

# FINAL PROCESS EVALUATION

for the **Second Cohort**  
of the Rural Opportunity Institute's  
Resilient Leaders Initiative

Prepared for ROI by  
**Hanaleah Hoberman, MPH**

March 2023

**Resilient  
Leaders  
Initiative**

powered by Rural Opportunity Institute

# Table of Contents

## Executive Summary

### Reach

#### Question: To what extent does RLI reach the intended audience?

Results

Findings

Alignment of scoring criteria with intended audience:

Adherence to stated process:

#### **Recommendations**

#### Question: To what extent was each convening agenda followed?

Results

Findings

Recommendations

#### Question: To what extent were the objectives of each convening achieved?

Results

Findings

Recommendations

#### Question: Are coaches meeting the deliverables outlined in the MOU?

Results

Findings

Recommendations

#### Question: Are bi-monthly coach check-ins taking place as planned and creating a space to a) share challenges b) share best practices c) get clarity around where teams should be at and what is coming up in the program

Results

Findings

Recommendations

**Question: To what extent did participants attend convenings as planned?**

[Findings](#)

[Recommendations](#)

**Question: To what extent did participants attend team weekly meetings?**

[Results](#)

[Findings](#)

[Recommendations](#)

**Question: To what extent were participants actively engaged in convenings?**

[Mid and Post-Cohort Results](#)

[Findings](#)

[Recommendations](#)

**Question: To what extent did participants complete the participant deliverables?**

[Results](#)

[Finding](#)

[Recommendations](#)

**Question: How satisfied were participants with the convenings?**

[Results](#)

[Findings](#)

[Recommendations](#)

**Question: How satisfied were participants with the coaching?**

[Results](#)

[Findings](#)

[Recommendations](#)

**Question: How satisfied were participants with their experience with RLI overall?**

[Results](#)

[Findings](#)

[Recommendations](#)

## **Context**

**Question: How appropriate was the program for the context in which the participant organizations are working?**

Results

Findings

Recommendations

# Executive Summary

Overall ROI staff followed the plan for RLI. Coaches moderated followed the plan, but struggled with some deliverables. Participant engagement varied and one team dropped out. Participants were very satisfied by their coaches and generally felt supported by RLI and their organizational leadership. However, teams at times struggled to meet deliverables and may have been discouraged when they fell behind or did not see the results they hoped for. Still, most teams had a core of participants who remained engaged throughout the program and both coach and participant reports indicate that participants who fully engaged benefited from the program.

**Reach:** ROI generally followed the process it set out for itself for reviewing and selecting applications. However, ability to complete RLI deliverables was missing from the application evaluation criteria. Additionally, ROI seems to lack clarity in the intended audience of the RLI program. By codifying the intended audience for the program, future evaluations can better evaluate the reach of the program.

**Fidelity:** For the most part convening agendas were followed. Though agendas were followed, the convenings had some issues with meeting stated convening objectives. While the vast majority of convening objectives covered in the full group were achieved, objectives that required breakout work were not reliably completed by all groups. Fidelity was high for coach bi-monthly meetings, which took place as planned and met deliverables.

Coach adherence to stated deliverables was moderate. Performance was high for expectations that occurred when ROI staff were present. However, coach performance of deliverables was lower (in some cases much lower) for expectations that required written submission but no face-to-face meeting with staff. Coaches particularly struggled to communicate team challenges to staff and request appropriate support.

**Dose Received (Exposure):** On average the participating organizations met the expectation for 76% of convenings. However this overall average masks a number of very concerning indicators around attendance. Attendance greatly dropped off in the second half of the cohort. The three person teams, which were already struggling with attendance during the first half of the cohort, completely missed the expectation in the second half. One team, Eastern Star, dropped out of the cohort after the fifth convening. As far as attendance at team meetings, most teams seem to have at least one member that didn't consistently attend meetings. This had a detrimental effect on three-person teams as they had little cushion for non-participation of members.

In assessing participant engagement with convenings, there were some issues with the ability of the data to answer this question. Participants do appear to have engaged enough to remember information presented during the convenings. There may have been some engagement issues with the third and fourth convenings. Improvements should be made to survey questions to better evaluate this in the future.

Half of the deliverables were fully completed by all teams. Some teams began having issues with deliverables due to external factors such as buy-in from organizational leadership and stakeholder availability. For a number of deliverables, it is difficult to determine whether deliverables were not completed or not submitted. In other cases, there appears to have been issues with team buy-in with parts of the RLI process. Multiple coaches discussed issues with team member motivation, hopelessness, and commitment as the program went into the third and fourth convenings. Coaches also reported issues with role confusion around what was and was not appropriate or helpful for them to take on to help their teams with the work.

**Dose Received (Satisfaction):** There was insufficient data to evaluate satisfaction with RLI as a whole, though participants reported feeling supported by ROI staff. There was some conflicting data regarding satisfaction with convenings. Overall participants seemed somewhat or fairly satisfied with the structure and presentation in individual convenings. However, participant reports of the usefulness of the convenings were low. Across convenings, participants commented about needing more time in breakouts. Participants requested more breakout time and time to reflect, and were appreciative when it was given. Participants expressed a desire to learn more about and collaborate with the other teams.

ROI may want to re-envisioning the convenings to make them less didactic or might consider restructuring RLI to put less emphasis on convenings altogether. There was very limited information available to evaluate participant satisfaction with their coaches. However, the limited information available indicates that participants were somewhat or very satisfied with their coaches.

**Context:** Participants overwhelmingly felt supported by their organizational leadership, a key contextual factor for the sustainability and impact of the program. At the end of the program, most participants reported that their organizations had the resources to sustain their pilots. However, one team struggled with a lack of organizational support, which prevented them from moving forward and may have been a factor in them dropping out of the program. ROI should revisit its method for evaluating and/or building organizational support.

The key contextual barrier affecting team success as reported by both participants and their coaches were the time pressures of work conflicting with the time requirements of the program. There are some indications that participants felt discouraged by falling behind on deliverables and not seeing improvements in their run charts. RLI might consider extending the program to allow for a longer time horizon to reduce time burden on participants and provide more opportunity to see improvement. Alternatively, RLI might consider reenvisioning the program to place more emphasis on learning and less emphasis on deliverables.

# Reach

## Question: To what extent does RLI reach the intended audience?

ROI staff were unable to provide a pre-existing description of the intended audience for RLI. However, they provided materials used to review program applicants. These materials and scorer notes were used to develop a preliminary description of the RLI Intended Audience.

The intended audience for RLI is: Teams comprising diverse stakeholders of organizations in Edgecombe County that are committed to the RLI process, including trauma-informed change, anti-racist mentalities, incorporation of new ideas and feedback, and strengthening community collaboration, in order to address well-defined organizational challenges, and that show evidence of capacity to fulfill and sustain a systems change project.

Additional themes that come up in notes, but were not incorporated into scoring criteria:

- Organizations that have been in the community a long time and will be in the community a long time
- Teams with members that have relevant experience and understand the realities related to the challenges they're facing
- Team members have shared vision, understanding, and goals
- Team members have time and capacity to meet deliverables
- Organizations that have a broad impact on the community
- Organizational leadership is invested in process

## Results

Community member and staff applications were scored separately. Community members only scored the applications selected for an interview. The purpose of having the community score written applications that have already been selected for interviews is unclear. Community ratings do not appear to have deeply affected the outcome as two programs that were in the top five rankings by community scorers were not selected for RLI. Consider integrating community scorers into the initial application review and placing their scores alongside staff scores in order to weight them evenly.

Applications were reviewed through a two-step process. Written applications were scored and, based on these scores, were selected for interviews. Applicants were then scored based on their interviews.

Out of the 19 initial applications reviewed, 7 were selected for interviews. From interviews, 5 were selected for RLI.

Written applications were scored by staff and community members on prior ACEs/resilience work, awareness-building, team commitment and capacity, track record, specificity of challenges, strategic thinking, and passion.

## Findings

### **Alignment of scoring criteria with intended audience:**

Since there was no specific description of an intended audience provided, and the draft description was developed from the scoring criteria, it was not possible to evaluate this.

However, I do note that capacity to fulfill ROI deliverables seems to be missing from the interview criteria.

### **Adherence to stated process:**

The seven applications selected for interviews were among the eight highest scoring applications in the staff scores. One application that was tied for the highest score, was not selected for an interview due to the applicant withdrawing from the process. Two applications that were ranked among the top five by community scorers were not selected for RLI. The top five scoring applicants from the interviews were selected for RLI.

## Recommendations

Use this draft description of an intended audience to formalize a description of RLI's intended audience.

It is unclear how heavily ROI weights the various criteria used to evaluate candidates. ROI should reflect on whether all criteria are equally valued or whether different criteria are of different priority levels. If criteria are at different priority levels, ROI should explore weighting different criteria accordingly in scoring.

Review the themes that came up in notes but were not incorporated into scoring criteria during the development of the intended audience and scoring criteria.

Incorporate questions regarding capacity to fulfill RLI deliverables into interview scoring

Ensure that all top scoring applications are invited to interview



# Fidelity

Question: To what extent was each convening agenda followed?

## Results

### Kickoff

- Group norms is listed on agenda but is not in slide deck
- Background on RLI was not on agenda but was in slide deck
- Teach charter is before next steps on agenda, but after next steps in slide deck
- Under Program Overview and Expectations, the only detailed item listed is curriculum timeline. But the actual slide deck included:
  - Program Goals
  - Program Timeline
  - Participant Deliverables
  - Coach Expectations
  - Recap last year's teams

- Intro to accountability board

### **Convening 1**

- Agenda closely followed

### **Convening 2**

- Human centered design and little bets section did not have details of major topics on the agenda. Major topics covered in the slides include:
  - Intro
  - ROI Example
  - RLI Example
- End of section on little bets included information about reimbursement for interviewees, which was not in the agenda at this point. This may not be the best place for it, given that the presenter has not yet covered Empathy Interviews, which comes next.
- In the slides, the Human Centered Design Icebreaker that is on the agenda here is not included
- The interview practice section includes tools “rules of thumb” for conducting an interview, but this is not included in the agenda

### **Convening 3**

- The brainstorming section of the agenda only listed a team-specific activity. But in the actual slides there were two team-specific activities, one just for initial practice (cat off a roof) and one specific to their design challenges.
- After the design challenge brainstorming, the teams did a clustering activity with their brainstorms, which was not listed specifically in the brainstorm section of the agenda

### **Convening 4**

- In the reflection section of the slides, revisiting systems maps is covered, which is not in the agenda
- There is a debrief before the break that is not on the agenda
- The Data Measurement section says this will cover how the coach will support the teams, but the actual content of her presentation is actually an introduction to measurement and data-informed decision making and does not appear to cover the specifics of her role and how it will support the teams

### **Convening 5**

- Slide deck includes an overview of next steps for little bets, which is not specified in the agenda

## Convening 6

- Testing little bets section included a process map, which was not listed in the detailed section of the agenda
- Testing little bets section includes explanation of gifts for participants, which was not listed in the detailed section of the agenda
- Testing little bets section included a breakout session, which was not listed in the the detailed section of the agenda

## Convening 7

- In the agenda, the little bet testing reflection section starts with a check-in on where teams are with their little bets, however teams did not address this question before breakouts and the question was not on the list for the breakout sessions either.
- Change management section included significant time reviewing barriers to change, which was not listed in the detailed section of the agenda

## Convening 8

- Although the Telling Your Story section was covered generally, not all subsection items were touched on or covered in depth. The presentation given focused primarily on the importance of storytelling, formats for storytelling (emphasizing visual formats), and instructions for the final celebration. Some of these items were not mentioned as sub-bullets in the agenda. Meanwhile, two listed subsections, framing the WHY for presentations and incorporating your pitch, were either not discussed or only briefly mentioned.

## Convening 9

- Agenda followed based on slides. Video unavailable to evaluate.

## Findings

For the most part agendas were followed. Some small divergence in the agendas of most convenings occurred, and appeared to stem from the iterative process of creating slides after the agenda was made.

The level of detail across agenda items was inconsistent. Some agenda items included sub-topics and outlines, while others of similar length did not.

Long agenda items often do not include details on substantial topics covered in the agenda, which may make replicating the program more difficult.

## Recommendations

Create more detailed agendas to facilitate replicable program work and reduce future work.

After slides are made, revise agenda to reflect any additions or changes that were made. This will make the revelations of the slide creation process replicable lessons learned for the next cohort.

Question: To what extent were the objectives of each convening achieved?

**Results**

Convening	Objective	Covered in Agenda	Notes	# Teams that Completed	Notes
	Build connection amongst cohort members, their coaches, and RLI facilitation team	Somewhat	Only activity building between-team connections or connections with facilitation team was the intro activity	N/A	
	Understand expectations and timeline for the program	Yes		N/A	

	Begin to create the norms and operating procedures for a safe and productive team and cohort working environment/relationships	Somewhat	ROI expectations of teams and coaches are communicated. Within-team norms are given time to create. However, there is not a co-creation activity where the cohort as a whole creates their norms.	5	SWEHS put charter in a different folder.
	Reflect on our goals / hopes for this program	Yes		5	SWEHS put charter in a different folder.
1	Understand ROI's systems map and strategy, and identify how your organization intersects with parts of the map	Yes		5	Eastern Star put their stakeholder analysis in a different folder.
	Discuss Trauma with focus on Historical Trauma and Adverse Community Environments	Yes		N/A	
	Explore the concept, principles, and benefits of being "Trauma Informed"	Yes		N/A	
	Review the importance of Resiliency Skills and Self-Care in this process	Yes		N/A	
	Explore and anticipate the barriers / challenges / trajectory of creating trauma-informed change within a big system/institution	Yes		N/A	
2	Understand the overall human-centered design process, and how building empathy fits in	Yes		N/A	
	Understand the goals, process, and best practices for conducting and debriefing an empathy interview	Yes		N/A	
	Conduct an effective empathy interview using a provided interview guide	Yes		Unknown	Notes from practice interviews were not provided

	Create a plan for conducting 3-5 empathy interviews in the coming month	Yes		Unclear (appears at least 3 of 5- see notes for details).	No team submitted notes from this discussion. Notes from coach bi-weekly check-ins indicate Eastern Star planned interviews for next week during the convening, but unclear how many. When UCPC recorded a bi-weekly 2 weeks after the convening, they indicated they were planning interviews. Notes from SWHS 2 weeks after the convening indicate they had conducted some interviews by then. Notes from DSS 1 week after convening don't mention interviews. Notes from ECC 3 weeks after convening indicate they had conducted 3 interviews.
3	Participants will be able to identify an insight from their empathy interviews.	Yes		N/A	
	Participants will be able to generate a design challenge statement based on the insight generated from empathy interviews.	Yes		N/A	
	Participants will be able to generate many solutions/possibilities to address their target population's needs.	Yes		N/A	
	Participants will be able to create a storyboard for one of their solution ideas.	Yes		N/A	

4	Teams will build community and spend some time reflecting on 1st Little Bet	Yes		2 (UCP and Eastern Star)	SWEHS- does not appear to have generated insights from little bet at this point, DSS and ECC did not upload Convening 4 work
	Teams will define and build another little bet	No	Appears to be assigned to post-convening work		
	Teams will understand the data evaluator role and process for Little Bets Data Collection	No	Didn't explain function and purpose of data evaluator role. Did not explain the data collection process. Appears other agenda items ran over and she didn't have sufficient time.	N/A	
5	Teams will build community and spend some time considering the story of their little bet & create a 3-minute pitch for it	Somewhat	Unclear whether creating a 3-minute pitch meets the objective of building community	2 (SWHS, UCPCOG)	Easter Star did write a pitch, but does not appear to have used the template and the pitch doesn't frame the issue or pitch the little bet. DSS document could not be opened for review.
	Teams will spend time giving and sharing feedback on pitches	Yes	Included in the slides but not on the agenda	2 (UCPCOG, DSS)	It is possible other teams went through the exercise, but only UCPCOG recorded it in the template. DSS document could not be opened.
	Teams will learn more about key drivers for data measurement of their Little Bets.	Yes		N/A	
	Teams will understand the Accountability Board and Funding Process for Little Bets	Yes		N/A	
6	Teams will hear perspective from panelists of previous cohort teams/coaches about their experiences with Little Bets Process	Yes		N/A	

	Teams will revisit pitches and update them	Somewhat	A couple slides revisited the idea of the pitch, but no opportunity was given for teams to update them.	N/A	
	Teams will learn of different examples and ways to test Little Bets	Yes		N/A	
	Teams will use templates to create a plan for teams to test Little Bets.	Yes		3 (ECC, UCPCOG, DSS)	SWHS didn't upload convening 6 work. Eastern Star appears to have dropped out at this point.
7	Teams will connect in groups to reflect on how Little Bet testing has gone thus far	Yes		4 (ECC, SWEHS, UCPCOG, DSS)	Eastern Star appears to have dropped out at this point.
	Teams will make connections to the data capturing for Little Bets and Change Management	Unclear		Unclear	Objective is unclear. Data coach presented.
	Teams will learn change management strategies and principles	Yes		N/A	
8	Teams will learn storytelling tips and practices to tell the story of their pilots	Partial	Focuses more on why storytelling is important than how to tell a good story.	N/A	
	Teams will review presentation instructions for Convening #9 Final Celebration	Yes		N/A	
	Teams will begin drafting components of the 30-60-90 day plan to sustain pilots after RLI program ends	Somewhat		3 (ECC, SWHS, UCPCOG)	DSS didn't upload the 30-60-90 template. Eastern Star had dropped out at this point.
9	Spend time in community celebrating the end of Cohort 2 of the Resilient Leaders Initiative	Yes		N/A	



	Learn more about each team's pilot program and share with stakeholders, peers, etc	Yes		N/A	
	Consider what's next for their pilots and alumni support	Yes		N/A	

## Findings

The vast majority of convening objectives that were covered in the full group were achieved. A few objectives were touched on briefly and may have benefitted from deeper coverage in the curriculum. However, objectives that required breakout work were not reliably completed by all groups. It is unclear whether groups did not complete the missing work for these objectives or just did not submit.

All objectives for the first and third convenings were fully achieved. All objectives for the second convening were also most likely achieved; the main issue was that teams were not required to submit notes for some activities, making it difficult to confirm the work occurred. It should also be noted that for the first half of the cohort, team work was found in a number of different folders outside of the team deliverables folders and teams seemed to be struggling to figure out where to put things in the google drive. However, this issue did not reoccur in the fifth through eighth convenings and it appears that RLI resolved the confusion about what folders should be used to submit deliverables.

Two objectives for the kickoff seemed to be only partially achieved.

- Build connection amongst cohort members, their coaches, and RLI facilitation team
  - The convening mostly focused on building connections within teams and with their coaches. Only the introduction activity focused on between team connections and connections with the facilitation team.
- Begin to create the norms and operating procedures for a safe and productive team and cohort working environment/relationships
  - While expectations were communicated, and teams began their team norm creation, no opportunity was given for the entire cohort to co-create norms.

Two objectives for the fourth convening seemed to be only partially achieved.

- Teams will define and build another little bet
  - This was not covered during the convening and was instead assigned as post-convening work
- Teams will understand the data evaluator role and process for Little Bets Data Collection
  - The data evaluator role was not fully explained and the data collection process was only briefly referenced. It appears this agenda item was cut short due to others running over on time.

Two objectives for the fifth convening were only partially achieved.

- Teams will build community and spend some time considering the story of their little bet & create a 3-minute pitch for it
  - One objective included building community. However, it is unclear that the assigned activity of writing pitches achieved this objective.
- Teams will spend time giving and sharing feedback on pitches
  - Only two teams submitted a record of receiving feedback on their pitches. It is possible the other teams received feedback, but didn't record or submit it.

Two objectives for the sixth convening were only partially achieved.

- Teams will revisit pitches and update them.
  - A couple of slides revisited the idea of the pitch, but no opportunity was given for teams to update them.
- Teams will begin drafting components of the 30-60-90 day plan to sustain pilots after RLI program ends
  - Three out of five teams submitted the required templates for this work. It is unclear whether the other two teams did not complete the work or whether they completed the work but did not upload the templates.

One objective for the seventh convening was unclear and could not be assessed.

Two objectives for the eighth convening was only partially achieved

- Teams will begin drafting components of the 30-60-90 day plan to sustain pilots after RLI program ends
  - Three out of five teams submitted the required templates for this work. One team had dropped out by this time. It is unclear whether the other teams did not complete the work or whether they completed the work but did not upload the templates.
- Teams will learn storytelling tips and practices to tell the story of their pilots
  - Presentation mostly focused on the importance of storytelling and few tips were offered.

All objectives for the ninth convening were achieved.

## Recommendations

Ensure that a template is provided for all in-convening activities so that participation and notes are recorded for subsequent evaluation

Create an opportunity for whole cohort co-creation of norms. Create more opportunities for whole cohort connection building.

Ensure that meeting objectives are clear and review presenter slides to make sure they fulfill the assigned objective. Ensure that all agenda items stick to allotted time so that others don't get cut short.

Work with the data evaluator to better introduce her role and explain the data collection process.

Visit teams during breakout time to ensure they are on task and completing assigned activities. Check in early with coaches whose teams aren't submitting templates from in-convening work to find out why this is not happening and how it can be resolved. Speak with coaches from the cohort whose teams regularly did not submit convening deliverables to find out why this occurred.

### Question: Are coaches meeting the deliverables outlined in the MOU?

Two data sources were used to determine the extent to which coaches met deliverables: team meeting agendas and coach bi-weekly reports. Since some deliverables were rather broad and non-specific, not all deliverables were able to be assessed. The data coach was not included in this assessment.

## Results

Deliverable	Number Expected	Coach	Met- Based on Agendas	Met- Based on Biweekly Report	Notes
Provide coaching support to one organizational participant team in the RLI program focused on designing & piloting trauma-informed policies & practices in rural Eastern NC.		N/A	N/A	N/A	This is more of the broad purpose of their coaching contract and not a specific deliverable.
Own the process of scheduling, planning, and facilitating a ~1-hour <u>weekly</u> check-in with your team to provide project management support, accountability, and encouragement throughout the program, from March - November 2022.	34	Chuck	6%	65%	
		Tara	88%	74%	
	21	Jamilah	71%	71%	Reflects expectations through the second week of August.
	34	Victor	21%	68%	Only began submitting agendas in Oct. Didn't use the template.
		Jaime	54%	61%	Reflects expectations through the end of Sep, when team quit.
10	Cate	100%	20%	Began in Sep. Submitted one bi-weekly report.	
Submit weekly team meeting agendas to ROI staff following the outlined submission process via the RLI Coach Deliverable folder on the ROI Google Drive. Set clear outlined objectives for each meeting that are documented in meeting agendas and measure / assess participants' progress towards program goals.	34	Chuck	No	N/A	Did well with submitting bi-weeklies. Team regularly met (though far below intended amount), but he only submitted 2 agendas.
		Tara	Yes		
	21	Jamilah	Yes		
	34	Victor	Partial		Began submitting agendas in Oct. Since Oct he set objectives, but no notes were taken to measure progress.
		Jaime	Yes		Completed nearly all agendas, but submitted in the wrong place.
	10	Cate	No		Cate only submitted one agenda, but based on biweeklies was the only coach to perfectly meet the weekly meeting goal.
Submit bi-weekly progress reports to ROI staff on progress of your teams' goals, objectives, and outcomes from weekly meetings and any barriers/challenges/additional support needed.	16	Chuck	N/A	75%	
		Tara		75%	
		Jamilah		89%	Reflects expectations through the 2nd week of Aug.
		Victor		75%	
		Jaime		69%	Reflects expectations through the end of Sep.
		Cate		25%	Reflects expectations Sep-through end of cohort.

Proactively take steps to ensure that your team stays on track and completes the required deliverables to meet RLI program goals.			Unable to assess.		This expectation is pretty open ended and is mixed with team actions.
Communicate any team-related challenges or concerns with ROI staff as they arise.	14	Chuck	Unable to assess.	29%	Expectation based on number of deliverables not completed/late. Eastern Star expectations ended when team quit. Communication of challenge counted if communicated EITHER in biweekly report or bi-monthly check-in. Unclear how ROI staff are communicating with coaches when teams are off track/submitting late. But coaches do not seem to have used the biweeklies to ask for support, even when team missed many deliverables or had low attendance. Unclear whether they knew what support might be available or help.
	11	Tara		36%	
	12	Jamilah		50%	
	9	Victor		44%	
	14	Jaime		14%	
	1	Cate	N/A	100%	
Participate in periodic check-ins with ROI staff to discuss team progress, performance, & opportunities for improvement.	5	Chuck	100%	Interpreted this to be referring to the bi-monthly check-ins. Unclear whether there were other meetings with staff that coaches were expected to attend.	
		Tara	100%		
		Jamilah	100%		
		Victor	100%		
		Jaime	100%		
		Cate	100%		
Ensure teams meet all participant deadlines.	See team deliverables reporting				
Meet all required deadlines for Coach deliverable			Unable to assess	Was unable to find a list of coach deliverables or deadlines.	
Undergo an evaluation process and score proficient or above in overall performance.	3	Chuck	100%	MOU didn't specify when these would occur or how many there would be. Unable to find description of planned evaluations in planning materials. Evaluations appear to have occurred twice (once in May and once in Sep), though the template was different each time. Coaches only were asked to complete a self-evaluation in Sep.	
	3	Tara	100%		
	1	Jamilah	100%		
	3	Victor	100%		
	3	Jaime	100%		
	0	Cate	N/A		
Attends convenings	8	Chuck	100%	Actual requirement was for 9 convenings but attendance wasn't reported for the final convening. Attendance was relatively low for several coaches.	
	8	Tara	75%		
	6	Jamilah	100%		
	8	Victor	63%		
	8	Jaime	75%		

## Findings

Presumably coaches were expected to perform the expectations outlined in the MOU 100% of the time. However, since coaches rarely, if every, met this expectation, this grading criteria was devised for deliverables evaluated on a percentage basis:

- **85%-100% = Fully Met Expectations**
- **69%-84% = Mostly Met Expectations**
- **54% - 68% = Partially Met Expectations**
- **Below 54% = Did not meet Expectations**

Using the higher data point from the two sources, a third of coaches mostly or fully met the weekly meeting expectation. All other coaches partially met the expectation. Data from the agendas and bi-weekly reports only matched for one coach.

Performance was high for expectations that occurred when ROI staff were present, such as attending convenings, meeting with staff, and participating in evaluation. All coaches fully met expectations for periodic staff check-ins and participating in the evaluation process. Half of coaches fully met the expectation to attend convenings. Another two mostly met this expectation. The final coach partially met this expectation.

Performance was lower (in some cases much lower) for expectations that required written submission but no face-to-face meeting with staff. Half of coaches met the expectation to submit meeting agendas. One additional coach partially met the expectation. One coach fully met the bi-weekly report expectation. Four coaches mostly met this expectation. One coach (who joined late in the program) did not meet the expectation. For the expectation around communicating challenges, one coach fully met this expectation. However, this is because she joined late in the program and her team did not miss any deliverable deadlines during that time. Of the remaining five coaches, all did not meet this expectation.

## Recommendations

Clarify vague deliverables in the MOU to make sure they are concrete and can be evaluated. Provide clear written guidance regarding expectations that may be unclear including: periodic check-ins, coach deliverable deadlines, and evaluations. If teams are meeting as planned, they should have met two times when each bi-weekly report was submitted. But the report only asks for one meeting date. Fix or clarify this discrepancy.

Consider using a deliverable- based instead of hourly contract structure with coaches to improve accountability. Provide a variety of structures or methods that coaches with different working styles can meet objectives (e.g. provide various options for planning team meetings and recording progress).

Actively engage coaches when teams begin missing deliverables and coach does not request support. Interview coaches regarding why they didn't ask for support. Offer a dropdown for types of support that can be selected in the bi-weekly report instead of just open-ended response. Additionally, intervene early with coaches that are not submitting agendas and/or bi-weekly reports as expected.

**Question: Are bi-monthly coach check-ins taking place as planned and creating a space to a) share challenges b) share best practices c) get clarity around where teams should be at and what is coming up in the program**

## **Results**

Meetings are taking place as planned. In total five check were held: April, June, July, September, and November. All meetings except for one (November) have had full attendance from coaches. For the first time, in the July meeting the data coach also attended. Coaches were asked to share a challenge they were facing in each meeting. They were also asked to share a best practice that had helped their team. In the first meeting, coaches were given information about where their teams should be using a link to the post-convening work. In the rest of the meetings, coaches were told more specifically what should be done and being worked on at this time. In the second and fourth meetings, but not in the first, third, or fifth meetings, staff also shared about how the teams should be feeling at this point in the program. Clarifications around coach deliverables were offered in all meetings.

## **Findings**

Meetings took place as planned and with full or near full attendance. The meetings touched on the topics planned for these meetings. Clarification on where teams should be and what is coming next was combined into the “Coming Up” section of the notes. It could be somewhat confusing to put information on where teams should be now in a coming up section.

Coaches may want to share more than one challenge in these meetings. Notes do not reflect the problem solving solutions offered by staff and other coaches for these challenges. Unclear whether and to what extent this occurred.

## **Recommendations**

Continue holding these meetings, as they seem to be achieving the goals of responding to a coach need communicated during the first convening.

Ensure adequate space to share all challenges faced by coaches and their teams, as well as providing time and space for problem-solving these challenges. Make sure to take notes during the problem-solving section of the meeting as well.

Since these meetings are intended to respond to coach feedback, add a section at the end of the meeting for feedback on the meeting structure and frequency. Coaches may have thoughts about how meeting agendas could be more useful or the ideal frequency of the meetings.

Consider adding a section for support requests from coaches, as coaches do not seem to be fully using bi-weekly reports to ask for the support they need.

Consider moving information about where teams should be to a specific section with that title. Consider sharing information about how teams should feel at that point in the program in all convenings.

## **Dose Received (Exposure)**



## Question: To what extent did participants attend convenings as planned?

**Goal:** Each participating organization commits to have at least three participants attend each convening.

### Findings

Out of the five participating organizations, three organizations met this expectation. On average the participating organizations met this expectation for 76% of convenings. However this overall average masks a number of very concerning indicators around attendance. Attendance greatly dropped off in the second half of the cohort. In the first half, teams met attendance expectations for 85% of convenings. However, in the second half, teams only met the attendance goal for 60% of convenings. While most teams had attendance drops during the second half of the program, large teams could absorb the drop while continuing to meet the three-person attendance goal. The three person teams, which were already struggling with attendance during the first half of the cohort, completely missed the expectation in the second half. Neither three person team met their attendance goal for any of the convenings during the second half of the program. Most concerning is that one team, Eastern Star, stopped attending convenings altogether after the fifth. It appears that this team dropped out of the cohort, as there are no coach reports after September. In his final report, their coach indicated the team was very discouraged and ready to give up.

### Recommendations

Consider modifying expectations for three-member teams or only allowing teams with more than three members.

Review warning signs in Eastern Star's application, team setup, and early coach reports to prevent team drop out in future cohorts.

## Question: To what extent did participants attend team weekly meetings?

### Results

Eastern Star: For the first half the the program, coach reported that two out of three members consistently attended. The third member's attendance seemed to be about two out of every three meetings. However, this information is limited for Phases 2 and 3 since no reports were submitted in July, most of September, or October. It appears the team stopped meeting around then and dropped out of the cohort.

Edgecombe Community College: Three out of seven members consistently attended all meetings. Four meetings had full attendance.

Southwest High School: During the first half of the cohort, most meetings had attendance of all three members. There were only three coach reports from the second half of the cohort. These reports indicated two out of three members attended most meetings.

Upper Coastal Plains Council of Government: Two out of five members consistently attended all meetings. Seven out of fifteen reported meetings had at least four out of five members. One member (Michael Stanford) did not attend any meetings. Another (Linda Barfield) only attended one meeting. Effectively this team seemed to actually have three, not five members.

Wilson DSS: Most meetings had attendance of at least five out of six members.

### Findings

Most teams (four out of five) seem to have at least one member that didn't consistently attend meetings. This affected larger team capacity less as there are more members to pick up the work.

### Recommendations

Consider setting a minimum team membership at four members. If allowing three-member teams, reconsider how individual team member capacity and commitment is evaluated during the team selection process to ensure that each team has at least three members that will be able to and committed to consistently attending meetings and sharing work. This bar should be higher for three-member teams who have less room for absences.'In order to allow small organizations to participate, consider creating a model for multi-organization teams with overlapping or related missions/communities of focus.

## Question: To what extent were participants actively engaged in convenings?

### Mid and Post-Cohort Results

Number	Question	Percent responded "Sometimes", "About Half the Time", "Most of the Time", or "Always"	Participants that responded "Yes"
Q89_1	Please rate the extent to which you have: - Created opportunities for stakeholders to share feedback and/or their perspectives on your organization's work	100% (Mid)/ 94% (Post)	
Q89_3	Please rate the extent to which you have: - Defined a problem from the perspective of the priority population rather than that of the organization	100% (Mid)/100% (Post)	
Q89_4	Please rate the extent to which you have: - Used insights from design thinking research to inform program planning	80% (Mid)/94% (Post)	
Q89_5	Created mock-ups or "little bets" to test ideal solutions	65% (Mid)/88% (Post)	
Q61	I have seen the community strategy in this image before		
Q11	I have seen this specific systems map before.		100% (Mid)/ 100% (Post)

## Findings

The questions referenced above, all ask about activities or topics covered during convenings. Therefore, for all Q89 questions, engaged participants should have responded that they sometimes or more often had done the activity. For the yes/no question, engaged participants should have responded “Yes”, indicating they had seen the systems map that was presented in the convening.

Out of twenty-five total participants, twenty fully completed the midpoint survey and seventeen completed the post-program survey. Of the five participants who did not finish the midpoint survey, three were deemed disengaged based on lack of convening attendance. Three of the participants who did not complete the post-test had dropped out of the program and were deemed disengaged. Of the other three, based on convening attendance one was deemed disengaged and another was deemed partially disengaged.

Nearly all participants reported having created opportunities for stakeholders to share feedback and/or their perspectives on their organization's work. However, most participants (80%) also reported having this experience at baseline. Therefore, the increase to 94-100% experience only informs us of the engagement of two to four participants.

All participants reported having defined a problem from the perspective of the priority population rather than that of the organization at both baseline and midpoint, saying little about participant engagement.

Compared to baseline five additional participants at the midpoint and two additional participants at post-test reported having used insights from design thinking research to inform program planning. However, four participants at midpoint still reported not having used insights from design thinking for program planning (although in the post-test all participants reported having done this). All four of these participants were present for the third convening when participants began this process, and three of the four were also present for the fourth convening where this process continued. All four of these participants also reported that they had not created Little Bets, indicating a lack of engagement in the third and fourth convenings for 25% of respondents.

Only 65% of respondents reported having created a little bet at the midpoint, something they should have done if they were engaged during either or both the third and/or fourth convening. Compared to baseline, only three additional participants reported having created a little bet. Five of the seven respondents who reported no experience creating little bets attended both convenings, and all seven attended at least one of the two. This seems to indicate a concerning lack of engagement during these convenings. However, the post convening surveys paint a somewhat different picture. In the post-convening surveys most participants reported that information in the convenings was presented clearly and did not provide many suggestions for improvement. However, a number of participants did request more time in breakout sessions, which could lend itself to participants not having reported completing the activities. There are also a few comments between the two convenings about the little bets assignments being confusing, indicating that at least a few participants needed further clarification. However, particularly with the third convening, there were a fairly large number of participants who attended the convening and did not complete the post-convening survey. This group is likely disengaged during the convening; their feedback is not being heard.

In the baseline survey, only one participant reported having seen the systems map prior, indicating that respondents who reported seeing the survey at the midpoint, had done so through engagement during the convenings. Also notable is that three participants who did not attend the convening where this map was presented reported having seen it, indicating a high enough level of engagement to seek out this information post-convening .

In the baseline survey, 35% of participants (7) reported having seen the community strategy prior. Therefore, there were thirteen participants (65%) who had not seen the strategy and who reported seeing this strategy at the midpoint due to engagement during the convening.

It should be noted that having seen a map or strategy is not the same as understanding it, and that the level of engagement required to report having seen something is fairly low. Therefore, this question has limited utility for assessing engagement during the systems mapping portion of the curriculum.

## **Recommendations**

Ask participants about understanding, rather than just familiarity, with items and concepts presented during convenings. Before convenings, show activity instructions to an unfamiliar third party to ensure clarity.

Speak to disengaged participants (those not attending and those reporting not having completed activities that occurred during convenings) and their coaches to understand their experiences with the third and fourth convenings to develop strategies for deeper engagement. Consider adding time to break out sessions during the third and fourth convenings.

## Question: To what extent did participants complete the participant deliverables?

### Results

#### Participant Deliverables

Deliverable	Met	Notes
Attendance by at minimum 3 dedicated team members (you're welcome to have more team members) from your organization is required during all Resilient Leaders Initiative Monthly Convenings	See convening attendance report	No clear expectation for individual participant attendance.
Meet all outlined deadlines, task and pre-work assigned by Facilitators, Coaches and/or ROI In between the monthly mandatory Convenings, your team will be required to complete work on your own in order to make progress on the program and your individual goals	No team has clearly met all deliverables. For details see team deliverables table.	
"Meet with your team for 1-2 hours per week at the cadence that works best for you. It is our expectation that you will schedule and keep the times made with your coach	See team meeting attendance report	No clear expectation for individual participant attendance.
Submit written updates on progress to your identified goals to coaches and program staff at monthly intervals so that we can offer support	Unknown	There does not appear to be a place where these are being submitted and recorded.
Spend 5-15 hrs / month per team member on work tasks. This work time does not include your time spent directly with your coach Complete Evaluation Surveys when they are shared with teams"	Unable to analyze due to question phrasing and response options given in Q96	Lowest option is 2-6 hours, thus cannot calculate the number of participants meeting the expectation of 5-15 hours. Question does not exclude time spent with coach, but the deliverable does exclude this time.

## Team Deliverables

Deliverable	Completed	Teams that Didn't Complete	On time	Teams that Completed Late	Feedback from Teams that did not Meet
Team Charter and group norms	5		3	ECC, UCPCG	
Complete stakeholder analysis	5		5		
Conduct 3 empathy interviews	5		5		
Complete interview guide	5		5		
Write at least 3 insight statements from your empathy interviews.	5		5		
Flip each of these into a design challenge.	4.5	SWHS (Partial)	4.5		
<i>Schedule and hold a Brainstorm Session</i> for each of the 3 design challenges you created.	4	SWHS	3	ECC	ECC coach communicated feeling supported by ROI staff
Select top 3 ideas from the Brainstorm Sessions you hold	3.5	ECC (Partial), DSS (Unknown)	3.5		
Create a Little Bet for at least 1 idea	3	DSS (Unknown)	1	ECC & SWHS (both unknown)	
Make a copy and rename the Little Bets Jamboard template and write in stakeholder feedback.	3	SWHS, DSS	3		
Complete 1-2 more empathy interviews	5		3	Eastern Star, SWHS	SWHS coach shared challenges with team accountability, motivation, and hopelessness. Team needed to be reminded regularly of the purpose of the work. At the same time, she reported a need to step back from doing the work for them.
Consider the learnings from new empathy interviews and generate new insights & design challenges and list them on Slide 2 of Convening #4 template doc	3	SWHS & DSS (Both Unknown)	2	UCPCG	SWHS coach reported difficulty completing interviews and little bets during summer vacation. She also discussed disengagement from at least one team member and failure to complete tasks from multiple members. She needed to provide intensive follow-up to facilitate progress. DSS coach reported team time was spent refocusing motivation and self-care instead of on deliverables. UCPCG coach shared challenges getting stakeholders to make time to get feedback. But coach described an engaged team working to problem-solve.
Use your new insights & design challenges to update your little bet.	3	Eastern Star & SWHS (both unknown)	2	UCPCG	Eastern Star coach reported difficulty scheduling interviews but didn't link to delays with updating little

					bet. SWHS coach explained that teacher resistance was leading to a plethora of ideas and challenges moving forward with decision on updating little bet. UCPCG coach requested clarification on expectations for coach role, particularly ability to lean in more.
Schedule a 45 minute team meeting with Data Coach .	5		5		
Identify what big step forward you'd like to make on your Little Bet. Conduct another round of feedback on a Little Bet.	3.5	SWEHS (Partial), Eastern Star	2	UCPCG, DSS	Eastern Star coach didn't submit bi-weeklies for July, though team agendas indicate the team met weekly and include this deliverable on 7/20 agenda. Notes from 7/27 coach meeting indicate team was waiting for church approval. Team notes for SWEHS indicate team was struggling with size and scope of little bet. Team lost key member during this period. But coach didn't request support in next bi-weekly check-in (submitted late).
Refine pitch. Then Revisit Stakeholder Activity (High Power Section) and reach out to at least one listed to schedule a time to share your pitch.	2	SWHS, Eastern Star & DSS (unknown)	1	ECC	There was no specific template given to teams for this. Based on team meeting notes and bi-weekly reports, there is no indication SWHS completed. Unable to determine whether Eastern Star or DSS completed.
Connect with Melissa McCoy on data process and receive feedback on Key Driver template.	4	DSS is unknown			
Capture results/feedback from your pitches.	1	SWHS, Eastern Star ECC & DSS (unknown)	0	UCPCG	ECC coach report states team had plans to receive feedback that week, but never submitted the feedback or reported about feedback again.
Submit funding applications.	3	UCPCG, Eastern Star	3		UCPCG consistently requested materials/supplies in bi-weekly coach report, but did not submit a funding application to purchase. In coach report for Eastern Star, coach reported funding need and a plan to submit a late application (8/27). But no application was submitted.
Consider what new information you've explored in Team Learning Communities. Capture your reflections and requests to explore new pathways <a href="#">here</a> .	3	DSS (unknown), Eastern Star	1	ECC, UCPCG	No indication Eastern Star completed activity. DSS included the activity in the meeting agenda, but did not submit the deliverable.



Add the data you've been collecting in your work with Data Coach Melissa to the spreadsheet.	2	DSS, UCPCG, SWHS			UPCCG realized that their measure wasn't sensitive enough and pivoted. DSS was resistant to setting a measurable goal. SWHS didn't have the support from above that they needed to move things forward.
Work on testing your Little Bet with at least 3 people, using <a href="#">this</a> template.	3	SWEHS (unknown), Eastern Star	2	ECC	SWEHS included this item in agenda and described a plan for piloting little bet in a separate document, but did not complete this template.
Keep testing your Little Bets! Test with at least 3 more people before Convening #8. If you've identified barriers or challenges, consider editing your bet or going in a different direction.	3	Eastern Star, DSS	N/A	N/A	Template and deadline not provided for deliverable. Results based on meeting notes and trackers. No tracker found for SWHS, but meeting notes indicate testing occurred. Eastern Star's tracker is blank for all little bet related questions and only tracks attendance. No tracker found for DSS. DSS coach reports during this period focus on team burnout.
Submit any funding applications.	0				No team submitted funding applications during this period, but it's not clear that it was required.
Complete <a href="#">Sustainability template</a> as you reflect on barriers to change and define strategies to address those barriers	3	Eastern Star	4	DSS	DSS and SWHS partially completed the template.
Gather data to complete your own Pareto chart (Use this to determine where you should continue focusing your little bets). Share data with Melissa via email so she can create your chart.	2	UPCG, DSS, SWHS			UPCG realized measure wasn't sensitive enough and had to pivot. SWHS reports too many little bets prevented progress. Team also lost team lead and coach midway through cohort.
Continue working on your 30-60-90 day plan in your weekly meetings	3	DSS (unknown), Eastern Star	N/A	N/A	
Submit Funding Applications	2	Eastern Star, ECC, SWHS	1	UCPCG	
Complete and submit Learning Journey Presentation form	4	Eastern Star	3	1	
Use email template in to invite stakeholders, <b>clients</b> , <b>fellow</b> staff, etc, to join Final Celebration via zoom.	ECC	Eastern Star, Other teams unknown			
Schedule and hold a practice session for your lightning talk.	4	Eastern Star			
**Half points signify a team partially completed the deliverable					
*Unknown means unable to determine whether a deliverable was completed					

## Finding

Seven out of fourteen deliverables (50%) were fully completed by all teams. For five deliverables, one or more teams turned in the deliverable late. For a number of deliverables, it is difficult to determine whether deliverables were not completed or not submitted (this is particularly the case for convening 4). Two teams, SWEHS and Eastern Star, seemed confused regarding where to upload team deliverables in the drive. One team, UCPG, fully completed all deliverables. ECC completed all deliverables fully or partially.

Eastern Star was on track to complete all deliverables until the post-convening work for convening four. This may be due to the difficulty the team was having scheduling empathy interviews. However, they were not alone in not submitting these deliverables. Participants communicated confusion over these deliverables in the survey. This confusion may have contributed to non-completion or other challenges discussed by coaches, such as time, stakeholder buy-in, and team motivation may be accumulating and/or intensifying as the program continues. Multiple coaches discussed issues with team member motivation, hopelessness, and commitment as the program went into the third and fourth convenings. Coaches also reported issues with role confusion around what was and was not appropriate or helpful for them to take on to help their teams with the work.

SWHS is the team with the highest number of incomplete deliverables. This is somewhat surprising given the high level of engagement from the team's coach and the fairly strong attendance record of the team members. The coach reported that the team was struggling with completing the stakeholder-engaged aspects of the project during summer vacation. She also reported issues getting team members to complete deliverables. Since this was a three member team, the team had fewer people to share the work and less cushion if team members didn't follow-through.

Eastern Star also shared challenges with stakeholder engagement and/or feedback. It seems that this team's commitment to the community engaged aspects of the process may have delayed their ability to move forward.

Two teams, SWEHS and Eastern Star, seemed confused regarding where to upload team deliverables in the drive.

Coaches often didn't request support in the bi-weekly report, even when their team was evidently struggling. This may not be the best forum to uncover team support needs. The bi-monthly group meetings may occur too infrequently to serve as this forum, or the group setting may discourage support requests. Teams that were struggling the most seemed so overwhelmed they were unable to determine what support could help them in order to request it.

## Recommendations

Review all deliverables, particularly for the fourth convening, to ensure clarity around how and where deliverable completion will be documented.

Anticipate role confusion for coaches experiencing capacity, motivation, and/or commitment issues in their teams. Prepare coaches for this challenge at program start and provide further clarification on what is and is not appropriate for them to do to support their teams. Consider adding activities to the midpoint of the program to re-energize participants, refocus them on their goals, and prevent feelings of hopelessness and burnout. Consider creating more specific participant deliverables rather than just team deliverables to ensure commitments by all team members at the outset and accountability within teams. When a team is missing deliverables, the coach is not submitting reports, or other signs of team struggle surface, staff should attend team meetings to observe, provide support, and problem-solve. In some cases, this appears to have happened, but in other cases it did not. It is not clear why staff chose to attend the meetings of some off track teams but not others.

Amend survey questions to better match deliverable expectations.

Remove or clarify the participant deliverable for written updates to coaches, since this does not appear to be being implemented.

Consider adding extra time between the third and fourth deliverables to allow for more time to collect stakeholder feedback. Consider the timing of the program to better facilitate stakeholder engagement for school teams.

Pre-upload blank copies of each team's deliverable templates into the drive instead of having them make a copy and save it elsewhere.

Create a space to record questions/curiosities that come up during the bi-monthly coach meetings. There is a space on the agenda for this but the conversation isn't being recorded. Supplement the existing bi-monthly check-ins with monthly one-on-one check-ins with coaches.

# Dose Received (Satisfaction)

Post convening surveys were provided for the kickoff and convenings 1-8, but not for convening 9.

Question: How satisfied were participants with the convenings?

## Results

	Kickoff	Convening 1	Convening 2	Convening 3	Convening 4	Convening 5	Convening 6	Convening 7	Convening 8	Overall (Mid)	Overall (Post)
# Participants	22	19	18	21	16	18	15	14	13	24	21
# Completed Survey	15	14	8	11	10	9	9	13	3	20	17
Percent Completed Survey	68%	74%	44%	52%	63%	50%	60%	93%	23%	83%	81%
Sufficient Response Rate to Analyze	Yes	Yes	No	No	Yes	No	Yes	Yes	No	Yes	Yes
% Ranked Most Useful Component	[Redacted]									20%	0%
% Ranked Second Most Useful Component										30%	12%
% Ranked Least Useful Component										15%	24%
% Somewhat or Strongly Agree That:										[Redacted]	

Material was Presented Clearly	93%	100%	100%	100%	100%	100%	100%	92%	100%
Understanding of Material Increased	80%	93%	100%	91%	80%	100%	100%	85%	100%
Topic was Relevant	80%	100%	100%	100%	80%	100%	100%	92%	100%
Ways to Improve	•Time to get to know other teams	•More time in breakouts •Create more opportunities to learn about other group orgs		•More time in breakouts •Clarify last assignment	•More time in breakouts •Clarify or reflect on purpose of 2nd little bet •Clarify timeline	•More time in breakouts •More cross-sharing and feedback between teams	•More time in breakouts •Clarify post-convening assignments •More time explaining testing tools	•More time in breakouts •Opportunity to know who is in attendance	•Provide support on post-convening support

## Findings

Overall participants seemed somewhat or fairly satisfied with the structure and presentation in individual convenings. However, participant reports of the usefulness of the convenings was low at mid-survey (50% thought it was one of the two most important aspects of the program and 15% thought it was the least useful component) and went down further at post-survey (12% thought it was one of the two most important aspects of the program and 24% thought it was the least useful component). The fact that at the end of the program nearly a quarter of participants thought the convenings were the least useful component is striking, given that convenings are a central program component.

Response rates were fairly low across most post-convening surveys. A response rate cutoff of 60% was applied in order to analyze a survey, which is a fairly low cutoff. Still, this meant that it was only possible to analyze the quantitative data from the kickoff and first, fourth, sixth, and seventh convenings. There were also significant issues with participants taking the survey more than once, making it difficult to ensure confidence in the response rates. The majority of respondents were satisfied with all convenings analyzed. Of the convenings analyzed,

satisfaction was lowest for the kickoff and fourth convening. As the convenings went on, participants seemed to become more confused about the activities, expectations, assignments, and timelines.

Across convenings, participants commented about needing more time in breakouts. When participants were given more breakout time in convenings, as occurred during the seventh convening, participants noticed and were appreciative. They also responded positively to having more time to discuss and reflect on the content. Although participants wanted more time in breakouts, they enjoyed the faster pace of the fourth convening, which may indicate that a better balance could give less time to presentations and more time to convenings. However, given the confusion of some participants about expectations and activities in the fourth convening, this faster pace may have left some participants behind.

A number of comments also spoke about wanting to better understand the goal and focus of the other teams' organizations as well as wanting more time to get to know other teams, collaborate, and provide feedback between teams.

Participant comments indicate that satisfaction increased with interactive activities, creative uses of technology, and time to think through things and brainstorm with their teams. Participants especially enjoyed opportunities to share and collaborate between teams. Opportunities to share and hear from others who had experience in the program, whether current or former participants, were received very well. Participants also appreciated opportunities to talk openly about trauma and think differently about systems of trauma and oppression in their communities.

## **Recommendations**

Consider restructuring the program to spend more time on components participants ranked as more useful than convenings. Alternatively, consider reenvisioning convenings to make them less didactic and more focused on skill-building and cross-team collaboration.

Consider following up with participants to contextualize these responses, seeking answers to the following questions:

- Would participants have liked fewer convenings?
- Do they think the program would have worked without convenings?
- How would they like to use convenings?

Employ strategies to increase post-convening survey response rates. Set the survey so that participants can only take it one time

Increase time in breakout rooms

Provide time for teams to present about their organizations and more opportunities for teams to get to know one another. Provide more opportunities for cross-team collaboration and feedback

Review timeline and expectations in more detail as program goes on and expectations get deeper and more complex. Before convenings, present activities to an unfamiliar third party to ensure they are clear. Allow time for questions to clarify post-convening assignments

## Question: How satisfied were participants with the coaching?

### Results

#### Participant Ranking of Coach Importance to Team Progress

	Mid	Post
# Participants	25	22
# Completed Survey	20	17
% Ranked Most Useful Component	40%	53%
% Ranked Second Most Useful Component	10%	29%
% Ranked Least Useful Component	15%	6%

### Findings

There was very limited information available to evaluate participant satisfaction with their coaches. However, the limited information available indicates that participants were somewhat or very satisfied with their coaches. Participant satisfaction increased over the program. At mid-survey half of participants rated coaches as the most or second most important aspect of the program. By post-survey, this had increased to 83%.

### Recommendations

Add quantitative and qualitative questions to evaluate participant satisfaction with coaches

## Question: How satisfied were participants with their experience with RLI overall?

### Results

	Mid	Post
# Participants	24	21
# Completed Survey	20	17
% Reporting Insufficient Support from RLI	5%	0%
% Reporting No Barrier to Achieving Goals	45%	29%

### Findings

Participants were not asked directly about their satisfaction with RLI as a whole, however, one question indirectly touched on overall satisfaction by asking about barriers to achieving team goals. This question indicates that participants may be very satisfied with RLI. Only 0%-5% of participants reported the lack of support from ROI staff had limited their progress and 29%-45% of participants reported no barriers at all. However, these results are very limited since the question does not directly ask about satisfaction.

### Recommendations

Add questions that directly ask about overall satisfaction with the program



# Context

Question: How appropriate was the program for the context in which the participant organizations are working?

## Results

### Participant Reports of Contextual Factors

% Reported Following Barriers Inhibited their Progress:	Mid	Post
Lack of support from organization leaders	0%	6%
Time	45%	59%
Not organizational priority	10%	0%
% Agree or Strongly Agree That:		
Organization leaders support participation in RLI	95%	94%
Organization has resources to sustain RLI work	65%	71%

## Findings

In addition to the participant surveys, coach bi-weekly reports and bi-monthly meeting notes were reviewed to add additional information on contextual factors affecting team success.

Participants overwhelmingly felt supported by their organizational leadership, a key contextual factor for the sustainability and impact of the program. Although very few participants reported that lack of organizational support was a barrier to their success, coach feedback indicated that one team, Eastern Star, struggled with a lack of support from the church, which prevented them moving forward with their little bets. Since Eastern Star did not complete the program, organizational support may have been a major factor in the success of teams.

The key contextual barrier for team success as reported by both participants and their coaches were the time pressures of work conflicting with the time requirements of the program. At least one coach indicated that he himself was struggling with time commitments of the coaching role conflicting with his fulltime job. Coach reports demonstrate that the available time of stakeholders to provide feedback (e.g. time given in staff meetings) was a time-related barrier as well. This further underscores the importance of organizational support. One coach was asked to check in with all teams in September. Her report, quoted below, highlights time challenges as more than just an issue of falling behind on deliverables. She identifies a mismatch between stated priorities and actual outcomes.

“My high-level takeaways are: 1) That all five teams are struggling to keep up with the course deliverables 2) I wonder if they are prioritizing checking the boxes for the deliverables over creating a theory/principles/action plan for sustained change efforts that could carry them forward beyond the RLI experience. 3) It feels like we might need to shift our support focus from results to learning. Meaning, I do not predict that any of the teams will be able to show improvement on a run chart, but they are all learning a TON. How can we pivot the focus so that teams are energized about what they have accomplished rather than disappointed in a lack of results?”

By the end of the program, 71% of participants reported that their organization had the resources to sustain their pilots. The timing of the program coinciding with the summer vacation made it difficult for school teams to engage stakeholders and test little bets.

## **Recommendations**

Consider extending the program to allow for a longer time horizon to reduce time burden on participants. Reevaluate stated program outcomes given time constraints. Consider placing more emphasis on learning and less emphasis on deliverables. Consider changing the timing of the program to better fit the school calendar.

Revisit the method for pre-program evaluation of organizational support to ensure teams will have the support they need throughout the program.

Consider improving strategy for ensuring that coaches have sufficient time to commit to the role. One other option might be to use one coach for several or all teams to allow coaches to structure this as a larger portion of their income rather than something they do in addition to a fulltime job.

Ensure participants are familiar with funding resources available through RLI. Add additional support to help teams to apply for project sustainability funding (e.g. external grants) beyond the RLI funding.