The background features a complex pattern of wavy, concentric lines in shades of orange and yellow. Overlaid on this are several large, semi-transparent circles in various shades of orange, creating a layered, organic effect.

LEADING SYSTEMS CHANGE

A Workbook for Community
Practitioners and Funders

Leading Systems Change: A Workbook for Community Practitioners and Funders

Published by Open Impact and the With/In Collaborative, 2019

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ACKNOWLEDGMENTS

IT TAKES A VILLAGE

Behind this workbook stands a legion of individuals and organizations without which the book itself, and the body of work it describes, would never have happened. The workbook was written by New Leadership Network (NLN) program leaders and facilitators Heather McLeod Grant and Adene Sacks, with help from writer/editor Jenny Johnston. But the practice it describes, the work itself, and the concepts that inspired it were co-created by hundreds of people, many of whom we'd like to acknowledge here.

The nearly 100 leaders in California's San Joaquin Valley who participated in the NLN and used it as a launching pad for local civic innovation. These brave new leaders led all the work coming out of the program: the innovations, community initiatives, and partnerships and collaborations that emerged from this experience and in response to local needs. They are the true heroes of this story.

The incredible group of NLN facilitators and coaches who helped us shape and deliver this work over six years—Belma González, Johnny Manzon-Santos, Mark Nicolson, Yeshi Neumann, Thomas Both, and evaluator Kris Helé, as well as early facilitators David Sawyer and David Ehrlichman.

The Stanislaus Community Foundation, under the leadership of Marian Kaanon, which has served as the backbone and implementation partner for NLN Stanislaus, as well as Caty Perez, Reggie Rucker, and Kate Trompetter, the talented local network weavers we hired to organize NLN events, help the networks stay connected, and provide important local context to the design and facilitation team.

The James Irvine Foundation, which initially conceived of the program and committed more than \$3 million to launching and supporting it through all its phases, under the initial guidance of program vice president Amy Dominguez-Arms, and senior program officers Anne Vally and Jessica Kaczmarek.

The Barr Foundation and the Hawaii Community Foundation, two philanthropic organizations deeply engaged in place-based leadership networks, which helped fund the publication of this workbook. They also provided helpful input and feedback on the work and served as valuable thought partners.

Heather's team at Open Impact, especially Gretchen Selfridge and Alyssa Moore, who provided administrative support to help manage the program and grant in Stanislaus County. Open Impact also made a significant pro bono contribution to this workbook.

In addition, there are many hundreds of authors, thought leaders, and related programs whose content and ideas we drew upon in curating the NLN curriculum, some of which we list in the resource directory. As we acknowledge throughout, we did not invent the deep areas of theory and practice—network strategy, systems change, design thinking, equity frameworks, coaching and leadership development, and others—on which the NLN was built. Each of these areas has vast roots and many practitioners, and it would be impossible to name all the people, programs, and experiences that influenced the way we integrated these concepts to form a toolkit for leading systems change. Rather, we have attempted to take what has worked for us and bring it into greater use and visibility. In so doing, we stand on the shoulders of many, and we are grateful to them all.



BEHIND THIS BOOK STANDS
A LEGION OF INDIVIDUALS AND
ORGANIZATIONS WITHOUT
WHICH IT WOULD NEVER
HAVE HAPPENED.

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LEADING SYSTEMS CHANGE
A WORKBOOK FOR COMMUNITY PRACTITIONERS AND FUNDERS

CHAPTER 1

THE NEED FOR NEW LEADERSHIP



SOCIAL
CHANGE IS
SYSTEMS
CHANGE

Visit any city, town, or rural community in the United States and talk to leaders on the front lines of social change, and here's what you'll hear: It's really hard out there. Our country and our communities face complex social and systemic problems—from persistent poverty, rising income inequality, and the opioid crisis to structural racism, mass incarceration, and climate change—that are scaling faster than our approaches to solving them. And in the past few years, many gains against these challenges have been undermined, adding even more urgency to the task at hand. Fatigued, isolated, and frustrated that they are not getting the impact they want, many social change leaders are losing faith in our current structures and institutions, including the traditional democratic process. They are longing for a new way forward.¹

These leaders—and the rest of us, really—are caught in a liminal moment. What it means to lead social change is rapidly shifting. Our longstanding definitions and expectations of leadership as a heroic, hierarchical, individual, or organizational act don't map to the size of our increasingly complex, interrelated, systems-level problems such as those mentioned above. Leaders, organizations, and even sectors can no longer work in isolation and expect to move the needle on issues or create lasting impact. As a society, we aren't facing new problems so much as wrestling with systems that no longer serve us. In other words, in this era of constant and rapid disruption, **social change is systems change**.

It's no surprise, then, that in recent years we've seen a shift back toward more networked and collective ways of working, with leaders and organizations acting more collaboratively rather than going it alone. While some people talk about this shift as a new approach to addressing complex social challenges, collaborating is as old as humankind. It's a return to the way many indigenous leaders and communities have always worked—and others used to work—before the centralized, hierarchical, specialized model of leadership took root, creating many of the systems and inequities now standing in the way of progress.

The energy around this “new/old” approach is palpable. Across the country, social change leaders working at various levels—from local to state to national—are increasingly being called to do systems change work and to do it collaboratively. They are forming novel alliances and networks in their communities or fields, finding new ways to align disparate views, and working at the intersection of issues to solve problems beyond their own spheres of influence. They are centering equity in their work and embracing the values of indigenous communities to heal the many illnesses in our society. And they are hacking old bureaucratic and rigid systems to create

¹ In this workbook we borrow from many prior works, including research for *The New Normal: Capacity-Building in a Time of Disruption* by Heather McLeod Grant, Adene Sacks, and Kate Wilkinson. Heather has also published several pieces about the NLN and the need for new approaches to leadership, including an early case study of NLN Fresno, written by Jenny Johnston, and the paper “I/We/It: Leadership for Social Change,” both published in 2015; and an article about the program published in a supplement to the *Stanford Social Innovation Review* in 2018.

new, human-centered versions that operate more equitably, fairly, and inclusively—inspiring us all to believe once again in the power of collective action.

And yet something is still missing. There is a sense that the most successful of these efforts have approaches in common that have yet to be well codified and spread broadly. Despite hundreds of experiments in collective impact, local collaboration, cross-sector networks, and aligned action, there's still

If transforming systems so that they work better for everyone is the why of this work, then the missing piece for leaders is the how

confusion about what to call this type of work (see "A Note on Language and Framing," page 12) and a shortage of shared wisdom on how to do it well. We're all inventing the playbook as we go—trying to remember what our culture has destroyed or forgotten in the last century—by putting relationships back at the center of our work. This has many leaders asking: *Just how can we collaborate and get productive in these complex systems? How can we re-create community that has equity*

at its center? And how will we need to change as leaders to get this work done?

If transforming systems so that they work better for everyone is the *why* of this work, then the missing piece for leaders is the *how*. Being a systems leader demands a different kind of toolkit—one filled with the approaches, mindsets, and support required for seeing, acting, and leading change across systems and in relationship. We certainly aren't the first to note this: There's been a growing body of work on network and systems leadership/entrepreneurship over the past decade, in addition to all the collective impact work in communities across the country. But in parallel with many of our colleagues and peers, we have been running a deep experiment in what it takes to build the capacity of leaders in a particular place to overcome siloed ways of acting, in service of transforming local systems for the benefit of all.

As we have learned, these new/old leaders need help building their own collaborative capacity and learning to build it in others; practice in crossing boundaries and aligning diverse teams productively; and opportunities to grow their self-awareness, their systems awareness, and their ability to act and learn from a place of deep empathy. They need experience and confidence in having tough conversations about race, power, and other issues of equity that are the proverbial elephant in the room in communities across America. And they need fellow travelers—other leaders who can become co-conspirators on this journey to move past what divides us and toward what unites us.

If social change leaders are missing the *how* of this work, then so too are the funders who increasingly seek to catalyze leaders to collective action. Recognizing that diverse groups are more capable of achieving systems change than leaders or organizations acting alone, many foundations are now supporting networks, collective impact processes, and movement building that embrace equity. But creating a network or group capable of true systems change is a daunting task, one that is orders of magnitude more complicated than launching a narrowly targeted program or improving a single organization's performance. While there are dozens of individual tools, frameworks, and practices that can inform this work, there is no comprehensive resource that explains how, why, and when these approaches might be knit together. This gap has left many funders and leaders scratching their heads, eager to catalyze and sustain productive social change networks but unclear about how to proceed. *I agree with the theory—but now what?*

THE NEW LEADERSHIP NETWORK

In 2011, the James Irvine Foundation interviewed emerging leaders in California's San Joaquin Valley²—a region covering eight counties in the center of the state—and asked them what kinds of support they needed to more effectively lead local change. A series of subsequent conversations in Fresno, the Valley's largest city, revealed that these leaders felt isolated and wanted more opportunities to collaborate with others to tackle local challenges. The San Joaquin Valley, and Fresno County in particular, is a place of great wealth, the epicenter of a \$6.9 billion local agricultural economy. But it is also home to immense systems-level challenges and a deepening set of inequities, with some of the highest poverty rates in the nation. It also features a range of ethnicities, races, and religions that makes other diverse communities look homogeneous by comparison. While there were other programs in Fresno offering networking, nobody was trying to create the kind of citywide or countywide connectivity that could help local leaders build the skills and relationships needed to create transformative change.

At the time, cross-sector networks and collective impact projects were still nascent, as was the early theory and practice of catalyzing networks for social change. The foundation hired Heather McLeod Grant and a team at Monitor Institute to conduct further research, then design and develop a program that would bring together diverse local leaders to learn, build relationships, and collaborate for a better future. In 2013, with the Irvine Foundation's support, they launched the New Leadership Network (NLN)

Creating a network or group capable of true systems change is a daunting task

² Paraphrased from Wikipedia: The San Joaquin Valley is the area in the Central Valley of California south of the Sacramento–San Joaquin River Delta. It comprises seven counties of Northern and one of Southern California, including all of San Joaquin and Kings counties, most of Stanislaus, Merced, and Fresno counties, and parts of Madera and Tulare counties, along with a majority of Kern County.

in Fresno: a leadership program comprising three weekend “convenings” over six months, designed to help cohorts of local leaders develop the tools, skills, and mindsets to see the whole systems at work in their community, understand their place in them, and begin acting on these systems more collaboratively to drive greater impact.

It was understood from the beginning that the NLN would evolve—and that it would take time for the network to begin seeing results. And yet even as the first cohort of 12 leaders cycled through the NLN, then the second, then the third, something different began to happen. Many participants began deeply connecting with one another and with their own aspirations for change. Some who had stood on opposite sides of issues for decades began to hear and absorb opposing perspectives. Instead of seeing just their piece of the community, these leaders started seeing the whole picture and experimenting with new ways to act. Individually and as a network, they began to see what they could achieve if the hurdles that kept them from impact—their own self-limiting stories, the city’s entrenched power dynamics, the systemic racism that undergirds everything—were brought to the surface, talked about in new ways, and transformed into a starting place for doing things differently.

They also began converting that insight into action. Within a year of its launch, NLN Fresno members had initiated more than 80 new collaborations. Working in groups, they either launched or added significant momentum to a series of local initiatives designed for systems-level impact—including a kindergarten readiness program in Fresno’s low-income neighborhoods, another that aimed to increase third-grade reading proficiency in the city, and a downtown revitalization project that would bring new business and transit-oriented development to Fresno. Network members also started joining one another’s boards, showing up as a unified

force at city council meetings, and meeting formally and informally to fuel the network’s momentum.

Within a year, NLN Fresno members had initiated more than 80 new collaborations

“I don’t think any of us had ever been part of anything like this,” reflects Scott Miller, former chair of Fresno’s Chamber of Commerce and a member of NLN Fresno. Adds fellow NLN member Keith Bergthold,

executive director of the Fresno Metro Ministry and a former city planner: “This network has created a kind of potential that would never have existed otherwise.” Forming trusted bonds with like-minded leaders who shared the same frustrations—and the same determination to improve their community—changed everything for these leaders, creating a level of support and solidarity that took everyone by surprise.

In 2016, based on scouting for a replication site, the Irvine Foundation launched a second NLN in Stanislaus County, located 100 miles north of

Fresno. Stanislaus is a different place in population and size, but with equally big challenges and equally complex diversity. But the NLN program itself—modified and adapted to fit the unique needs of this new set of leaders and to reflect what had been learned from the pilot site in Fresno—quickly began having a similar impact on local leaders and their ability to work differently within their community. Leaders moved from feeling isolated to feeling part of an energized network of similar peers. And they began acting on local systems together almost immediately—working to redesign local police cadet training to have more community input; overhauling a government program designed to connect Spanish-speaking parents to childcare support; and collaborating across sectors to help mentally ill homeless individuals who were driving significant healthcare costs receive the support they needed to get off the street. These are just a few examples of the concrete impact the program is already having after only two years. (For more examples of impact in both NLN sites, see Chapter 9.)

"I started to see Stanislaus coming back to life, moving from this very suicidal place to a place of hope"

From the outset, we designed the NLN program based on how we wanted the network to evolve over time, informed by a diagram from network theorists Valdis Krebs and June Holley. The first step was to help Fresno County (and then Stanislaus County) leaders move from operating in scattered and highly fragmented ways to beginning to connect with one another, with the NLN serving as the initial hub. We wanted them to create both horizontal and vertical connectivity to bridge across existing silos and power structures. As participants started to form their own connections, organize around shared interests, and collaborate on local issues, the NLN would become a multi-hub network with different clusters focused on self-generated activities. Over time, we hoped it would evolve further into a dense core/periphery network that reached beyond its members and into the larger community. (See Figure 1.1 for an illustration of how the NLN network evolved in Fresno.)

What surprised us, though, was how quickly these shifts happened and how profoundly the relationships among leaders changed how they showed up in their community and amplified their impact. "Our own orientation as individuals changed, along with our perspective about how we are in relation to each other, and our relationship to our work," says Marian Kaanon, CEO of the Stanislaus Community Foundation and an NLN member. Fellow member Kate Trompetter, who serves as NLN Stanislaus's network weaver, frames it even more strongly: "I started to see Stanislaus coming back to life, moving from this very suicidal place to a place of hope."

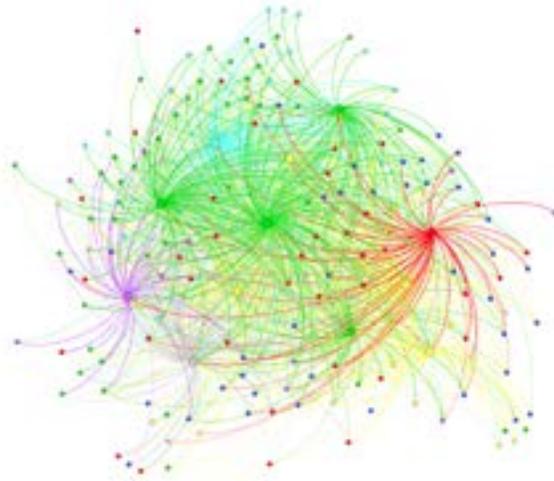
In other words, what started as an experiment in fostering a collective approach to community change—and building the capacity of leaders to impact systems—has emerged as a promising mechanism for making

FIGURE 1.1: NLN FRESNO NETWORK DEVELOPMENT

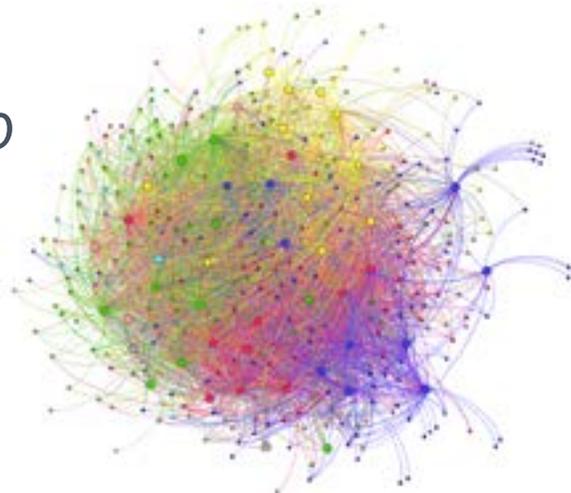
COHORT 1 PRE-NLN



**COHORTS 1 & 2
POST-NLN**



**COHORTS 1-4,
PLUS EXTENDED
NETWORK**



progress against longstanding local problems. Looking beyond these two communities, we believe the NLN can serve as a powerful model for how leaders in other communities—or those working on specific issues—can organize themselves to create systems change.

LEADING PLACE-BASED SYSTEMS CHANGE

The NLN program is still evolving—indeed, it has been at every step along the way. But more than five years into this work, we wanted to share what we have learned, what is working, and what challenges remain. Across two networks, eight cohorts of community leaders, and different generations of design and facilitation teams, funders, and community partners, we have learned an enormous amount about what it takes to create place-based cross-sector networks, build leaders' capacities to do this work, and help them drive real impact locally. Knowing that the *how* continues to be a challenge for the field, we wanted to turn our learning into an accessible case study and guide for foundations, facilitators, and local leaders looking to operationalize their ideas for systems change—to move from theory to practice more quickly.

This workbook offers a “toolkit” for creating systems leadership—particularly in the context of place. While there are a number of good books and articles on how to create various types of networks for impact—especially collective impact projects—there is very little on how to build leaders' capacities to be “system leaders.” Ultimately, we wanted to create a resource that speaks to both aims: building a systems change network and building leaders' skills for a new era. This workbook, then, is not a grand synthesis or a field-wide study of various approaches to creating cross-sector leadership; we recognize that there are other programs attempting similar things but using different frameworks and language. Some people would call the work described here “civic innovation” or “civic entrepreneurship” or “systems entrepreneurship,” or even the more dated “community leadership.” We call it *leadership for systems change*—a process for unleashing a network of leaders on the local systems in which they live and act.

We wrote this workbook for the brave new wave of civic leaders on the front lines of social change looking to grow their ability to impact systems; for communities with high potential to transform their trajectories through cross-sector collaboration; for funders and conveners seeking to create holistic leadership networks or to support more networked ways of working among grantees and within communities; and for designers and facilitators who crave real-life models of networks that “show don't tell” the way forward. We hope it helps fill a gap in the field, spark a conversation about what kind of leadership is needed now, and ultimately catalyze the kinds of change needed in so many communities.

WHAT'S INSIDE

This workbook has two parts. The main part offers a detailed case study of how we approached creating networked leadership for systems change in two California communities—from selecting participants, to designing and running convenings, to wrestling with the big questions of how to sustain networks over time. We can't underscore enough that the journey shared here captures just one approach to building leadership networks, and that no single approach could ever be one size fits all. Rather, we hope that by laying out a clear story of the details, challenges, and opportunities of our own experience, readers can take what they need, learn what they can, and gain something helpful in their own journeys toward change.

At the end is the “how to” portion of the workbook—where we share many of the exercises and activities that we have experimented with in the NLN. We also offer preliminary thoughts on replicating this experience in other communities, and reflect on the various ways these ideas, frameworks, and tools might be applied to different contexts. In addition, we link to templates and worksheets that can be downloaded from the NLN website, where we also highlight a number of resources that have been helpful to us. Here is a quick preview of what's inside:

In **Chapter 2**, we share more about the two NLN communities and what they taught us about the conditions that must be present for a place-based network to take root. While these communities are unique, they have challenges in common with towns and communities across the United States: income stratification and poverty, a changing economy, dysfunctional politics, structural racism, etc. We explain how these issues helped shape the NLN strategy.

In **Chapter 3**, we highlight the theories, frameworks, tools, and approaches that we believe are essential to creating collaborative networks capable of systems change—and describe how we curated this interdisciplinary content to form the NLN curriculum and program. We also share the I-We-It framework that became shorthand for our theory of change and guided our choices along the way.

In **Chapter 4**, we start diving into the nitty-gritty of network building by explaining how we identified and selected the right leader-participants, picked a backbone organization to partner with, and assembled a talented facilitation team to lead the work. As this chapter drives home, who is in the room is as important as the curriculum.

In **Chapters 5–7**, we walk through the NLN's arc of learning and how it unfolds across the three convenings that comprised each cohort's core experience. Each three-day convening has its own goals and purpose, with each session playing a key role in building relationships, skills, and momentum within each cohort over the course of six months.

In **Chapter 8**, we talk about sustaining the NLN network after the cohort convenings and what we're learning about how to keep the work, the connections, and the engagement of a network alive after the formal program ends. Ultimately, for each network to realize its full potential, it has to embed in the local community and not remain dependent on outsiders.

In **Chapter 9**, we document and share the NLN's impact: both the small and large effects that this program has had on the participants, on their ways of working together, on social capital and connectivity, and on the communities in which they live—and how much deeper and different it is than what we'd initially hoped for or imagined.

In the **Conclusion**, recognizing that this work is constantly evolving, we share our emerging lessons, talking frankly about both the challenges and the opportunities of building collective leadership for systems change. We also reflect on how these ideas might be applied to other contexts, before concluding with parting thoughts for the field.

In the **Activities section**, we share many of the exercises and activities that we have used in the NLN, and we link to additional templates and resources that can be accessed on the NLN website.

We see this workbook as the beginning of a conversation—and we invite your feedback. We hope it helps deepen the confidence of network conveners and facilitators in nurturing networks, moving them from insight to action more quickly. We hope it helps bridge divides across race, class, issues, and sectors in communities across the country and helps build collective capacity for civic innovation, collaboration, and large-scale transformation. And we hope it can serve as a model for others seeking to reinvent our democracy so that it works better for everyone, not just an elite few. We can't change the world unless we change the way we work—and this is one small step toward that.



A NOTE ON LANGUAGE AND FRAMING

One of the most complicated aspects of designing the NLN program, and writing about it, has been the challenge of language. There are many theories and frameworks that relate to this body of work—each with its own vocabulary and intellectual underpinnings. In decades past, entire fields of practice have developed around “community leadership,” “community development,” “community organizing,” and “community change,” not to mention the more academic “civic engagement.” And the same could be said about “systems thinking,” “systems change,” and “complexity theory.” And this is just scratching the surface.

Because the social sector sits at the intersection of both markets (business) and states (government), language from both sectors gets adapted to work in these interstitial spaces of civil society. The social movements, activism, and organizing of the 1960s–’70s drew heavily on sociology and political science frames. In the 1980s–2000s the sector adopted more of the language and frame of markets. And language from both sectors is used for social change, depending on who is doing the framing. We acknowledge that our particular frame as authors—based on our own lived experience—is fairly academic, rooted in our own whiteness, and borrows more from “business” concepts than grassroots activism or equity-based community work.

Over the last decade, we’ve seen new/old concepts applied in our sector, including the use of systems thinking and complexity theory, network thinking and theory (enabled by technology), and design thinking. And language itself is constantly evolving. Today one can hear the phrase “civic innovation” and “civic entrepreneurship” applied to this work, as startups like FUSE Corps and Code for America seek to bring innovation into the public sphere. Others use the frame of “network leadership/ entrepreneurship” or “systems leadership.” Simultaneously, movement building is seeing a resurgence, with the rise of Black Lives Matter, #MeToo, and #NeverAgain—and the sector as a whole is recognizing the need for a multidisciplinary toolkit for the work of social change.

As one of our team members, Belma González, observed, “This workbook is really a guide to re-creating equity and building community, with values and methods that have worked forever in a variety of cultures, while using updated language to get the attention of people in power in foundations, academia, and public institutions.” All of which is to say, we recognize that there are many ways to talk about this work—what we share here is merely our own approach, in a particular place and time, with a particular lens.

OUR DEFINITIONS / GLOSSARY

Backbone: A “hub” organization or intermediary that supports the collective work of a network or collaborative project, typically by managing shared back-office functions or services.

Capacity building: The consulting firm TCC Group defines capacity as the “skills and ability to make and execute decisions in a manner that achieves effective and efficient results,” and capacity building as “the process of building those skills and abilities.”

Civic innovation: According to author Alex Howard, “a new idea, technology, or methodology that challenges and improves upon existing processes and systems, thereby improving the lives of citizens or the function of the society that they live within.”

Cohort: A group of individuals going through a shared developmental program at the same time; we use the term to refer to each class of participants in the NLN.

Collective impact: The consulting firm FSG coined the term to mean “the commitment of a group of actors from different sectors to a common agenda for solving a specific social problem, using a structured form of collaboration.”

Community: In this workbook, we use community to refer to a physical place and the people who live there; in this case, California’s Fresno and Stanislaus counties.

Container: Typically this term is used for anything holding a *product*; we use it to refer to the work of facilitators in holding a *process* for a group, including building strong trust.

Convening: We use this word to refer to the three-day sessions in which NLN leaders came together for intensive developmental activities, and for larger gatherings of the network.

Cross-sector leadership: An interdisciplinary approach to solving problems by engaging multiple sectors in creating integrated, holistic solutions. According to the Presidio Institute, being a cross-sector leader requires skills in building teams, solving problems, and achieving impact.

Design thinking: Stanford’s d.school describes design thinking as a methodology for creative problem solving that is typically rooted in the mindsets and needs of those you are creating for.

Empathy interview: This term from design thinking refers to the process of interviewing end users about their experience (with a product, service, or system) in order to gain new insights for innovation or better efficiency.

Leadership development: The teaching of key concepts to individuals (or groups) to help them become better leaders in organizations, systems, or communities.

Movement: A broad group of interconnected people and organizations focused on a larger shared goal or issue area; a network of networks.

Network: A group of people and organizations defined by intentional relationships around an issue, geography, or identity.

Network weaver: A member of the network whose job is to engage members, help connect them to one another and to

other community efforts, and actively support design teams and collaborations.

Social innovation: According to the Stanford Graduate School of Business, social innovation is “the process of developing and deploying effective solutions to challenging and often systemic social and environmental issues in support of social progress.”

Social sector: The larger field of nonprofit organizations, foundations, and leaders intent on impacting the world to produce greater social good.

System: The container for the work of the social-change sector; a system can be an organization (e.g., the ACLU), a larger entity (e.g., a school district), or even a whole industry (e.g., healthcare).

Systems change: Addressing the root causes of social problems, which are often embedded in larger networks of cause and effect.

System(s) leadership: FSG used this term in the singular to talk about the kind of leadership required for creating systems change; we use it here in the plural, since many of these leaders work in multiple systems.

Systems thinking: A holistic approach to analyzing and understanding complex, dynamic problems.

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LEADING SYSTEMS CHANGE
A WORKBOOK FOR COMMUNITY PRACTITIONERS AND FUNDERS

CHAPTER 2

UNDERSTANDING LOCAL CONTEXT



COLLABORATIVE LEADERSHIP FOR SYSTEMS CHANGE

Photo Courtesy of United Way of Stanislaus County, One Table Community Dinner

Most communities in the United States could benefit from collaborative leadership for systems change, but not every community is ready or able to support this new way of working. In our case, determining whether leaders in Fresno and Stanislaus counties were willing to rise to the commitment that systems leadership required—and whether the local context lent itself to this approach—was a critical first step. Was there fertile ground for a network to take root? Below, we share a bit about the conditions that were present in the San Joaquin Valley of California when we launched the New Leadership Network—conditions that helped define and shape these two experiments in networked leadership.

CALIFORNIA'S SAN JOAQUIN VALLEY

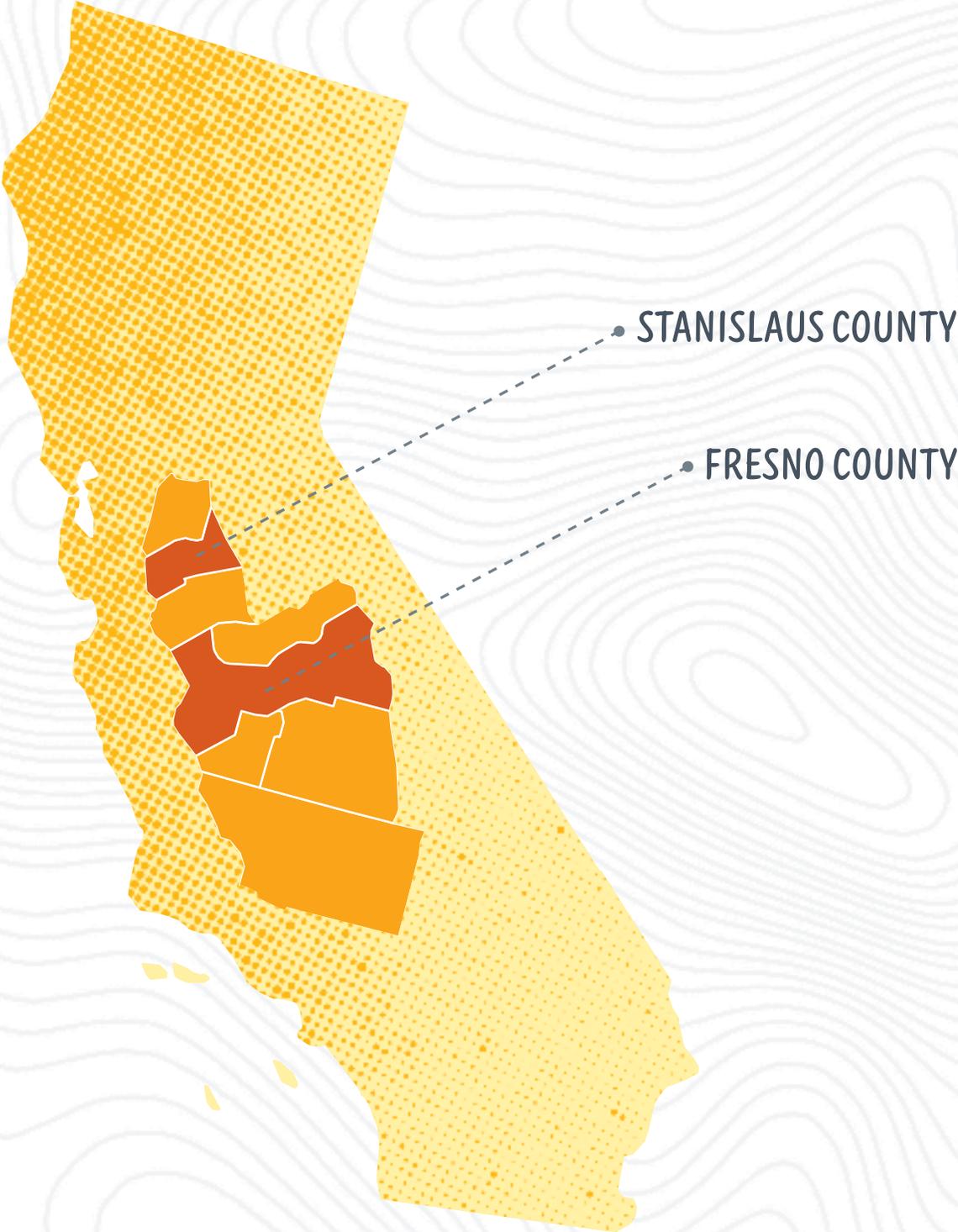
The San Joaquin Valley, where Fresno and Stanislaus counties sit, had long been a priority for the Irvine Foundation's grantmaking, because the region has high rates of poverty and significant barriers to opportunity, while having fewer philanthropic resources than the state's coastal metropolitan areas. At one of its board meetings, held in Fresno in 2010, Irvine Foundation trustees heard from local leaders about the area's challenges and how they were trying to address them. The foundation's board and staff came away committed to identifying additional ways to support local emerging leaders—which ultimately led to the grant supporting the design and implementation of the NLN in both sites. (For a visual overview of the San Joaquin Valley, see Figure 2.1.)

Before launching the NLN, we spent months researching the region and conducting interviews—more than 40 in each community—on behalf of the Irvine Foundation to assess local needs, determine whether we thought a cross-sector leadership network could take hold, and surface issues that it might address. Like many communities in California's San Joaquin Valley, both Fresno and Stanislaus have a long history of immigration, an agriculture-based economy, and a conservative political culture. They also face a host of systems-level challenges that made them seem ripe for collective leadership.

A sprawling metropolis of more than half a million people, the city of Fresno is the county seat and the largest of 15 cities in Fresno County, a region that grows 40 percent of the nation's fruits and vegetables. While the city's wealth is immense, it is also highly concentrated in a small number of companies and families, with very little flowing back into the community. Moreover, the Valley's extraction economy means its abundance is literally something that gets shipped elsewhere; despite the surrounding lush farmland, Fresno has the state's highest rate of food insecurity. It's a pattern common to other resource-based economies: A small number of landowners benefit from the labor of many working families, who struggle to get ahead.

Over the last five decades, the challenges facing Fresno have mounted, deepening the city's list of complex problems. Fresno has the fifth

FIGURE 2.1: SAN JOAQUIN VALLEY, CA—STANISLAUS AND FRESNO COUNTIES



highest poverty rate among all U.S. cities and the nation's eighth highest unemployment rate, according to recent data. It also has the second highest vehicle theft rate, the eighth lowest literacy rate, one of the country's lowest rankings for educational attainment, and the third worst air quality among all U.S. cities. The Valley's verdant landscape is almost nowhere to be seen in downtown Fresno or its surrounding lower-income suburbs, where a near-complete lack of green space prompted the Trust for Public Land to rank Fresno's urban park system the worst in the nation. For decades local government—under the sway of real estate developers—embraced sprawl, without any growth strategy or much long-term planning.³

Situated 100 miles north of Fresno, in the northern half of the San Joaquin Valley, is Stanislaus County. Stanislaus is quickly becoming an affordable exurb of the expensive Bay Area—and it confronts a vexing list of systems-level challenges similar to Fresno. The county is home to half a million people, many of whom are spread out and live in rural pockets of the community. Nearly 300,000 live in the county's two largest cities, Turlock and Modesto, 20 miles apart. As in Fresno, agriculture is a big industry in the county, with area farms generating nearly \$4 billion annually. But this abundance is not equally distributed: Per capita income in Stanislaus is \$22,915, significantly lower than the national average, and more than 22 percent of residents live below the poverty line.⁴ As with other rural parts of America, Stanislaus County never fully recovered from the 2008 recession. Its unemployment rate is 71 percent higher than the national average, and educational attainment is also concerning: 15.4 percent of county residents have less than a ninth-grade education, and only 11 percent hold a bachelor's degree, well below the national average.⁵

Many local leaders feel they are doing great work yet are stuck in the shadows of the coast's more affluent San Francisco Bay Area and Los Angeles region

The two communities have another notable similarity. The 250-mile-long San Joaquin Valley is of vital economic importance to California, the country, and the world because of its agricultural production. And yet there is also a sense of abandonment in Fresno and Stanislaus, and a feeling of inferiority. Many local leaders feel they are doing great work yet are stuck in the shadows of the coast's more affluent San Francisco Bay Area and Los Angeles region, with their tech startups and Hollywood glamour. Residents of the San

³ Statistics compiled from a number of sources including: The American Lung Association's "State of the Air," 2013; Elizabeth Kneebone, Carey Nadeau, and Alan Berube, "The Re-Emergence of Concentrated Poverty: Metropolitan Trends in the 2000s," The Brookings Institute, November 2011; "Cities with the Best and Worst Unemployment Rates," *Forbes*, January 23, 2013; "Cities with the Most (and Least) Stolen Cars," *Forbes*, June 26, 2013; "America's Most (and Least) Literate Cities," *24/7 Wall Street*, February 21, 2014.

⁴ <https://www.modbee.com/news/local/article3172459.html#storylink=cpy>

⁵ As of September 2018, the 24-month unemployment rate compiled by data from California's Employment Development Department averages 7.2 percent. Stanislaus County data is courtesy of Opportunity Stanislaus.

Joaquin Valley often feel like the poor, younger, less powerful “sibling” in the state—even though the region is critical to the future of California and even the nation. As NLN network weaver Kate Trompetter puts it, “Stanislaus County is like someone who is beautiful, creative, and all about possibility, but just feels like complete garbage about themselves.”

Having complex, adaptive problems to address is a good starting place for collective action. But the size of the challenges facing a community is not itself an indicator that a leadership network will gain traction—in other words, these problems are a starting condition, not a gauge of community readiness. In trying to determine what was frustrating local leaders and what gave them hope, we saw several conditions that made them seem open to the NLN’s kind of transformative leadership experience. These conditions are present in many communities, because they are a direct result of the complex systems—government, business, education, etc.—we’ve created over the last century that no longer serve us well. (See Figure 2.2 for an illustration of these conditions and how the NLN helps address them.)

1 | Low Horizontal Connectivity (Silos)

In both Fresno and Stanislaus counties, local change leaders were remarkably disconnected from one another, even when they were doing similar or complementary work. Within and across sectors, very few leaders were looking elsewhere to see how their efforts could connect; rather, they were heads-down, working in their own organization, issue, or sector silos. In Fresno in particular, the sense of isolation and distrust created by this way of working had become part of the local culture and was preventing positive initiatives from scaling. “Our community is seriously in trouble because of its siloed, fragmented, divisive, and polarized state,” explains NLN Fresno member Keith Bergthold, executive director of the Fresno Metro Ministry.

“That happens along ethnic, racial, and demographic dimensions. It happens along left and right. It happens along rural to urban. There’s a whole array of polarities that stand in the way of progress.”

Consequently, few leaders or groups working to improve their community’s shared future knew one another or how to work together effectively. Like the proverbial blindfolded men and women,

each feeling different parts of an elephant, they operated with a limited understanding of the best path forward—they were focused on their individual parts, not the whole. And without relationships, collaboration, or shared understanding or vision, their good-faith efforts seemed destined to yield disappointing results. “There are plenty of silos in Stanislaus County,” says NLN Stanislaus member and Stanislaus Community Foundation CEO

Having complex problems is a starting place for collective action, but not a gauge of community readiness

FIGURE 2.2: CONNECTION AND COLLABORATIVE CAPACITY



Marian Kaanon. “But our problems are much bigger than any one silo can handle on its own.”

2 | Low Vertical Connectivity (Power)

Many leaders also felt cut off from the established power base, which in both communities operated more like an exclusive club that remained mostly white, older, and male. Because power structures are adept at replicating themselves, the political leadership tended to reflect a narrow segment of the population that had always been in charge, rather than the demographics of these communities today. In both places, there was a vibrant set of emerging leaders—including women, millennials, and leaders of color—who were working hard to improve their community’s future but had no seat at the established table and didn’t have the social networks to get an invitation. Little effort was being made to include these truly representative voices in decisions vital to the community’s future.

And yet there was no question that both communities were far more diverse than their leadership reflected. Both areas had long histories of immigration, welcoming refugees of all types—from Armenians fleeing genocide in the 1920s, to poor white families fleeing the Oklahoma Dust Bowl in the ‘30s, to Hmong and Laotian refugees of the Vietnam War in the ‘70s and ‘80s, to Latino farmworkers across many decades, to Afghani, Syrian, and Iraqi refugees today. Moreover, many community-based leaders saw flaws that a disconnected power structure could not see—and held strong views on equity, structural racism, and other systemic issues that those in power were not always tuned into.

3 | Community Readiness for Change (Momentum)

The most critical factor we observed, however, was an undeniable sense in both communities that they had reached a potential tipping point. In Fresno, a new readiness for change was brewing, driven by shifting external dynamics and conditions within the city itself. The city’s longstanding brain drain had started to reverse, with highly educated professionals tired of paying expensive coastal prices beginning to move back and invest in the community, start families and businesses, and make Fresno hip again. The city also boasted a pragmatic Republican mayor, Ashley Swearengin, in office from 2008 to 2016, who worked tirelessly to streamline local government and revitalize the destitute downtown, with a vision for slowing suburban sprawl, creating new-economy jobs, and addressing longstanding environmental problems.

There were other changes on the horizon as well when we launched the NLN: Fresno was slated to become a hub in California’s new statewide high-speed rail network, which could create thousands of jobs, connect the city to the Bay Area and Los Angeles, and radically change the city’s economics. Meanwhile, under the Obama administration, federal and

state resources were beginning to flow into the city in the form of Promise Neighborhood grants, and philanthropic foundations, like the Irvine Foundation and the California Endowment, were beginning to invest more in this historically overlooked part of the state. Additionally, several collective impact initiatives—mostly focused on the cradle-to-career pipeline and early childhood development—had also emerged. “It felt like there was new opportunity and urgency for us to deepen our community’s commitment to addressing some of our big issues,” says NLN Fresno network weaver Katy Perez, an associate vice president of development at California State University, Fresno. In Fresno, for the first time in a long time, there was a sense of positive momentum and change.

In Stanislaus, that sense of readiness was more grassroots, bubbling up from within local leaders and organizations rather than outside investors or trends. A number of leaders were already building coalitions, radically rethinking their ways of working, and changing how local government functioned. “We were realizing that there was never going to be enough money to fund our way out of these systemic challenges. It was going to have to be us looking at ourselves and working together differently,” says Marian Kaanon. Some social change leaders in the community already had an emerging orientation to collaborative work, forming several collective-impact initiatives. One effort in particular, called Focus on Prevention, sought to align county funding so that public agencies were addressing root causes, along with existing issues, in the criminal justice system. “Given the challenges we face, we needed new ways of approaching these problems and broader community participation in solving them,” says NLN Stanislaus’s Ruben Imperial, from the county’s Chief Executive Office, who led the Focus on Prevention effort.

At the time, the Stanislaus Community Foundation had begun hosting annual meetings to bring together forward-thinking, community-minded leaders to talk about new ways of working together—and the rooms were overflowing. “Neighborhood champions, community organizers, the mayor and other elected officials, education leaders, you name it—it was the face of the community,” says Marian. “People were just hungry for a new and deeper way to work together, because they were all experiencing the same challenges.”

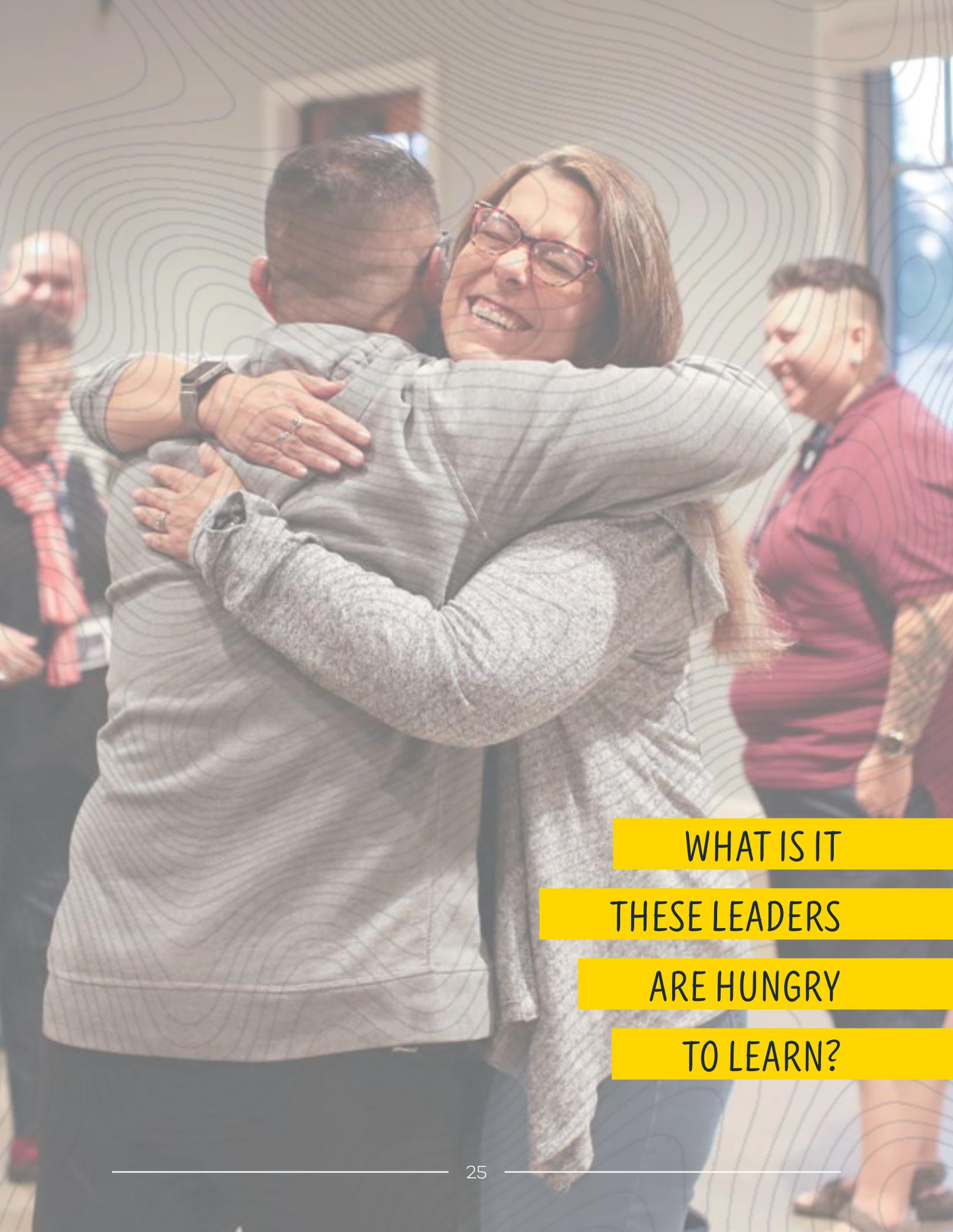
In other words, there was already fertile ground for creating leadership for systems change. Many other cities or communities—perhaps even most—may not know how to transform their ways of working. But if they recognize that the way they do things now is not working—and they are open to a new way of tackling shared problems—then there is a good chance that a cross-sector network for systems change could root and grow. “You can’t just drop it into a community where there isn’t a hunger for doing things differently, and where there isn’t a sense of how that work might look,” says Marian. “There has to be both an appetite and an openness to change.”

LESSONS LEARNED

Understand local context. Internal leaders taking on a program like this will naturally understand the local context; for outside consultants like us, it's critical to be invited in, not to parachute into a community and set up a leadership network. In both communities, we were responding to local leaders' requests for more capacity building, and we did significant advance research—gathering information about the community and talking to leaders to assess local needs—before designing the program. The kinds of questions we asked included: *What issues or problems is the community struggling with? What are the community's most important assets that might be leveraged to help solve problems? Who are the leaders stepping up to tackle these challenges?*

Assess community readiness. One of the most important questions we asked in our research was: *Does the community exhibit the characteristics that make it conducive to this kind of intervention?* Systems-level challenges are a starting condition for a leadership network, and the lack of vertical and horizontal connectivity can signal openness to a new way of working. But these indicators are not proxies for community readiness. Most importantly, there needs to be a desire for change. If local leaders aren't motivated to try new ways of working, it could be difficult for this approach to succeed.

Customize the program. There is no "one" program; rather, the program design must respond to a community's specific needs. *What is it these leaders are hungry to learn? What types of problems are they grappling with, and what frameworks or tools might help them be more successful?* We started NLN not with a program design—or a silver bullet in search of a problem to solve—but with the goal of using empathy to understand real needs on the ground and then design a program responsive to those needs.



WHAT IS IT
THESE LEADERS
ARE HUNGRY
TO LEARN?

1
NEED

2
CONTEXT

3

4
PEOPLE

5
CONVENING 1

6
CONVENING 2

7
CONVENING 3

8
EMBED

9
IMPACT

C
CONCLUSION

A
ACTIVITIES

ONLINE
RESOURCES

LEADING SYSTEMS CHANGE
A WORKBOOK FOR COMMUNITY PRACTITIONERS AND FUNDERS

CHAPTER 3

CURRICULUM AND DESIGN

WHAT DO LEADERS NEED IN ORDER TO CHANGE SYSTEMS?

So what do leaders need in order to change systems? What new competencies will help them build their capacity to lead collectively and in relationship? What does the new toolkit for local social change actually look like—and how might it be taught? We cast a wide net in our efforts to answer these questions, drawing on existing theory and practice, and building on the great work that has already been done elsewhere. In our early research into NLN program design, we conducted a broad literature review and analyzed other community and leadership development programs nationally, to capture what had been tried and learned before. In recent years, whole bodies of new work have emerged in this space, and we studied whatever we could get our hands on.

We found lots of helpful tools, frameworks, and perspectives related to leadership, networks, community development, equity, and social or systems change—a number of our favorites are listed on the website. But we believed that no single one of them on its own was enough to help leaders solve complex systems problems or broaden their capacity to lead in new ways. We also wanted the NLN to be interdisciplinary, with content curated from a number of fields, because we believed that multiple perspectives would enable leaders to act skillfully and adaptively within complex and changing contexts. These realizations drove our decision to build the program around a combination of tools and approaches.

THE FIVE PILLARS

Ultimately, we built the program around five core “pillars”—foundational theories or approaches that came to inform each stage of our design. Nearly all of the experiences and exercises rolled out as part of the NLN process had one of these five pillars as a conceptual foundation. Importantly, our facilitation team had experience in each, which informed our ability to do this work well from the outset and shaped our approach to program design. We touch briefly on each of these pillars below, offering a more detailed resource directory on the website.

1 | Systems Thinking

Systems thinking has (re-)emerged in recent years as a holistic approach to seeing and studying how the parts of systems connect, interrelate, and influence one another; how these connections evolve and reshape over time; and how they nest within the context of even larger systems. Systems thinking builds on decades of prior work in the 1970s and '80s around complexity theory and systems dynamics, with grounding in natural sciences, computer science, and even social and political theory. Because the NLN's core premise was to help leaders focus on the complex, dynamic whole—not just see and act on the parts, or single issues in isolation—systems thinking was a natural program pillar. Learning to view the world through a systems lens would enable local leaders to see both the human systems in which they operated

and the more formal institutional components of their community in fresh light, making leverage points or places to intervene more obvious.

2 | Network Theory

Related to systems thinking is the growing body of work around social networks. Network theory focuses on relationships between people and within groups, viewing collective action through the lens of building social ties, connecting and aligning people around shared goals, and helping them move to action. In many ways, network theory is a new overlay on decades of work in sociology related to building social movements and collective action, including community organizing from the 1960s and '70s—indeed, the language and framing of networks has been used to understand concepts that have been around for decades. But in the last decade, especially with the rise of online social media networks, there has been an explosion in both the theory and practice of building intentional networks. In our minds, this includes the recent focus on collective impact, which emphasizes a structured process and outcomes of collaborative networks. We tried to capture the best of both current thinking and previous decades of work and apply it to the NLN.

3 | Design Thinking

In some ways, design thinking is almost the opposite of systems thinking. Rather than looking at a complex, dynamic whole, design thinking focuses on a very specific end user, shrinking a problem down to a manageable size in order to allow for ideating and prototyping. Whereas systems thinking focuses on the big picture and can be quite conceptual, design thinking is very focused on small interventions, and is highly concrete and tangible. In other words, if systems thinking is about looking at the whole from up on the balcony, then design thinking is about being on the dance floor.⁶ It zooms in on the ways in which humans *experience* systems in order to start innovating within them. Like network thinking, design thinking has been ascendant over the last decade—moving from a field initially focused on technology and product creation to one that extends to human-centered systems design, and applications around social change.

4 | Leadership/Coaching

A central goal of the NLN was to connect and empower community *leaders*—so it stands to reason that we would also draw upon the vast field of leadership development, and the decades of thinking and research that have gone into figuring out what makes successful leaders tick. Importantly, though, we were less interested in leadership for organizational management

⁶ Harvard professors Ron Heifetz and Marty Linsky wrote about this concept in their articles and books on adaptive leadership.

than leadership for social impact and community change—in other words, in helping leaders learn to lead laterally and in relationship, beyond their organizational boundaries. This facet of leadership development has both a strong internal and an external focus, helping leaders explore the depths of their own motivations and identify their strengths and learning areas—and then learn how to engage others in their work. It is also highly relational, helping leaders bring a new level of honesty and empathy to their community relationships, so we drew on interpersonal and group dynamics work as well. We also taught leaders coaching skills as a way to enhance their self-awareness, their awareness of others, and their ability to lead adaptively in complex community situations.

5 | Equity

We added this fifth pillar along the way, having learned through this work that you can't talk about transformative leadership without talking about race and equity—full stop. All of the things that leaders are trying to change in their communities are byproducts of the systems that they are in, and those systems are often built on bias and power dynamics that keep some groups up and keep others down. Leading with and for equity means constantly looking at the systems around us and asking: *What has this got to do with equity, power, and systemic bias?* It means disrupting inequitable practices, honoring the distinct contributions that emerge from each person, and removing the predictability of success or failure that correlates with any social or cultural factor. It also means acknowledging the larger and often “invisible” patterns of power, privilege, and oppression at play in a community—and that leadership itself is often thought of in a white frame, which inhibits leaders of color from bringing their traditions and beliefs into the conversation. Leaders often aren't given the space or the support to tackle issues of class, race, power, and equity head-on—and yet real community change requires it.

While programs and trainings exist that help leaders bring some of these individual pillars into their work, we had not seen them all integrated into one program, tailored and built around the needs of real leaders aspiring to do systems change work in place-based communities. Our creativity, then, came in the blend—in finding a way to knit these frames together into a new toolkit for systems change.

Our creativity came in the blend—in finding a way to knit these frames together into a new toolkit for systems change

THE I-WE-IT FRAMEWORK

Figuring out how to shape and integrate these pillars into one program was the next task—and for this, we needed an organizing framework that could help simplify the complexity of our own design. To do this, we adapted the “I-We-It” framework—based on intellectual concepts pioneered by philosopher Ken Wilber of the Integral Institute, applied by facilitation team member Mark Nicolson, and adopted by some of our fellow travelers at American Leadership Forum as a shorthand way of talking about the work. (See Figure 3.1 for an illustration of how the pillars and the I-We-It framework fit together.) The I-We-It framework helped us draw together the five pillars in service of the three levels of systems we were trying to impact: individual leaders (“I”) working in networked and collaborative ways (“We”) to reach the larger goals of systems change (“It”). In other words, it helped us reframe these tools and frameworks around the different “units of analysis” that we sought to simultaneously impact through the program.

I = Leader

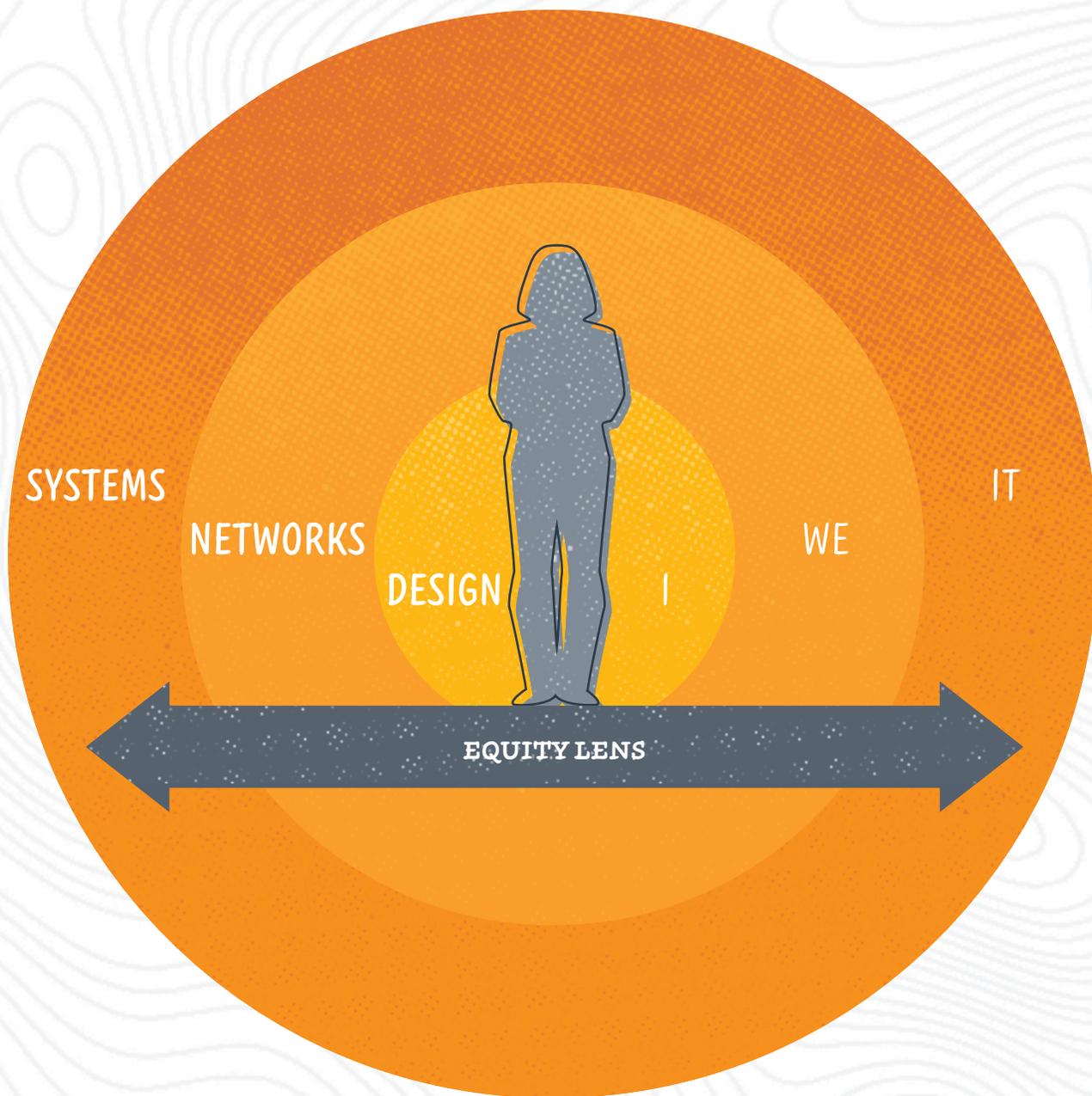
Systems leadership requires leaders to develop—and lead from—a place of greater self-awareness. For the NLN program, focusing on the “I” meant helping leaders get in touch with their motivations and how these motivations were impacting their work; develop a deeper understanding of how they show up in the world and are perceived by others; articulate their own story in service of change; and, most importantly, build their understanding of the “I” as embedded in a set of collective relationships and constructs, or a larger “We.” Working on the “I” was not about privileging the notion of individualistic, heroic leadership, as so many leadership and social entrepreneurship programs do. Rather, it was about developing self in relation to others and to systems—the “I” in relation to “It” and “Thou,” to paraphrase Martin Buber. Throughout their NLN convenings, we worked with leaders on claiming their core values and personal story, getting in touch with their purpose, and developing other adaptive leadership skills for doing systems-level work.

We = Network

For the NLN, the “We” was about the collective—the groups and cross-sector networks needed to catalyze social change. Systems leadership requires the ability to lead in relationship, to be embedded in a network or group of leaders embracing collective action. And that requires its own skillset—including the ability to collaborate across differences, build individual and group capacity, and nurture collective activities and impact. This notion of collective action is as old as time: Humans have always lived in tribes and formed groups and communities, whether through family, church, work, school, society, or online. Focusing intentionally on the “We” acknowledged that social change gets accomplished through collective

Social change is, by definition, social

FIGURE 3.1: CORE NLN FRAMEWORKS



action—social change is, by definition, social. As part of this frame, we also helped the group develop skills around emotional intelligence, interpersonal and group dynamics, influencing, organizing, and planning.

It = Systems

If the “I” was about self-awareness, and the “We” about community, then the “It” was about developing greater systems awareness and enhanced insight into how to effect large-scale social change. Most individuals are not natural systems thinkers, and in the West it’s not something that typically gets taught. A more mechanistic, individualistic paradigm underpins the very foundation of Western culture—we focus on specializing, and on parts, not the whole. As a result, leaders don’t always see the systems in which their work is embedded, question underlying assumptions, or seek to address root causes of problems. For us, the “It” was about helping NLN leaders understand the larger systems they operate in, create shared understanding of problems, ideate new solutions, and see themselves as part of a collective network empowered to act. As part of this frame, we taught NLN leaders systems mapping, scenario planning, network mapping, and design thinking as approaches to tackling systems change.

Critically, this I-We-It framework made it easier for NLN leaders to see the ways in which individuals, collective groups, and larger systems interrelated, and how each impacted the mindsets and effectiveness of the others. It was also part of what made the NLN unusual. Most leadership programs focus just on the “I,” seeking to build individual leadership skills, most often in the context of organizational management. These “I” skills can be important, but the real change comes when these skills are developed *in relationship* with the “We” and the “It.” As NLN facilitator Mark Nicolson, who has led many leadership programs, says: “To do all three of these together is very rare, and it is a very different orientation toward social change.”

NLN PROGRAM DESIGN

If the five pillars and the I-We-It framework were the intellectual and curricular “content” pieces of the NLN, then the third critical component was program design. From the outset, we made many design choices based on the outcomes we were seeking and hoping for. We wanted to build a cross-sector network capable of going both fast *and* deep—fast in the sense that we were looking for the network to have community impact almost immediately through emerging civic innovations and collaborations, and *deep* in the sense that we would be connecting social change leaders on a personal as well as professional level, orienting them not just around task or content but also around relationships.⁷

⁷ This concept is used by the Interaction Institute for Social Change in their Facilitative Leadership workshops.

To achieve this, the NLN program design featured several reinforcing threads woven into an arc of learning that integrated content, process, and relationships. First, we wanted NLN participants to move through highly interactive peer-learning experiences to expose them to all five pillars and orient them around the I-We-It framework. In order to develop deep trust in the group, we also built in numerous moments to help participants understand one another as individuals, develop greater empathy, and experience being vulnerable in front of their peers. Together, these threads helped equip NLN members with the hard and soft skills—and the network of support—they would need to take on tough community challenges.

Each NLN network comprised 50 to 60 leaders, but not all of them joined at once. For each network, we assembled four discrete cohorts, or smaller groups, of roughly a dozen leaders, each launching six to eight months after the other. This was a fast pace by leadership program standards, but we felt the urgency of the challenges facing the two counties and believed both were at critical inflection points—and we didn't want it to take 10 years for the impact of the network to be felt. We also knew that having smaller groups would allow us to take participants through intense relationship-building experiences that would be more difficult in a large group. Once the individual cohorts formed, the intent was to weave them together to create one larger network in each community.

Each three-day convening had its own purpose and design, complementing and building on the others

For each cohort the program unfolded through three convenings spaced roughly eight to 10 weeks apart over six to eight months. (See Figure 5.1 on page 55 for a visual illustration of each cohort's arc of learning.) Each three-day convening had its own purpose and design, complementing and building on the others.

Convening 1 | In.Formation

The goals of this first convening were to begin building a strong emotional “container” in the network, and to begin understanding both the community's challenges and assets. We did this by having participants get to know one another at a deep level, build trust, and develop empathy to bridge their differences. We also spent a fair amount of time understanding local issues and systems in the community and beginning to introduce key NLN frameworks and tools.

Convening 2 | Learning Journey

The goals of the second convening were to continue deepening the relationships among participants, explore issues of equity, and help the leaders understand how to begin acting on the systems they are in to solve local problems. For this convening, we took participants out of their local context

to another city or community—a literal journey—where they were exposed to new people, ideas, and ways of working.

Convening 3 | Integration

The goals of the final convening were to conclude the structured portion of the program, design the future of the NLN network, and equip the leaders to take what they learned back into their community and apply it to their work. To do this, we spent significant time bringing closure to emotional and practical work started in the cohort, brainstorming ways to stay connected going forward, and using rituals to close one portion of the program while opening another.

Over time we began to see that this trajectory of network-building loosely tracks to the stages of the design thinking cycle: to start with empathy and understanding, begin ideating and prototyping, and then move to action and testing ideas. In this case, the group wasn't creating products, but rather civic innovations or systems-level solutions that they would test collectively. Additionally, we recognized that these leaders needed touchpoints in between convenings, so we held dinners for them. These were formal opportunities for them to check in on their developmental journey, to spark renewed engagement, and to start weaving together the larger network. Lastly, we also planned for ongoing convening, connecting, and collaborating to happen during the “sustain” phase of the network—which we discuss in more detail in Chapter 8.



LESSONS LEARNED

Experiential learning trumps content. In reflection, after five years of experience with the NLN, and a dynamic and evolving curriculum, it's possible that the actual "content" of the program matters less than we initially thought. Community leaders are hungry for time and space to reflect and learn, and for deeper relationships with their peers. While the intellectual content of a program is important, what matters more is that it is well designed and gives leaders an experiential opportunity to work on the I-We-It nested systems they are in.

Go both deep and fast. We think designing the NLN to go both deep and fast was important. That's not to say that taking a year for a cohort experience is wrong—but it would impede how quickly a community can get to a tipping point of leaders with a shared vocabulary, toolkit, and vision for change. And in a world where everything is accelerating, we wanted to bring some urgency to the work. Ironically, the experience at the convenings is one of "going slow to go fast"—at each convening we slow things down and allow leaders time and space to reflect deeply, but the pace at which we move them through the program is more accelerated than most leadership programs.

Remain responsive and emergent. As a team, we are continually tweaking the NLN content and design—based on things we're hearing and learning, feedback from the group, or new ideas we want to test out. Today, while we think we've settled on a design that is probably 80 percent baked, we will continue to iterate on the remaining 20 percent as long as we're doing this work.

FROM FRESNO TO STANISLAUS

(A version of this originally ran as an article in the Stanford Social Innovation Review in 2018.)⁸

The NLN program we ran in Fresno County was similar but not identical to the one we ran in Stanislaus County; most notably, a different team implemented the work. Fresno was our pilot site, the place where we did the bulk of our learning by trying things out to see what resonated with the group and what really worked. After running four cohorts of 12–15 people each in Fresno, we stepped back, analyzed our evaluation data and observations, and reflected on what we might do differently in Stanislaus. Throughout this workbook, we focus on where we landed, and the current NLN model, rather than our initial prototype. But it is worth calling out here some of the bigger shifts that took place from Fresno (v. 1.0) to Stanislaus (v. 2.0).

Balancing I, We, and It In Fresno, we put more emphasis on building the network (“We”) and changing the larger community (“It”)—partly to differentiate it from other individual leadership programs, and partly as a reflection of the skills of our facilitation team at the time. But in so doing, we inadvertently downplayed the role of the “I” and missed important opportunities for participants to give and receive feedback about how they “show up” as leaders. In Stanislaus, we wanted to help participants work on the attitudes and behaviors that could either undermine or support their effectiveness. We learned that when these three dimensions are fully balanced, they work together and reinforce one another.

Adding individual coaching As a result of the insight above, we also added coaching to NLN Stanislaus, hiring professional coaches to give each leader at least four individual coaching sessions over the course of the program. This addition proved helpful to these leaders in addressing their own developmental challenges or issues that came up while going through such an intensive program. We also taught several modules on coaching as an important network leadership tool.

Integrating design thinking In Fresno, we had one half-day session on design thinking at the second convening, and it was almost an afterthought. But after seeing how this training catalyzed a number of organic collaborations in the group, we integrated it more fully into the program. In Stanislaus, we introduced design thinking during the first weekend and had leaders work on intentional design projects throughout the course of the program. We’ve realized that design thinking—in addition to being a great problem-solving process—helps create a stronger collaborative “container” for civic innovation, especially when combined with systems thinking, as we explore more in Chapter 5.

⁸ “Creating a Cross-Sector Leadership Network” by Heather McLeod Grant, in *Stanford Social Innovation Review*, Winter 2018.

Addressing race, equity, and power In Fresno we didn't really tackle issues of class, race, power, and equity head-on. While the participants we recruited were diverse (across sectors, race, gender, age, education, socioeconomic status, etc.), our initial two-person facilitation team was white and we didn't explicitly address equity in the group. In Stanislaus, we seized the opportunity to address this imbalance by deliberately recruiting people of color to our facilitation team; by raising conversations about equity, power, and privilege in the group; and by integrating an equity lens throughout the program. We also made a conscious commitment to explore how these issues show up in our facilitation team and how we model both vulnerability and fierceness around these topics.

Embedding in the community Another big shift in Stanislaus was having a community partner act as our backbone organization (or supporting intermediary) from the outset. In Fresno, there wasn't an ideal institution to play this role, and as a consequence—despite hiring a part-time local “network weaver”—when the cohort program ended, it was hard to maintain momentum. In the second site, we partnered with the Stanislaus Community Foundation on the grant proposal, and they helped with recruiting, program logistics, network weaving, communications, and more. Not only did our partnership help build local capacity for this work, but we're hoping it helps maintain greater momentum as the network takes its work into the future.



1
NEED

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CONTEXT

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DESIGN

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CONVENING 1

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CONVENING 2

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CONVENING 3

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EMBED

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C
CONCLUSION

A
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LEADING SYSTEMS CHANGE
A WORKBOOK FOR COMMUNITY PRACTITIONERS AND FUNDERS

CHAPTER 4

GETTING THE
WHOLE SYSTEM
IN THE ROOM



THE *WHO*
MATTERS JUST
AS MUCH AS
THE *WHAT*

The NLN vision was based on the simple idea that if we connected diverse local leaders who already had proven their ability to innovate, great things would happen. This theory of change borrowed heavily from concepts by author and organizational consultant Margaret Wheatley, who wrote, “The world doesn’t change one person at a time. It changes when networks of relationships form among people who share a common cause and vision of what’s possible....Through these relationships, we will develop the new knowledge, practices, courage, and commitment that lead to broad-based change.”⁹ Creating critical connections among civic innovators in a community was at the core of the NLN.

We had another guiding principle as well: In building social change networks, the *who* matters just as much as the *what*. How community leaders experienced the NLN program would largely depend on the people around them: the local leaders who were participating, the team facilitating the program, and the backbone organization and funder supporting the work. Together the leaders, facilitators, and backbone comprised the full “human container” for the NLN experience—along with the funder, which was more of a behind-the-scenes supporter. It was important for us to get all of these groups right. Even with the perfect curriculum and design, the NLN would not succeed if we got the “people” part wrong.

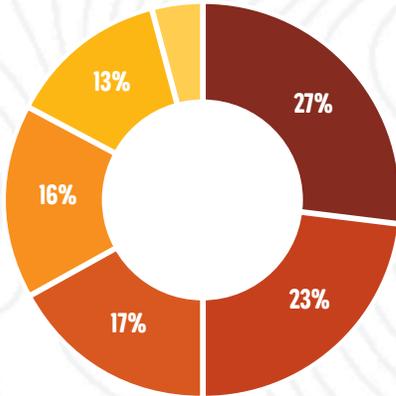
PARTICIPANT LEADERS

Central to the “people” challenge was selecting the right leaders to participate and convincing them this was worth their time. For a network to become capable of sparking transformative local change, we also believed it needed deliberate diversity. We wanted each cohort to draw talent not just from the nonprofit, private, and government sectors but from education, health, faith, and media, as well as from the dynamic spaces between sectors—those interstitial areas where some of the most interesting social innovations often emerge. We also intentionally invited both established and emerging leaders, baby boomers and millennials, and leaders from different races, genders, ethnicities, orientations, and economic circumstances. This level of diversity would enable the group to develop a broader perspective on the challenges facing their community, and on the assets that could be leveraged to tackle them. (For an illustration of the diversity of both NLN networks, please see Figure 4.1.)

We also knew that not every leader in the community would be a match for the NLN. Early on, we developed selection criteria to identify leaders who had already demonstrated an ability to innovate and lead local social change, from whichever sector. Specifically, we sought participants who were:

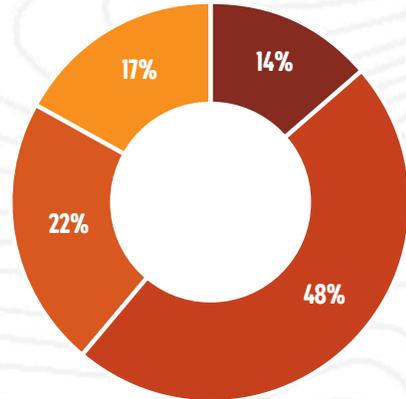
⁹ “Using Emergence to Take Social Innovations to Scale” by Margaret Wheatley and Deborah Frieze, published online at margaretwheatley.com.

FIGURE 4.1: COMBINED NLN NETWORK DEMOGRAPHICS (FRESNO AND STANISLAUS)



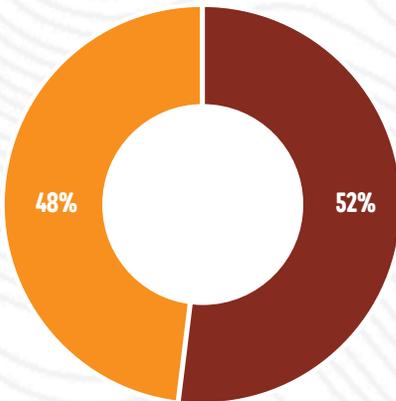
BY SECTOR

- Nonprofit / Philanthropic
- Private / Business
- Public
- Multi-sector
- Academic
- Other 4%



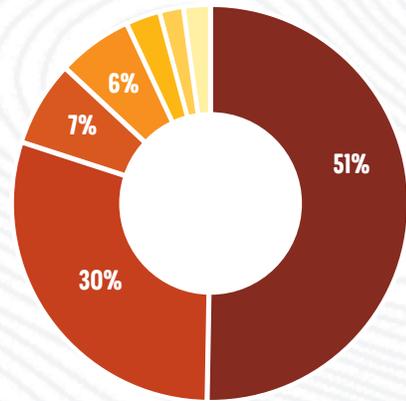
BY AGE

- Under 35 years
- 35-44 years
- 45-54 years
- 55 years and over



BY GENDER

- Male
- Female



BY ETHNICITY

- White / Caucasian
- Latino / Latina
- African American
- Multiracial
- Asian / Pacific Islander 3%
- Middle Eastern 2%
- Other 2%

Source: Combined self-reported participant survey data for Fresno and Stanislaus NLN networks as percentages of total.

A total of 106 leaders responded to the survey, 59 from Stanislaus and 47 from Fresno. Participants were allowed to select more than one category.

- Strong local leaders with solid track records and a proven ability to get things done
- Curious learners who sought to understand their region in a comprehensive way
- Hubs of existing networks who had strong local relationships in their community
- Boundary crossers who welcomed the chance to collaborate across political, cultural, economic, and other differences
- Ethical individuals who held high standards and prioritized commitment to positive impact

Given that the facilitation team came from outside the community, it was initially challenging for us to understand local political and social dynamics—e.g., the way power flowed, who the “usual suspects” were, and who was striving to do things differently. We learned that it helps to have a guide in this early stage—a community foundation or other anchor institution that can serve as a backbone and help the program team navigate the local landscape. In both places, our early-stage recruitment was a combination of open call, word of mouth, and modest marketing, all designed to encourage diverse leaders to apply.

Not surprisingly, identifying mainstream leaders was easier than identifying leaders who were emerging or on the periphery of existing power structures—in other words, the “usual suspects” showed up first. Our team made multiple trips to Fresno and Stanislaus during each recruitment phase, talking to people, following leads, and using that information to create an informal network map by sector and connection. Once the interviews began, the process became easier. We asked each interviewee to name additional leaders who could benefit from and contribute to the NLN, and other people they saw leading innovation locally. Later-stage recruitment was driven by the network itself. Participants in each cohort knew whose voices were missing, and their insights helped us target both power brokers and innovative leaders outside the mainstream. Each subsequent cohort pulled the network further into the periphery, where many emerging community leaders operate.

Our early-stage recruitment was a combination of open call, word of mouth, and modest marketing

The Interview as Disruptive Experience

Most of the time, if a leader made it to the interview, our facilitation team already believed that they had an important perspective to bring to the network. But before a candidate stepped into the room, we made sure they had filled out an application, submitted a resume, confirmed that they could attend all convenings, and received written material about the NLN, so

that they had a rough idea of what to expect from the experience. We kept the meetings short, emphasizing these were mutual interviews where both parties needed to make sure of the fit. We spent almost none of the time reviewing a candidate's resume. Our goal was to understand who these leaders were more fully, not just their day job, so our questions were more holistic. *Where are you from and why do you do the work that you do? What do you see as challenges and opportunities in this community? What is holding this community back? What is propelling it forward? What is your learning edge as a leader?*

We were looking for whether a candidate had curiosity about others and a desire to co-create a more positive future

More than anything, we were looking for whether a candidate had curiosity about others and a desire to co-create a more positive future for their community. We were also looking for evidence of vulnerability and humility—key indicators that this person would approach the cohort experience with an open mind and heart. For most, this interview approach created a disruptive experience, as leaders are rarely given the opportunity to tell their stories or to share their most personal perspectives. Their willingness to “go there” told us a tremendous amount about what they would bring to the network, as well as their openness to working in new ways.

It was also important for the interviewers—we always had at least two—to stay alert to their own biases, and to be mindful of what they were bringing into the room. How the interviewers showed up and how the NLN was explained in these conversations mattered. “People have to trust that what they're joining has meat on the bone,” says NLN member and Stanislaus Community Foundation CEO Marian Kaanon. Just as interviewers were looking for connection and fit, so too the leaders were assessing whether the program was a fit for them. “When I interviewed, I instantly loved their approach to leadership, how they showed up, and how vibrant they were as human beings,” says Amy Vickery, director of communications and legislative affairs for Stanislaus County and an NLN member. “I thought: I want to spend more time with these people.”

Selecting a Diverse Group

At the end of each interview, we made it clear that we weren't choosing applicants based on individual merit alone—we were considering a wide range of factors (age, gender, ethnicity, sector, etc.) in making our selection. This meant that even the most curious, humble, and fantastic candidate might not be selected because of our commitment to creating a fully representative network. This declaration was another moment of disruption—not many leaders are told that acceptance is not just about their qualifications, but about what the community needs. As a result, we sometimes had to manage rejection. For example, after learning they were not accepted, a candidate

told their friends in the network that they were a victim of reverse racism. Contrast this experience to another applicant who told us, “I applaud you for looking to recruit a diverse cohort, and if I don’t get in it will be because someone else’s voice is more needed.”

When choosing candidates for a new cohort, we kept both the composition of the overall community and the overall network in mind. If one cohort included several people from one sector or field, then we looked to balance that out in subsequent cohorts. We also checked references at times to clarify whether what we experienced in the interviews was validated by others. Additionally, we learned from experience to be cautious about putting two leaders from the same organization in the same cohort, which could impede their ability to show up fully and vulnerably. We were also mindful that a leader’s positional power in the community could inhibit their participation as well. Often but not always, those who are too comfortable with positional power, or in elected office, don’t have the mindset, desire, or freedom to explore different ways of working or to share deeply vulnerable experiences.

Even though we had local help with recruiting, we insisted that our facilitation team do all the interviews and assume the role of “bad guy” in making final selections. This protected the neutrality of the backbone organization or local network weaver—and protected the team from being overly influenced by those with personal relationships in the community. In the end, the process wasn’t perfect—we accepted several candidates who proved a poor fit, and, undoubtedly, we turned away a few leaders who could have benefited and brought a lot to the NLN. But this process helped ensure that the vast majority of the leaders we did accept brought tremendous energy—and their full selves—into the network.

FACILITATION TEAM

The second most critical “people” component was having the right facilitation team to lead the experience. Moving leaders through a highly experiential network-building process is not something that just anyone can do well; it is nuanced work—particularly when you are asking leaders to stretch themselves emotionally and intellectually beyond their comfort zones. As a result, we wanted members of our team to have deep experience in coaching teams, managing interpersonal and group dynamics, and facilitating experiential learning. Ultimately, leading an NLN-like program is more art than science, hinging on the team’s ability to hold the group so that they feel safe to speak frankly, get curious, and explore their own perspectives out loud. Emotional intelligence, an intuition about human experience, and a capacity to sit with people in empathy were critical characteristics for each facilitator.

In fact, the NLN facilitators implemented the program, but they did not stand above it. The facilitation team needed to embody all of the characteristics we were asking the group to embrace—the openness, the inquiry,

the humility, the willingness to “step in it” to get to the truth. All of the hard conversations that we would help participants have, we needed to have as well. In many ways, the facilitation team came to represent a living example of what it means to lead differently and in relationship—the very thing that the program was designed to inspire. “We are co-learning with them,” says NLN facilitator Johnny Manzon-Santos. “We are in the process with them.”

Relatedly, we came to believe that the facilitation team should also mirror the diversity of the network. All three members of our initial Fresno team were white—so in Stanislaus we assembled a larger team of five that was more representative and could bring authentic conversations about power, equity, and race into the NLN. However, diversifying the team proved more complicated than anticipated, because many facilitators of color didn’t want to join an initially all-white team. This created a dilemma: Our intentions were good, but not paying more attention to equity and inclusion at the outset inhibited our ability to diversify the team later. So we reached out to our networks and addressed our own team dynamics, hiring an equity coach, Yeshi Neumann, who is skilled in working with white people around their issues of privilege and discomfort with race. Ultimately, we found two talented facilitator-coaches willing to join us: Belma González and Johnny Manzon-Santos.

Adding Belma and Johnny helped us create a team better positioned to both lead the complex NLN work and model what diverse leadership looks like. “When there’s an all-white team in front of a room, there are blind spots that could potentially be reinforced,” says Johnny. Diversifying the facilitation team also helped us deepen the equity work in the group by having hard conversations about race and power with the NLN leaders. “We’re supporting a diverse group,” explains Belma. “There’s a mirroring happening, and I think our ability to support their diversity is reliant on us being diverse ourselves.” We came to understand that building a diverse team was only the beginning, not the end, of our journey around equity.

Finally, we learned that our facilitation team needed the ability to adapt, pause, or pivot when the moment required it. What would happen when a new group of leaders came together was a mystery—we couldn’t predict how participants would show up, what group dynamics would appear, or what tough conversations would need to be had. This meant the team had to be intentional about where to lead a group, while also remaining open to constant learning and refinement. “Our team spent a lot of time talking about the moments that we missed or messed up and role-playing what we would have liked to have said in the moment,” says NLN facilitator Mark Nicolson.

BACKBONE ORGANIZATION AND FUNDER

Lastly, in addition to the NLN leaders and facilitation team, both the foundation funder and the backbone organization played critical supporting roles in creating a solid human container for the work. The James Irvine Foundation

helped develop the NLN in response to local needs and served as the sole funder of both NLN networks. And the Stanislaus Community Foundation became a true partner in the replication site, playing a critical role in launching and nurturing that network.

From the outset, the Irvine Foundation had limited direct interaction with the NLN program. The foundation provided funding for implementation, supported the facilitation team in doing the work, and tracked the results of the grant; the program officers also visited the site several times to meet with local NLN leaders. As the network developed, the Irvine Foundation's board understood that this grant couldn't be measured with more traditional program metrics. Instead, they reviewed NLN network maps, learned about the many collaborative projects developed by NLN leaders, and received additional survey data that illustrated growing connectivity across silos.

After two years in Fresno, the Irvine Foundation supported funding another site, in Stanislaus County. When that grant was approved in 2016, however, the foundation was undergoing significant changes, with a new CEO at the helm, and a new strategy focused on increasing political and economic access for the people of California. The priority given to the San Joaquin Valley remained, but the foundation's investment strategy shifted, and the decision was made to discontinue expansion of the NLN beyond Stanislaus. NLN participants still consider the Irvine Foundation a valuable partner for its deep investment in collective infrastructure that they would have been unable to afford otherwise. However, the change has also reinforced that external funding can be temporary, and local leaders now need to sustain the NLN's momentum.

As for the role of the backbone, when the NLN launched in Fresno, there was no single community institution that could have served as an ideal neutral partner. Instead, we relied on our relationships with local leaders identified by the Irvine Foundation—and later, NLN Fresno's network weaver, Caty Perez—to ground us in the local context. The downside was that we didn't have the benefit of a trusted entity guiding program design, and there was no local backbone in which to embed the network after the formal program ended. This had important implications, which we explore more in Chapter 8.

When we decided to replicate the NLN in Stanislaus, one reason for picking that location was the presence of an anchor institution—the Stanislaus Community Foundation (SCF)—that could serve as a partner at every stage of the NLN's development. We were fortunate to work with SCF's CEO, Marian Kaanon, who embodied “systems leadership” and became a critical collaborator with the NLN. In fact, we structured the replication grant so that SCF would receive funding to help manage program logistics, run a micro-grant innovation fund for the NLN, and host the network weaver. “It really helped that the foundation was championing this from the outset,” says Marian. “Because it was viewed as a program coming through the Community Foundation, it helped the NLN gain traction much more quickly.”

LESSONS LEARNED

Take a holistic view of applicants. In selecting participants, we often value an applicant's lived experience more than where they work or went to school. In other words, a leader's role in the community counts as much as a resume. We accept many early-stage or grassroots leaders because their lived experience is core to the network's conversation. We also want to attract candidates who are fully embedded in the community and close to the work that the network would tackle.

Cultivate a diverse network. An important part of the success of the NLN is the deliberate diversity we cultivate in each cohort, and across the entire network. We think of diversity across many dimensions: positional power versus grassroots; ethnic and gender diversity; different sector and issue backgrounds; etc. We believe this diversity is critical both for healing local communities and for creating the right inputs and environment for real innovation to occur.

Build a diverse team. One of the best attributes of the NLN Stanislaus facilitation team has been the diversity of perspectives they bring to the work—not just in terms of race and ethnicity, but in terms of lived experience, career backgrounds, and particular skills and aptitudes. Ideally, the facilitation team for this sort of program should reflect the types of diversities that might show up in the room.

Walk the talk. It's critical that the facilitators function as a harmonious unit, and that they work on their own dynamics in parallel to helping the group work through theirs. The facilitators don't have to be perfect, but they do need to do their own work—and practice what they are preaching to the group. If the facilitators say one thing but do another, the group will quickly sense hypocrisy; this can inhibit the safety and trust of the cohort experience.



CENTERING EQUITY
IS CRITICAL FOR
HEALING LOCAL
COMMUNITIES

1
NEED

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CONTEXT

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DESIGN

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PEOPLE

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CONVENING 2

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CONVENING 3

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EMBED

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C
CONCLUSION

A
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LEADING SYSTEMS CHANGE
A WORKBOOK FOR COMMUNITY PRACTITIONERS AND FUNDERS

CHAPTER 5

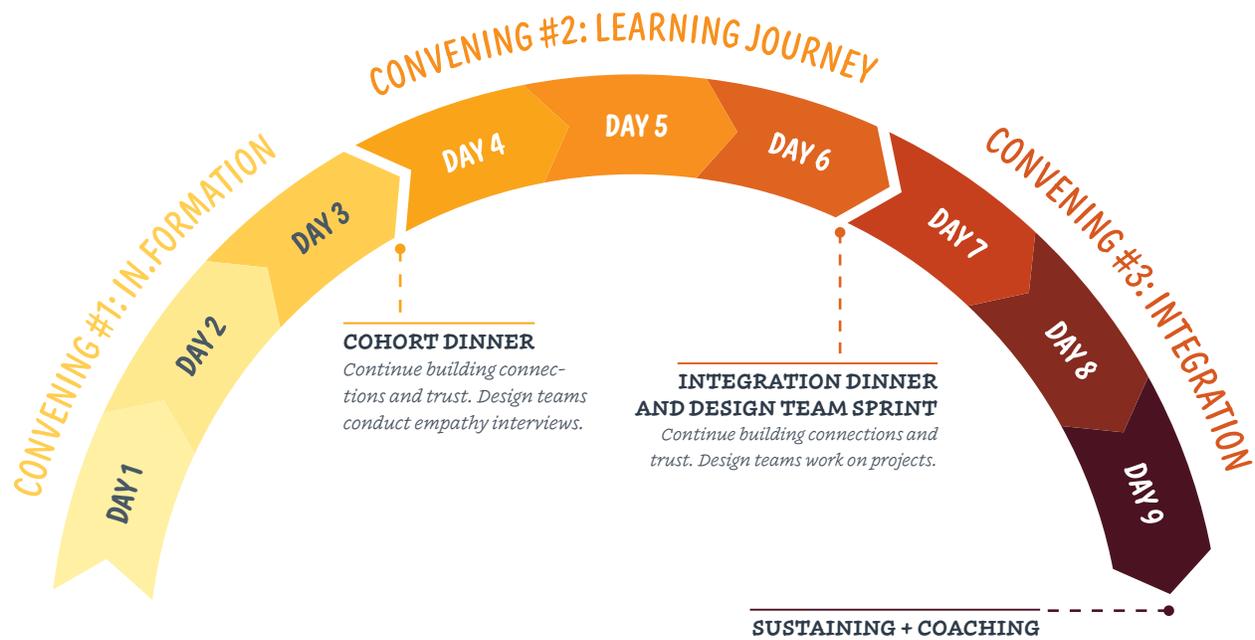
CONVENING 1: INFORMATION

NLN ARC OF LEARNING



The Arc of Learning represents a high-level visual overview of the content, curriculum, and design used for all three NLN convenings. In this diagram, we illustrate what happens at each convening, and each day, “at a glance.” Chapters 5, 6 and 7 provide a more detailed narrative description of what happens each day, and the impact on participants. More detailed descriptions of the specific activities, and facilitation instructions, are available in the back of the workbook and on the book website.

FIGURE 5.1: THE ARC OF LEARNING

**CONVENING #1** ▼**DAY 1** CREATING THE CONTAINER

Orient participants, build connections, and establish trust in the group.

- Rituals of Connection: Whose shoulders are you standing on?
- Personal Introductions
- Community Agreements
- Program Orientation

DAY 2 STORIES TO SYSTEMS

Use participant stories to map and understand larger community systems.

- Passion Talks (Part One)
- Systems Mapping (Part Two)
- *Design Thinking: Gift Giving
- *Design Project Scoping

DAY 3 SYSTEMS TO STORIES

Help participants identify which challenges to address, form design teams, and set personal leadership intentions.

- *Empathy Field Guide
- Gatekeeping
- Moments of Movement: KELP

CONVENING #2 ▼**DAY 4** WE ARE NOT ALONE

Expose participants to new ideas by meeting leaders in other communities. Reconnect and recommit to intentions.

- Site Visits in Host Community
- Exchange with Local Leaders
- Leader's Stand

DAY 5 DESIGN DAY

Teach human centered design as an approach to tackling systems challenges.

- *Design Project Synthesis
- *Improv Exercise: Yes/And
- *Prototyping Dashboard

DAY 6 BRAVERY DAY

Explore equity, power and privilege in the cohort and the larger community.

- Leadership Feedback
- Equity Fishbowl
- Diversity Circles

CONVENING #3 ▼**DAY 7** RE-DESIGN DAY

Capture learning from the prototypes, and help teams determine future action. Examine team dynamics.

- *Design Project Testing
- *Design Team Feedback Grid

DAY 8 INTEGRATION

Help participants integrate their learning and invite others to support their vision.

- Personal Network Mapping
- Peer Consult
- Empowering Questions

DAY 9 IT'S OVER / NOT OVER

Design the network's future and retell the story of each participants' journey.

- Design the NLN Future
- Rituals of Connection: What is my NLN story?

*Offered for use under creative commons license from the Stanford d.school

I,

WE,

IT.

The goal of the first NLN convening was to build a strong and trusting “human container” for the work ahead. We wanted these leaders to quickly form deep relationships, breaking down the walls between them and deepening their perspectives on themselves and their work. So from the opening minute, we designed this convening to be intentionally disarming—to lift these leaders out of more traditional ways of working and help them gain new perspective on themselves (“I”), on one another (“We”), and on their shared community (“It”).

The physical setting went a long way toward creating the right conditions for this exploration and growth—we wanted each cohort to be in a bubble, with little outside disruption. To achieve this, each Fresno cohort spent the weekend in two shared homes in the Sierra Nevada mountains, while the Stanislaus County groups retreated to a small resort in the foothills—both remote, rustic settings that were not too close to home or office. For many leaders, this first weekend was one of the most transformational parts of the NLN experience. As NLN network weaver Kate Trompetter says: “I’m not sure I’ve ever had a more fulfilling experience, certainly in any leadership program, but in any sort of convening.”

DAY 1

CREATING THE CONTAINER

At many retreats, differences are stifled in service of building goodwill and consensus. But our goal was the opposite—to bring people’s differences to the surface and make the group’s diversity of perspectives visible. During a cohort’s first day together, we rolled out a series

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**ACTIVITY:
RITUALS OF CONNECTION:
WHOSE SHOULDERS ARE YOU
STANDING ON?**

This ritual of arrival helps participants surface something important from their lives, take risks, and become more vulnerable. (page 122)

of exercises designed to quickly get to the core of who was in the room. Our opening ritual, which we dubbed “Whose shoulders are you standing on?” was a case in point. We asked participants to head outside and bring back an object that said something about who had most shaped their development as an individual. Then they each presented their object to the group, explained what it represented, and placed it on a tray in the center of the room.

Time after time, even participants who came in with their “game face” on ended up going deep because the nature of the exercise compelled it. One leader found chains that had fallen off a gate, and put them down, saying, “I’m the great-grandson of slaves.” Another dropped a piece of trash on the tray, because “People think the place I come from is trash.” The ritual invited participants to show a part of themselves they normally didn’t reveal. Over half an hour, this homemade altar became the group’s first act of co-creation, grounding them in the power of story, invoking ancestors and

cultural heritage, and serving as a reminder of the humanity in the group. “You realized quickly that this whole experience would be about truth-telling,” recalls NLN member and Stanislaus Community Foundation CEO Marian Kaanon. “It was about moving beyond the boundaries of comfort, and what should be said, and into hard territory right away.”

Not all of the first day was so intense. After the opening ritual, we presented a high-level set of slides that walked participants through the rest of what was to come in the program. Shifting to the safety of frameworks came as a relief to those who felt uncomfortable going so deep so fast. We did similar toggling between intense vulnerability and more left-brained activities at each convening. “You’re playing at your edge, then come back to your place of comfort—it was that kind of scaffolding,” explains NLN facilitator Mark Nicolson. To ensure that participants felt okay being vulnerable, we also introduced community agreements that made it explicit that we were creating both a safe and a brave space.

These agreements set the right tone for the deep introductions that came next. In advance of the convening, we asked each

leader to prepare a three-minute speech, to share more about who they were, what really mattered to them, and why they do what they do. During this exercise, each participant

**ACTIVITY:
PERSONAL INTRODUCTIONS**

These introductions help leaders share deeply personal stories, give feedback, open up, and accelerate trust in the group. (page 114)

A



DAY 1

CREATING THE CONTAINER *(continued)*

(and each facilitator) was given time to tell their story—and, once again, they rarely shied away from telling the truth. One leader talked about migrating from Mexico with his mother and siblings, then living in a low-income community where priests convicted of sexual abuse were sent, because the assumption was poor people wouldn't challenge the church. This experience compelled him to become an advocate for social justice and equity. Another young lawyer talked about growing up poor, in a place with no sidewalks and pit bulls on every corner—which compelled her to pursue law and become a community advocate. Many leaders hadn't initially intended to share so much, but hearing others' stories created momentum.

Even leaders who knew one another were surprised by what they learned. "It added depth to people that you thought you already knew," says NLN Stanislaus member Amy Vickery, director of communications and legislative affairs for Stanislaus County. "Even if you knew them, you didn't know them like you did after having the time and space to go deep." Many participants pointed to these talks as one of the most profound moments of their journey. "I was shocked at how quickly people were able to be authentically honest about the issues they face personally and professionally," says NLN Fresno network weaver Katy Perez. "We were really talking about some very serious, very personal, very private things quickly with complete strangers."

Following that exercise, we introduced "homerooms"—pre-assigned small "support groups" in which participants could process big topics in more intimate environments. We intentionally mixed up the composition of these groups—by race, gender, orientation, class, personality, and learning style—as a way to connect people

who might not otherwise interact. In this first homeroom, the leaders reflected on what they heard in the three-minute speeches. In subsequent convenings we used these smaller homerooms after a large group experience that warranted a more intimate debrief.

We ended the first day after dinner, with a light introduction to two recurring aspects of the convenings: movement and design thinking. For each cohort, and at each convening, we would occasionally integrate brief moments of movement—including stretching, yoga, or dance—to help participants stay connected to their bodies and hearts, not just their minds.

Some came to view these short pieces of movement as touchstones of their NLN experience. The second theme in the evening was design

thinking, which we introduced with a simple "gift giving" exercise to familiarize leaders with the concept of human-centered design, and how people's stories can inspire innovation. The leaders interviewed one another about their experience receiving a gift, and then used insights from these interviews to design a better gift-giving experience for one another. For many leaders, this was their first experience with prototyping, and with using empathy to drive creative solutions.

ACTIVITY: MOVEMENT

Using movement throughout the convenings gives participants a chance to get out of their heads and into their bodies. (page 130)



DAY 2

STORIES TO SYSTEMS

If the first day was about answering “Who am I as a leader?” and “Who are we as a group?” the second day was about beginning to understand the larger community, and local systems (“It”), more holistically. Leaders are often taught to remove themselves from people’s stories in order to become “objective” actors at the systems level. But we wanted them to see that change can happen only when we understand the impact of systems on real people. Additionally, a core skill of systems thinkers is the ability to see both the parts and the whole, and how they connect. The goal of this day, then, was to connect the often impersonal, analytical assessment of how systems work (or don’t) with the leaders’ own stories about these systems.

We did this bridging through what we called “passion talks.” Just as each participant had the opportunity to give a deeply personal introduction on the first day, we now gave them

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ACTIVITY:
STORIES TO SYSTEMS
PART 1 & 2

This activity helps connect personal stories and passions to complex community issues and systems. (page 116 & page 118)

the chance to offer their perspectives on community issues in short five- to seven-minute presentations.

We asked them

each to come prepared to answer the following questions about a local issue they cared deeply about: *What is the key issue facing our community that drives me? What are the obstacles and challenges to success? What does the future look like if we succeed? What do I need in order to achieve success?*

Having already experienced the three-minute introductions, partic-

ipants quickly “got real” about the local issues that they were working on. What emerged from the exercise was, in effect, a map of their community’s many issues and assets. “Homelessness, mental health, infrastructure, early childhood development, the land—they talked about parts of the community that were being neglected by existing infrastructure,” explains NLN facilitator Johnny Manzon-Santos. Inevitably, there was incredulity in the group at some of the barriers and gaps these talks revealed. In one cohort, a police officer who saw abused children in crisis described the lack of connection between these kids and social services. In another, a librarian who helped Spanish-speaking migrant families teach their children to read talked about how little support she received from the local library system.

For leaders, seeing their own community—their own systems—in this way was revelatory, especially for leaders who had been working their whole life in sector or issue silos, or for those who came from more privileged backgrounds. “It is a wake-up for people to realize that nobody sees the whole system, and that the system actually serves the people who have the power,” says Mark. Seeing the whole system also allowed for the first intentional conversation about power dynamics, and challenges around race and equity in the community. Ultimately, the exercise helped participants to begin seeing systems thinking as a leadership practice that helps them switch elevations on the problems they hope to solve.

Each brief talk was captured by one of the facilitators in real time, with highlights drawn onto a big piece of



DAY 2

STORIES TO SYSTEMS *(continued)*

flip-chart paper and then placed on a wall. This “story wall” became source material for what we needed the leaders to do next—namely, to begin creating an informal map of the community’s different and overlapping systems built from the stories these leaders had told. We then invited them into a round of collective “sense-making” and asked them to look at the issues mapped on the wall more holistically.

What common patterns or themes emerged from these stories? How did issues of power and equity impact what they were seeing? What did they see on that wall that they had never considered? We wanted these leaders to see how many of these issues were connected and “intersectional,” and to begin seeing opportunities to intervene in new ways.

DAY 3

SYSTEMS TO STORIES

Armed with a new level of understanding about local systems, their intersections, and their human impact, these leaders could now begin to contemplate how to act on these systems with their newly formed tribe of fellow travelers. We used two frameworks to guide these leaders through a process of collaborating on these complex issues: human-centered design—which provides a structured process for group collaboration—and coaching, which uses inquiry to understand behavior.

DESIGN THINKING

Having introduced human-centered design the first evening through the gift-giving exercise, we provided a more robust training on the topic this second day. Design thinking is a structured process for innovation that has become popular over the last decade through business authors and organizations like the d.school at Stanford

and the design firm IDEO. By connecting design thinking with systems thinking, we gave the leaders a way to use empathy and storytelling as creative forces that are just as powerful as more analytical approaches to creating change.

Next, we used themes that surfaced in the passion talks and the story wall to help these leaders form topical design teams. They would use these small groups over the course of the NLN program to explore, brainstorm, and test new solutions to local problems. In helping the design teams form, we made sure that the topics didn’t land too closely to any one person’s day job—it

ONLINE RESOURCE: DESIGN THINKING

We use various open-source design-thinking exercises from the Stanford d.school throughout the NLN. newleadershipnetwork.org/tools/



DAY 3

SYSTEMS TO STORIES *(continued)*

was important to bring outside perspectives to a problem—and that they reflected what was emerging from the group. We also helped balance the emerging teams in terms of number and diversity of members and made it explicit that the ultimate outcomes were less important than learning the process of design.

Each design team was then given time to develop a point of view on their issue and develop a set of “*How might we...?*” questions that could lead them to a line of inquiry and innovation. They also started to identify who in their community (“end users”) could help them answer these questions via end-user empathy interviews. Just as leaders in the cohort used their own stories to map larger systems, they would now gather stories out in the community that could help answer their design questions—centering their inquiry on people, not problems.

COACHING AND LEADERSHIP

Once leaders had their design teams and an issue to explore, we then introduced a coaching framework that complements design thinking by talking about empowering questions as an interview framework. How could these leaders tap into the wisdom of local experience, letting go of what they thought they knew in

order to learn from others? Leaders are so often expected to “know it all”—but here, we wanted them to open themselves

up: to use their intuition, practice empathy, and get curious about the stories of the people they would soon interview. The goal was for them to have the

opportunity to design ways to act on community systems differently using empathy and stories as a starting point.

Throughout all three convenings, we tried to integrate coaching as an approach to leadership that aligned with what we were asking these leaders to do at the “I,” “We,” and “It” levels. At the “I” level, we focused on how coaching can help leaders understand how they “show up,” and are perceived by others. As Johnny says, “Coaching is about asking: *What is their presence like? What values are they embodying wherever they are, whether at home, in a boardroom, or at a community meeting?* Coaching can help someone get more in touch with what’s important to them, so that they’re showing up as intentionally as possible.”

Coaching also became a tool for helping the group think about its own dynamics as a network. Using the same principles, the group reflected on how they were evolving as a “We.” *How are you showing up with this network of leaders that you are engaged with? What impact do you want to have as a group? What’s possible for this network? And what’s getting in our way?* Lastly, we also explored what a coaching framework can bring to the systems level of creating change, with leaders learning to use inquiry and reflection as key tools for understanding what was going on in their community—naming what’s present, including the equity and inequity, and understanding their role in either perpetuating or shifting it.

In teaching coaching as a critical leadership competency, the facilitators had to employ coaching techniques themselves, and model this way of being for the group. “All four of us are coach-like at the front of the room,” says Johnny. “We remain



ONLINE RESOURCE: COACHING

We use various open-source coaching activities from other programs throughout the NLN. newleadershipnetwork.org/tools/



DAY 3

SYSTEMS TO STORIES *(continued)*

curious, and we're paying attention to who's speaking and who's not. Part of what coaching means is seeing these leaders as creative, resourceful, whole, and connected. How we see them has an impact on the risks they take and how they can lean into each other in this vulnerable time."

We ended the first convening by returning full circle to the "I," or individual leadership journey, with a coaching exercise designed to help leaders overcome their inner critic at a pivotal time, when they are on the verge of learning and leading differently. We also gave them time to journal in order to capture what they'd learned about their own leadership and express an intent for their own learning going forward. And we foreshadowed what would come next, to ensure that the leaders still felt the container during the months before the next convening.

Leaders often left this first convening marveling that they didn't always know one another's job titles or other trivial "facts."

Instead they knew what motivated one another

to do the work they do, what they cared most deeply about, and often, what stood in the way of them reaching their

did a deep dive very quickly, which was part of what bonded us all. There was a sense that something was being created that had not existed before—that we were on the frontier of a new kind of working together."

A

**ACTIVITY:
GATEKEEPING**

This activity helps participants examine their inner critic, or "gatekeeper," and work on what is inhibiting their stepping into greater leadership. (page 120)

full potential. "When I left that first session, I cried on the way home," says one participant. "I was like, 'I need to do more for my community; these people are amazing.'" Most of the time, leaders left feeling tightly bonded, and no longer alone in their efforts to change their community. Says Katy Perez: "The first retreat was very emotional and very raw. There were real conversations, tears, and laughter. We just really



LESSONS LEARNED

Make attendance mandatory. This program is highly experiential, and as such, depends as much on who is in the room as anything else—it's not a conference where people can dip in and out, or sit at the back of the room checking email. In fact, we require that all NLN leaders sign a commitment form up front, saying they will be present at every day of every convening. The only exceptions we make are in cases of extreme illness or family emergency. And even then, if it happens on the first weekend, we'll move that leader into the next cohort.

Invite vulnerability. Having leaders exhibit serious emotions, vulnerability, or bravery early on in the experience—typically with the stories on the first day—tends to open the floodgates of intimacy for the rest of the cohort experience. You can't plan for it, but you can invite a group into feeling safe or brave enough to really answer questions honestly without fear of retribution or judgment. It also helps to have the facilitators participate in a few of the exercises, such as the personal introductions, and model vulnerability and trust for the group.

Manage the group's energy. The cohort convenings are intense and packed full of experiential exercises that push participants intellectually and emotionally. For example, the second day of each convening is often exhausting. It is important to give real breaks with time to go outside throughout the day, and keep the group fed and caffeinated. We often leave the evenings free to give participants time to recover, reenergize, and simply be together over a meal.



COMMUNITY AGREEMENTS

These agreements are kept visible in the room, revisited throughout the convenings, and adapted over time as the group's context shifts. One cohort settled on this list of agreements, which are fairly representative of what most groups come up with:

- Be and stay curious about one another.
- Honor confidentiality. What's said here stays here; what's learned here leaves here.
- Experiment with your normal behaviors. Consider moving up your listening or moving up your sharing.
- Assume best intentions. Be aware of impact.
- Disagreements are part of relationships; stay in relationship even if you don't agree.
- Be present. Leave distractions outside the room. Step out to take care of something.
- Expect non-closure.
- Create a safe AND brave space.



CREATE

A SAFE

AND BRAVE

SPACE

1
NEED

2
CONTEXT

3
DESIGN

4
PEOPLE

5
CONVENING 1

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CONVENING 3

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CHAPTER 6

CONVENING 2: THE LEARNING JOURNEY

I,

WE,

IT.

The second convening offered a different kind of disruptive experience—a three-day learning journey designed to get leaders out of their familiar contexts and expose them to innovative tools and ideas that they could adapt to their work, while continuing to deepen their relationships with one another. Placing this “away” experience in the middle of the learning arc enabled leaders to step outside their usual mental models and ways of approaching issues, and to begin applying new perspectives to the challenges in their own communities. “If the first session was a deeply personal moment, the second session allowed for practical, very strategic conversations,” reflects NLN Stanislaus member Ruben Imperial, from the county’s Chief Executive Office.

We designed different learning journeys for each NLN network, so that they aligned closely to the issues that each group was facing. Two of the four NLN Fresno cohorts, for example, traveled to Portland, Oregon, on a trip focused on downtown revitalization and urban planning—an important issue in Fresno. NLN leaders met with the city’s former mayor and its director of planning, as well as an assortment of Portland business owners, urban designers, and residents—all leaders who could speak to the challenge of place-making. Visiting a city that 30 years ago faced problems similar to Fresno gave participants new perspective on how a community can intentionally shift from good to great, while also illustrating how inequity can persist even in the face of progress. “I was troubled by how in planning for growth, you can forget to plan to help the underprivileged,” says NLN Fresno member Terance Frazier, owner of a real estate investment firm.

Most other cohorts from Fresno and Stanislaus traveled to the San Francisco Bay Area, which enabled different thematic learning focused on social innovation and design thinking. To learn more about the application of human-centered design to systems change, the cohorts spent a half-day on the Stanford University campus. “I thought the learning journey was really the meat of the experience,” says NLN Stanislaus member Amy Vickery, director of communications and legislative affairs for Stanislaus County. “What we learned about systems transformation was eye-opening, and it got a lot of creative juices flowing.”

DAY 4

WE ARE NOT ALONE

While each cohort embarked on a customized journey, the general arc of the convening was the same—it started with an opportunity for leaders to reestablish their own connections, and then involved bringing in outside speakers to share new perspectives with the group. Hence the title of this day: We wanted NLN members to realize that whatever they were struggling with, other leaders in other communities faced similar challenges—literally, they were not alone. Some NLN leaders were anxious about how this convening would be different from the intimate intensity of the first. Indeed, there were times when external speakers triggered frustration because of a temporary return to “business as usual” in a space intended for truth-telling. So we began the day by giving NLN leaders space to reconnect deeply with one another first, before bringing others in.

Next, most cohorts visited the Stanford d.school—an experience NLN leaders consistently cited as a highlight. “We were in an environment so rich with knowledge and information,” says Ruben Imperial. “How often are you going to be able to go to Stanford and learn from people who have been doing work like this?” The visit started with a tour of the d.school space and its classrooms, which helped demonstrate how human-centered design *physically* invites a different approach to work, such as having furniture on wheels so that it can be easily reconfigured, and having movable whiteboards and walls for brainstorming. Then Thomas Both, who runs a d.school program called Designing Social Systems, walked the leaders through examples of design projects and

described how teams from all over the world come together to work there. This gave the leaders real-life models of the type of work they would soon do in their own design teams.

We often ended that first day with an opportunity for leaders to participate in an exchange with other changemakers in the local learning journey community. In Portland, this involved dinner with a number of civic leaders hosted by a prominent community business owner at her penthouse apartment in the trendy Pearl District. During NLN Stanislaus, the cohorts ended this day with a dinner at a local food incubator in San Mateo, called KitchenTown, with both Bay Area food innovators and local Stanislaus experts talking about the possibilities for bringing entrepreneurship to the agricultural economy in the San Joaquin Valley. As intended, the evening helped create a bridge between the two valleys—addressing any “less than” feelings that might have been sparked by being at Stanford, and elevating Stanislaus as a hub for innovation in its own right.



DAY 5

DESIGN DAY



**ONLINE RESOURCE:
DESIGN THINKING**

We use various open-source design-thinking exercises from the Stanford d.school throughout the NLN. newleadershipnetwork.org/tools/

The leaders experienced a different kind of journey on the second day, as they became more immersed in the design

curriculum, building on concepts introduced at the first convening. While the main goal of the day was to help leaders work on their design projects, there was a second goal as well—to intentionally stress-test the cohort “container” built during the first convening. Leaders typically left the first retreat feeling closely connected to their fellow NLN members; some even called it a “falling in love” experience. Now we wanted them to grow by having uncomfortable conversations, dealing with conflict, and beginning to do real work together.

The leaders started the day in their design teams, unpacking the empathy interviews they had conducted with community members between the first and second convening. Each team was joined by a design coach, who was either a member of the facilitation team or an NLN leader from a previous cohort, and who helped guide them through the experience. These sense-making sessions could be very poignant, as leaders wrestled out loud with a range of emotions that their empathy interviews evoked. Often these interviews provoked them to see issues in a completely new light, and to vicariously experience how people are impacted by local systems.

We then asked the design teams

to bring these new insights into their work. Specifically, we wanted to move leaders from a narrow focus on the individuals they interviewed to using that empathy as a creative force for beginning to change larger systems. Most often, we did this by introducing a series of improv-inspired games that lightened the mood, helped leaders flex their creative muscle, and demonstrated the mindsets necessary for brainstorming. Then, in this more creative frame of mind, the teams started ideating solutions to the challenges and opportunities unearthed in their interviews. To help with this task, we gave the teams design templates with a series of questions to work through that helped them move from observation, to insight, to creative ideas for solving problems. The design coaches worked hard to keep the leaders connected to actionable insights from their interviews, rather than leaping to more abstract analysis.

As a final step, each team was tasked with planning a prototype to be presented at the next convening, six weeks away. At the end of the day, leaders shared their initial prototypes with the other teams for feedback. “I felt like we walked away with some really cool tools and different perspectives on how to approach solving problems,” says Amy Vickery. “I got really excited about what we were learning; my brain was just on overdrive.”



DAY 6

BRAVERY DAY

On the third day, the leaders set aside their design team projects and came back together as a full cohort to tackle their own group dynamics. If design day mimicked an actual work environment, then bravery day was intended to help these leaders have hard conversations about their own leadership style, their team dynamics, and underlying issues that often don't get discussed out loud. On bravery day, it was time to get real about interpersonal experiences and impressions, no matter how uncomfortable—including how power and privilege were showing up in the cohort, in the community, and in participants' day-to-day work.

There was no set curriculum for this day—rather, we responded to the dynamics that emerged in the group and used our own form of facilitation improv to address what was coming up. But we learned that supporting leaders in naming tough issues while they were in the cohort “container” helped bolster their abilities—and their bravery—to address these issues in the community itself. Among the range of interactive activities we used, a few stand out; more detail on each of these can be found in the Activities section on page 113, or on the NLN website.

Individual feedback. In order to help NLN participants understand how they were showing up, and explore how this impacted their leadership (the “I”), we led a

structured exercise for them to give and receive feedback to one another. It is rare for leaders to have an opportunity to get real feedback, yet they can learn so much about themselves, even from those who have a limited experience interacting with them. During this exercise, we pushed participants to be candid about their observations of their peers—and to be open to receiving direct feedback as well.

Constellation. This exercise helped spark conversation about how the group saw itself (the “We”) while also demonstrating how social networks and systems function. Facilitators placed an object at the center of the room to represent the overall NLN network, and participants then physically arranged themselves in proximity to the center. We asked: *How central is the work of the NLN and these people to you? Where do you feel you are in relationship to others in the NLN network?* The exercise invited another layer of discussion about community dynamics, individual leadership stances, and the larger systems at work that either bring people closer together or pull them apart.

Diversity rounds. We often helped leaders enter the complicated equity conversation by naming the many identities we all carry into the spaces we inhabit—a relatively simple way to spark conversations about how we see ourselves and others, and how identity is socially constructed. For example, we asked them to sort themselves into smaller groups by socioeconomic class, and then discussed what it felt like to be a member of this group—what was positive, what was challenging, and so on. Then we changed

A

**ACTIVITY:
LEADERSHIP FEEDBACK**
This activity helps participants articulate what helps them succeed, and what holds them back. (page 126)

ing up, and explore how this impacted their leadership (the “I”), we led a



DAY 6

BRAVERY DAY *(continued)*

it up, asking them to sort themselves by other identities: gender, race/ethnicity, sexual orientation, age, sector, etc. We kept doing these rounds until we felt the group had been sorted into numerous smaller “identity” groups and had a visceral sense of how many multiple and often overlapping identities leaders carry.

Equity fishbowl. We ran an additional exercise that stood apart, because it featured the facilitation team, rather than participants. By

this time, the leaders had heard about what motivated each facilitator to do this work, but they were also curious about us as a

“We.” As it happened, our own story illustrated that even solid-looking teams must frequently renew their own trust, especially when facing new challenges. We told them about our initial rocky journey to becoming a more diverse, multiracial team. Cohort members were then invited into the “fishbowl”—or the center, with the facilitation team—to ask questions or share responses. Often this launched an important conversation about the racial dynamics in the larger group, using the facilitators’ experiences as a jumping-off point.

For participants, witnessing this conversation among the facilitation team never failed to elicit important conversations. Once, Belma González was triggered by the fact that she had never heard Adene Sacks describe that several consultants of color turned down a request to interview for a role on the team. She questioned if she had done the right thing by joining the

program’s leadership. Recently, the fishbowl conversation caused a white person in the cohort to question whether it was fair to impose a racial lens on relationships between people in the cohort. What started as an angry moment between this white leader and several other participants became an ongoing dialogue about white fragility and whiteness in the county.

It’s worth noting that these were risky moments for both the facilitation team and participants. But they have also resulted in very real conversations about how racial dynamics play out—and they laid the groundwork for greater honesty. “Most people don’t have that experience of taking that kind of risk and being loved and supported even in their anger,” says Belma. Adds facilitator Johnny Manzon-Santos: “We were so transparent, and that upped the vulnerability and the authenticity in the room. If we’re experiencing discomfort, then we’re really holding ourselves and each other accountable.”

After the learning journey convening, the leaders had a considerable design task ahead: to plan and execute on their design team project prototype. In between the second and third convenings, facilitators offered themselves up for coaching with leaders to help them integrate key learnings, and to the design teams for additional support. While there was more interaction and work required of the leaders between the learning journey and final convening, they were no longer alone.

A

ACTIVITY:

EQUITY FISHBOWL

This activity, grounded in our facilitation team’s own experience, helps participants begin to discuss issues of equity, power, and racism within local systems. (page 124)



LESSONS LEARNED

Start and end with connection. People need to get reconnected every time they come together, and they need to have a moment of connection before they depart. We honor that by starting every retreat and every day with a check-in. We leave more space for connection and personal development on the last day, after participants have had a chance to get comfortable with one another.

Cultivate diverse design teams. The facilitation team often pushes design team participants to work on problems that they know nothing about—and to experience the power of tackling a community challenge with no expertise or stake in the outcome. We also avoid having too many leaders from the same sector in the same design team. Having intentional diversity makes the groups much more creative and gives everyone the experience of working on a diverse team.

Emphasize process over product. We tell the leaders at the start of the design team experience that we don't care if they emerge with a prototype that has a future. We're as interested in having them learn design as a way of collaborating with diverse stakeholders as we are in creating a project that will live on. They should have as much pride about their experience as a team tackling something complex and ambiguous as they have about the actual prototype they create.



1
NEED

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CONTEXT

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DESIGN

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PEOPLE

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CONVENING 1

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CONVENING 2

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CHAPTER 7

CONVENING 3: INTEGRATION

I,

WE,

IT.

A few months after the learning journey, leaders gathered for their final convening. The goals of this session were to cement what had been learned, help leaders translate that into their everyday lives, and explore what lay ahead for the larger NLN network. Typically, leaders entered this convening feeling a sense of both accomplishment and new beginnings—of this group having created the space, tools, and relationships that would help them become the systems leaders they wanted to be. The final convening, then, was both the end of the intense cohort experience and the beginning of a larger network. “It’s where we start talking about how, now that we have this kind of family, what is the family going to do together?” says facilitator Belma González.

DAY 7

RE-DESIGN DAY

Leaders had again spent time between convenings working on their design team projects and testing their prototypes. On this final day of the design arc, it was time to synthesize what they had learned in their groups by discussing a number of questions: *Did their prototypes work or not? What else had leaders learned about the issues their prototypes addressed, as well as from the people they met? Had their design project run its course, or should it be pursued as part of the work of the larger network?* Sometimes a team's learning matched what it had thought it would learn—but not always. For example, one team focused its prototype on addressing reentry among incarcerated individuals. The team was initially convinced that probation officers did not fully understand these individuals' needs. But after a month of conversations, they learned that repeat offenses of a handful of probationers were impacting the ability of probation officers to have empathy for other formerly incarcerated individuals. That was a *different* problem, with a different prospective solution.

Next, each team began to consider the potential for future work on their topic. *What more would they need to know about their user population to keep working on this issue? What other prototypes or experiments might be interesting to run? Who else in the community might be interested in partnering with the team for future exploration?* Sometimes, a team concluded that its project had run its course; while others were intent on running the next-level experiment or sharing what they had learned with the larger community. One team in Stanislaus County, for example, decided to formally propose their idea for a pop-up co-working space for

local entrepreneurs to county leaders focused on business development. Two teams from different cohorts merged around the idea of creating a more positive public narrative about the city of Modesto.

At the end of the first day, the teams presented their work back to the cohort. We asked leaders to summarize their complete story—that of their users, their experiment, and their team's experience working together. Just as personal sharing in the first convening created momentum for truth-telling, these share-outs inspired the group to see the potential for future work together. "I wanted to be part of every one of the teams after hearing about what they'd done together," says NLN Stanislaus member Michelle Reimers, the assistant general manager of external affairs for the Turlock Irrigation District. "You could feel the eagerness of people wanting to collaborate with others, and to build on these pilot projects."

These sessions were also a way for the teams and the cohort to make sense of their projects—and to embed this approach in their work as leaders. Additionally, what got presented during these share-outs shed light on what the team learned about the process of design thinking, and the need to be adaptive. One team had planned to host an incubator for local farmers and technology leaders to expose high-school students to innovative agriculture jobs, but this idea proved too time-consuming and expensive. Instead, they held a dinner for local teens and agriculture leaders to talk about the future of ag-based jobs in the Valley, which accomplished many of the same goals with less effort.



DAY 8

INTEGRATION

One of the most common challenges in leadership development is figuring out how to help leaders integrate new learning back into their everyday lives. That's why we set aside most of the second and third days to explore this "translation challenge" on multiple levels: for individuals as leaders ("I"), for the group as part of a network ("We"), and for the larger systems in the community ("It").

This second day focused mostly on the "I." Leaders walked through exercises designed to help them articulate and refine their personal visions for their own future. *How did they see themselves as leaders in their community? Were they doing the work that would take them where they wanted to go? What would they need to achieve their vision for change?* We wanted participants to have another round of exploring what they wanted to create now. "Now they can do that dreaming from a more confident place, with a more complete sense of themselves, and with the support of this incredible network that believes in them," says facilitator Mark Nicolson. To ensure that leaders had opportunities to talk about the challenges they would face in pursuing their goals, we also offered them four individual coaching sessions, to take place after the final convening. These coaching sessions would serve as a bridge between the intimacy of the cohort and the realities of daily life.

Another kind of bridge was helping leaders see the "We" of their work in new light. Participants had been living and breathing the power of networks throughout their cohort experience. But with that experience coming to a close, we wanted them to think about the other networks

they were a part of—and whether these existing relationships aligned with their future work. Specifically, we walked them through a network-mapping exercise that helped them visualize their social networks and get feedback from others on how those relationships might need to shift given their new aspirations. *Who was missing from their network? Who holds the power? What was their network positioned to do?* At the end of the exercise, leaders reflected out loud on what needed to shift in their current networks to achieve their future visions.

We typically ended this intense second day with an opportunity for leaders to show a lighter side of themselves by hosting a "No-Talent Show," where they had to give a brief demonstration (song, dance, humorous skit, etc.) for the group. The emphasis here was not on actual talent—hence the name—but rather, creating space for these leaders to be vulnerable, self-deprecating, and playful with one another. It was almost a guarantee that someone who had been relatively quiet would shock the group with their performance. One leader did a dance number in which she slowly and suggestively untied a shoe. Another leader known for his stylish coif washed and styled his hair. Leaders also sang songs from their ancestors and performed traditional dances, highlighting the richness

ACTIVITY:
PERSONAL NETWORK MAPPING
This activity helps leaders assess their relationships and local networks and align them to what they are trying to achieve. (page 128)



of the group and their shared community.



DAY 9

IT'S OVER / NOT OVER

After all that these leaders had experienced, after all of their aha moments and insights, they were now equipped with new mindsets, tools, and approaches that would help propel them—individually and as part of a network—as systems leaders in their community. On this final day, we took them full circle through the story of how far they'd come and helped them prepare for the work that lay ahead. We wanted to see where the group had energy and ideas on how to carry the work forward. To help with this, we created a gallery walk in a room and posted key questions on the walls: *How might we support one another to continue to grow as leaders? How might we stay connected and continue to collaborate? How do we integrate with other cohorts? And how might we position the network to impact the community?*

After completing the gallery walk and posting ideas next to the questions, leaders were then asked to select a question to develop more fully, synthesizing what they saw into overall recommendations for the cohort. After group discussion, we then gave leaders the opportunity to commit to doing one thing to help propel the cohort forward. While some of their specific ideas would fade over time, what tended to stick was the sense that they got to decide—and create—their own future. “In that third session, we were starting to sense what this could be beyond these convenings,” says Ruben Imperial, an NLN Stanislaus member and deputy chief executive officer for Stanislaus County. “People started to understand what was possible through the network and how important that was.”

Finally, we helped participants

frame for themselves the impact of their NLN experience. This was, in effect, a closing ritual for the group—a way for them to think about who they were when they started the program, who they had become, and how far they had traveled. It also loosely mirrored the opening introductions. One by one, leaders were given the opportunity to share a few key moments from their NLN journey, while sitting in a chair in the center of the circle. This time they were also asked to invite two peers to sit beside them and offer additional comments: “AND what I ALSO saw you do is....” This gave cohort members an opportunity to share an observation about the speaker’s journey that they may not have thought of themselves. Participants continued until everyone had the opportunity to speak—and the results were powerful. “When everyone tells their story, they get to see the whole arc of the change,” says Mark Nicolson.

With the final convening day completed, leaders were now better prepared to shift their work from the cohort level to the network level; to experiment

back in their daily lives with their new tools, mindsets, and approaches; and to bring their new visions for themselves and their community to life. Says Ruben Imperial: “I left thinking about how we could further strengthen our relationships and the meaning that we started to make up there.”

A

ACTIVITY:

RITUALS OF CONNECTION: WHAT IS MY NLN STORY?

This closing ritual helps participants publicly retell their own personal journey through the NLN experience. (page 122)



LESSONS LEARNED

Center equity throughout. We have been emboldened over time to bring equity to the center of many different conversations in the group around why things are the way they are in a community. Again, we do not teach a “module” on equity frameworks, but rather integrate this lens into the work throughout, and try to model it in how our team functions together. While we do a deep dive on this topic during the learning journey, we also make sure to bring it up at every convening, including the last one.

Acknowledge that the end is here. While the invitation to continue working in design teams and participating in the larger network is all present at the last convening, we don’t want leaders to skip the fact that this cohort chapter is closing. We ask leaders to say what they need to say to the others while in this intimate space—and to not slow down on their learning.

Use design teams to knit the network. We’ve realized that the design teams offer a bridge to the other NLN cohorts and to the larger community. Many community leaders outside the network can be involved in the prototypes; other cohort leaders can lend their expertise as coaches and share learning from their own experience. The design teams offer an easy way to break down the “elite club” reputation of the network and create more porous boundaries between the network and larger community.





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CHAPTER 8

EMBEDDING AND SUSTAINING THE WORK



STAY

CONNECTED

AND

PRODUCTIVE

The previous chapters have been about *building* a local cross-sector leadership network—from recruiting the right members to managing their journey through an intensive set of activities designed to better equip them to drive systems change. But in so many ways, the more challenging aspect was what came next—sustaining the network. Once the NLN network was launched, we wanted members to continue to act, embedding their new ways of working in the community and maintaining their connections. But with the scaffolding of the convenings now gone, we needed a new set of structures, ones that were purposefully designed to help nurture self-reliance and spur ongoing collaborative work.

A number of networks skip this final step, offering little support beyond the initial program, and invariably they lose momentum. Even if they have a plan, networks can still run off-course during this “sustain” phase. While there is lots of literature on building networks, very little has been codified on what comes next. *How can the engagement that helps keep a network healthy be supported over time? How do you help members stay connected and productive?* As we worked to shepherd both NLNs into this transitional phase, we stumbled plenty. We also learned a lot, discovering a set of core elements that we believe help a network to become embedded and sustainable over time.

EMBEDDING IN THE COMMUNITY

In both communities, the Irvine Foundation provided two years of additional funding after the formal NLN program. While less expensive than the cohort-building portion, this phase was no less important. Because Fresno was the first NLN, we had no road map to follow, and we learned from our mistakes. At the time, we thought about network building and sustaining as sequential: first run the program and cross-weave the cohorts, then build the future container. In hindsight, waiting until the “end” to sustain NLN Fresno hampered its progress—which is why we took a different approach in Stanislaus, implementing these elements long before the formal program ended. In both communities, we eventually landed on a similar set of supports to sustain these networks over time, and we share some of them here.

Find a backbone organization. As noted earlier in this workbook, one of the biggest lessons we learned from Fresno was the need to have a strong backbone organization in place from the start. The lack of a backbone in Fresno made it much harder to sustain the network once the formal program ended. But in Stanislaus County, we partnered with the community foundation from the outset—and the difference this made is hard to overstate. Two of the foundation’s leaders and three board members went through the NLN program and helped guide the network at every stage of its growth. The foundation’s insight, support, and ownership of the network made the shift from building to sustaining far smoother than the experience in Fresno.

Nurture network governance. As the NLN Fresno cohorts came to a close, we established a steering committee, comprising elected representatives from each cohort, to help participants take more ownership over the network's future. This committee helped decide what to focus on in the sustain phase, and how to allocate the additional two years of funding. In Stanislaus, we put an advisory council in place much earlier, during the second cohort. While the advisory council in Stanislaus also comprised diverse leaders, its members were self-selecting, making participation a good gauge of which leaders had energy to help lead the network going forward. In both communities, this governing body helped the network contemplate its future aspirations for impact, cross-weave cohorts, communicate to the community, and advise on plans for sustaining it. Additionally, in Stanislaus, the advisory council helped oversee a micro-grant fund that was set up to support projects with potential for larger impact.

Hire a network weaver. In both Fresno and Stanislaus, we hired a network weaver early on—a member of the network paid as a consultant to engage members, help connect them to one another and to other community efforts, and actively supporting design teams and collaborations. But while NLN Fresno's weaver, Caty Perez, often found herself with the dual task of serving as both the weaver and backbone organization, NLN Stanislaus's weavers—first Reggie Rucker, then Kate Trompetter—worked closely with the community foundation. As a result, they had more bandwidth to think strategically about member participation and to assist with network engagement, without having to take on many other tasks.

Cross-weave the cohorts. Another lesson from Fresno was to start weaving the full network early on. Tight-knit cohorts do not become a tight-knit network unless the pathway from one to the other is supported while the network is still developing. In Fresno, we had previous cohorts join each new cohort for a day at their final convening. In Stanislaus we started the work of cross-weaving the cohorts and nurturing a whole-group identity right after the second cohort graduated. In both communities, we engaged the members of earlier cohorts, inviting them to select events or the learning journey, enlisting them as coaches to design teams, and hosting “integration dinners” after each cohort graduated. All of these efforts became opportunities to establish a shared, network-wide agenda as the NLN was still forming.

Host informal meet-ups. Both NLNs have been intentional about creating ongoing social opportunities that bring the network together and give members a chance to connect outside of structured convenings and after the formal program ends. During the final two years in Fresno, the network held bimonthly dinners, cocktails, and breakfasts for network members to develop closer relationships across cohorts. In Stanislaus, this phase of the network is only just beginning—but we expect to see a similar pattern of ongoing convening and connecting happening there. A subset of NLN Fresno members continues to connect and collaborate.

Support collaboration. The network collaborations and projects in Fresno were more organic, and we didn't have a lot of structure or any funding in place to support them. In Stanislaus, because we decided to emphasize design thinking from the outset, we set up an innovation fund at the community foundation to support work coming out of the design teams. As a result, NLN Stanislaus leaders had access to small grants that they could use to hire a consultant or coach, buy supplies, or pay for team activities. NLN Stanislaus focused energy on supporting the design teams in other ways as well. Several new projects emerged from ideas sparked during the cohort experience—such as an effort to try and establish a local incubator for food entrepreneurs—and these initiatives received paid coaching and staffing support.

Provide ongoing development. In Fresno, network members expressed an interest in having ongoing developmental opportunities over the final two years of the grant. They requested and were offered expert-led trainings on board governance, design thinking, strategic communications, and facilitative leadership, among other topics. The network also self-organized a two-day “capstone” event at which they reviewed everything they had learned and taught key modules from the NLN curriculum to one another, as a way to help codify and cement key frameworks. This event functioned a bit like a “train the trainers,” preparing NLN members to take what they had learned back into their own organizations and communities. In Stanislaus, the group held additional design workshops after their convenings to help NLN leaders begin applying human-centered design skills to larger community issues.

Facilitate peer learning. In Stanislaus, members have been less enthusiastic about bringing in outside trainers for ongoing professional development. Rather, they have chosen to create more peer consulting events, where NLN members come together at a leader's request to help think through a specific challenge. One such peer consult focused on a challenge related to a homeless initiative led by an NLN member, while another consultation focused on water rights in Stanislaus. Network members brainstormed and prototyped ideas for addressing both challenges, adding fresh perspectives for the leaders to carry forward in their work.

How can the engagement that helps keep a network healthy be supported over time?

LETTING GO

During the sustain phase in both networks, our facilitation team aspired to recede further into the background and allow the network to lead itself—which proved easier in theory than in practice. In Fresno, the NLN was not initially ready for this transition. In Stanislaus, this was easier because network leadership was embedded in the backbone and the advisory council from the start.

Today, NLN Fresno participants continue to do powerful work in their community—work that is deeply informed by the new leadership approaches they now possess, by their increased confidence in their ability to impact larger systems, and by the relationships they forged through the work. But the group’s energy for stoking the flames of the network has largely burned off, with the formal aspects of the program tailing away, leaving behind residual relationships and a number of continuing community projects. As of this workbook’s publication in 2019, there is no formal NLN structure, although many of the members continue to collaborate on work together, and the network of relationships endures.

What is the new invitation? What does it mean to be involved in the NLN over the long term?

Stanislaus, of course, is just beginning to transition from the formal program to the sustain phase. As a result, the NLN Stanislaus advisory council is actively stewarding conversations about what the network can and should become. As Ruben Imperial, who is on the council, says, “Asking leaders to come and connect in a retreat-style format with other leaders doing some of the best work in our community was the original invitation. But what is the *new* invitation? What does it mean to be involved in NLN over the long term? What are we inviting people to?” These are big but vital questions designed to get members clear on what they are willing to do to strengthen the network going forward.

As a starting point, the Stanislaus advisory council has begun articulating the network’s values (See NLN Stanislaus’s Values on page 91). “They are the principles that connect NLN members together, root us in our shared experience, create long-term sustainable change, and invite the community to come along,” says Kate Trompetter. The network is starting to define success on two levels: what they want to do, and what values they want to share and spread in their community. This has opened up a new way of thinking about network engagement; some members might be directly involved in the network’s work, while others might be more generally enrolled in its values.

NLN Stanislaus still faces its own set of challenges, with another year to go in its sustain phase. The Stanislaus Community Foundation is figuring out how the NLN nests within its larger programmatic work and what support it needs over the long term. The network will also need to decide whether it will stay a closed network or begin to integrate with other groups in the community that may help further its work. What is not contested, however, is that NLN Stanislaus is taking strong ownership of its work and impact—signaling not just a successful shift from learning toward action, but a likelihood that the network will continue to work toward systems change. “We want to make sure that this has longevity in our community and that we all keep prioritizing it and coming together to help each other,” says NLN Stanislaus member Amy Vickery. “We don’t want it to end.”

LESSONS LEARNED

Design with the end in mind. It almost goes without saying, but one of the most important lessons we learned is the need to design for network sustainability from the outset. In Fresno, we didn't really address how to embed and sustain the network until after the cohort experiences were done. In Stanislaus we started this process much earlier, with a dedicated community backbone, a network governing body, and more attention to embedding the work via design projects from the outset.

Allow design teams to morph. In Fresno, the cohort projects were less formal or structured and so they continued to evolve or dissolve organically. In Stanislaus, some of the design teams faded with time, some continued intact, and many merged or shifted focus, adding members from other cohorts and from outside of the network. We're continuing to track the evolution of these teams to see how they adapt over time.

Create many ways to engage. For a network to remain strong, it needs a variety of touch points for different members. Some NLN members are interested primarily in continuing to deepen their relationships with others in the network. Others look to the network for more structured personal and professional development opportunities. Still others want to leverage the network for work that they are already doing or have begun as part of a design team. The goal in both Fresno and Stanislaus has been to serve all these needs over the life of the grant.

Secure long-term funding. Ideally networks should secure a minimum of two years of support, after the formal program, to embed the work in the community. Luckily the Irvine Foundation provided this, though we now realize that once the money ends, it's hard to maintain the same level of network momentum; the work becomes more diffuse and organic, and less focused or intentional.

NLN FRESNO'S MANIFESTO



Participants in Fresno's first cohort attended a learning journey in Portland, Oregon, where they were interviewed by a branding consultant over dinner, who took their direct words and created the following "manifesto." This informal charter was passed from cohort to cohort and became a rallying cry for Fresno's NLN leaders focused on improving their community.

Grow here.

This is a place to start a new life. To stand up. Why? Because life is hard. But family makes you strong, and it's the strength of our families that lets us turn hardpan into bounty. Here it's about empathy, and humility. Everyone here is tested. Some make it—some don't.

We work the line, and dare to dream, and we're crazy enough to think we can build a better place. And we don't like quitters. Have you ever loved a loser? That's what we've been called. But if being a loser means that our kids go hungry so that we can feed yours, then sure, call us losers. Because that's exactly what happens here.

Diversity? Are you kidding me? That's a buzzword for someplace else. Here, it's just life. This is a place to make your own path, and you have no idea how big this place can be if you play your cards right. This may be a big place, but it's our ground zero. We don't produce food. We produce life. We can't be proud of a system that keeps people in poverty. And change is going to cost money.

Even heard of a pluot or an aprium? We didn't think so. We invent—we don't just work. "Don't work in the fields like we had to," our parents said. "You can be more." And we are. But here's a simple fact of life: Mom retired making \$270 a month. We carry that burden. We're not afraid—and now we're looking ahead.

As they say, it's harder to realize the opportunity than realize the problem. And here's the problem: The nation gets off cheap because of us. And here's the opportunity: The nation depends on the quality of our roots. We grow your family; our roots nourish yours. We challenge you to stand up with us, because you can't live without us.

Welcome to our community garden. It happens to be the size of a valley. This is a place of good hands, and good food. And we're here forever.

NLN STANISLAUS'S VALUES



Just as NLN Fresno went through a phase of contemplating its future, and deciding what it wanted the network to become, NLN Stanislaus has just entered this “existential” phase at the time of publication in 2019. Rather than focusing on the overall purpose, structure, or activities of the group, NLN Stanislaus started by committing its values as a group to paper, as follows:

Equity by design. The only playing field that will ever be even is the one built with those who don’t get to play. We think about and act on what is equitable on purpose.

Empathy. Knowing that your destiny is inextricably tied to another’s story is the only way to ensure a commitment to the common good. When people feel seen and heard, they will tell you the truth, and only then can we create shared understanding and move forward together.

Creativity. While committed to the common good, we are skeptical of the common wisdom. What’s common is unchallenged and uninteresting. What’s uncommon precedes joy.

Disruption. Action requires discomfort. Energy requires friction. While the purpose of the bridge is to connect, its strength depends on a healthy amount of tension.

Strong relationships. Strength in relationships is foundational to lasting and meaningful change. We are committed to strong relationships, especially when there is divergence among us.

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CHAPTER 9

MEASURING IMPACT

GREATER SENSE OF CONNECTION, TRUST, AND SUPPORT



Measuring the impact of local cross-sector leadership networks is complicated—particularly when those networks aren’t focused on a single issue and are designed to produce results on multiple levels of communities or systems. In our case, no single evaluation tool addressed the full scope of our intended impact on the leaders as individuals, the collective network, and the larger systems they were working to change. We studied surveys used by other leadership programs, to see how they evaluated individual outcomes, and looked at collective impact initiatives and network evaluations to gain insight into how “We” and “It” results were measured. Ultimately, we created an integrated evaluation that flowed from our theory of change and addressed the questions we most needed to answer.

For both networks, we used a combination of internal tracking and reflection along with external evaluation, because we had varying needs for formal and informal learning. In Fresno, we worked with an outside firm to assess the collaborative projects at midpoint, and then hired evaluator Kris Helé to conduct a “summative” or final evaluation of outcomes once the structured program ended. The evaluation comprised a comprehensive online survey distributed to all network members, a focus group with select NLN leaders, and confidential interviews. We also asked Kris to build a survey tool we could use for each cohort in Stanislaus County, once that program kicked off, and to conduct a final evaluation there after all four cohorts have cycled through, in late 2019.

Network mapping, or social network analysis, was another way for us to measure ongoing network health (the “We”)—how NLN connections were forming, how dense the network was becoming, where members were mixing or not, and who was in the core and periphery. In both programs, we mapped the network every six months, using that data to inform cohort recruitment. For example, our mapping of Cohort 3 in Stanislaus showed that many leaders left with the same clusters they came in with, prompting us to select a less connected group of leaders for Cohort 4. The network maps, considered alongside the survey and qualitative data, helped create a multidimensional view of the network. “They are complementary pieces,” explains Kris. “Between them, they help tell the story of the NLN much better than any one method could on its own.”

Of course, there are limitations with any evaluation of this kind. All of the data sets were self-reported, with participants assessing their own growth, perceptions of the network, and engagement in collaborative work. Further, each leader entered the program from a different starting point, and there was no true baseline to compare changes over time. Moreover, individual leadership development, networks, and community change are all influenced by many factors, so any evaluation can only demonstrate the NLN’s contribution to outcomes, not attribution. One of the biggest limitations was the fact that real systems change is not measurable in the short term, so we have had to rely on proxies. Namely, we looked at the strength, breadth, and number

of emerging collaborations as a leading indicator of the NLN’s potential for longer-term community impact.

There is still more to learn about the impact of the NLN on leaders, their networks, and their communities. But based on the evaluation data we have gathered so far, it is clear that the NLN is having impact at all levels of the I-We-It framework. Below and in Figure 9.1, we share some of what we are seeing emerge, synthesizing data across both networks.

EVALUATION OUTCOMES

I: Individual Leadership Outcomes

The vast majority of NLN participants in both sites reported **substantial leadership growth** as a result of the experience: they have a greater understanding of themselves and others; have developed more self-confidence and leadership skills; and feel better equipped to create local change in their communities. They are also actively applying what they learned, which enriches their collaborations and reinforces their personal growth. “The network has changed the way that I think and changed certain parts of who I am, and it will forever change the way that I work,” says NLN Fresno weaver Caty Perez.

In Stanislaus, these outcomes are equally strong. Nearly all NLN Stanislaus members report that growth in their understanding of how they “show up” as leaders has been “considerable” or “transformative.” They report being better able to understand and communicate about their own strengths and weaknesses, and many had revelatory moments during the NLN. “I think the program accelerated everyone’s confidence level, and they moved at a quicker pace in their own personal development than they would if they hadn’t gone through the program,” says NLN Stanislaus member Joe Duran, executive vice president of Self-Help Federal Credit Union.

Almost all members across both networks report **growth in specific leadership competencies** and skills as a result of the NLN. Leaders report some of the greatest growth in their ability to navigate through ambiguity and across differences—key features of community change. Frameworks and practices around design thinking, systems thinking, and facilitative leadership have been particularly potent, sparking new ideas and practices. “The tool I have been using the most is design thinking,” reports one Stanislaus participant. “I’m constantly asking myself what the end user really needs and/or how to improve existing services based on actual, not perceived, needs.”

Indeed, many NLN members are **applying what they have learned** from the program in new ways. One Stanislaus member is using network mapping to illustrate their organization’s relationships with other community groups. Another is conducting empathy interviews as a regular practice: “My newfound love is to understand the ‘story’ of those around me. I want to

FIGURE 9.1: ASPIRATIONAL OUTCOMES AND IMPACT



understand where they've come from, their background, and struggles." And members from both networks are sharing what they learned with colleagues and those in their professional networks. Says one Fresno leader: "This experience is changing conversations I have every day, in all aspects of my life."

One of the unanticipated outcomes of the NLN program has been its role in encouraging members to **step into higher-level leadership positions** in the community. About half of NLN Fresno members have changed jobs, usually moving to a role with greater influence; others have advanced their leadership by joining local boards and commissions. They are also recommending one another for new jobs or civic opportunities. "Probably a third of us [in the Fresno network] ended up working with each other in formal employment or on boards," says Caty Perez. Whether in paid or volunteer positions, NLN members are attractive talent because they are vetted, like-minded leaders who connect around purpose and a shared approach.

Many leaders entered the program discouraged, and left feeling more energized

The NLN is also **renewing members' sense of purpose**, empowering them to take on new challenges and restoring their commitment to making a difference. Many leaders entered the program discouraged, and left feeling more energized. "Fresno kind of beat me up mentally," admits NLN Fresno member Terance Frazier. "I

just felt like nobody wanted to change things, and I didn't want to be there anymore. But being part of the network rejuvenated me. It 'brought me back' to Fresno." Both Stanislaus and Fresno members report significant growth in their optimism about the future of their community and in their energy to engage in community-level change. Says one Fresno participant: "It totally rebuilt my confidence. I met people who are like-minded who wanted to make a difference, and it just completely changed my trajectory."

We: Network Outcomes

Across the board, members in both networks have made significant new connections as a result of the program. In both counties, the majority of NLN leaders report feeling a **greater sense of connection, trust, and support** among those working to create better local futures—and believe that members are achieving more together than they could alone. Nearly all NLN Fresno leaders say that the program helped connect them with people they did not know prior to the NLN, and many of these relationships fall outside of their sectors or silos. "Learning the power of collaboration, the power of networking, and being intentional about building trust has impacted many leaders who weren't as focused on that before," says Joe Duran. NLN Stanislaus's Marian Kaanon says that accelerates collaboration: "There's this deep river of trust that's unspoken. It's almost a shorthand that allows us to move to change very quickly. We've already built trust, so that's off the table. Now it's: What's the issue, and how do we get to impact?"

Members are also connecting with one another to gain information, make introductions, or link one another to **new volunteer or paid opportunities**. In Fresno, Caty Perez saw a lot of members go out of their way to connect leaders to people in their own networks. In both communities, members are tapping the wisdom of the “We” to gain insight from their peers and to collaborate on work together. “People are serving on each other’s boards, hiring each other for consulting gigs, working on projects together, asking NLN members to serve on initiatives, asking them to help promote something—you name it, I’ve seen all of that happen,” says Marian Kaanon. The NLN has in fact served as a new talent and leadership pipeline for both communities.

Beyond the professional outcomes of the network, members speak to the value of their NLN **friendships and personal support**. NLN relationships have brought laughter, enjoyment, and solidarity to what can often be lonely and isolating work. “There is a moment that happens when I walk into a community event and realize there are 25 NLN members between me and the door—it will take me six hours to get across the room because I’ll stop and hug each of them,” says one NLN Fresno member. In Stanislaus, one participant formed her own support group with fellow women members: “I found that I was lacking a group of strong, supportive women, empowering me that I can have a career and still be a great mom, while dealing with the man’s world in the industry that I’m in.” Building these trusted relationships is for many members an important outcome. “We really need each other, this community of support,” says Kate Trompetter of NLN Stanislaus. “When I feel really run down, the first group of people I think about as being my fellow travelers are this group of people, regardless of cohort. Our ability to lead depends on that relational network. That is so critical to systems change and that really came to life for me in this experience.”

It: Collaboration and Systems Change Outcomes

FRESNO: ORGANIC COLLABORATION

In both Fresno and Stanislaus, the collaborative progress toward systems change continues to be encouraging. Within a year of its launch, NLN Fresno had kicked off more than 80 identified collaborations, nearly half of which produced real outputs. Some of these were smaller, more time-bound projects that the group called micro-collaborations, while others were larger initiatives. “Networking allows us to exponentially increase the effectiveness and efficiency of our impact,” says NLN Fresno member Mark Keppler, executive director of The Maddy Institute for Public Affairs. “And in a place like Fresno, with overwhelming problems and limited resources, such efficiency is essential.”

Other collaborations that existed prior to the NLN in Fresno got a lift from more connected leadership and began engaging the broader community around shared goals. For example, the Birth Through Third Grade Challenge

(B3 Fresno County)—a partnership between First 5 Fresno County, the Fresno Housing Authority, the Fresno Unified School District, The Children’s Movement of Fresno County, and the Fresno County Library—was a system-wide collaboration that aimed to increase the percentage of students proficient in third-grade reading, in which a number of NLN members participated.

Meanwhile, new collaborations between two or more NLN Fresno leaders included the following (this list is illustrative, not comprehensive):

- A partnership between five NLN leaders and their organizations spawned a kindergarten-readiness program where moms in low-income Fresno neighborhoods train other moms on preparing their children for school. In just a few months the program led 138 parent education workshops across the city and quickly started scaling.
- A partnership between NLN members representing Habitat for Humanity and Kaiser Permanente led to a \$400,000 grant to build a neighborhood playground in West Fresno, a highly impoverished area with high rates of childhood obesity.
- A collaboration between the Fresno County Library and the Fresno State Humanics Program led to a summer support program that distributed 600 books and 1,700 meals to low-income children in its first summer as a prototype.
- A subset of NLN members collaborated to improve a downtown Fresno city block with high potential and great need. The end result of the project, if realized, would be a fully developed “dynamic street” featuring mixed-use buildings (including retail, restaurants, a startup incubator, and high-quality mixed-income housing) that would augment downtown revitalization.
- A number of NLN leaders launched systems leadership development programs of their own, leveraging much of what they learned in the NLN. One group started the Latino Leadership in the Valley group, which subsequently created a Young Professionals Latino Leadership Academy and a Latino Neighborhood Leadership Cohort. Another member went on to start a Central Valley program for charter school leaders and leaders of education reform initiatives called the 360 Accelerator.

Notably, none of these projects was funded by the NLN, as we didn’t launch the innovation fund until the Stanislaus site. Rather, NLN members did these projects on their own because they had built strong ties, learned about one another’s work, and started combining resources in new ways. This included partnerships formed among people who previously had not worked together. “A level of competition still exists, but it’s showing up as a community in competition with itself to be stronger, more transparent, and more collaborative,” reflects one NLN Fresno member. “We are more outcomes-

based, ‘how might we?’ drives the conversation, and data is a key element for finding solutions together.”

While NLN Fresno currently has no formal structure, network members continue to work together to bring change to their community. Recently, three NLN members collaborated to push for a local tax measure that would have brought millions in new funding to Fresno city parks. And via another initiative in low-income West Fresno, NLN members got together to engage the community in local planning for a federal grant. “A community that feels like it’s been forgotten and neglected for generations suddenly had a voice and had a say,” explains Caty. These are signs that even without a formal network, members are still partnering on major local change efforts. “When you see something interesting, like a school project bubbling up or the parks initiative, and then you look at who’s leading it, it’s like, ‘Oh, of course, NLN members are doing it.’”

STANISLAUS: DESIGN TEAM PROJECTS

In Stanislaus, members are collaborating on the same three “It” activities as their counterparts in Fresno: small collaborations, big collaborations, and accelerations of existing work—though, with the full network just taking shape, it’s still early days. Projects from the first few cohorts have already had a substantial impact—demonstrating the power of these leaders, armed with their new toolkit, to accelerate systems change. One team, working under the tagline “The Shit Is Rigged,” created a plan for getting more nontraditional candidates running for local office. Through their empathy interviews and design process, they learned more about what residents were looking for in local elected leaders, and even encouraged several NLN members to run for office.

Another standout was a design team project that led to a change in the way new police recruits are trained. The team explored whether increasing mutual empathy between community members and law enforcement could form more positive relationships. Typically, new police officers learn about community relations in a classroom, via lectures from veteran police officers. But the design team brought new recruits together with college students who had a history with law enforcement for a facilitated conversation, leading to greater empathy on both sides. Based on this work, the Stanislaus County Sheriff’s Department launched a project—co-led by community members, new cadets, and senior law enforcement officials—to redesign how new police cadets are trained to interact with community members. The team presented its work to the statewide California Commission on Peace Officers Standards and Training, with the hope of integrating it into statewide training.

Projects have already had a substantial impact—demonstrating the power of these leaders to accelerate systems change

There were also projects that proved powerful precisely because they didn't work. Tony Jordan, an NLN Stanislaus participant and the head of early childhood development in Stanislaus County, spearheaded one team's work to expand access to quality early childhood education. The team asked: *How might we engage and better understand the needs of parents around early childhood education?* Tony had helped lead an expensive project to create online tools that help parents research childcare options, but the tools weren't being used. For its design project, the team joined a group of Spanish-speaking mothers to understand how they researched childcare options—and learned that they weren't using the tools because much of the website was not in Spanish. “At first he was devastated,” says Belma González. “It was a year or more of his work, and it wasn't what he anticipated. But then he came around to, “This is good, I need to know this. This is bigger than my ego or my job responsibilities.” The county is now revamping its approach to marketing early childhood opportunities to local parents.

Additional design projects produced from the Stanislaus NLN included:

- A partnership between Modesto Junior College and Stanislaus County government aspired to close the achievement gap by helping first-generation students and families navigate college and better access a system of support, including free transportation and other services.
- Several projects focused on rebranding Stanislaus County by telling a different story about the region in order to build civic pride, retain talent, attract employers, create more tourism, and mobilize residents to engage locally. One of these groups launched the Modesto Design Collaborative to inspire young creatives in the region to help build a better community future.
- Several other projects have been mentioned elsewhere in this workbook, including a project that created a pop-up working space for local small business entrepreneurs; the integration of county resources supporting cradle to career pipelines; and an initiative designed to create opportunities for high-school students in food and agricultural innovation and entrepreneurship.

In addition to the formal design projects, many Stanislaus members have been using network tools and approaches to advance other community work. For example, Ruben Imperial, the deputy chief executive officer for Stanislaus County, launched an initiative to identify nearly 150 individuals with the highest hospital psychiatric admissions, emergency room admissions, and law enforcement contacts—i.e., those driving substantial healthcare and public safety costs. He and the assistant sheriff put together a working group to figure out how these individuals might get the support they needed, using planning tools Ruben had learned through the NLN, including empathy interviews, ideating, and prototyping. “We reached out to 10 of the identified

individuals and tested our idea for two weeks, then we came back and made adjustments,” he says. “This idea of prototyping has fundamentally shifted how I view the ways we are working in government.”

LOOKING FORWARD

In both networks, leaders will tell you that as important as these formal collaborations are, they are only a piece of what the NLN is achieving. Rather, it is the many complex ways in which these new tools, approaches, relationships, and collaborations are knit together that are driving systems change. “I wish it was neater and tidier,” says Marian. “I think people here sometimes want to see the discrete outcomes. But we’re all working together and weaving it into everything.”

Ultimately, the real test of the NLN will be connecting its existence to Fresno and Stanislaus counties becoming better communities over time. *Did hunger get reduced because people in this network assumed leadership roles and took that on? Did childhood literacy increase? Did infant mortality, drug use, or incarceration decrease?* That kind of systems change doesn’t show up for years or even decades. But getting at that long-term data would take additional time and investment, to obtain a more longitudinal perspective on the NLN’s impact.

In Stanislaus, where the NLN is in the early part of the embed/sustain phase, members hold a strong vision for what the NLN could become. For NLN member Joe Duran, the social justice orientation of the group could change city and county leadership over time. “I believe that it can be catalytic in regard to what this community will look like in 10 years,” he says. Many hope the NLN can establish more projects, more pilots, and bigger initiatives that they can put their stamp on. As NLN member Amy Vickery puts it: “I think we really can have a powerful impact on the community if we continue this work, and if we lean on each other to make it successful. I eventually want to see a community that looks entirely different.”

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CONCLUSION

IT'S OVER /
NOT OVER



THIS

APPROACH

IS COMPLEX



Our journey as practitioners designing and implementing this work has mirrored that of the NLN design teams. We gained empathy for the communities we were working in, used that understanding to prototype and test a systems leadership program, and have spent the last six years iterating and refining the model. This workbook is our attempt to share our experience with this dynamic and ongoing work; we have learned that it's a continuous learning cycle. For other practitioners and funders seeking to start the journey and create their own version of systems leadership, a few high-level takeaways stand out.

KEY TAKEAWAYS

The systems we are in no longer serve us. This is a difficult time to be on the front lines of social change. As a society—indeed, as a world—we are living through massive dislocation and disruption. Families are reconfiguring, small and rural communities are crumbling from the lack of investment or jobs, and democracy is under attack. The social systems that defined our past aren't agile or inclusive enough to serve this moment in time. We need new ways to create meaning, purpose, community, relationship, and systems that work better for everyone, on a more human scale. The social sector can—and must—be a leader in this work, by taking more risks and empowering leaders at all levels and from all sectors to innovate and navigate this change.

The social systems that defined our past aren't agile or inclusive enough to serve this moment in time

The NLN approach can create the conditions for community change.

When we embarked on this journey, we had the unique opportunity to build a new/old model of leadership development and put it into practice. We had lots of theory and some relevant experience—but more importantly, we were committed to trying new things, learning, and adapting as we went. We had no idea if this experiment would work—but it did. Giving leaders the opportunity to think about their own leadership, build relationships, and work at the systemic level can create the conditions for transformative change in a community. Leaders in these counties are now stepping into new roles and rising to new challenges—they have formed new connections, and are using these to accelerate existing work, innovate new approaches, and collaborate across issues and sectors to get more done. And they are beginning to change the larger systems in which they work and live.

This work requires patient capital. Without the Irvine Foundation's multi-year commitment—and their comfort with experimentation—we never could have run the NLN program. In our network-related work over the past decade, we have seen many similar experiments cut short because there wasn't enough funding or long-term support to achieve network momentum. While the myth of self-organizing is compelling, and many funders want to

leverage collective action, they often don't fund it adequately. The truth is, this work doesn't happen spontaneously. It takes an intentional disruption of the way people currently work, as well as someone—e.g., a backbone, or a facilitation team—to carve out the time and space for these leaders to start learning and working in new ways. This really is systems-focused capacity building and funding at its best.

This approach is complex. We're not going to lie: This work is messy, time-consuming, and hard to manage and measure. It means investing in people and process, and then trusting that good things will happen; it's more about emergence than linear planning or strategy. That's not to say that this work isn't strategic. In fact, in our decades of experience as strategy consultants and funders, it might be some of the most strategic work we've ever done. We understand that many funders prefer to support more focused or bounded programs with easily anticipated and measurable outcomes. And yet those programs don't always map to the complex reality of what cross-sector leaders on the front lines of social change are navigating today. Supporters of this systems approach (whether facilitators, funders, or backbone organizations) must be comfortable taking risks, and working alongside—and trusting—those on the ground for it to succeed.

There is no silver bullet. One of the most important lessons we can impart is that there is no easy way to build the capacity of leaders and networks for systems change. At the end of the day there is just “the work.” The NLN model is just one example, run in two unique communities, with a diverse set of inputs (facilitation team, backbone, leaders, program design, funding), at a particular time, and in a specific place. Our hope in writing this workbook is that others will be inspired to adapt this model to their own communities and contexts. And we are also eager to learn from fellow travelers experimenting with other approaches to creating systems-level community change.

WHAT'S NEXT FOR US

As for the team that catalyzed this NLN experiment, in the spirit of emergence, we are on our own individual and collective journeys. As a group, we are running several follow-on experiments to the NLN. We are working with the First 5 statewide network in California to develop systems leaders working on early childhood development in their counties, and are also developing a combination place-based/issue-based network in Napa County with the local First 5 and cross-sector leaders. From these two experiments, we are already learning a lot about what it takes to adapt this model to other contexts.

In addition to working on our own consulting, we've also developed two collaborative initiatives out of our NLN work. In service of continuing to design and run systems leadership programs in communities and issue-based networks, Adene, Mark, Johnny, and Belma have formed the With/



In Collaborative. Meanwhile, Heather and her team at her new firm, Open Impact, are bringing these practices to donors and foundations, as part of their philanthropic advising. Together, we're interested in spreading these practices to leaders, communities, practitioners, facilitators, and funders. With the publication of this workbook, we will be embarking on a "sharing" journey, where we will write and speak about all that we've learned at industry conferences and online—and we'd love to exchange ideas with others doing similar work.

It is our greatest hope that our stories and lessons learned will inspire civic leaders, funders, and other changemakers across the country to make a shift toward this new/old way of leading and working. While we are years away from knowing the NLN's long-term impact, the impact on individual leaders and local problems has been both immediate and astounding. We have been honored to watch these leaders in California's San Joaquin Valley step out of their siloes, embrace new approaches to leadership, and develop a renewed sense of collective power to change their communities. We have seen them tackle entrenched local problems that few communities seem equipped to take on, moving the needle on issues once deemed hopeless. These leaders show us the future of this work but also the future itself: a world in which leaders link their passions, power, and perspectives to form networks committed to advancing the common good. We invite you join in this work, and this larger movement, to transform our world.



ADVICE TO PRACTITIONERS AND FUNDERS

Before attempting to adapt the NLN model to a different context, it's worth considering these variables, or key success factors, that might influence implementation:

- **Proximity:** We intentionally ran the NLN in the context of place, where cross-sector leaders are embedded in a natural “container” together, to give them the opportunity for formal and informal in-person exchange. It's harder to do that when leaders are isolated or separated by geography—and the ability to reach critical mass is essential to impacting larger community systems. We do think the NLN model could potentially work when the focus is a common issue rather than a common place. In fact, we're running an experiment in applying this model to First 5, a statewide network of county-based leaders working on early childhood development in California.
- **Size of community:** We think there's something special about working in mid-sized communities (between 100,000 and 1 million residents) such as Stanislaus County and Fresno County. Neither is a large urban environment, where this program might be a drop in the bucket, but neither are they too small to have a diversity of new leadership. While we haven't had the opportunity to try the NLN model in large cities such as New York or Los Angeles, we think it could work with a smart adaptation around network focus. It could also work in rural communities, if there was a broader geographic reach—say, a statewide rural leadership program.
- **Quality of local leaders:** Because of the size of the communities we entered, we were able to tap emerging leaders with significant talent who hadn't yet had access to the kinds of developmental opportunities often available in larger urban areas. Based on our experiment in these two communities, we believe that there are talented leaders in every community—the people who rise to the top, take responsibility, innovate new solutions, and get things done on behalf of the common good. They just haven't yet been discovered or supported in this way. However, as we noted in Chapter 4, it's important to screen participants for fit with this kind of program.
- **Realistic program budget:** The NLN was funded entirely by one private foundation. We understand that not every community has a large foundation willing to support this kind of work—and not every community will fund this through philanthropy. In terms of relative costs, the NLN program is in the midrange of pricing, at roughly \$20,000 per participant (assuming a 15-person cohort); other leadership programs we are familiar with cost closer to \$75,000 per participant, while some local programs cost much less. We believe that with some slight modifications (e.g., a smaller facilitation team, no overnight retreats) key elements of the NLN program

could be delivered more economically. It's worth considering whether a community foundation, local business, or even a chamber of commerce would be willing to fund a lighter-touch version of the NLN. While this work does require funding, it might not take millions of dollars to get a more streamlined version off the ground.

- **Skilled facilitation team:** We worked hard over time to build the right facilitation team, with diverse coaches and trainers who had decades of relevant experience and who all lived in the greater Bay Area of California, where we are based. As a result, our team cost more than hiring two individuals to run a program, or trainers living in a lower-cost area. That said, we think that a smaller, more affordable team could replicate this model if they were willing to adapt the NLN content to their own strengths, and/or leverage online training resources to supplement the in-person work. We are interested in running a “train the trainers” program to help other facilitators and practitioners adapt the NLN program to their own contexts.
- **Program model dosage:** Having worked with social entrepreneurs on scale and replication for much of our careers, we know a fair amount about experimenting with program models, from high-touch, high-cost programs to unbundled offerings that are lower touch and lower cost. Of course, it's impossible to have a control group and compare apples-to-apples versions of the NLN model in different contexts, or different variations of the program model in the same context. We encourage others to experiment both with the content and design of the program model, as well as the dosage. But we believe that putting leaders through an intensive leadership experience over a shorter time frame—and running cohorts every six months rather than every year—allowed the networks, and the communities, to get to a tipping point sooner than in most leadership programs.
- **Funder support:** Lastly, having the right funders is critical. Philanthropists and foundations are at an interesting moment, dealing with competing external forces and disruption of their own. On the one hand, pressure is rising to be more accountable and transparent, more strategic, and more focused on what can be controlled and measured in their grantmaking. At the same time, a number of funders are recognizing that traditional logic models, theories of change, and “strategic philanthropy” don't always translate to the complex, messy work of changing systems. Consequently, some foundations are shifting away from the more logical-rational approach and back to more “trust-based,” or “systems,” philanthropy—an approach that allows for complexity, emergence, collaboration, collective impact, and systems change. We think that embracing complexity and spending more time in proximity to the work they are attempting to influence will help funders understand that they are of the system, not outside of it.

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ACTIVITIES

ACTIVITY 1

Personal Introductions

🕒 TIMING

This exercise takes **6–8 minutes**/person. At NLN this exercise takes the majority of the first afternoon.

★ EXPERTISE

None. As long as the group has spent time establishing confidentiality and “community agreements,” this exercise is one that is created for and by the community.

PURPOSE

To disrupt how leaders get to know one another by sharing deeply personal stories, giving empathic feedback, opening to vulnerability, and accelerating the level of trust in the group.

USE

Any time leaders are entering into a collaborative change process, especially if they are coming from different sectors, perspectives, communities, etc.

FACILITATION

Pre-work: Prior to gathering, leaders receive instructions to prepare a 3-minute talk introducing themselves to the group by focusing on their inner values and motivations rather than their resume. They are asked to answer a deeply personal question: *Why, at the deepest level, do you do the work that you do?* For inspiration, we use the Mary Oliver poem “Summer Day,” which ends: “*Tell me, what is it you plan to do with your one wild and precious life?*”

What’s needed: A comfortable room that can hold chairs for the participants, set up in a U or semi-circle. Post-its and pens should be circulated before the exercise begins.

Instructions:

- 1 Reintroduce the purpose of the talk. Remind leaders that we aren’t interested in their resume, but what’s *behind* it.
- 2 Remind the group of community agreements (confidentiality, etc.) and let them know that strong emotions are OK.
- 3 Choose the speaking order by drawing numbers and give people the opportunity to trade if they want.
- 4 Introduce the concept of “love notes.” Hand out small pads of paper and ask everyone to write a short reflection or affirmation in response to each talk. (They should wait until the speaker has finished to do this).
- 5 Instruct each speaker to stand at the front of the group (not on a podium), where they will be the focus of attention.

Instructions (continued):

- 6 For each leader's talk: (6-8 min/person):
- Start timer with 3 minutes on the clock. Facilitator gives a quiet warning at 2 minutes and a 30-second reprieve if needed.
 - Afterward, the speaker remains standing while participants write their notes.
 - Speaker then receives 1–2 minutes of verbal reflections from the group.
 - Collect the love notes and give them to the leader to read later.

WHAT WE'RE LEARNING

- ✓ Monitor the energy of the group. We've found that groups typically need a short break every 60–90 minutes; movement, caffeine, or short walks outside are all good ways to renew the group's energy.
- ✓ It's important that leaders receive brief feedback after they have shared their story. This builds the group's empathic capacity and helps people see how they impact others.
- ✓ Love notes are important to help leaders avoid any regret over what they have shared. In our experience, leaders tend to say things that they rarely or never say in public. This risk needs to be rewarded.

"TELL ME, WHAT IS
IT YOU PLAN
TO DO WITH YOUR
ONE WILD AND
PRECIOUS LIFE?"

ACTIVITY 2

Stories to Systems. Part 1: Passion Talks

TIMING

This exercise takes **8–10 minutes**/person. At NLN this exercise takes the majority of the second day.

EXPERTISE

None. As long as the group has spent time establishing confidentiality and “community agreements,” this exercise is one that is created for and by the community.

PURPOSE

To build a rough “systems map” from the stories of NLN leaders and demonstrate that local systems are a creation of both individual and collective beliefs and behaviors.

USE

This two-part exercise helps connect personal stories and passions to complex community issues and systems. It’s also a great way to have leaders present their work in a way that builds connections between them.

FACILITATION

Pre-work: Prior to gathering, leaders receive instructions to prepare a 5-minute talk about a community issue they care passionately about and are working on. We ask them: “Don’t just tell us about your job. Tell us what you are trying to change in your community.” Leaders can use a visual or handout, but we forgo projections to save time. We use these questions as prompts:

- What is the key issue facing your community that you are seeking to solve?
- What are the obstacles and challenges to success?
- What does the future look like if we succeed?
- What do you need to be more successful?

What’s needed: A comfortable room that can hold a circle of chairs for the participants, a large blank wall for hanging poster-sized flip charts, two easels with flip charts, and large markers for note-taking.

Instructions:

- 1 Introduce the purpose of the Passion Talk and the prompts.
- 2 Choose the speaking order by drawing numbers and give people the opportunity to trade if they want.
- 3 Give participants expectations on timing. Each speaker gets 5 minutes, with a warning at 4 minutes.
- 4 Tell participants that facilitators will take notes on flip-chart paper as they speak, and then post these on the wall.
- 5 After each leader speaks, the group asks questions and provides feedback for 2–3 minutes.

Instructions (continued):

- 6 Participants are invited to add additional thoughts and questions to the notes on the wall.
- 7 This “wall of stories” (with the posted summaries) grows with each talk. By the end, the group has a full picture of all their stories and local issues they are working on.
- 8 After the talks are finished, break into small groups and invite the leaders to reflect on how they have been personally affected.

Note: Creating the “wall of stories” can be as simple as transcribing key phrases from a leader’s talk; examples of how to capture the Passion Talks are available on our website. Make sure that you have thick markers, and that you highlight that person’s name at the top of the page for easy identification

WHAT WE’RE LEARNING

- ✓ After the last talk, we refrain from immediate sense making to give people time to reflect in small groups before moving on to systems mapping (Part 2).
- ✓ As with the 3-minute introductions, groups typically need a short break every 60–90 minutes; movement, caffeine, or brief walks are good ways to renew the group’s energy.
- ✓ This exercise also provides insight into leaders’ capabilities. Can they switch elevations on the challenges they are addressing? Can they communicate effectively? Do they struggle to articulate what they need to achieve greater impact? These talks give the facilitators a sense of what is needed both for individuals and the group.

DON’T JUST TELL US
ABOUT YOUR JOB. TELL US WHAT
YOU ARE TRYING TO CHANGE
IN YOUR COMMUNITY

ACTIVITY 3

Stories to Systems. Part 2: Systems Mapping

🕒 TIMING

This session takes a **minimum of 2.5 hours** to complete.

★ EXPERTISE

This session requires strong facilitators with **working knowledge of systems thinking** and a degree of comfort embedding equity into the conversation.

PURPOSE

To demonstrate that leaders do not need to distance themselves from individual stories in order to act on systems, and to show that a systems map can emerge from stories of people in the room.

USE

At NLN, this exercise typically follows the Passion Talks on Day 3.

FACILITATION

Prior to this exercise, each leader has revealed his/her individual story and community issue. Now, leaders will construct a collective narrative about local community systems and begin to imagine a new future.

What's needed: The room should be open and free of tables. Small groups can cluster around easels or walls and build on the group consensus. We also use templates to help organize the group's thinking.

Instructions:

- 1 Introduce an overview of systems thinking, and the value of moving from stories (proximate to individuals) to systems (seeing the whole).
- 2 Divide into small groups of 3–4 people for 20-minute discussion of what the individual stories say about the current state of the community and larger systems. Each group should select a note-taker to record the conversation on a template or flip chart that stays at that station in the room.
- 3 Reconvene as a full group to debrief what emerged in the small group. Record this conversation as well.
- 4 Have them go back into small groups for another 20 minutes. Now, ask participants to brainstorm the ideal future state of their community. Again, a note-taker should record each conversation.
- 5 Reconvene the full group to hear what emerged in their small-group conversations, and record this.

Instructions (continued):

- 6 Reconfigure the groups so that the leaders have new brainstorming partners. Send each group to a different station around the room to brainstorm how they might achieve the future state described there. Invite the leaders into a moment of creativity. Ask them to record each idea, both big and small, on a Post-it or worksheet.
- 7 Reconvene the full group to hear their favorite strategies for attaining the future state of their community/system.
- 8 To close, invite reflections about the process that allowed them to collectively create this “systems map.”
- 9 Follow-up: Facilitators should collect, synthesize, and reflect back to the group the systems assessment.

WHAT WE'RE LEARNING

- While this session is not specifically geared to talking about equity, talking about local systems opens the door to conversations about power and privilege in the community. This can be a powerful moment for the group to wrestle with local dynamics around equity, and it requires the facilitators to create a trusting and brave space. If the conversation becomes too polite, facilitators should revisit the community agreements.

LEADERS CONSTRUCT
A COLLECTIVE NARRATIVE
ABOUT LOCAL SYSTEMS
AND BEGIN TO IMAGINE
A NEW FUTURE

ACTIVITY 4

Gatekeeping

🕒 TIMING

Approximately **2–2.5 hours** total. The demonstration takes 30–40 minutes. The small group activity will take about 1 hour for each group of 3 leaders. We tend to follow that with 30 minutes of journaling.

★ EXPERTISE

This session requires a strong facilitator who is unafraid to make visible the unspoken challenges facing leaders. It's also important that the facilitator is comfortable holding the group through a truly honest and vulnerable baring of their challenges.

PURPOSE

To help leaders examine the role of internal protective voices or “gatekeepers” that emerge when they begin to take greater risks in their lives or careers.

USE

This exercise deepens the interdependence within the group and allows individual leaders to work transparently on what is inhibiting their own leadership with trusted colleagues.

FACILITATION

Prior to this exercise, each leader has revealed his/her individual story and community issue. Now, they will dig into more details about their own journey as leaders.

What's needed: A comfortable room that can hold a circle of chairs for participants. The room should be closed to outside interference (external observers, catering, etc.) during this exercise. Facilitators should solicit a volunteer in advance to demonstrate the exercise in front of the group.

Instructions:

- 1 Set up the room so that the full group is seated in a semicircle with three empty chairs as the focal point.
- 2 Introduce the concept of “gatekeeper” (aka the “inner critic or protector” or “voice of judgment”) as the internationalization of doubt, fear, shame, or racism/sexism/homophobia that can prevent leaders from stepping into greater power.
- 3 Explain the role of the three chairs. The first chair represents the higher self (i.e., the individual's vision for their own leadership). The second chair represents the leader's gatekeeper. The third chair represents the leader's inner cheerleader, friend, or more supportive self.
- 4 Invite the volunteer to sit in the first of the three chairs. From that chair, ask the leader to express his or her vision for leadership to the group for 2–3 minutes.

Instructions (continued):

- 5 Now invite that leader to sit in the chair that represents the gatekeeper. Ask the leader to now speak to their visionary self in the voice of their inner critic for 1–2 minutes. A facilitator should encourage the leader to dig into what those inner voices may be saying.
- 6 Ask the leader to go back to the visionary chair and describe how it feels to hear the gatekeeper attack their vision for leadership.
- 7 Now invite the leader to sit in the third chair, which represents the friend or cheerleader. Ask the leader to talk to the gatekeeper, which makes the inner wrestling between the cheerleader and the gatekeeper voices visible. Ask if there is anything that the friend wants to say to the gatekeeper in appreciation of its work. Ask the friend to speak directly to the visionary self to offer words of support. Offer additional support as the facilitator.
- 8 Finally, invite the leader back into the original visionary chair to express the vision again. This time, the leader's voice should be more centered and determined.
- 9 Invite the group to offer brief reflections on the process they just observed (5–7 minutes).
- 10 Divide participants into small groups of three. Each leader takes a turn going through the full exercise with their small group for 15 minutes, rotating through all 3 chairs. The facilitator should provide written instructions with indicated timing for the small groups to use.
- 11 After the group reconvenes, give leaders 30 minutes to journal. Ask them to capture what they've learned about their own leadership and an intent for their own learning.

WHAT WE'RE LEARNING

-  This exercise plays multiple roles in the life of the group. For the volunteer, it's often the first time they have articulated their gatekeepers. The act of publicly acknowledging them creates an opportunity to shift from shame to an appreciation for their gatekeeper. For the group, the honesty and vulnerability required in this exercise deepen the connections already growing between the leaders.
-  This exercise has allowed the NLN facilitators to begin to connect the internal gatekeepers to different forms of internalized oppression. Framing the internal negativity as reflections of inequitable societal expectations is often empowering for leaders to consider.

DIG INTO WHAT**THOSE INNER VOICES****MAY BE SAYING**

ACTIVITY 5

Rituals of Connection

TIMING

Rituals can be short moments of collective meditation or longer reflections. The “Whose shoulders am I standing on?” and “What Is My NLN Story” exercises take **about an hour** for a group of 15–20.

EXPERTISE

None. As long as the group has spent time establishing confidentiality and “community agreements,” this exercise is one that is created for and by the community.

PURPOSE

To help a group mark significant moments together, to make visible the complexity of perspectives, and to create intention around who the leaders want to be, both individually and collectively.

USE

Any time a group begins, ends, or solidifies something important. Co-creating a simple ritual will deepen reflection and memory.

FACILITATION

Rituals are central to how NLN makes moments more significant by creating opportunities for the leaders to express themselves in different ways. These rituals can be as simple as standing together and expressing gratitude, or they can be more intensive.

WHOSE SHOULDERS AM I STANDING ON?

This exercise is used at the opening of the first day to mark the beginning of the group’s journey. It’s a ritual of arrival that allows individuals to surface something important from their life and to immediately take risks and become more vulnerable.

What’s needed: Easy access to the outdoors. If that’s not possible, then ask participants to bring an object with them to the gathering. You will also need a small table or tray that can sit in the center of the room to hold the objects.

Instructions:

- 1 Introduce the purpose of the ritual as marking the start of the leaders’ journey together and becoming a collective. They will claim the space where the group will be together, and bring others into the room who have supported them.
- 2 Invite the participants to go outside and find an object that symbolizes an important person or people in their life. Pose these questions: *Who is central to why you are here today? Whose shoulders are you standing on?* They should spend no more than 10 minutes finding an object.

Instructions (continued):

- 3 When they return, ask leaders to present their objects to the group and place them on a tray or table in the center of the room. As they do so, ask leaders to say their name, what the object is, and who it represents. Each person speaks for a maximum of 2 minutes.
- 4 In the closing, note the creation of an “altar to our stories” that can be referred to later in the group’s work together.

WHAT IS MY NLN STORY?

This exercise is the closing ritual at NLN, done in the last few hours of the group’s time together. Its purpose is a public retelling of each leader’s personal journey through the NLN experience.

What’s needed: A quiet and private room with a circle of chairs.

Instructions:

- 1 Give the leaders a few minutes to recall three moments that represent the “before, during, and after” experience of the NLN.
- 2 Introduce the arc of each leader’s talk. For each talk (5-7 minutes):
 - Ask the speaker to select two others from the group to offer reflections on what they share.
 - Direct the leader to speak for 3 minutes and share key moments from their NLN journey and how they were impacted.
 - Ask the responders to offer feedback using the following prompt: “AND, what I ALSO saw you do is....” This allows colleagues a final opportunity to celebrate something about that person’s journey.
 - Ask that leader to select the next speaker.

WHAT WE’RE LEARNING

- ✓ Rituals are powerful. They give individuals permission to express themselves more fully to the group, helping create vulnerability, deepen trust, and build connections. By witnessing others, participants build their empathy and capacity to see the world through others’ eyes.
- ✓ Rituals can also be disruptive. Participants are initially wary of being asked to step out of their comfort zones, so the facilitator must help overcome initial resistance. Over time, even the most resistant groups begin to revisit the rituals they have co-created.
- ✓ Rituals can build a collective capacity to talk about complicated issues and express less comfortable feelings. Often, what is expressed in ritual can become an invitation for further exploration.
- ✓ Rituals also solidify learning. Asking leaders to recount their experience in front of their fellow travelers helps cement learning and commitments.

WHO IS CENTRAL

TO WHY YOU ARE

HERE TODAY?

ACTIVITY 6

Equity Fishbowl

🕒 TIMING

Allot at least **90 minutes**.

★ EXPERTISE

This exercise is not recommended for a facilitation team that is not deeply committed to its own exploration of how race impacts its work together. The facilitators do not have to be experts on issues of equity. Rather they have to be comfortable talking about their own journey around issues of equity, power, and racism as a team.

PURPOSE

To equip leaders to surface and address issues of equity, power, and racism within systems.

USE

This exercise can be used to jump-start a group conversation about structural racism. Often this deepens leaders' understanding of how racism shows up in their relationships and work.

FACILITATION

This exercise works best when the group is already in deep relationship with one another and clear on the community agreements. It should also happen as part of a larger conversation about the role of systemic racism and power dynamics in the work itself and in the larger community.

What's needed: It's important that the room be closed to outside interference. The group should be sitting in a circle. The facilitation team will sit in a "fishbowl" inside that circle so that the group can observe the conversation from the outside.

Instructions:

- 1 Tell the group that they are going to witness a conversation between the facilitators about how issues of racism and equity play out in the facilitation team. Make it clear that the conversation is not staged, and that it might be difficult to hear us speak about sensitive issues present in our dynamic.
- 2 Let them know that after the conversation, they will be invited to ask questions, react, or reflect on its relevance to the group itself.
- 3 Speak to the dynamics present in your team. We often begin by telling our team's history, starting as an all-white group. Over time and with much work, we became a multiracial team, work that continues to this day. This conversation can go for up to 30 minutes.
- 4 At the end of the conversation, participants are invited into the "fishbowl" to ask questions or make comments. Often this begins an important conversation about the racial dynamics in the room.
- 5 The full circle is re-created and the facilitators lead a debrief.

WHAT WE'RE LEARNING

- ✓ This is a risky moment for both the facilitation team and the group. It's safer to have conversations about equity and racism that are abstract, but harder to look at how racial dynamics are playing out among trusted colleagues. And, it is even rarer for a team be honest about their struggles and still be in productive relationship with one another.
- ✓ Even when this exercise has resulted in strong emotions and hard feelings, it has always laid the groundwork for greater honesty. With the facilitation team as a proxy, this exercise often enables discomfort and anger to come to the surface and be acknowledged. When done with support, leaders get practice at expressing discomfort around issues of power and racial inequity.

OVER TIME AND WITH MUCH WORK,
WE BECAME A MULTIRACIAL TEAM,
WORK THAT CONTINUES TO THIS DAY

ACTIVITY 7

Leadership Feedback

TIMING

Each individual takes approximately **12 minutes**, with a few minutes for transitions. We allot an hour for small groups of 4.

EXPERTISE

This session requires a facilitator with a **working knowledge of coaching** who will be unafraid to help groups step into greater intimacy. Ideally, this facilitator can participate in the feedback and step in if a leader is negatively impacted by what they have experienced.

PURPOSE

To help leaders articulate what propels them toward success and what holds them back.

USE

This exercise is intended for a group that aspires to greater levels of leadership in their work and life. At NLN we tend to do this after the group has had the opportunity to see one another in action as part of a work group.

FACILITATION

This exercise is centered on the idea that we can learn a lot about how we show up as leaders from those who have even limited experience working with us. It allows leaders to experience what others see in them: both their strengths and weaknesses. That recognition is often a relief and a motivator.

What's needed: This exercise occurs in groups of 3 or 4. Each group will need enough privacy for an intimate conversation: a room closed to interference or outside, where leaders can find a quiet place. It is often helpful to provide the small groups a handout with instructions.

Instructions:

- 1 Introduce the exercise by talking about how rare it is for leaders to get candid feedback from those who experience that leader day to day. It's important to contrast this with the more typical annual review from an employer.
- 2 Explain that they will be divided into groups of 3–4. Each leader will take turns receiving feedback from the others.
 - Decide who in the group will be the focal person and who will be the timekeeper.
 - Have the focal person sit quietly while the others reflect on two prompts:
 - *Here is where I see you as talented and powerful.*
 - *Here is where I see you get in the way of your own greatness.*

Instructions (continued):

- Before the focal person receives the feedback, decide whether he/she will record what is said on their phone or in writing. Most leaders will have a hard time absorbing all that is said, especially the praise.
 - In the first round of feedback, each leader takes 1–2 minutes giving the focal person feedback about how they see the leader excelling.
 - In a second round, each leader takes 1–2 minutes giving feedback about where they see them struggle or get in their own way.
 - The focal person has the opportunity to respond and say how they are impacted by hearing the feedback.
 - It is helpful to provide some guiding prompts for this feedback. We typically suggest the following:
 - *Thank you.*
 - *This how your feedback has affected me...*
 - *Here is where I will need your support...*
- 3 Reassure participants that this feedback is happening within a circle of trust and respect, and that most leaders experience relief at being recognized for both good and bad. It is common for the group to feel anxious and to push back on this process. It is also important to flag that most leaders are well versed in their own limitations but actually have a harder time hearing praise.
 - 4 After the whole group returns from their conversations, lead a quick debrief. Ask what people learned from one another.
 - 5 Follow this exercise with an energizing moment that allows the group dynamic to reset.

WHAT WE'RE LEARNING

- ✓ This exercise always elicits strong emotions from leaders at the beginning. After hearing the instructions, leaders tend to protest that they don't know one another well enough to give real feedback. But by the end of the exercise, they are often amazed at how well they have been recognized for both their strengths and their weaknesses. Our conclusion: We are all more obvious, and more observant, than we give ourselves credit for.

WE ARE ALL MORE

OBVIOUS, AND MORE

OBSERVANT, THAN

WE GIVE OURSELVES

CREDIT FOR

ACTIVITY 8

Personal Network Mapping

🕒 TIMING

It's important that the map's complexity fits the purpose of the exercise and the time allotted. At NLN, we dedicate a **minimum of 2 hours** for this exercise.

★ EXPERTISE

It is helpful but not required to have a facilitator with a **working knowledge of network strategy and mapping**. It is very possible to facilitate a network mapping session with adequate preparation and supportive tools and processes.

PURPOSE

To determine whether a leader's network assets (who they know and work with) align with what they see as their future work.

USE

This is a great exercise to create visibility around who is enabling or inhibiting our ability to achieve greater impact. At NLN, we have most effectively used network mapping to help leaders align existing or new relationships with their strategies.

FACILITATION

The goal of the exercise is to create a visual of the current state of that leader's network (their relationships) and invite feedback from others about whether it serves that leader's aspirations.

What's needed: Each participating leader will need a poster-sized paper and Post-its of different colors and sizes. The room should have ample wall or table space so that each leader can spread out as they build their map. It's important to take pictures of the map at the end of the exercise.

Instructions:

- 1 Introduce why network mapping is relevant to amplifying a leader's impact on a system. It is also important to provide definitions of key terms for network maps. Relevant slides are available on our website.
- 2 Have the leaders brainstorm the purpose or goal they intend to map. Make clear that networks are often organized around a specific goal. Facilitators should encourage leaders to focus on broad goals, even when that goal is highly aspirational. The final purpose statement is written on a 4x6 Post-it.
- 3 Have leaders share their final purpose statements in pairs or small groups. Facilitators should intervene if a leader is struggling to focus the inquiry.
- 4 Describe the full process to creating a simple hand-drawn network map. Relevant slides are available on our website.
 - Take 15 minutes to brainstorm what people or organizations are essential to the purpose that leader has committed to (our "network relationships"). This

Instructions (continued):

includes key colleagues; influential but more removed ambassadors; or those who are roadblocks to progress. Write each name on a small Post-it. Encourage the leaders to be strategic rather than comprehensive. If helpful, they can use different colors of notes to denote those who inhibit or promote their success.

- Direct leaders to place their purpose Post-it in the center of a poster-sized paper. Then, leaders should place each smaller Post-it to represent where a specific relationship sits relative to the leader's purpose. If a person or organization is key to achieving the leader's purpose, that Post-it will be close to the center. If someone is remote, they will be further away.
- Now, direct leaders to rearrange the Post-its to also reflect the relationships between the people and organizations on their map. This will require them to create clusters of organizations and people that work closely together. Again, facilitators should brainstorm with leaders on how to accurately represent the network they envision.

5 Pair leaders to discuss whether their network assets support their purpose. Possible conversation prompts include: *What is my network positioned to do? Who has power in my network? Who is missing from my network? What barriers or opportunities exist that I was previously unaware of? What would my network look like if I was achieving my purpose? What changes need to happen?*

6 Finally, reconvene the group. Lead a reflection to understand what leaders have learned and determine possible next steps.

WHAT WE'RE LEARNING

- ✓ In making the networks visible to themselves and others, leaders often realize that they don't have the network of relationships they need to achieve their aspirations. Perhaps they are spending too much time with the wrong people or have made assumptions about what relationships among others means for their work. Either way, the visibility promotes their thinking about what needs to happen next.
- ✓ Often leaders get lost in this exercise because they overdo the detail of people they are mapping, or their purpose statement is too broad. Facilitators should monitor the leaders' energy and help them clarify what will be most useful given their stated purpose.

WHAT WOULD MY NETWORK

LOOK LIKE IF I WAS

ACHIEVING MY PURPOSE?

WHAT CHANGES NEED

TO HAPPEN?

ACTIVITY 9

Moments of Movement

🕒 TIMING

Moments of movement can be quick—a pause during an intense moment to stand and stretch—or longer, such as a 30–45 minute block of time using games and physical exercises to build trust or demonstrate a new skill.

★ EXPERTISE

None. The specific type of movement called for can be determined by the facilitators based on who is in the group and what they are working on. If the movement involves physical contact, it's important to ask and receive permission from the group, set basic guidelines, and make it OK for participants who are not comfortable with being touched to just observe.

PURPOSE

To manifest a new skill or build trust through non-verbal connection. To deepen relationships and provide collective moments of transition between intense learning sessions.

USE

All groups need relief after sitting for long periods of time. What we're suggesting is that you leverage natural breaks to build more

cohesion across the group and integrate the mind and body. This can be a silly game, a yoga stretch, or a more intentional piece of somatic teaching (as described here).

FACILITATION

What's needed: A quiet and private room with enough space for the participants to move around easily. It's important that the room be closed to outside interference. You will also need a speaker to play music.

KELP

This exercise can be used to transition after intense work together, and introduces both quiet reflection and somatic practice. It takes about 10–15 minutes.

Instructions:

- 1 Start the music. Suggested tracks: Max Richter's "On the Nature of Daylight" or Bobby McFerrin's "Common Thread."
- 2 Divide the group in half and invite anyone uncomfortable being touched to stand to the side. Make clear that any contact will be only on the arms, backs, and shoulders.

One half of the group should then spread out across the space, stand still, and close their eyes. Tell them that they are kelp, rooted to the ocean floor, unable to do anything but receive the nourishment of the ocean.
- 3 The second group then plays the role of the ocean, and moves around, gently making physical contact with the kelp (arms, backs,

Instructions (continued):

shoulders), in keeping with the music.

- 4 After one song ends, switch roles. Kelp is now the ocean. Ocean is now the kelp.

COACHING THROUGH MOVEMENT

This exercise is used to begin a conversation about peer coaching. It makes visible the multiple ways we can support our colleagues and creates greater self-awareness about roles we're choosing to play. It is also silly and fun. Plan to spend about 30-40 minutes on this exercise as described.

Instructions:

- 1 Divide the leaders into pairs. One leader will be the coach and the other will be the partner. Let the group know that the three pieces of movement in this exercise will mirror three different coaching styles.
- 2 In the first round, explain that the coach will be keeping their partner safe while they move around the room with their eyes closed. The coach is invited to steer their partner away from people or physical objects by lightly touching their shoulders when needed to redirect them.
- 3 Start the music and invite the partner to begin moving about the room knowing their coach will keep them safe. Play the full length of the song so that the coach and their partner will have an opportunity go get more comfortable with this experience. After the end of the song, invite pairs to share how that experience impacted them.
- 4 In the second round, invite the coaches to hold their partner's hands in order to amplify the movements their partners are already making to the music. This is a process of deep attunement to the unique expression of the partner as it occurs in coaching. The coach encourages not with their words but with their hands: expanding their movements, contracting them, taking them further than they might otherwise. Ask movers to tell coaches what physical contact they are open to. Again, at the end of the song, invite pairs to share how they are impacted.
- 5 In the final round, start the music and invite the coaches to play a more directive role, actively moving their partner around the room. While you are inviting the coach to lead, it is important that the coach stay attuned to their partner's inclinations. This again mirrors coaching, where the coach can play a directive role but always in service of the client. This time around, the song should be more energetic to encourage risk-taking. Again, invite the pairs to reflect after the song is finished.
- 6 After the three songs are complete, switch partners and repeat the above steps.
- 7 Finally, once everyone has had an opportunity to be both coach and partner, lead a debrief to explore some of the following prompts: *What did they learn about being a coach? What was it like to receive support? Did one style of "coaching" feel more comfortable than others?*

WHAT WE'RE LEARNING

- ✓ Movement is powerful. It allows a group to re-energize and connect somatically. It gives individuals some space to process and reset. It can also solidify learning and integrate the mind and body. Asking leaders to embody new skills and ways of being can be stressful; movement can deepen their understanding and openness.
- ✓ Movement can feel personally risky to participants. Leaders often resist this unorthodox way of learning. We offer relief by using humor, allowing giggling, or inviting them to step out of the group when needed. As a group grows more comfortable, we often experience an uptick in requests for movement.
- ✓ Introducing movement as a facilitator can also feel risky. When we first ask a group to step out of their comfortable zone, it is often met with resistance and may feel like breaking facilitation norms. With practice, this gets easier to overcome.

MOVEMENT CAN DEEPEN RELATIONSHIPS,
PROVIDE MOMENTS OF RELIEF AND TRANSITION,
AND HELP LEADERS INTEGRATE MIND AND BODY



NLN TEAM AND CONTRIBUTORS



HEATHER MCLEOD GRANT

NLN Managing Director and Co-Facilitator

Heather is the cofounder of Open Impact, a social impact advising firm, and a published author, speaker, and consultant with more than 25 years of experience in social change. She is the coauthor of the bestselling [Forces for Good](#) and other publications, including [The Giving Code](#). Previously she was the founder of McLeod-Grant Advisors, helped lead the nonprofit practice at Monitor Institute, and served as a McKinsey & Company consultant. She has advised many of the leading nonprofits, social entrepreneurs, philanthropists, and foundations of our time, and has given hundreds of speeches and workshops. She has expertise focused on philanthropy, social change networks, leadership and capacity building, social innovation and entrepreneurship, and nonprofit management. Heather began her career as an Echoing Green Fellow in 1993 when she cofounded *Who Cares*, a national magazine for social entrepreneurs. She has been a venture partner with the Draper Richards Kaplan Foundation and served on many local, national, and global nonprofit boards. She holds an MBA from Stanford University and an AB from Harvard University.



ADENE SACKS

NLN Program Director and Co-Facilitator

Adene is a philanthropic advisor and social impact strategy consultant who spends her days thinking about how networks, design, and strategy can amplify leaders' efforts at changing social systems. She happily wears many hats, including program director of the New Leadership Network; senior advisor to Open Impact; and founding member of the With/In Collaborative. Previously, Adene spent a year working with the Organizational Effectiveness team at the Packard Foundation and has served as senior advisor to both DataKind and the Fellows Program at Stanford's Hasso Plattner Institute of Design (d.school). Adene also served as the first senior program officer at Jim Joseph Foundation and in 2011 received the JJ Greenberg Award for Philanthropic Leadership. Adene's writing, focused on what impacts our ability to repair our world, has appeared in *Stanford Social Innovation Review*, and on the Center for Effective Philanthropy and Grantmakers for Effective Organizations blogs. She and Heather recently coauthored [The New Normal](#), a study that explores how we support social change leaders on the front lines of this political moment.



JOHNNY MANZON-SANTOS

NLN Coach and Co-Facilitator

Johnny is passionate about surfacing connections and engaging peace and social justice movements as an activist, organizer, and client advocate. He is co-principal of pearldiving LLC, a coaching and consulting practice that partners with individuals and organizations in transition, and a founding member of the With/In Collaborative. A strategic thinker with deep experience in the nonprofit sector, he served 15 years as executive director of health/HIV agencies in New York and San Francisco. He has led through boom and bust economic times and is intimately familiar with all phases, including startup, rapid expansion, downsizing, and merger. Johnny's earliest community work centered on crisis counseling and anti-discrimination training with young people in high-risk situations. Johnny is certified by the Coaches Training Institute, credentialed through the International Coach Federation, and trains and mentors coaches as a faculty member with Leadership That Works. He is an alumnus of Brown University and the Executive Program for Nonprofit Leaders at Stanford University's Graduate School of Business.



BELMA GONZÁLEZ

NLN Coach and Co-Facilitator

Belma González has provided individual coaching, group coaching, and coach training for more than a decade. She believes coaching skills can support personal growth and self-awareness, emotional intelligence, leadership enhancement, change management, work/life transitions, emotional-physical-spiritual balance, and fulfillment, and can be utilized to further healing, equity and liberation. She is a faculty member with Leadership That Works, a founding member of the With/In Collaborative, a core associate with RoadMap Consulting, and a vetted member of more than 15 coaching "pools" for numerous leadership programs, including the Nexus Fellowship, Rockwood Leadership Institute, and programs associated with CompassPoint Nonprofit Services and UCSF's HealthForce. Belma worked in nonprofits for 26 years, including a community-based women's clinic and a leadership program for women's health leaders. She holds a Professional Certified Coach credential through the International Coach Federation and a BA from San Francisco State University.



MARK NICOLSON

NLN Co-Facilitator

Mark is dedicated to helping himself and others live lives of purpose, connection, and social and environmental justice. He works with several social change visionaries, including Business Alliance for Local Living Economies (BALLE), the design and consulting firm IDEO, Desmond Tutu's family foundation, and many equity-focused startups. Mark has an MBA from Stanford University and an MA in classical literature from University of Oxford. Early in his career, he worked in investment banking. After the spiritual awakening that inspired his life and work philosophy, he became a partner in Alexander, the UK pioneer in executive coaching, then took a two-year sabbatical to manage the garden and study at Esalen Institute. More recently he has also seen the potential for plant medicine and empathogens to give us access to creativity and transformation, and to heal trauma. He is becoming certified to offer MDMA-assisted psychotherapy for PTSD in association with FDA-approved clinical trials.



THOMAS BOTH

NLN Design Curriculum Lead

Thomas is a designer and design educator whose passion is helping people understand the practice of human-centered design—and their ability as designers—to innovate how they learn, think, and solve problems. He is director of the Designing for Social Systems program at the Hasso Plattner Institute of Design (d.school) at Stanford University. In this program, he teaches professionals how to apply design thinking to complex social challenges and facilitates workshops for social impact leaders to develop a more human and strategic practice. Working with both students and professionals, Thomas has designed and led immersive hands-on experiences, including the Design Thinking Bootcamp executive workshop and various iterations of a fundamentals course called Design Thinking Studio. From these programs, he developed methodologies and created free public resources such as the Bootcamp Bootleg. Thomas earned a master's degree in design from Stanford after a previous career as a mechanical engineer.



CATY PEREZ

Network Weaver (Fresno)

Caty is the associate vice president for development at California State University, Fresno. She has served Fresno State for almost 18 years in various development roles, with the goal of creating an environment of philanthropy both on campus and in the community. She engages with alumni, friends, corporations, and foundations through strategic partnerships and raises private support. She is a thought leader and strategic collaborator across the university and community. She also serves as vice president for Fresno Innovative Charter Schools and on the advisory board for the Phillip J. Patino School of Entrepreneurship. Caty is a San Joaquin Valley native and received a BA in applied mathematics from Fresno Pacific University and MA in education leadership from California State University, Fresno.



KATE TROMPETTER

NLN Coach and Network Weaver (Stanislaus)

Kate is an organizational and systems coach. In her practice, she helps people and organizations increase their impact through meaningful, facilitated experiences and coaching. A native of Stanislaus County, she is also certified as a Community Coach through Leadership That Works. She worked in the nonprofit sector for over a decade in various leadership positions and, in 2018, in an act of foolishness (or bravery, depending on how you look at it), she started her own facilitation and coaching practice in an effort to increase her impact and experience as much joy as possible. She obtained her BA in sociology at the University of California, Davis, and a Master of Public Administration degree at California State University, Stanislaus.



JENNY JOHNSTON

Writer and Editor

Part journalist, part anthropologist, Jenny Johnston is an expert in helping organizations and authors find innovative and “sticky” ways to communicate their visions and their stories to the wider public. Her recent clients include the Levi Strauss Foundation, Omidyar Network, Skoll Global Threats Fund, University of California, Berkeley, the W.K. Kellogg Foundation, and the Presidio Trust. She also served as developmental editor on a handful of recent bestselling books. Before starting her own practice, Jenny served as senior editor at Global Business Network, a scenario planning consultancy and futurist think tank based in the Bay Area, where she shepherded an ever-changing range of publications and presentations from concept to completion and ran modules on “strategic storytelling” for clients and coworkers. Prior to that, she was copy chief for a major consulting firm and an arts and culture editor in Boston. She holds an AB in cultural anthropology from Princeton University, an MA in the same from University of Colorado Boulder, and an MS in journalism from Boston University.



J SHERMAN STUDIO

Design Team

J Sherman Studio, Ltd. is a top-tier design firm in Newton, Massachusetts led by principal and owner Julie Sherman. The Studio partners with nonprofits, foundations, and companies to create clean, creative, and intentional design. Julie’s team is built of a small group of talented artists who enjoy solving problems and working collaboratively so that every project benefits from their combined expertise. The Studio strives to bring clarity, confidence, and energy to clients’ ideas, helping them achieve their goals and getting them the attention and results they deserve. Over the past 12 years, J Sherman Studio has worked with major foundations, including Charles and Helen Schwab Foundation, The James Irvine Foundation, W.K. Kellogg Foundation, Levi Strauss Foundation, and The Rockefeller Foundation. The Studio is proud to work with many local and national organizations, amplifying their messages, strengthening their brands, and magnifying their impact. These include Centering Healthcare Institute, The diaTribe Foundation, GripTape, Harvard Office for Sustainability, More Than Words, Open Impact, and the Social Innovation Forum.



MARIAN KAANON

President & Chief Executive Officer, Stanislaus Community Foundation

Marian Kaanon is the president and CEO of Stanislaus Community Foundation. A first-generation Assyrian American, Marian grew up in Modesto and graduated from University of California, Davis. Marian began her career in broadcast journalism before working in public relations and legislative affairs in both the public and nonprofit sectors. She has served as CEO of Stanislaus Community Foundation since 2012. Stanislaus Community Foundation is a place-based funder that has invested nearly \$18 million in local nonprofits and over \$2.5 million in scholarships to students. During Marian's tenure, Stanislaus Community Foundation has tripled its charitable assets under management and now leads the Cradle to Career Partnership, a long-term movement to impact the lives of 109,000 children and their families in Stanislaus. Stanislaus Community foundation's vision is that Stanislaus becomes a community of choice, where people live, work and thrive. To achieve this vision, the foundation believes the way forward is through trusted relationships and bold leadership, and its backbone support of the Irvine New Leadership Network is a core part of the foundation's work.

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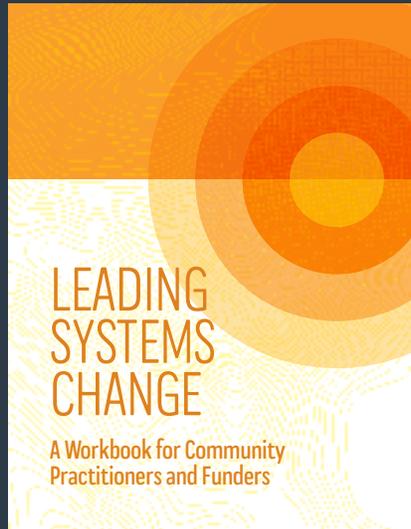




ONLINE RESOURCES

In an effort to keep our resource list dynamic and updated, we have chosen to include it on the NLN website rather than in this workbook. Please visit:

<http://newleadershipnetwork.org/tools/> for a more detailed listing of various resources and additional exercises mentioned throughout this book.



We encourage you to download and
read our full report at newleadershipnetwork.org



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