



MORGAN GRAVES CONSULTANTS, LLC
PRESENTS:

2019 ELEVATE CONFERENCE

TOOLS TO TAKE YOUR ORGANIZATION TO THE NEXT LEVEL

JUNE 1, 2019 | 8:30 AM

Harris-Stowe State University - William L Clay Sr. Early Childhood Center
3026 Laclede Ave., St. Louis, MO 63103



Marnée Morgan
Morgan Graves Consultants LLC



Dr. Vetta Sanders-Thompson
Washington University in St. Louis



Donnatesa Dean
Barnes-Jewish Hospital



Stacey Easterling
Non-Profit - Philanthropic Leader



Monique Norfolk
Mosaic Beginnings



Maranda Richardson
MWR Coaching & Consulting



Shakira Onwuachi
Kumba Collective LLC
YMCA of the Greater Twin Cities

LEADERSHIP DEVELOPMENT

STACEY EASTERLING, MPH

ELEVATE CONFERENCE

JUNE 1, 2019

The background is a light blue gradient. There are several realistic water droplets of various sizes in the corners: top-left, top-right, and bottom-right. The text is centered in the middle of the page.

ARE LEADERS MADE OR BORN?

The background is a light blue gradient that transitions from a pale, almost white blue at the top to a deeper, more saturated blue at the bottom. Scattered throughout the corners are several realistic-looking water droplets of various sizes. These droplets have a glossy, reflective surface with highlights and shadows, giving them a three-dimensional appearance. They are positioned in the top-left, top-right, and bottom-right corners, leaving the bottom-left corner relatively clear.

WHAT IS LEADERSHIP?

LEADERSHIP DEVELOPMENT

- THE BASIC PRINCIPLES OF EFFECTIVE LEADERSHIP /WHAT IS A GOOD LEADER?
- INTRODUCING DIFFERENT LEADERSHIP STYLES (LEADER, KNOW THEY SELF)
- HOW TO ENGAGE IN ORDER TO MAKE YOUR ORGANIZATION MORE EFFECTIVE

EFFECTIVE LEADERSHIP EMBODIES..

- DECISIVENESS
- AWARENESS
- STRATEGIC
- ACCOUNTABILITY
- EMPATHY/COMPASSION
- CONFIDENCE
- OPTIMISM
- HONESTY
- INSPIRATION (VISION)

“ THE BEST LEADERS MAKE SOUND, DEFENSIBLE DECISIONS IN A TIMELY FASHION, ESPECIALLY IN TIMES OF CRISIS AND UNCERTAINTY. MANAGERS AT ALL LEVELS OF THE ORGANIZATION ARE INVOLVED IN CONSTANT DECISION-MAKING AND THE QUALITY OF THESE DECISIONS (BOTH SPEED AND SOUNDNESS) ACCUMULATES AND DECIDES THE FATE OF THE ORGANIZATION. EXECUTIVES PERCEIVED AS INDECISIVE OR POOR DECISION MAKERS WILL QUICKLY LOSE THE CONFIDENCE AND COMMITMENT OF THEIR TEAM. ”

TIM MORIN, PRESIDENT & CEO, WJM ASSOCIATES, INC.

EFFECTIVE LEADERSHIP: DECISIVENESS

- GATHER INFORMATION FROM A BROAD RANGE OF SOURCES.
- FOSTER CONSTRUCTIVE CONFLICT.
- HONESTLY CONSIDER THE ALTERNATIVES.
- TEST ASSUMPTIONS. (IS THAT REALLY TRUE?)
- MAKE A CLEAR YES/NO DECISION AND THOROUGHLY EXPLAIN IT.

LEADERSHIP STYLES

- BUREAUCRATIC
- CHARISMATIC
- SERVANT LEADERSHIP
- TRANSACTIONAL



**WHICH LEADERSHIP STYLE IS THE BEST
STYLE?**

FOR SUCCESS:

- LEADERS BETTER THEIR ENVIRONMENT
- LEADERS KNOW THEIR TEAM AND THEY KNOW THEMSELVES WELL
- LEADERS MAINTAIN A POSITIVE ATTITUDE
- LEADERS BUILD THE NEXT GENERATION

RECOMMENDATIONS

1. INVEST IN YOU
2. INVEST IN PEOPLE
3. ACTIVATE YOUR LEADERSHIP WHEREVER YOU ARE

QUESTIONS?



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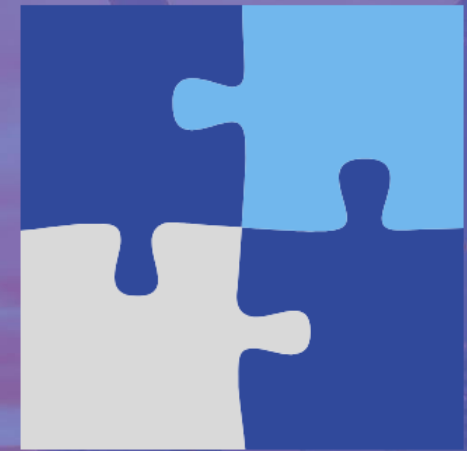
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Early Childhood Center

PRESENTED BY:

Marnèe Morgan
CEO-Principal Consultant



MORGAN GRAVES
CONSULTANTS LLC

What is a Strategic Plan?

- A strategic plan is a tool used by organizations as part of management planning activities that support:
 - Establishing Priorities
 - Focused Energy and Resources
 - Strengthening Operations
 - Establishing Common Goals for Employees, Board Members, and Other Stakeholders
 - Consensus for the Intended Results and Outcomes
 - Assessment of the organization's response and ability to adjust in a Changing Environment

What is a Strategic Plan?

- The strategic planning process is a collaborative effort involving the internal and external organizational stakeholders designed to influence change, shift focus, make decisions, and resulting actions that shape and define the organization, core services, why we do the work, and future-oriented.
- Effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also how it will know if it is successful

Why a Strategic Plan?

- Organization Synergy
- Changing Environment
- Grant Funding Criteria
- Growth
- Mission Alignment

Goals

- Recruit and equip a board of directors to include an advisory committee with the necessary tools to provide vigilant oversight and strategic visioning.
- Establish clear roles and responsibilities between the CEO and Board of Directors to include:
 - Effective and on-going communication
 - Workload/support
 - Strategic visioning
 - Partnerships

Goals

- Review and assess current programming to determine strategic areas of focus
- Build bridges between nonprofits and key institutions (business, local government, nonprofit, philanthropy, etc.) to increase partnership and cooperation
- Strengthen volunteer base to increase capacity and impact

Strategic Planning Process

- A common approach to a strategic planning process involves segments or phases that are designed to create commitment for the implementation of the strategic plan.
- The process phases are driven by principles which include:
 - Meaningful engagement of stakeholders
 - Transparency and information sharing throughout the process
 - An independent consultant whose role is to guide and build capacity by engaging the internal stakeholders, using team-centric methods, without dictating the process
 - Attention to external issues and trends
 - Engagement of external stakeholders

Strategic Planning Process

- Phase 1: Getting Organized
- Phase 2: Data Gathering & Engagement
- Phase 3: Making Sense of the Issues
- Phase 4: The Vision
- Phase 5: Implementation

Phase I: Getting Organized

- The organization phase will include the following:
 - Establishing the core planning team
 - Establishing a strategic planning timeline
 - Organization Assessment and Analysis
 1. SWOT Analysis
 2. Key Stakeholder Analysis

Phase II: Data Gathering and Engagement

- The data gathering and engagement phase involves the following:
 - Internal Stakeholder Interviews
 - Listening Sessions
 - External Stakeholder Interviews

Phase III: Making Sense of the Issues

- Creating Systems
- Creating Goals and Timelines
- Restructure bylaws
- Board development
 - Recruitment
 - Orientation
 - Membership dues
- Strategic partnerships

Phase IV: Vision

- The vision phase will create a space to apply what was acquired during the engagement and analysis activities to the short and long-term planning goals.

Phase V: Implementation

- The key factors to consider with the strategic plan implementation phase involves:
 - Mission Alignment
 - Organization Investment
 - Feasibility
 - Capacity
 - Community Engagement

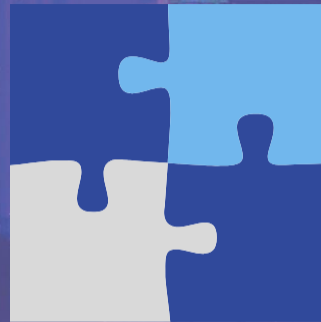
Strategic Direction

- The strategic direction is to focus on:
 - Identifying the organizational strengths and assets
 - Shift the focus to the point of the greatest impact
 - Reviewing the process layers *listening sessions, research, and emphasizing mission alignment*

THANK YOU

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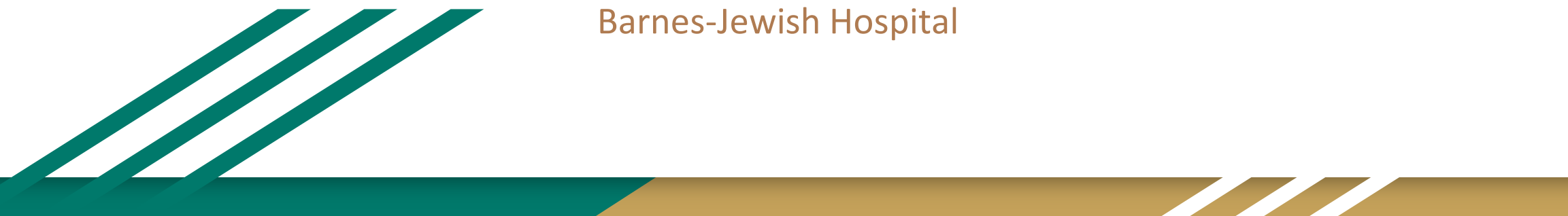


Shakira Onwuachi
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YMCA of the Greater Twin Cities



Program Evaluation: The Key to Unlock your Organization's Success

Donnatesa Dean, MPH
Clinical Program Manager
Barnes-Jewish Hospital



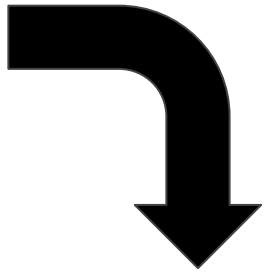
Topics

- **Research vs. Evaluation**
- **Why is Program Evaluation so important?**
- **Stages & Components of Evaluation**
- **Program Evaluation Tools You Can Use**
 - **Using SMART goals**
 - **Logic Models**
- **Q&A**

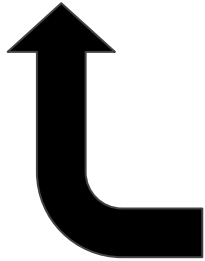
Research vs. Evaluation



- Generates information for decision-making
- Active, real-world setting
- Stakeholder-derived questions
- Program or funder-derived question
- Stakeholder/funder reports



- Goal is to produce generalizable knowledge
- Researcher-derived questions
- Theory-driven/ tests hypotheses
- Controlled Setting
- Publish results



Research

Evaluation

Evaluative Research

Program
Evaluation



Program Evaluation: What is it?

A systematic collection of evidence that demonstrates a program was effectively implemented with the target audience and achieved its intended goals.

Evaluation (1) assesses the effectiveness of an ongoing program in achieving its objectives, (2) relies on the standards of project design to distinguish a program's effects from those of other forces, and (3) aims at program improvement through a modification of current operations

Program Evaluation: Why is it Important?

1. **Informs the development of tailored program based on population needs**
2. **Allows for continual improvement of program design and implementation**
3. **Helps demonstrate program impact/success**

Planning + Evaluation: The link to building a winning program!

To know you have a successful program, it important to embed evaluation early and often

1. Define your problem & research solutions (ASSESS NEED)
2. Define success (SET CLEAR GOALS & OBJECTIVES)
3. Develop your plan (OUTLINE WHAT WILL BE DONE BY WHOM)
4. Execute your plan (MONITOR PROGRESS & ADJUST)
5. Examine your outcomes (DID YOU MEET GOALS)

Types of Program Evaluation

Program Stage	Before Program Begins	New Program	Established Program	Mature Program
	FORMATIVE		SUMMATIVE	
Question Asked	To what extent is the need being met? What can be done to address this need?	Is the Program operating as planned?	Is the program achieving its objectives?	What predicted and unpredicted impacts has the program had?
Evaluation Type	Needs Assessment	Process / Implementation Evaluation	Outcome Evaluation	Impact Evaluation

These summative evaluations build on data collected in the earlier stages.

Formative Stage: The Needs Assessment

Needs Assessment allows for data gathering to assess problem in a target population AND inform design development of a program

KEY QUESTIONS

- What are the characteristics, needs, and priorities of target population?
- What are potential barriers/facilitators?
- Who are my stakeholders?

METHODS & TOOLS:

- Literature Reviews (google scholar, PubMed)
- Census Data
- Interviews & Focus Groups
- Surveys
- Observation
- Usage Data

Formative Stage: Process/implementation Evaluation

Process Evaluation: assesses whether your program is being implemented as intended. Plan to track, review and report out on progress frequently

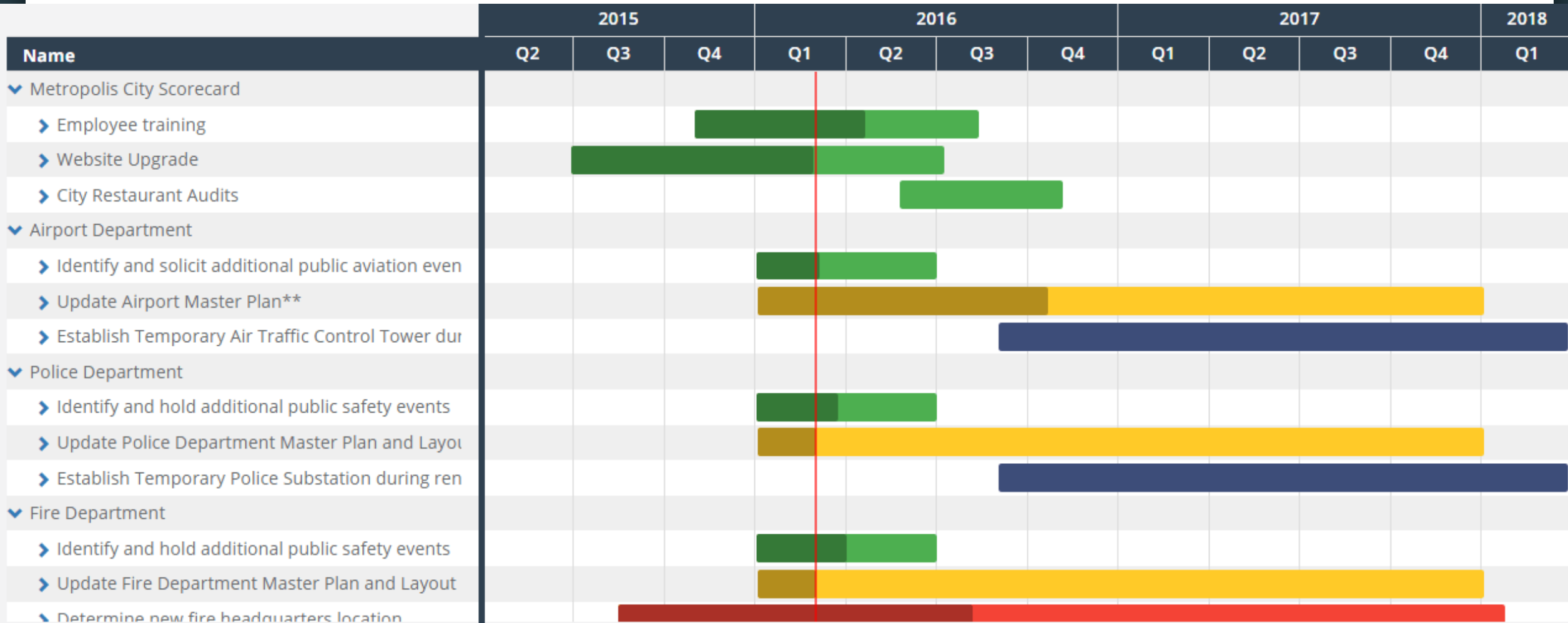
KEY QUESTIONS

- Who does the program target?
- What has the program done?
- When will the program activities take place?
- How much will this cost? (money & time)
- What are the barrier/facilitators of the program strategies/activities

METHODS & TOOLS:

- Gantt Chart (timeline of plan)
- Project Management System
- Scheduling Logs
- Sign-In sheets
- Budget/Expense Reports

Gantt Chart Example:



Summative Stages: Outcome & Impact Evaluation

Effectiveness evaluation: measures extent to which outcome and impact objectives for your program are being met/ has been met.

KEY QUESTIONS

- How well did the program work?
- Did the program produce or contribute to the intended outcomes in the short, medium and long term?
- For whom, in what ways and in what circumstances?
- What were the particular features of the program and context that made a difference?

METHODS & TOOLS:

- Pre-post surveys
- KAP Surveys
- Questionnaires
- Interviews
- Checklists
- Feedback forms
- Trend Data over time

Program Evaluation Tools You Can Use

- **SMART GOALS/OBJECTIVES:** used to bring precision & clarity around what you aim to accomplish and how you intend to do it.

Specific | Measurable | Actionable | Relevant/Realistic | Time-bound

- **LOGIC MODEL:** a systematic and visual way to present and share your understanding of the relationships among the resources you have to operate your program, the activities you plan, and the changes or results you hope to achieve.

S.M.A.R.T. GOALS: Model & Examples

The MODELS:

- By [when], [measure - includes who and what].
- [Who] will do [what] resulting in [measure] by [when].
- By [when], [who] will do [what] resulting in [measure].

Examples:

- By December 31, 2019, reduce the percent of 9th graders in St. Louis City and County who are obese from 8% baseline to 7%.
- Service Reps will conduct 3 or more customer meetings each week resulting in Gain four new clients for consulting business by July 31, 2019.

Logic Model: The Components

- **Problem Statement**
- **Overarching S.M.A.R.T. Goal**
- **Inputs**
- **Outputs**
- **Outcomes**
 - **Short-term**
 - **Mid-term**
 - **Long-term (Impacts)**

Problem Statement:

What are we trying to address?

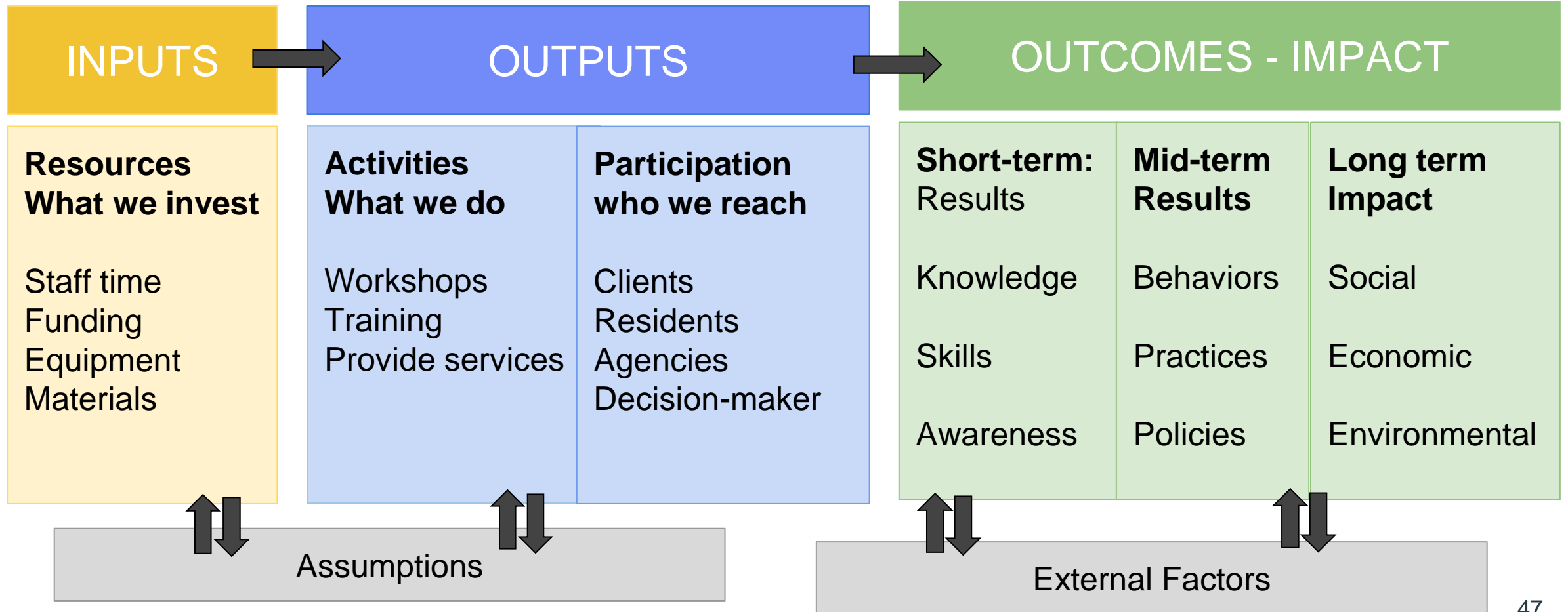
Description of problem that you would like to address

Disease Prevalence for a specific group, a societal concern or issue

Goal:

Relevant to problem and activities

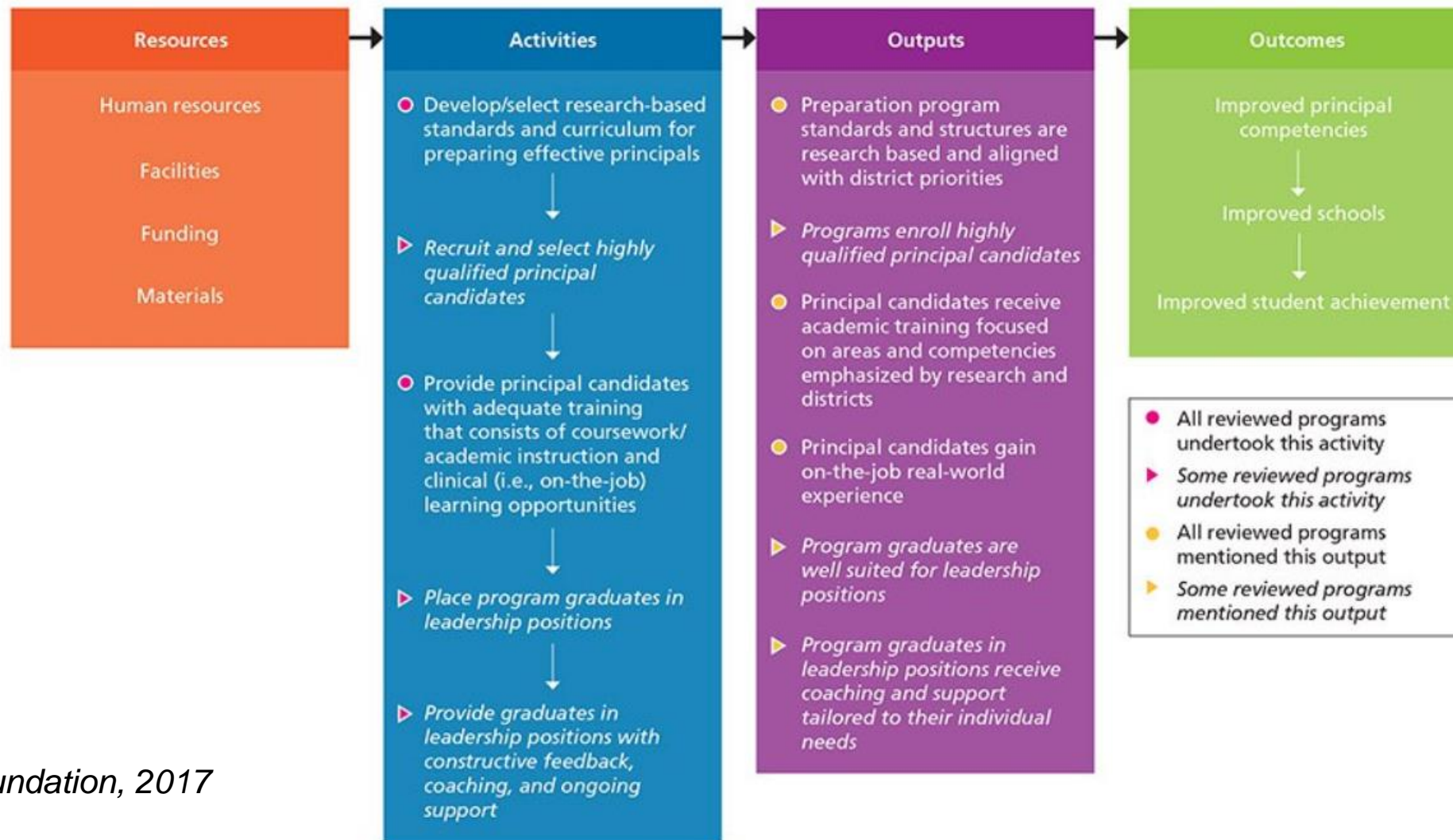
SMART Goal related to Long-term issue you wish to address



Adapted from Wallace Foundation, 2017

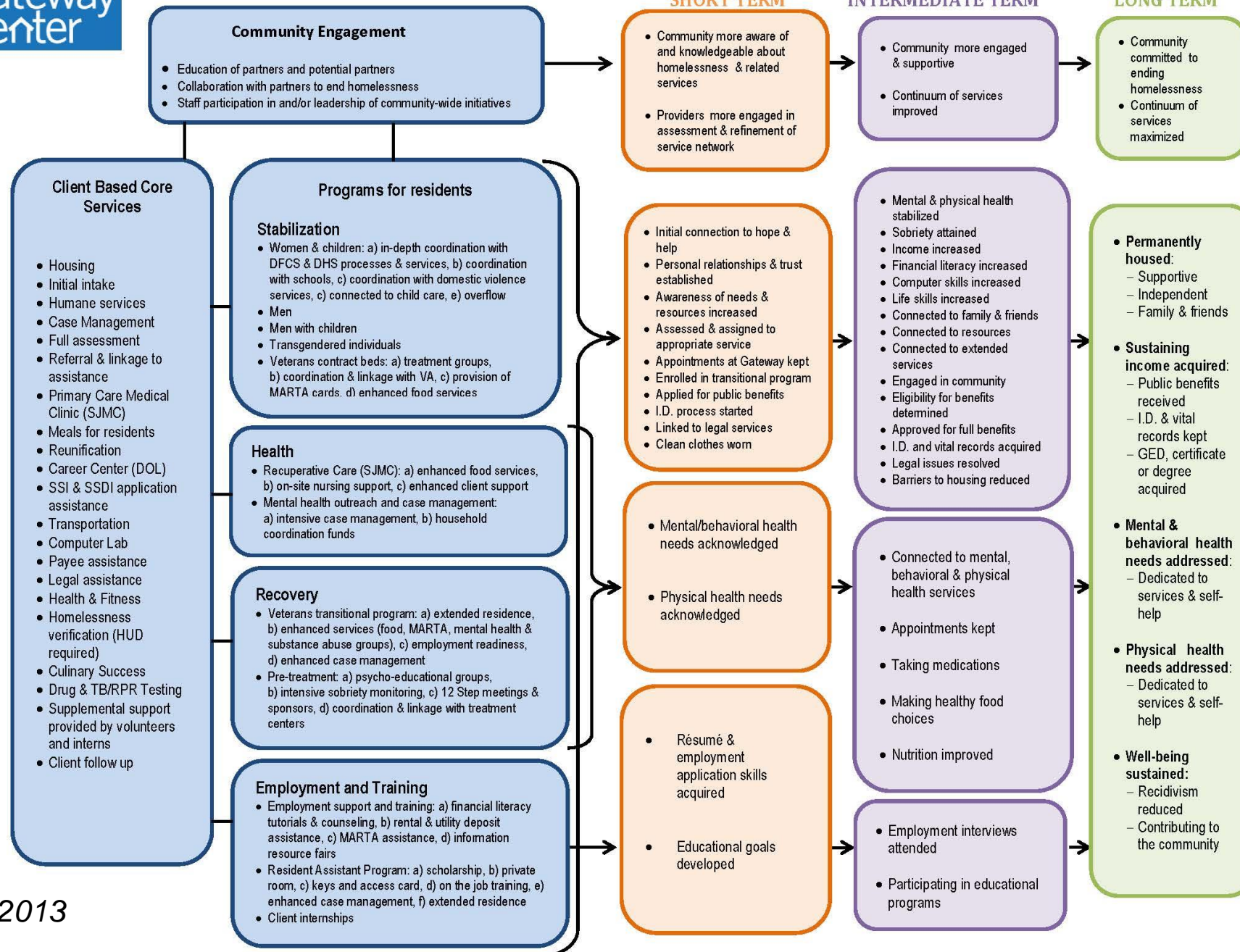
Logic Model—Principal Preparation Programs

The problem: Many states and districts struggle with the shortage of new principals who possess competencies needed for effective leadership. While attending training programs, principal candidates often do not receive academic coursework and clinical experiences that adequately prepare them for leadership positions in real life. After graduation, new principals often do not receive sufficient support and mentoring tailored to their individual needs to guide them in the first few years in leadership positions.



WHAT WE DO...

SO THAT THESE OUTCOMES OCCUR:



Takeaways

1. **Program Evaluation should start EARLY and be embedded in your planning design & implementation**
2. **Evaluation using similar guiding principles and methods as research for a specific purpose of determining if a program met its intended goals**
3. **Formative evaluation involves needs assessments**
4. **Set goals that are S.M.A.R.T. (specific, measureable, achievable, relevant, and time-bound)**
5. **Use LOGIC Model during program development to bring together problem, targeted solution, program strategies and monitoring and outcome metrics**

Thank You!

Questions for me?



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MOSAIC BEGINNINGS, LLC

"WHERE ALL OF THE PIECES COME TOGETHER"

MONIQUE A. NORFOLK, MPH



SM

OUR APPROACH

- Remove barriers
- Increase organizational capacity
- Create positive community impact
- Increase sustainability



WHO WE SERVE

- Non-profit organizations
- Faith-based organizations
- Civic organizations



THE PROBLEM

A yellow and red chalk lies on a white surface, having just written the word "PROBLEM" in bold, black, uppercase letters. The word is slightly tilted. The chalk is positioned at the bottom right of the frame. The background features a faint, light purple geometric pattern of triangles and a watermark that reads "depositphotos.com".

PROBLEM

WHAT A GRANT WRITER IS

A person who pulls together the information provided and puts it into the proposal format



WHAT A MOSAIC BEGINNINGS GRANT WRITER IS

- Grant Writer PLUS:
 - *Experienced federal grant reviewers*
 - *Team of trained evaluators*
 - *Team of trained program developers*
 - *Experienced project managers, program coordinators, community organizers*
 - **MUCH MORE!!!**



EVALUATION



COLLABORATION



SUSTAINABILITY



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FACEBOOK: www.facebook.com/MosaicBeginningsLLC

PHONE: 314-266-8174

Thank
you


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