results), should write Ellen Schall, Robert F. Wagner School of Public Service, New York University, 600 Tisch Hall, 40 West 4th Street, New York, NY 10012.

The use of both of these personal assessment tools, as well as others such as KAI and FIRO B, reflects the Fellowship's belief that personal and inter-personal issues—though certainly more difficult to address than improving technical expertise—are the ones most likely to derail leaders in the field. They are, therefore, the issues critical to an individual's ability to lead change. Just as important, we believe it is impossible to change organizations, systems, and communities unless the people who work in them, and especially those who lead them, change as well. Using these self-assessment tools as a foundation, therefore, the Fellowship seeks to facilitate experiences that allow our Fellows to better understand themselves, practice new behaviors, perhaps even "re-invent" parts of their professional style, and make the kind of personal development necessary to lead public change.

"As we progress in our careers," notes Jean Thomases '97, now a consultant in New York City, "we tend to get more responsibility and more work, and there are very few opportunities for reflection and feedback. It becomes harder and harder to get a clear sense of what you do well and what you don't. One of the most important parts of the Fellowship was the opportunity to think of oneself, to take stock of one's personal skills and challenges."

Part Four: The Fellowship Experience

Individual Leadership (1st Residency at the Foundation)

The first Foundation residency takes place at the beginning of the Fellowship and grounds and orients Fellows to the Foundation and its work. It now kicks off with a weekend that brings Fellows and their families to Baltimore for a tour of the city and the Casey Foundation as well as for a Fellowship overview. This introductory weekend recognizes the challenges the Fellowship presents to the personal lives of its mid-career Fellows. By including family members in the program's kick-off and presenting the importance, excitement, and seriousness of the experience, the Fellowship helps family members understand more fully why their loved ones will be away from home for most of the next 11 months. This dislocation, however, remains one of the biggest challenges to Fellows' successful experience of the Fellowship and is more fully discussed in this paper's conclusion.

After this introduction and their families return home, Fellows dive into the Fellowship. There are four sub-themes for this first residency: Getting Clear, Getting Smarter, Getting Connected, and Getting to Practice. Indeed, much of the rest of the Fellowship is built from the work that takes place in these first six weeks at the Foundation.

Getting Clear

From the very beginning, each Fellow is challenged to work through a process of self-evaluation and reflection around his or her individual leadership. One of the focal points of the first residency is a five-day "retreat" seminar organized around the theme of **Personal Development**. Its goals are:

Part Four: The Fellowship Experience

- To give Fellows the opportunity to begin planning their personal development throughout the Fellowship;
- To increase their capacity for reflection and renewal; and
- To enhance their ability to plan their career more effectively.

During the retreat, Fellows receive feedback and analysis based on their Myers-Briggs assessment as well as from the Casey multi-rater instrument, and during the fourth cohort, the KAI and FIRO B assessment tools. They are then paired to reflect on and process these results. They confront both their strengths and shortcomings and get a better handle on their own leadership styles.

This retreat seminar has also included a workshop on developing vision, as well as a session that introduces Fellows to techniques that help them step back from important interactions and consider their own effectiveness. During this first seminar and throughout the rest of the first residency, there are several other activities that help Fellows clarify what they want to accomplish throughout the Fellowship. These are focused around developing their Individual Learning Plans and final projects, investigating and choosing their first placement, and exploring how they can find ways to maintain their emotional balance and sustain their energy—both in the context of the Fellowship and beyond.

Following the retreat, Fellows return to Baltimore for their first Residency. In the fourth cohort, the entire group, led by John Isaacson, Managing Director of Isaacson, Miller, an executive search firm, participated in a session on career-building and tying one's passion to actual work. In the context of a discussion of adult career development, Isaacson helped Fellows under-

stand and frame their personal and professional stories thus far—for example, what "territories" they have mastered and how they have learned from their failures and successes. This thinking in turn focuses Fellows on the learning they want to pursue during the Fellowship. Most important, it points them from the very beginning toward the ultimate goal of the Fellowship—to prepare them to move into positions of greater responsibility where they can effect large-scale change for children and families.

Getting Smarter

The first residency kicks off the yearlong process of expanding Fellows' knowledge base about how change for children and families happens and how they can play a role in making change occur. This process begins through readings and discussions about theories of change and the latest thinking around leadership development. There are knowledge-building sessions on community organizing, public systems reform, family strengthening, and results-based accountability—all of which seek to provide new information for Fellows. Key staff also lay out and explain the Foundation's theories of change and related grant-making strategies, drawing on examples from the Foundation's own work.

Getting Connected

Getting connected is important in this first residency because the Fellowship believes that the Fellowship group, as described in Part Three, is an important practice or learning ground, where Fellows can learn from one another and test the group management and collaborative leadership skills crucial to successful leadership. To encourage Fellows' cohesion, the Personal Development seminar, for example, includes several Outward Bound-style group-

building activities. For the fourth cohort of Fellows, the first residency also included several intentional "Learning Group" meetings with organizational development consultants George Silcott and Rose Miller, who were part of the larger Fellowship faculty. These sessions included discussion and activities to encourage Fellows to invest in each other's success and build the trust and connection necessary to promote group learning.   The Fellowship has also experimented with this work using Barry Oshry's group dynamics model. Still, we are not completely clear about the best way to transmit this information to Fellows, and this aspect of the Fellowship remains a work in progress.

Also related to this group learning, each Fellow receives a laptop computer to use for the year and is encouraged to communicate via e-mail with other Fellows, as well as Fellowship and Foundation staff throughout the year. We have found that e-mail can serve as an important medium by which to develop ideas and relationships. While the group of Fellows gathers during these residencies and seminars, they spend about half of the Fellowship apart. E-mail, therefore, serves as a way to stay connected, to solve problems, and to try out new ideas among interested colleagues in a safe environment. In their second issue of Lessons Learned, a series of newsletter/ essays written by Fellows during the first two cohorts, first-year Fellows Yolie Aguilar, Dolores Briones, and Lawrence Murray provide a straightforward discussion of pulling together an e-mail discussion group. This kind of Listserv, they write, can help to break down the debilitating sense of isolation leaders for change often confront. [7]

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[7]   Copies of "Lessons Learned" are available from the Annie E. Casey Foundation. Please contact John Sullivan at 410-547-6600.

During their first residency, Fellows also connect with the rest of the Foundation. Doug Nelson, President of the Foundation, and Ralph Smith, Vice President, make two substantive presentations. Fellows meet at length with their sponsors, who provide an introduction to the entire Casey network. They learn about the Foundation's history and experience, its institutional perspective on change. Particularly, Fellowship staff and other experts talk about their work and their theories on what contributes to change in communities, organizations, and public systems for children and families. This provides a learning context with which to frame the Fellowship, as well as rich examples of how one links leadership and action to a theory of change. This is critical information for Fellows, who are in the process of developing their own theories, which they will test throughout the Fellowship. In this first residency, Fellows also attend Foundation staff meetings and staff development workshops as part of a general orientation to the work of the Foundation.

Getting to Practice

Finally, the first residency begins the skills-building process that will develop throughout the Fellowship. Fellows participate in the first of five sessions on collaborative leadership and in a workshop on interest-based negotiation. They are introduced to the concepts and skills associated with reflective practice. They take part in activities designed to encourage introspection and creativity, key elements of effective leadership. As described above, they are challenged to make a yearlong commitment to one another, to form a learning group and to use the group as a feedback or coaching mechanism around the issues identified through their personal assessments

and described in their Individual Learning Plans.

During this first residency period, Fellows have in early Fellowships participated in a mini-seminar on conducting site visits to prepare them to enter into their field placements with a learning perspective. In the past, they have then done one-day visits to local Baltimore agencies, organizations, and communities. These activities have helped Fellows think about how to enter a new environment, how to develop strategies for learning what one wants to learn, how one's cultural and professional perspectives affect what one sees, and how to conduct informational interviews with professional staff, line staff, and community residents. In some cohorts, Fellows have also traveled to Washington, D.C. for a day at the White House, where they attend policy briefings and meet with the White House Fellows. In the fourth cohort, they visited with the Open Society Fellows. These meetings have allowed the Casey Fellows to explore how one takes up the "fellow" role in a thoughtful and intentional way.

Part Four: The Fellowship Experience

Approximately two months into the Fellowship, Fellows head to their first placement, which lasts about ten weeks. Much of the work in the first residency is focused on individual learning. Learning in this second phase of the Fellowship builds from this knowledge outward, placing the individual in the context of organizations.

Fellows' placements vary depending on their interests and needs. While many gravitate to where they may want to work in the future, Fellowship staff encourage them to find places where they can deepen their learning and broaden their vision. In the first residency, they have developed a new self-awareness. They have learned some new skills. In this first placement, they can practice these new skills. They can use a new, relatively low-risk environment to try on unfamiliar leadership behaviors and see how they fit. In whatever placement they choose, Fellows investigate the theory of change at work and explore how that theory is articulated and acted on throughout the organization

The second seminar, held midway through the first placement, takes up this organizational perspective in earnest, focusing on Internal Issues in Organizational Change. The seminar has three explicit goals:

- To increase Fellows' understanding of what it takes to change complex organizations and to increase Fellows' capacity to be effective leaders of those changes, particularly from within organizations;

- To continue Fellows' learning about group process and increase their capacity to function as a self-managed group focused on learning; and
- To help Fellows finalize their Individual Learning Plans.

Generally set in New York City, the seminar, which engages Fellowship faculty Tom Gilmore and Mal O'Connor from the Center for Applied Research (CFAR), has in the past focused on vision, diagnosis, and translating vision into an operational plan. For the fourth cohort of Fellows, the seminar focused on CFAR's notion of the "campaign" as a metaphor for approaching organizational change. This idea suggests leaders adopt the orientation and related strategies of a political or marketing campaign in seeking to move and seat their internal change agenda. The seminar used New York City's Administration for Children Services (ACS), which is undergoing significant change under complicated circumstances, as a shared case against which Fellows could test their developing theories of change. Fellows developed this learning case through pre-arranged interviews with ACS staff. The seminar also used readings from leading theorists and practitioners for thinking about how to construct and sustain change of sufficient magnitude that it will last beyond one's tenure. Finally, the seminar asked Fellows to reflect on their own experience with organizational transformation, both from their previous work and from insights gained during their current placements.

In addition to the seminar's exploration of organizational change, this seminar sounds the "renewal" note on several occasions. For example, during the second Fellowship, a class on walking, held in Battery City Park, provided a "lesson" on the importance of exercise and body alignment. Informal evenings at the theater or at a jazz club have also reinforced the practice of

Part Four: The Fellowship Experience

renewal, providing informal downtime from the work of the Fellowship and encouraging group cohesion and trust.

Fellows who wish to deepen their learnings around organizational change are also able to attend a three-day workshop on "Authority and Group Dynamics," offered by the A.K. Rice Institute. We believe that Fellows' understanding of their own authority and their relationship to people and institutions of authority are crucial to their ability to lead complex change. The A.K. Rice workshops are, as the Institute describes them, "designed to enhance individuals' awareness of group and organizational processes and their participation in them." [8] The workshop's premise is that the ability of individuals to learn and act effectively in groups and in institutions is affected by the ways in which authority is vested in them, the ways they perceive and use their authority, and the degree of responsibility they experience and exercise with respect to the group's work. In this way, the "Authority and Group Dynamics" workshop enables Fellows to develop a greater awareness of the conscious and unconscious forces at work in group process and to build their ability to lead and manage in group settings. We offer this opportunity through the Fellowship because it is one of the few (non-workplace) experiential settings we know where people can practice new behaviors around authority and actually change how they act in the workplace.

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8   A.K. Rice brochure, as quoted in the "Evaluation of the Annie E. Casey Foundation's Children and Family Fellowship Program: Context Study and Fellowship Experience. Year One Final Report." (New York: Academy of Educational Development) 1994. Contact: the A.K. Rice Institute at (202) 887-8955.

Part Four: The Fellowship Experience

The second Foundation residency, organized around the theme of Creating a Context for Change, takes place at the Fellowship's midpoint. This period serves as an opportunity for Fellows to reflect on their first placements, finalize their Fellowship Plans, pick second placements, and frame their final projects. Still, while considerable time is allowed for this individual process work, the second residency opens the theoretical lens of the Fellowship wider. Here, we consider what is necessary to mobilize public will, involve multiple stakeholders, and engage communities in significant change. To this end, Fellows participate in a variety of learning activities, conversations, and presentations.

Fellows join in several skills-building workshops, many of which are tailored to match interests and new knowledge needs described in their Individual Learning plans. For example, the fourth cohort of Fellows asked that Fellowship faculty Mark Friedman and Jolie Bain Pillsbury create additional sessions on results-based accountability after Fellows found their presentation in the first residency compelling. John Isaacson, who helped Fellows consider their career stories and aspirations in the first residency, returns at this time, as well. Here, he focuses Fellows towards the future on the career trajectories they may pursue when the Fellowship ends. In the third and fourth cohort, Sam Kaner of Community at Work also did two days of work with Fellows to help develop their facilitation skills.

During this residency, there are also three sessions over three days on interest-based negotiation. This emphasis on negotiation (both one-on-one and

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in groups) reflects the Fellowship's recognition that the collaboration required for large-scale change depends on these skills. Further, role-plays and videotapes used in these sessions provide powerful mechanisms for Fellows to practice new behaviors (and perhaps fail before improving) in a relatively safe environment. This expresses the Fellowship's broader belief that changing adult behavior (not only negotiation skills, but a wide range of personal issues related to leadership) is not likely without intensive practice.

During the second residency, several speakers with different perspectives on leadership and change, particularly focused on mobilizing public will, address the Fellows. Over the years, these have included community organizers and issue advocates with a diversity of styles including Michael Eichler of the Consensus Organizing Institute, Ernie Cortes of the Industrial Areas Foundation, David Liederman from The Child Welfare League of America, Robert Moses from the Algebra Project, and Rebecca Adamson from First Nations Development, among others. These speakers not only introduce new ideas to the Fellowship's discussions, but also expose Fellows to potential allies in different parts of the country.

The third seminar in the Fellowship takes place at this time. It is organized around the theme for the entire residency, **Creating a Context for Change**. In the first two Fellowships, this seminar was held in Washington, DC and focused on the federal government's role in shaping the children and family services environment. Acknowledging the growing impact of devolution to state governments and the Foundation's interest in neighborhood transformation, the third and fourth cohorts have traveled away from DC to

examine this issue at a state level (in Portland, OR) and from a local perspective (in Philadelphia, PA).

 In addition to improving Fellows' learning about group process and their capacity as a self-managing learning group, this seminar introduces Fellows to frameworks and tools that help them understand and manage the external environment affecting change efforts. Sessions in this second seminar have varied from cohort to cohort. The first two cohorts covered subjects such as "Environmental Scanning as a Way of Positioning Your Issue," "Intergovernmental Relations," and "Lessons on Leadership: Learnings from the Effort to Elect Women and People of Color." Scouting reports of federal agencies conducted by Fellows, Congressional tours and conversations with leaders from federal, state, and local government and the nonprofit sector all enriched these discussions.

The third cohort used stakeholder mapping and force field analysis frameworks, as well as discussions with state and local officials, to build a collective case study around the development and implementation of the Oregon Health Plan, a major public policy shift in that state. They explored issues of public engagement with civic leaders from the public, non-profit, and private sectors. And, guided by Lynn Fallin '95, former Casey Fellow and Executive Director of the Oregon State Commission on Children and Families, they considered lessons from Oregon's efforts to benchmark its human services delivery, as well as its attempts to fashion a more effective federal-state-local partnership.

Part Four: The Fellowship Experience

Most recently, the fourth Fellowship group studied the challenges of building public will through Philadelphia's efforts to reform its school system through the Children Achieving initiative. Here, Fellows applied the "campaign" framework for change (first introduced by the Center for Applied Research during the second seminar on Internal Issues in Organizational Change) to the challenges of a system-wide reform effort. In conversations with representatives from both inside the public school system and from the broader community, Fellows explored issues in Children Achieving's start-up, its efforts to sweep people into this multi-faceted reform effort, and finally, its attempts to build momentum for the reform more broadly.

During the second residency, in addition to the intensive seminar experience, Fellows make presentations to the Foundations' Board of Trustees, many of whom are also Board members of United Parcel Service (UPS). They discuss their vision for children and families, their theories of change, as well as their thoughts on the kinds of positions from which they will seek to lead post-Fellowship. In the fourth cohort, this interaction with the Board included an exploration of UPS' leadership role in welfare to work programming, how UPS seeks to influence public policy through advocacy and lobbying, and finally a conversation about how UPS, an international company with 330,000 employees, manages institutional change. In addition to connecting UPS to the work of the Fellowship, these sessions are meant to take advantage of UPS' private sector expertise in areas with direct application to public service leadership.

Systems Thinking (2nd Placement)

The second placement, which ends just six weeks before the completion of the Fellowship, challenges Fellows to find an organization where they can continue their learning, shadow a leader whose style and effectiveness they hope to emulate, and/or help them clarify their post-Fellowship career choices. Fellowship staff and sponsors, who had served as door openers and guides for the first field placement, pull back to more of a consultant's role, offering advice and support, as needed. These placements, as well as the related activities during this period, provide Fellows with opportunities to practice new skills and competencies, take risks, and reflect on new learnings and their personal progress.

Midway through their second field placements, Fellows take part in a **Systems Redesign** seminar. The fourth of the series, it builds on the Fellows' understanding of organizations, as it seeks to:

- Provide Fellows with a better understanding of systems thinking; and
- Enhance their ability to design a strategic intervention into a system.

Over the years, this seminar has used a variety of frameworks and theories to help Fellows understand the dynamics of systems and think about ways to intervene in systems for maximum impact. Some sessions, for example, have incorporated the use of Large-Scale Group Simulation of Systems Redesign software and explored issues in financing system reform efforts and integrating cultural values into systems change.

Part Four: The Fellowship Experience

In all but the first Fellowship, the Systems Redesign seminar has taken place in the home community of one of the Fellows (who along with other Fellows helps to design the seminar). It generally explores the connection between human services systems and the communities they are meant to serve. For example, in the Fellowship's first year, the seminar took place in El Paso, Texas, and studied issues related to the Texas-Mexico border. In the Fellowship's second year, the group convened in Sault Ste. Marie, Michigan on the reservation of the Sault Ste. Marie Tribe of the Chippewa Indians and examined the efforts there to revitalize the community's economic and other institutions within the distinctive traditions of the Chippewa culture. For the third cohort, the Fellowship traveled to Austin, Texas. There, Fellows used a systems thinking framework to investigate the work of the Community Change for Youth Development Initiative, which is developing, through partnership, a system of continuing, community-wide opportunities for youth to mature, work, and learn. Most recently, Fellows traveled to California to study San Francisco's cross-agency initiative for integrating the care for children. They used "theory of constraint" and decision-tree technologies to analyze specific issues facing this innovative system.

Part Four: The Fellowship Experience

Integration and Application
(3rd Residency, Retreat, and Closing)

The final residency period occurs at the end of the Fellowship, when Fellows must complete their final project, initiate, conduct and/or conclude their job search, and finally, make the transition out of the Fellowship. During the last weeks of the final residency, each Fellow presents his or her final project to the other Fellows, as well as to Foundation staff.

This residency period includes a number of skills-building workshops, the subjects of which are identified by the Fellows themselves. John Isaacson returns once more to do a final session on career paths, working with Fellows on identifying next jobs and marketing themselves to potential employers and the broader field. Ted Ford Webb and representatives from other executive search firms also come in, interview Fellows, and then provide feedback on Fellows' presentations and job search strategies. And there is a workshop on communication and public speaking, where Fellows are introduced to several frameworks that offer ways to understand and facilitate dialogue with others, whether through the media or directly. Fellows also receive individualized feedback and coaching on their own communication style.

Finally, there is an Undoing Racism workshop, conducted by the People's Institute for Survival and Beyond. This builds on Fellow-led conversations on race in the first residency. All of this work is based on the Fellowship's belief that these issues are critical to leading change in organizations, systems, and communities.

Part Four: The Fellowship Experience

The fifth and final seminar, **Personal Development/Transitioning Back**, is held at this time in a retreat setting. As in the other seminars, the Fellows, with support from Professor Schall, design many of the activities. This final seminar also engages consultants Kaye Craft and Suzanne Zahir Anderson and returns Fellows to the theme of the initial seminar, transitions, with an additional focus on integration and closing. Here, the transition is focused outward, toward helping Fellows complete the Fellowship and make decisions about their next jobs and careers. Through individual and group work, Fellows knit together their learnings from the Fellowship, process unresolved issues, and begin shaping their vision for the future. Sessions in the fourth cohort included: Connecting with Self and Others, Personal Feedback and Development, Managing Relationships, Future Planning, Appreciations and Acknowledgments.

Staying Connected (Post-fellowship/Fellows Network)

As one can clearly understand from this description of the Fellowship experience, The Annie E. Casey Foundation makes a significant investment in strengthening the leadership capacity of its Children and Family Fellows. Following Fellows' "graduation" from the program, the Foundation continues to invest in this cadre of leaders through the AECF Fellows Alumni Network. This Network seeks to support a growing and diverse group of leaders from a variety of fields and backgrounds, all committed to a similar value system and to improving the outcomes for poor children and families. The Network provides opportunities for professional collaboration and supports Fellow-to-Fellow relationships that maximize the impact of the Fellowship experience.

The Network gathers all alumni and current Fellows for an annual meeting and conducts ongoing professional development activities. These have included intensive workshops on Challenges and Opportunities in Partnering with Faith-based Organizations, Building Sustainable Movements that Promote Public Will, and Facilitation. The Network is also developing its own section on the AECF website to facilitate Fellow-to-Fellow communication, promote collaboration, and aid Fellows' career development. In general, the Network allows Fellows to use one another as resources, support the current class of Fellows, and offer ongoing expertise to the Fellowship program at the Foundation.

In 1999, the Network, with Foundation support, instituted a mini-grants program, which today makes available a total of $150,000 annually to Fellowship alumni to:

- Support Fellows as leaders in transforming systems and impacting the field;
- Add value and practical solutions to the major challenges in the Foundation's work of transforming severely troubled neighborhoods to ensure that children and families flourish;
- Create opportunities for Fellows to address challenges through innovative, creative, and cutting-edge approaches; and
- Allow Fellows to share expertise and learnings among one another, thereby catalyzing new ways to tackle tough challenges and solve problems.

A committee, comprised of past and current Fellows, as well as Fellowship staff, makes funding decisions for the mini-grant program, which will likely continue to increase its size and scope in future years.

More broadly, a Network Committee guides the Fellows Network. This group consists of representatives of each Fellowship cohort and Fellowship staff, as well as the chairs of the Network's Mini-Grant and other committees. A Network Coordinator, former Fellow Brenda Donald (who was preceded by Kim McGaughey, another Fellowship alum) facilitates the work of the Network and publishes Network News, the Fellowship's monthly mailing.

Today, the Children and Family Fellowship has developed a distinctive niche among the hundreds of leadership development programs sponsored by foundations, colleges and universities, and non-profit organizations. This niche can be defined, on one hand, by the Fellowship's audience and goals (i.e., whom we recruit and to what end) and, on the other, by the Fellowship's approach to leadership development.

> ### Leaders for Children, Leaders for Systems Reform, Leaders on the Move

The Children and Family Fellowship was designed by and for the Annie E. Casey Foundation. Its broad intent—to develop leaders who can assume responsibility for large-scale reform and community capacity building on behalf of children and families—complements and supports the Foundation's considerable investment in these kinds of change efforts. Indeed, there is no existing leadership development program that shares the Fellowship's ultimate and ambitious goal of preparing leaders for this particular kind of large-scale work.

The Fellowship is distinctive in other ways as well. Unlike most leadership development programs, it is neither generic (i.e., focused on building leadership for the public, non-profit, and private sectors generally) nor limited to one field.[9] While it focuses on children and families, the Fellowship is multi-

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9   The W.K. Kellogg Foundation National Fellowship Program, the Columbia University Charles Revson Fellows Program, and the CORO Fellows Program in Public Affairs are all excellent examples of programs that attempt to build the "generic" leadership capacity of its participants to take on a wide range of challenges. The Robert Wood Johnson Foundation Health Policy Fellowship, which focuses on health policy leadership, and the Boston University Join Together Fellows Program, which builds leadership skills for individuals fighting drug and alcohol abuse, represent two examples of established programs that serve a single field.

disciplinary, recruiting professionals from a wide variety of related areas, including education, psychiatry, law, juvenile justice, health care, and others. Its design is thematic, so while there are substantive pieces that expand Fellows' knowledge of the children and family services arena, there is considerable importance placed on developing skills and abilities that are part of any effective civic leader's repertoire. And while many excellent leadership development programs are grounded in particular communities, the Children and Family Fellowship is a national program that recruits broadly in the hope of finding individuals who will ultimately provide leadership of federal, state, and community-based reform initiatives.

The Fellowship's design is intensive, full-time, and requires Fellows to live away from home. Some Fellows resign their existing positions. Others take a leave of absence. This distinguishes our model from many other national programs, and, at the same time, generates additional challenges. The literature and experience of existing leadership programs attest to the value of allowing people to remain in their current jobs and communities while participating in leadership development activities and programs. Staying "in-place" allows people to ground their learning and work toward real results in a real organizational context. In fact, the Center for Creative Leadership in North Carolina, one of the country's top non-profit institutions teaching leadership and executive education, has identified part-time course work in a fellowship or executive education program as one of five broad categories of experience that provide an in-place developmental lift to managers and staff. [10]

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10   Michael M. Lombardo and Robert W. Eichinger, "Eighty-eight Assignments for Development in Place: Enhancing the Developmental Challenge of Existing Jobs" (Greensboro: Center for Creative Leadership, 1989) 1-12.

Recognizing this potential for in-place development, the Children and Family Fellowship, nevertheless, pulls people out. From its inception, the program has been conceived not to move people along an organization or system pipeline. In contrast, it is set up for mid-career professionals who aspire to take on new leadership positions, in many cases outside their current organization or system. Though the Fellowship may remove a valuable leader from a local context for almost a year, we believe pulling people out of their existing context is critical to their ability to grow into the reform leaders we trust they will become. Our full-time intensive experience gives them the space to practice new behaviors and strategies, which can be tested in Fellowship settings with significantly lower risk.   It gives them the opportunity to develop a broader vision and to shift their career trajectory significantly. Short-term, in-place programs are not as suited to promoting this kind of growth. Finally, since all Fellows are out of place and brought physically together for the Fellowship, each class develops a sense of community. Both during and after the Fellowship, Fellows serve as a personal support and learning network for one another, a network bonded by a similar and intense Fellowship experience.

Part Five: Defining Our Niche
The Fellowship in Context

An Experiential Learning Approach to Developing
Leaders as Reflective Practitioners

In addition to creating a distinctive, full-time model that serves a
relatively specialized group of mid-career professionals, the Fellowship has
created a unique approach to leadership development that integrates our own
ideas with those from other programs. We believe the Fellowship reflects
much of the best current thinking in the leadership development academy.

See Appendix D:
Overview of Leadership Development Programs

As part of an evaluation report of the Children and Family Fellowship's first
year, the Academy for Educational Development conducted a "context study."
This included an overview of foundation-, university-, and non-profit-
sponsored leadership development programs ★ and placed the Fellowship
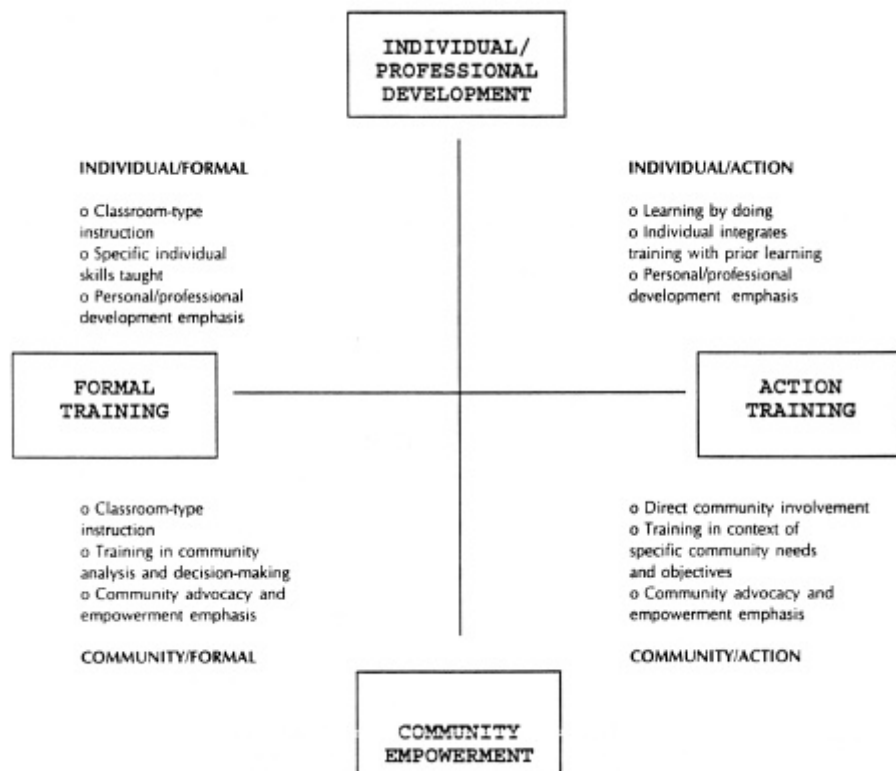within a conceptual framework for leadership training. The report described

Figure 1

Part Five: Defining Our Niche
The Fellowship in Context

a framework that places leadership programs based on two factors—

program focus and training approach. (See Figure 1) Leadership develop-

ment programs' "program focus" ranges from models seeking to enhance

individuals professional development to those that seek to build community

empowerment. The "training approach" dimension ranges from formal train-

ing (classroom-type instruction and analysis) to action training (with heavy

experiential components). Figure 2 places several established leadership de-

velopment programs according to these criteria.

The Children and Family Fellowship finds itself in the individual/action quad-

rant of this graph in Figure 2. First and foremost, the Fellowship concen-

trates on the professional development of individuals, especially through the

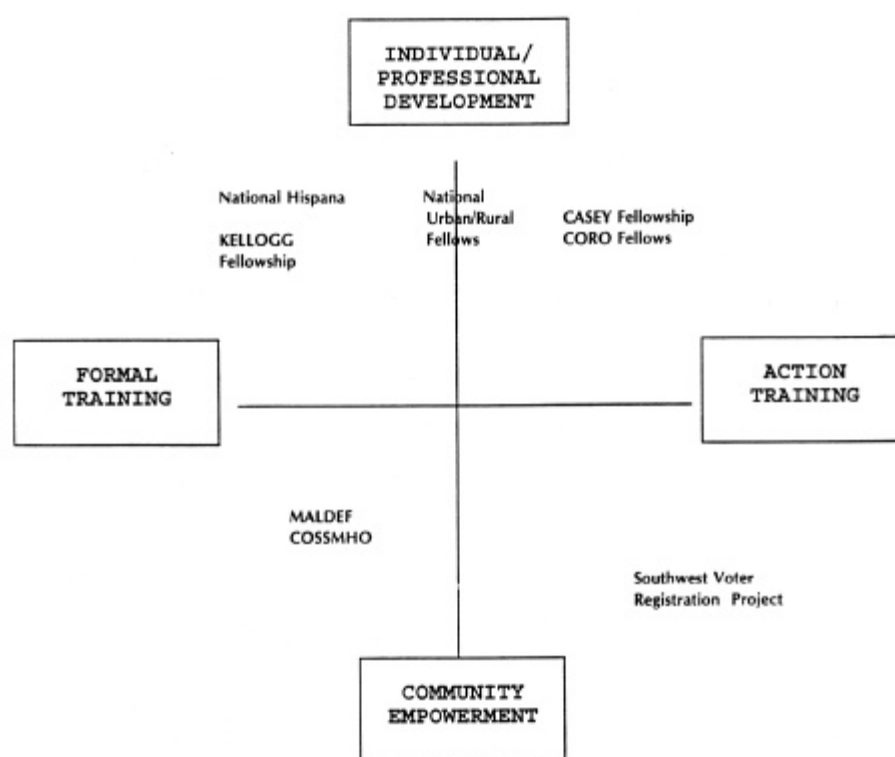use of Individual Learning Plans, an approach adapted from the W.K. Kellogg

Figure 2

Foundation's National Fellowship Program. [11] Unlike other programs, how-ever, the Fellowship does this individual development in an intense, long-term, full-time group setting meant to replicate complex, real-world group contexts. We believe this individual-within-a-group orientation represents a unique and powerful aspect of the Fellowship. Along the training continuum, the program places an emphasis on field placements and even utilizes a dy-namic, experiential approach to its most formal component, the seminar series. [12]

The above conceptual framework identifies two important dimensions along which to understand the Fellowship's approach in context.   A third dimen-sion would place leadership development programs along another learning-type continuum that describes a program's emphasis on technical learning versus process learning.

Initially, Fellowship designers had planned to place heavy emphasis on the acquisition of new technical knowledge. Subsequently, we have focused on building Fellows' capacity and vision, particularly through the articulation and testing of a personal theory of change. [13] As we have described in earlier sections, we have found through our experience and in the literature that it

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11   In designing the Children and Family Fellowship, we have borrowed liberally and gratefully from other leadership development programs, adapting ideas to the specific goals of our program. For example, we learned a great deal about mentoring and advising from the Rockefeller Foundation's Warren Weaver Fellows Program and the Institute for Educational Leadership's Education Policy Fellowship Program. The National Urban Fellows program greatly informed our thinking about field placements.

12   "Evaluation of the Annie E. Casey Foundation's Children and Family Fellowship Program: Context Study and Fellowship Experience. Year One Final Report." (New York: Academy of Educational Development), 1994.

13   Even with the program's bias toward developing capacity and vision, Fellows still have ample op-portunity to gain technical knowledge. Initially, they can identify areas of interest through their Individual Learning Plans. They can in turn set up field placements, conferences, and other site visits to gain this knowledge, do readings beyond what is offered in the Fellowship materials, and even pursue this information through their final project.

is relatively easy for mid-career professionals to learn new technical material and expand their base of knowledge. There are a multitude of resources (and indeed other fellowships and leadership programs) available to this end. Some of our earliest questions centered on what derails leaders. We now believe that what truly prevents a leader from succeeding (in our case, leading large-scale reform and community capacity building efforts) is not simply a dearth of technical knowledge. Rather, it is the leader's inability to use him- or herself effectively in a complex environment that increasingly requires sustained collaboration, inter-system coordination, and a sensitivity to and understanding of people not just from diverse races, ethnicities, and cultures, but from different disciplines, organizational levels, and professional contexts. Leaders in this kind of environment require "process" or "relational" skills that enable them to be self-aware, to understand their role, and to develop theories of action from the complex grist of their experience.

Professor Schall, who designed and still administers the Fellowship's seminars, has argued that a large piece of leadership in the non-profit and public sectors is often just this kind of "messy" relational work. In fact, much leadership takes place in what Donald Schön has colorfully described as the "swampy" areas of public service practice, far from the "high hard ground," where technical theories and action suffice. To be successful, writes Schall, effective leaders "must master both kinds of terrain. They must be able to solve high ground technical problems that present themselves...and they must [address] and make sense of [swamp problems] for themselves and others." [14]

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14   Ellen Schall, "Learning to Love the Swamp: Reshaping Education for Public Service," *Journal of Policy Analysis and Management* 14 (1995), 202-220.

This shift in the Fellowship's thinking from technical learning toward this kind of process learning mirrors a similar shift described by Paul Bauman and Louis Weschler in the Rocky Mountain Program, a nine-day residential leadership development seminar for practicing public sector leaders conducted at the University of Colorado. The Rocky Mountain Program started with a technically oriented curriculum based on a case study approach. It focused on what Argyris and Schön have called Type I learning, which is characterized by a didactic teaching method and analysis (in this case, centered around case studies) that "underscored the linear thought processes characteristic of the rational approach to management." Post-program evaluations of early Rocky Mountain seminars, however, revealed that public sector managers were more attuned to Type II approaches to learning. Thus, at the Rocky Mountain seminars today, the curriculum is experiential and interactive and "learners are viewed as participants in the learning process." There is "less dependence on lecture" and much greater opportunity for "personal expression of emotion and risk taking." [15] This kind of Type II learning, as Schön has argued, better prepares the "reflective practitioner," able to deal with "'indeterminate, swampy zones of practice that lie beyond [the] canons [of technical rationality]." [16] In short, Type II learning experiences, such as those found in the Rocky Mountain program and in our Fellowship, prepare public, non-profit, and community leaders to manage the complex realities that are part and parcel of change initiatives in government service systems, non-profit organizations, and communities.

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15   Paul Bauman and Louis Weschler, "The Rocky Mountain Program: Advanced Learning for the Complexities of Public Management," *Public Productivity Review* 14 (Summer) 463-475.

16   Don A. Schön, *Educating the Reflective Practitioner: Toward a New Design for Teaching and Learning in the Professions* (San Francisco: Jossey-Bass, 1987) 3.

The design of the seminar series and the development of the Fellowship generally reflects the thinking of Schön and Argyris, the Rocky Mountain program, and others. We have come to believe, along with Wilfred H. Drath and Charles J. Palus at the Center for Creative Leadership, that leaders today need: "(1) the capacity to understand oneself as both an individual and as a socially embedded being; (2) the capacity to understand systems in general and as mutually related and interacting and continually changing; (3) the capacity to take the perspective of another; and (4) the capacity to engage in dialogue." [17] These are the kinds of abilities that the Children and Family Fellowship strives to develop because we believe these are the abilities that will enable mid-career professionals to successfully engage the complexity of leading large-scale change initiatives.

A study of executive education and leadership development programs for the private sector suggests this is the right track—not only in respect to the learning style of our Fellowship, but as to our design more generally. Penn State Professors Robert Fulmer and Albert Vicere have identified four key trends in the field: a shift to programs customized to meet the needs of specific institutions and industries; the growth of shorter-term programs available to larger numbers of people, the need for large-scale, transformation-oriented initiatives, and an increased interest in experiential, action-learning techniques that deliver measurable results. [18] With the exception of the move to shorter-term programs (generally driven by cost considerations), the Children and Family Fellowship reflects these larger trends in leadership

17 Wilfred H. Drath, and Charles J. Palus, *Making Common Sense: Leadership as Meaning Making in a Community of Practice*, (Greensboro, NC: Center for Creative Leadership, 1994) 2.
18 Robert M. Fulmer and Albert A. Vicere, *Executive Education and Leadership Development: The State of the Practice* (University Park, PA: Penn State Institute for the Study of Organizational Effectiveness, 1995) iii.

development. Our program is customized to serve the needs and support the goals of the Casey Foundation. It seeks large-scale change and attempts to link the skills and abilities Fellows develop in the program with the transformation of large-scale human services systems, organizations, and the communities they serve. Finally, the Fellowship depends heavily on Type II action-learning techniques—field placements, multi-rater assessments and feedback, and dynamic group learning activities.

In sum, the designers, planners, and staff of the Children and Family Fellowship have made every effort to identify and integrate the best practices available for developing mid-career professionals to lead large-scale reform. While our program has a distinctive focus and relatively narrow niche, we take seriously our obligation to translate our learnings from this initiative. This report represents the beginnings of such an effort. Lessons Learned, a newsletter formerly published by the Fellowship, is another. [19] It provided an essay-length forum for program staff and participants to reflect on leadership issues and experiences and a medium through which to communicate these learnings to a broader audience. In the future, we hope to produce additional publications that continue to reflect our thinking as the Children and Family Fellowship develops.

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19   If you would like to be on the mailing list for publications produced by the Fellowship, contact John Sullivan at the Annie E. Casey Foundation, 701 St. Paul Street, Baltimore, MD 21202. Telephone 410-547-6600.

Part Six: Lessons Learned Thus Far

While it is still quite early to declaim hard and fast learnings from the Children and Family Fellowship, we would like to present some of what we have learned thus far. Just as we ask our Fellows to reflect on their leadership style and work, we too attempt to take a reflective approach to the Fellowship. Periodically we stop, take stock, and consider what has worked or not and why and examine the program's strengths, as well as its ongoing challenges. What follows, therefore, are some of the "lessons" gleaned from this ongoing process of reflection and evaluation.

Changing adult behavior is difficult, but doable.

Building new skills, particularly critically needed relational skills, with adults is difficult. From our experience with the first four cohorts of Fellows, however, we believe that it is doable. Fellows have learned a broader repertoire of responses to challenges and difficulties. They have learned to shift the ways they act, interact, ask questions, value diverse input, handle conflict, engage, and manage personal power.

For example, one first-year Fellow learned in early feedback from the 360° Casey Questionnaire that her "in-your-face" professional style—while powerful—hindered her ability to listen to other people's points of view and build consensus in group situations. Fellowship staff worked closely with her, and other Fellows called her on her behavior when she became confrontational during group sessions. By the end of the program, the Fellow had not eliminated her assertive style, but had learned to back off when it was strategically appropriate.

To make these kinds of changes possible, however, the Fellowship has learned that you must take a deliberate and strategic approach. Because most of us receive precious little feedback about our professional styles, we begin with the Casey 360° Questionnaire, role messages, a Myers-Briggs assessment, as well as the FIRO B. These raise a set of behavioral issues for the Fellows to consider. With the help of Fellowship staff and other Fellows, each Fellow then processes this information and decides which issues he or she will work on, often identifying the issues explicitly in the Individual Learning Plan. As we know from transforming behaviors around smoking or overeating, adults change only when they decide they want to change. Self-identification of an issue, therefore, is a crucial step in this process. From here, as in the example above, Fellowship staff and the other Fellows then help to develop forums and other opportunities through which the Fellow can test and practice a new set of behaviors. Only through repetition—and by experiencing an alternative behavior's success—can the Fellow become comfortable with a new way of conducting him or herself.

> Multi-disciplinary groups provide powerful learning opportunities.

Fellows have learned that they all have responsibility for the successful functioning of a group; that whatever they do—whether they speak out or retreat—has an impact on how a group works. The learning environment of the seminars has been able to recreate a collaborative work setting similar to the ones in which so many public sector and community-based professionals are struggling.

Part Six: Lessons Learned Thus Far

Reform efforts today are likely to bring people together from different and autonomous agencies and from diverse communities. People in these change efforts often have training in a variety of disciplines and may look at similar problems through radically different frames. Similarly, people often come from diverse racial and ethnic backgrounds, influencing their view of a particular situation. In these reform settings, there are often no formal lines of authority. Everyone can take up their leadership, and indeed the entire group has the potential to lead as a collective.

To manage these change efforts and groups productively, however, Fellows (and we) have learned that it takes considerable facilitation, communication, and negotiation skills as well as a sophisticated awareness of how power and culture operate.   The Fellowship has learned that we have a responsibility to teach these skills and build this awareness because complex, diverse, inter-disciplinary settings are the environments in which leaders for change today must operate. This said, we also continue to struggle with the best methods for transmitting these skill sets and understanding how best to deliberately encourage individuals' commitment to group learning and group cohesion. To this point, each cohort's ability to function as a learning group has varied quite widely, some more successfully than others. Thus, while we can confi-dently promote the importance of group learning and function for leadership, lessons on implementing a group learning "curriculum" within a leadership development setting will have to wait.

Part Six: Lessons Learned Thus Far

It is critical to match the right leadership development program with the right person at the right moment in that person's life.

The Children and Family Fellowship is not for everyone. It works for people who have achieved already, but still strive for accomplishment and leadership at higher levels or in other venues. And it works for people who are at a transition point in their careers and who are ready to change. To join the Fellowship requires a conscious desire to invest one's time in the service of building one's capacity. Not everyone is at a point in his or her career or life to make this kind of investment. Timing is everything. We have learned that the intense, full-time leadership development opportunity the Fellowship offers works for people who are ready to seek new roles and a new set of challenges, even though the program may disrupt their personal lives in complex ways. We have found that Fellows must be ambitious, that whatever their chronological age, they must be in a place in their careers where they are still willing to exert the considerable energy and commitment necessary to instigate or lead large-scale change efforts on behalf of children and families. Along with this desire, it helps if they are geographically mobile. Since there are a limited number of these large-scale leadership opportunities available, Fellows must be willing and able to move to new states or communities where their skills and abilities are urgently needed.

All of these learnings reflect the importance (not only for the Fellowship, but for all leadership development programs) of selecting the "right" people, not just talented people. The Children and Family Fellowship has helped virtually all Fellows make significant transformational steps in their professional

Part Six: Lessons Learned Thus Far

and personal leadership. To date (and admittedly two cohorts of Fellows are still less than three years removed from the Fellowship), some Fellows have sought and found the large-scale leadership roles for which the Fellowship seeks to prepare them. In the future, as we learn more about the kinds of people who successfully use the Fellowship to take on and do these big jobs well, we will continue to hone our selection process to incorporate this knowledge and bolster the long-term outcomes the Fellowship was designed to produce.

> Many aspects of the Fellowship can be applied in organizations—even our own.

The Fellowship has taught the Annie E. Casey Foundation a little about itself. Feedback from the first-year Fellows caused the Foundation to re-think its own staff development challenges. It required the Foundation to change, in particular to enrich our performance review process to help staff think through the opportunities and challenges they want or need to address in order to enhance their skills and build their careers. This discrete example has confirmed a broader, more abstract learning, as well. In this work about changing systems and communities that serve disadvantaged children and families, we have learned that at all levels—in neighborhoods, at state agencies, even in the philanthropic sector—all of us must be able and indeed willing to change ourselves and our organizations.

Part Six: Lessons Learned Thus Far

Renewal and balance are keys to sustaining leaders.

Leadership can be exhilarating, self-affirming, and immensely productive. It can also be lonely, difficult, and, at times, defeating. Leading large-scale change requires huge stores of psychic and physical energy, which, over time, are often depleted. Developing modes of personal renewal and creating balance between one's personal and professional lives are critical to enabling leaders to restore this energy. This is true even within the context of the Children and Family Fellowship, where Fellows are immersed in an intensive yearlong leadership development experience. By offering social or downtime during seminars and other activities, promoting physical fitness, and encouraging spiritual and religious activities, the Fellowship tries to help Fellows practice renewal and balance, just as they practice new negotiation or organizational diagnosis skills. Ultimately, Fellows' ability to find ways to recharge their emotional and physical strength will impact their leadership. Large-scale change for children and families is not something that happens in a matter of weeks, but can, and generally does, take years. Understanding and practicing modes of renewal and balance, therefore, is an important strategy for enabling leaders to stick with this difficult work for the long haul.

Part Six: Lessons Learned Thus Far

> Attending to "transitions" is important to a successful leadership development program, and just as important to career development.

Change is hard, but many of us seek to make change in our lives without deliberately addressing the challenging psychological and emotional aspects that often accompany change. Change, and its older sister, transformation, are leitmotifs throughout the Children and Family Fellowship. Fellows get constant practice at change—moving from their old jobs to the Fellowship, from the Foundation's residency periods to placements and back, from their families and friends to the Fellowship group and back, and finally from the Fellowship out to the next phase of their careers. Using a theoretical framework developed by William Bridges, the Fellowship helps Fellows make sense of these changes and at the same time prepares them for the transitions they will inevitably face throughout their careers and lives. Of course, we do not yet have significant data about how important this framework will be for these Fellows as they re-enter the workforce. Still, we are confident that this deliberate, conscious approach to change will enable Fellows to start their new jobs more effectively and help them help others through the dislocations inherent in any large-scale systems reform or community building effort.

Appendix   A:
Children and Family Fellowship Framework

Appendix   B:
Children and Family Fellowship Faculty
(in alphabetical order)

Appendix   C:
Sample Table of Contents from Reader Pack

Appendix   D:
Overview of Leadership Development Programs

INDIVIDUAL LEARNING

Learning Outcomes	Skills Involved	Tools
Each fellow is expected to have developed… 1. More effective use of self as leader of change in chosen area with increased knowledge in that area 2. Personal, articulable theory of change 3. Ability to balance personal and professional life	Managing transitions (personal & organizational) Understanding of how you impact others Capacity to reflect on and shift goals, assumptions and actions Ability to give and receive feedback Ability to put own and others' experience into broader framework and to build theory from practice Capacity to integrate new ideas and approaches into personal theory and actions Ability to communicate your own story in powerful ways Ability to communicate effectively across audiences Strategic use of self Ability to form and access networks Ability to work effectively in groups	• Meyers Briggs • 360° multi-rater (designed specifically for fellowship and field) • Coaching (by seminar staff, sponsors, field placement hosts, others, and by peers) • Individualized training • Role analysis • Renewal • Journaling • Personal visioning • Reflective practice • Individual fellowship plan • Explanation of AECF core strategies • Critical incident analysis • Exposure to different leadership styles • (speakers, field placement hosts, conferences, networks) • Field placements as opportunity to explore new and possibly uncomfortable territory Pre-Fellowship Reader Pack in: • Leadership • History of reform in children and family services • Race and ethnicity • Children and family services • Systems redesign • General background • Focused study/discussion groups on selected readings

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ORGANIZATIONAL LEARNING

Learning Outcomes	Skills Involved	Tools
4. Understanding of dynamic and structural issues involved in changing organizations, including the irrational and chaotic aspects of organizations	Group process and facilitation skills	• Vision setting
5. Ability to manage organizational and environmental diagnosis/analyses	Working with and leading collaboratives/strategic partnerships	• Diagnostic frameworks
6. Capacity to manage goal setting process that leads to clear short and long-term goals within the context of a broader vision	Negotiation	• Case studies
7. Capacity to develop and implement strategies to move organization from the existing reality to new future	Communication	• Critical incident analysis
8. Ability to create and measure outcomes (at organizational, system and cross-system level)	Managing crises, dealing with the unexpected	• Reflective practice: developing lessons learned
9. Ability to use data and information to plan and drive program and policy decisions	Reading and adapting to environmental changes/challenges	• AK Rice conference on authority
	Managing and developing people effectively	• Site visits
	Using evaluations and evaluators effectively	• Environmental Scanning
	Building a learning organization	• Stakeholder mapping
	Dealing with people over whom you have no authority	• TQM tools and techniques
		• Force Field analysis
		• Examination of role of Front Line Workers
		• Site visits, field placements as opportunities to observe and interact with different organizational structures and strategies
		• Exploration of AECF core strategies

SYSTEMS LEARNING

Learning Outcomes	Skills Involved	Tools
10. Broader vision of how to approach change 11. Understanding of "systems thinking" 12. Understanding potential for/of new relationships between formal systems and communities 13. Ability to design a strategic intervention into a system	Ability to move outside own discipline and territory Familiarity with technical issues, e.g., funding streams Ability to examine own "mental models" and assumptions Ability to map and analyze systems and systems breakdowns Understanding of principles of building a "learning system" Ability to articulate and act on a theory of change	• Total Quality Management tools, including flow charts, cause and effect diagrams and pareto charts. (1994) • Reengineering tools, including work process redesign. (1994) • Systems thinking tools, including mental models, system as cause thinking, single and double loop learning, operational thinking, dynamic thinking and idealized design. (1994 & 1995) • System modeling and simulation, using computer software to map systems redesign, test assumptions and demonstrate results. (1995) • AECF strategy days • Field placements • Community Asset Building • Force Field Analysis • Exposure to different cultures and governance structures

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SOCIETAL LEARNING

Learning Outcomes	Skills Involved	Tools
14. Mobilizing political will for change 15. Understanding of history, construct and implications of racism in US and ability to work effectively across cultures	Communicating to mass audiences Framing issues strategically Engaging others	• Public Agenda Foundation theories re: how public decides • Undoing Racism workshop led by Peoples Institute for Survival and Beyond • Advocacy Institute Work on lobbying and coalition building • Framework for understanding civic engagement

Jolie Bain Pillsbury
President, Sherbrooke Consulting, Inc., Arlington, VA

Jolie Bain Pillsbury and Sherbrooke Consulting seek to foster leadership growth and excellence in systems that have a direct impact on the lives of children and families.

Dr. Pillsbury has worked with numerous state and county government agencies in 21 states and the District of Columbia and served as a technical assistance resource for efforts funded by the Edna McConnell Clark Foundation, the Danforth Foundation, and the Pew Charitable Trust, as well as the Annie E. Casey Foundation. Pillsbury has consulted to many non-profit organizations as a facilitator, strategic planning resource and organizational development consultant. She has also served as a Senior Consultant with the Council for Excellence in Government and approximately 500 government executive Fellows using models developed for benchmarking and leadership for results.

Thomas Gilmore
Vice President, CFAR (Center for Applied Research)

For almost two decades, Thomas Gilmore has consulted to a wide variety of clients in the public and private sectors. His work in various industries from health care to corrections to energy conglomerates focuses on planning and implementing strategy, and the organizational and management development work that is so often linked to effective follow-through. Today, Gilmore consults through CFAR, the Center for Applied Research, a private management consulting firm that links strategy and organizational

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development for clients facing change. He holds adjunct teaching positions in the University of Pennsylvania's Wharton School in Health Care Admini-stration and in the School of Social Work. He is also a Senior Fellow at the Leonard Davis Institute of Health Economics.

Gilmore's work on leadership issues has focused on the crisis and opportu-nity of changes in command. His book, Making a Leadership Change: How Organizations and Leaders Can Handle Leadership Transitions Successfully, provides practical guidance on all phases of the transition process from the initial thinking about the need for change, through the executive search process, to the major areas with which the new leader must engage over time to be successful. He brings to his clients and to his work a well-honed sense of how roles and relationships work in real settings, linking strategy to working alliances.

John M. Isaacson
Managing Director, Isaacson, Miller
Boston, MA

John M. Isaacson is managing director and founder of Isaacson, Miller, an executive search firm dedicated to finding exceptional leaders for mission-driven organizations.

Isaacson launched his career as the assistant to the Secretary of Human Services for the Commonwealth of Massachusetts. He was employed imme-diately as the state's recruiter for commissioners in the human services. He served three governors and five secretaries of human services over eight years, recruiting cabinet officers and commissioners. In between recruiting

assignments, he served as an Assistant Commissioner of the Department of Youth Services, as an Assistant Secretary of the Executive Office of Human Services, and as the Director of the Office for Children.

Since helping to found Isaacson, Miller in 1982, Isaacson has led searches in every part of the firm's practice. He has helped Isaacson, Miller to develop its cumulative knowledge of the craft of search—the missionary purposes of institutions, the disciplines of markets and the emotional and intellectual learnings that leaders acquire in a committed working life.

Mal O'Connor
Principal, CFAR (Center for Applied Research)
Philadelphia, PA

Mal O'Connor is an expert in field research and field methods and has done extensive ethnographic studies of work processes and workplaces. He has explored local work cultures through an examination of the tools they choose to use both to create products and services and to document and measure their performance. By linking culture and folklore to an understanding of modern technology, he has developed an in-depth understanding of how beliefs and values shape organizational life.

O'Connor serves as a consultant with CFAR, the Center for Applied Research, a private management consulting firm that links strategy and organizational development for clients facing change. He is currently focusing his efforts in the following areas:

- Methods of linking strategic thought and action to carefully planned organization-wide change efforts;

- The role of customers as participants in design, construction, and delivery of products and services;
- The importance of cross-functional teams in building learning organizations and their relationship to existing hierarchical structures; and
- The design of flexible "tool kits" for accomplishing large-scale organizational change.

Ellen Schall
Martin Cherkasky Professor of Health Policy and Management
The Robert F. Wagner School of Public Service,
New York University, New York, NY

Ellen Schall joined the Wagner School Faculty in 1992, having most recently served as President of the National Center for Health Education. A lawyer by training, she had previously been Commissioner of the New York City Department of Juvenile Justice (DJJ). Under Schall's leadership, DJJ won national recognition for innovative programming and management excellence. In 1986, Harvard University and the Ford Foundation selected DJJ for a $100,000 Innovations Award, and in 1989, DJJ's accomplishments were highlighted in a national documentary televised on PBS, "Excellence in the Public Sector with Tom Peters."

Until 1999, Schall directed the clinical initiative at the Wagner School. This effort involves framing learning as iteratively connected to both work and school and offers structured opportunities for students to do both. She has been responsible for the Wagner School partnership with the Children and Family Fellowship since 1992/3.

Donna Stark
Director, Children and Family Fellowship
Annie E. Casey Foundation, Baltimore, MD

At the Casey Foundation, in addition to leading the Children and Family Fellowship, Donna Stark is a team leader for the Neighborhood Transformation and Family Development demonstration in Indianapolis and a member of the Boston team. Prior to her appointment as Fellowship Director, she was a Senior Associate in Planning and Development, where her work focused on the planning and implementation of the Foundation's five-year plan (1997-2001) and coordinating the work of the Planning and Development unit. Prior to her work in planning, she worked on issues related to comprehensive state level human services systems reform.

Before joining the Foundation in 1993, Stark was the first State Director of the Children and Family Systems Reform Initiative for the State of Maryland. Her primary responsibility was to direct Maryland's interagency effort to restructure the service delivery systems of all state departments serving children and families. She also directed the development of local governance models implementing reformed service delivery systems. Stark has also taught at Ohio State University and the University of Maryland and directed several private, non-profit organizations that provided both community-based and residential services to children and adults.

Kathleen White
Independent Consultant
New York, NY

Kathleen White is an organizational systems consultant specializing in individual role and organizational development. She works with individuals and teams to balance the dynamics experienced in the workplace with understanding and to achieve individual, team, and business objectives.

Her consulting career has focused most recently on executive role consultation and team development in several organizations, including: Goldman Sachs, KingWorld Productions, the American Society of Composers, Authors and Publishers, ABC Global Marketing, the Academy of Television Arts and Sciences, The Metropolitan Police in London, and the Jewish Board of Family and Children's Services in New York.

Along with her consulting work, Kathy White was a founding member and past Director of the Program in Organizational Development and Consultation at the William Alanson White Institute. She has been Director of Academic Affairs at Washington Square College, New York University.   Currently, she is an Adjunct Associate Professor of Clinical Psychology at Teacher's College, Columbia University and City College, City University of New York.

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CHILDREN AND FAMILY FELLOWSHIP

Pre-Fellowship Reader
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Table 1.   Sampling of Foundation Based Fellowship Programs

PROGRAM NAME	TYPE OF PROGRAM AND ELIGIBILITY	PROGRAM DESCRIPTION
Bush Foundation Leadership Fellows Program	Programs may last for only a few weeks or more than a year. Primarily for mid-career professionals. Eligibility limited to residents of Minnesota, North Dakota, South Dakota, and northwestern Wisconsin. 40 fellows per year.	Awards made for academic training, internship training, or both. Fellowships awarded only for full-time study in degree-granting or non-degree granting educational programs. Program intends to prepare men and women at mid-career for greater leadership roles within their professions and communities. A stipend of $3,200 per month is provided as well as an allowance for tuition and travel, up to $17,000.
Bush Foundation Medical Fellowship Program	Full-time program, may extend from three to twelve months. Targets mid-career physicians, at least 35 years old with seven or more years of clinical practice. Eligibility limited to physicians practicing in Minnesota, North Dakota, South Dakota, and northwestern Wisconsin.	Fellowships awarded for clinical programs of study as well as for management/policy development training. Program designed to enhance community health care in the targeted region. Programs of study are self-designed and self-managed. A monthly stipend of $4,000 is provided as well as up to $12,500 for tuition and up to $5,000 for travel expenses.
Chicago Community Trust Community Service Fellowship Program	Full-time, for a period of three to fifteen months. For individuals employed full-time in not-for-profit organizations in Cook County, Illinois. 2 fellows per year.	Designed to enhance and expand personal and professional skills, and abilities of individuals in leadership positions. Leave of absence required in order to pursue program. Applicants prepare an individual plan for personal growth and development activities. Maximum award of up to $75,000 which includes current salary and benefits, travel, lodging, and related program expenses.
Aaron Diamond Foundation Postdoctoral Research Fellowships	Full-time, two-year program. For early-career biomedical and social scientists working in New York City. 25 individuals will be supported in 1994.	Fellowship encourages excellence in postdoctoral research addressing the problems of AIDS and drug abuse, and aims to increase the number of researchers working on these problems. Established scientists work as mentors. Stipend of $36,000 per year. In addition, the mentor's institution receives up to $30,000 per year to cover costs associated with the fellow's research.

Table 1.   continued

Program	Terms	Description
Robert Wood Johnson Foundation Health Policy Fellowship	Full-time, twelve months. For mid-career health professionals. 6 participants per year.	Designed to help fellows gain an understanding of the health policy process and to contribute to the formulation of new policies and programs. Following an eight-week orientation with White House advisors and other national experts, fellows assume government work assignments in Washington, D.C. Fellows develop legislative proposals, arrange hearings, brief legislators for committee sessions and floor debates, and participate with staff in House and Senate conferences. Fellows paid stipends, equal to their salaries, up to $50,000 per year plus fringe benefits. Relocation expenses, within certain specified limits, are also provided.
W.K. Kellogg Foundation National Fellowship Program	Part-time (25%) for three years. Early-career professionals. 50 participants per year	Program aims to identify individuals with leadership potential and prepare them to address major social issues in the United States and beyond. Fellowship consists of a series of seven seminars, one held in Latin America, during the three-year span; an individual learning plan; small-group activities; cross-group seminars involving fellows from all cohorts; and a biennial forum for fellows who have completed the fellowship. Three year grant award of $35,000. For those employed by nonprofit institutions, the Foundation also supports 12.5% of their salary, up to predetermined maximum.
Rockefeller Foundation Warren Weaver Fellows Program	Full-time, one-year residency program at the foundation. Targets early-career professionals who have completed their academic or professional training. 5 fellows per year	Program designed to provide participants with first-hand experience in the field of philanthropy, while enabling the foundation to acquire fresh perspectives on its work. Fellows may come from any area of professional life, but must have basic qualifications for work in the particular area for which they apply. Stipend provided of between $40,000 to $55,000 plus moving costs. Medical and group life insurance are also provided.
Russell Sage Foundation Visiting Scholars Program	Full-time for period of up to one year. For established and younger scholars in the social sciences. 12 fellowships per year.	Program designed to allow visiting scholars to pursue their research and writing at the foundation. Scholars are provided with offices at the foundation, secretarial support, computational and library facilities, and salary support for the academic year of up to $100,000 when unavailable from other sources. Scholars from outside the greater New York City area also provided with subsidized apartments nearby the foundation offices.

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Table 2. Sampling of University Sponsored Leadership Development Programs

PROGRAM NAME	TYPE OF PROGRAM AND ELIGIBILITY	PROGRAM DESCRIPTION
Boston University Join Together Fellows Program	Part-time. One week leadership program institute. Two four-day leadership seminars. Membership in the Join Together Computer Network. Individuals chosen from various fields.	Funded by a grant from the Robert Wood Johnson Foundation to the Boston University School of Public Health. Designed as a national resource for communities fighting drug and alcohol abuse. Program provides a multi-year experience to foster competency in coalition building and development, and understanding of effective substance abuse prevention and treatment strategies. Applicant's employer must certify that the employee will continue to receive salary and benefits while conducting fellowship activities.
University of Colorado Rocky Mountain Program	Part-time, ten-day residential management development seminar. Targets practicing administrators and policy makers. About 30 participants per session.	Program offered twice a year. Its goals are: to update management practices of participants, to increase understanding of the policy process, and to encourage professional development. Emphasis on a learning approach to decision making and interpersonal relations, and on shared decision making and shared control of the learning environment.
Columbia University Charles Revson Fellows Program	Full-time eight month academic program. Primarily targets individuals in New York City. Targets mid-career as well as early career individuals. 10 fellows per year.	Program enables fellows to spend two terms in full-time study to enhance their understanding of and ability to contribute to the improvement of New York City or other large metropolitan centers. Each fellow develops an independent study program which may be inter-disciplinary. Fellows also attend a series of weekly dinner seminars, weekly fellows' seminars, and a spring conference. There are no formal academic requirements as the program is not degree oriented. Fellows receive a stipend of $15,000. Program also pays tuition, fees, and medical insurance.
MIT Community Fellows Program	Full-time, nine-month academic program. For mid-career professionals. 10 to 12 fellows per year.	Present focus of program is on addressing problems of youth in communities of color. Participants enrol in courses and develop individual projects designed to address youth needs in their communities. Fellows receive a $15,000 stipend.

Table 3. Sampling of Nonprofit Institutions' Leadership Development Programs

PROGRAM NAME	TYPE OF PROGRAM AND ELIGIBILITY	PROGRAM DESCRIPTION
American Council on Education Fellows Program	Full-time, academic year. For early-career administrators and faculty in higher education institutions. 30 participants per year.	Goal of the program is to help participants gain the expertise and perspective necessary to assume significant leadership roles in higher education. Participants serve as interns to college or university presidents and/or vice-presidents, participate in seminars, and visit other university campuses. Fellows are also expected to write a paper on a higher education topic. Fellows may serve as interns either at host campuses or at their home institutions. The nominating institution continues to pay the fellow's full salary and benefits, and is also responsible for travel expenses. Several grants are available to nominating institutions to help offer institutions' expenses in replacing fellows.
American Leadership Forum	Part-time, 22-day program implemented in each of five existing local chapters over the course of one year. 20 to 25 participants, per year, selected from public, private and non-profit sectors. Program operates in: Houston, Hartford, Tacoma, the state of Oregon, and Silicon Valley in California.	The program is dedicated to joining and strengthening established leaders in order to serve the public good. It enhances leadership by building on the strengths of diversity and by promoting collaborative problem-solving within and among communities. Program consists of orientation followed by a week-long "wilderness challenge" for all participants. Each class then returns to its local community and continues meeting for a series of monthly seminars to examine the challenges facing today's leaders. Program includes a local project in which participants join together to address an urgent community problem. Graduates establish a leadership network and continue to meet to explore community problem-solving.
American Psychological Association Congressional Fellowship Program	Full-time, one year program. Targets Ph.D. psychologists who are members of the APA. Two fellowships awarded to early-career psychologists and one fellowship awarded to a mid-career psychologist.	Purpose is to provide psychologists with a public policy learning experience, to contribute to the more effective use of psychological knowledge in government, and to broaden awareness about the value of psychology - government interaction. Each fellow spends one year working as a special legislative assistant in the staff of a member of Congress or Congressional Committee. Activities involve conducting legislative or oversight work, assisting in Congressional hearings and debates, preparing briefs, and writing speeches.

Table 3. Continued

		Fellows attend an orientation program on Congressional and Executive branch operations, and a year-long seminar series on science and public policy issues. Fellows receive a $37,000 stipend plus $2,500 for travel and relocation expenses to one Washington, D.C. area. The senior fellow receives a stipend of $47,000.
Center for Creative Leadership Leadership Development Program	Six-day training program for middle- to upper-level managers	Purpose is to enhance leadership skills and abilities of business managers. The program combines lecture, group exercises, assessment questionnaires, and individual feedback sessions to provide managers with constructive information about themselves, their leadership styles, behavioral impact, and decision - making styles. Follow-up training is also offered. Program tuition is $4,200 including meals. Travel and accommodations are additional.
Center for Creative Leadership Dimensions in Leadership	Six-day training program for human service administrators. Targets public and private agency directors.	Program addresses leadership development from three perspectives: personal, team and organizational. Participants create a resource network and set goals for personal and organizational development. Conducted on a custom basis. Program tuition is $2,000.
CORO Fellows Program in Public Affairs	Full-time, nine month program. Targets recent college graduates. 12 participants per year in each CORO center: San Francisco, Los Angeles, St. Louis, and New York City.	Intensive experience-based training in public affairs and public policy. Fellows complete at least five field assignments at a government agency, a political campaign, a community-based organization, a labor union, and a corporation. Fellows participate in weekly seminars, field assignments, individual and group projects, and retreats. Field experiences consist of internships in agencies. Tuition is $3,500. Stipends of up to $10,000 are available, based on need, to assist with living expenses.
CORO Leadership/New York	Part-time, nine month program. Requires 12 workdays, 9 evening meetings and 2 weekend retreats. Targets emerging civic, public, private, and non-profit New York City leaders. 40 participants, between ages 30 and 45, selected every year.	Program developed in collaboration with the New York Partnership. Program provides direct exposure to the individuals and institutions prominent in the decision-making process of New York City. Participants explore critical issues confronting the city and develop a broad understanding of public policy development. Program consists of a series of Issue Study Days and Special Focus Evenings.

Table 3.   Continued

Program		
CORO Bronx Community Leadership Initiative	Part-time, three year series of training programs in the Bronx for youth, teachers, and key community service professionals.	Program designed to provide participants with the professional and group skills necessary to build a coalition of concerned citizens committed to dealing with vital issues in their community. Program reaches across generations and special interest groups
Development Training Institute Leadership and Management Program for Community-Based Development (LAMP)	Part-time, four-month program. Targets mid-career professionals, directors and senior managers of organizations involved in community revitalization activities. 18 participants.	Program designed to enable participants to become effective, entrepreneurial and influential leaders in their organizations, their communities, and the field of community based development. Training consists of two five-day workshops separated by a three-month practicum period. During the practice, trainees complete assignments which apply workshop hearings to the actual day-to-day operations of their organizations. Tuition plus travel room and board at workshops is $4,700.
Institute for Educational Leadership Education Policy Fellowship Program	Part-time, one year program. Targets mid-career professionals. Focus on developing collaborative solutions to problems in education, health, and social services systems. Presently operating in 13 sites: Tempe, AZ; Los Angeles; Denver; Hartford; Normal, IL; Boston; Lansing; Minneapolis; St. Louis; New York; Raleigh; Portland/Salem; and Washington, DC. 15 fellows selected per site.	Program provides opportunity to examine public policy and leadership, and to increase the capacity to exercise leadership in a variety of settings. Collaborative solutions emphasized. Program offers on-site seminars, workshops, and special events. Fellows also attend two issue-intensive national meetings. Various program activities enable participants to reflect on their leadership behavior so that they may enhance their leadership skills. Each employing agency pays the program fee of $1,800 per fellow and program-related travel arts, and provides release time for program activities.
Institute for Educational Leadership DeWitt Wallace-Reader's Digest Fund Collaborative Leaders Program	Part-time, one year program. Targets mid-level managers and promotes collaboration within and across agencies. Presently operates in New Jersey and Virginia. 15-25 participants per site.	Program focuses on collaboration between and among all agencies serving youth and their families. Consists of on-site training activities and one national meeting. Agency leaders serve as members of a "policy response team" and formally interact with the participants. Employing agency pays program fee up $1,500 and travel costs.

Table 3. continued

Mexican-American Legal Defense Fund (MALDEF) Leadership Development Program	Part-time, one year program. Twenty-week training Cycle. Targets mid-career Latinos(as). About 150 participants per year. Multiple sites.	Program established to address the problem of Latino(a) under-representation on decision-making boards and commissions. Provides training in leadership skills, promotes placement of Latinos(as) on boards and commissions, and provides a framework for analyzing community issues. Program graduates participate in more in-depth training. Graduates have also formed independent alumni associations in several sites. Emphasis on placing graduates in local boards and commissions as well as in state and national boards and commissions.
National Coalition of Hispanic Health and Human Services Organization (COSSMHO)	Part-time, year long program. Targets mid-career professionals working on Hispanic Health issues. 12 participants per year.	Program designed to provide additional skills to persons in leadership roles, elected and appointed officials, to do advocacy around Hispanic health issues. Starts with four-week summer program at the Harvard Kennedy School of Government. During the year, participants develop health advocacy projects in their own communities. Projects are monitored by COSSMHO. Fellows come together in Washington at the end of the year to discuss their projects, testify in Capitol Hill, and advocate in other ways.
National Hispana Leadership Institute	Part-time, four intensive one-week sessions over a nine-month period. Targets early-career and mid-career professional Hispanic women. 25 participants per year.	Program brings together and prepares dedicated Hispanic women with demonstrated community leadership. One-week session themes are the following: 1) The national Hispanic community, demographics and political improvement; 2) public policy, management, strategic planning and organizational development (at Harvard's John F. Kennedy School of Government); 3) self-assessment, executive leadership, decision making, and action planning (at the Center for Creative Leadership); and public policy and the legislative process (in Washington, D.C.). Participants make a commitment to mentor two Hispanic women and implement a public policy project.

Table 3. continued

National Forum for African-American Public Administrators Executive Leadership Institute	Part-time, eight-month program. Eight 2 1/2 day weekend sessions. Targets African-American administrators who are candidates for top executive positions.	Training focuses on two areas: management/leadership and professional development. Program designed to provide African-American administrators with information and skills to be effective city managers. Program cost is $4,000. Most training sessions held in Washington, DC.
National Urban/Rural Fellows	Full-time, fourteen-month program leading to a Master's in Public Administration. Targets mid-career minorities. 20 fellows per year.	Program trains fellows to become public servants in government and managers in non-profit settings. Participants are expected to impact public policy at national and local levels of government. Fellows attend two summer sessions at Baruch College and complete correspondence course work during the mentorship period. The mentorship a nine-month placement as special assistant to a senior administrative officer in a government agency or a major non-profit organization. Fellows come together for a mid-year conference. A stipend of $18,000 for the fourteen-month period is provided plus travel costs and tuition.
Rural Development Leadership Network (RDLN)	Part-time, 18 to 30 month program. Targets community leaders from poor rural communities. 12-15 participants per year.	Designed to support the combined development of low-income minority rural communities and the leaders of these communities. Participants develop a community development project in cooperation with a sponsoring organization, pursue an independent study program, and attend a five-week training session. Qualified participants may earn a Master's degree from Antioch College. Sponsoring organization contributes $7,500 to RDLN for overhead and academic expenses, plus $15,000 as an education grant to the participant. Salary payments may be substituted for the education grant.
Southwest Voter Registration Education Project	Flexible program. Targets Latinos(as) with leadership potential in Southwest communities.	Recruits individuals who exhibit community leadership through voter registration projects and trains them to run for local public office. Program aims to increase political representation of Latinos(as). Program is informal, community-specific, facilitated by field organizers.