

May 2000

The Annie E. Casey Foundation Fellows Network

*A Report on the History,
Accomplishments and
Challenges for the
Casey Fellows Network*

Kim McGaughey

Overview of Report

Purpose. There are five major purposes for this report:

- 1) Provide historical documentation on the Network;
- 2) Showcase Network accomplishments;
- 3) Highlight challenges for the Network;
- 4) Facilitate decisions on improving the Network; and
- 5) Demonstrate the value of the Foundation's investment in the Network.

Methods. Several types of information were used to achieve these purposes:

- Demographic information on 39 Fellows from four Fellowship classes;
- Head counts and self reports on the involvement of 29 Fellows from the first three Fellowship classes in major Network activities;
- Baseline data on nine performance measures to be tracked over time;
- Comments from Fellows; and
- Network documents.

Organization. The report is comprised of the following sections:

- History of the Network.
- Overview of the Network.
- Review of Network Strategies:
 - Designing an infrastructure to manage the Network;
 - Enhancing the leadership of Fellows;
 - Using Fellows as resources; and
 - Supporting on-going communication.
- Network performance measures.
- Fellows' suggestions for improving the Network.
- Network Committee action plan in response to this report.

History of Network

From the beginning, Fellows desired to create a collective group from individual Fellowship classes and build through action among Fellows a sustained movement to improve outcomes for children and families.

Initial vision

- During the 1994 Fellowship year, the first year Fellows envisioned a forum, or institute, that would “build and sustain a critical mass of Fellows capable of catalyzing external energies in concert with the mission of AECF.” They developed four major principles to guide its work:
 - Race matters: racism should be isolated or controlled in social policy development, systems transformation, and service delivery.
 - Power should shift to the ground: Communities, and the children and families that live in them, should be the primary architects of their lives, their neighborhoods, and the institutions that serve them.
 - Leadership is a collective, not an individual experience: Since Fellows are located across the country with authority, expertise and influence, we should help one another carry out reform initiatives.
 - Reform requires complex relational approaches, not just technical fixes.
- Ralph Smith, Vice President of the Annie E. Casey Foundation (AECF), offered a point of view that the AECF management committee was committed to the concept of an alumni group, but was less than enthusiastic and had not supported the institute for three reasons:
 - The committee felt the proposal represented the thinking of one class. Many members wished to await more diverse opinions and the involvement of succeeding classes.
 - Some members were disinclined to create an advocacy group within the Foundation.
 - Some felt the concept was too Foundation-centric and not focused on the goal of the Fellowship to help Fellows change the field.
- Therefore, the AECF management committee responded to the initial institute proposal from the 1st year Fellows by agreeing to sponsor the Fellows Forum.
- In September 1995, after completing the Fellowship year, the first year Fellows hosted a forum entitled “Confronting the Future: Issues of Power and Authority in the New Federalism.” They invited the second year Fellows to attend, as well as Casey staff and other colleagues.

History of Network

Decision to form a Network

- In 1996, the Foundation contracted with 1st year Fellow, Dolores Briones, to interview the Fellows and make recommendations on post-Fellowship activities. Based on feedback from Fellows, Dolores coined the term “Network” and recommended:
 - A Network be institutionalized;
 - Fellows meet once a year to share learnings and to continue leadership development;
 - The Foundation support ongoing communication among the Fellows through the Internet and perhaps a newsletter; and
 - The Foundation increase its use of Fellows as resources.
- In 1997, the first three Fellowship classes met together in New York. This event later became known as the 1st annual gathering of Fellows.
- During the gathering, Dolores presented her report and the Fellows agreed to form a network. Lynne White, then Director of the Fellowship, asked each Fellowship class to select two representatives to meet in Baltimore to design the Fellows Network.

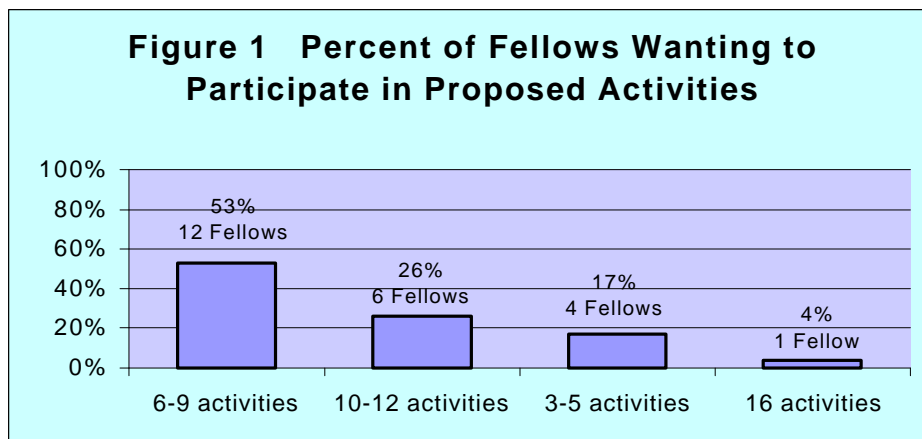
Building of a Network

- In June 1997, Fellows from all three classes -- Trine Bech, Dolores Briones, Edward Chisolm, Brenda Donald, Kim McGaughey and Jean Thomases -- met in Baltimore.
- Ralph Smith shared with this group that the AECF management committee could sustain and encourage a network that would leverage knowledge and maximize impact on the field. The committee saw the network as building durable relationships and continuing to maximize return on the Foundation’s investment in the Fellows. It saw the network as prompting them to be more strategic in involving Fellows in the work of the Foundation as TA providers, in consultative processes, and as members of its extended family.
- The Fellows decided that connections among Fellows to date had been isolated and adhoc – the Fellow’s Forum or one Fellow helping another Fellow. Events needed to be more strategic, intentional and planful.
- The Fellows developed the mission, strategies, activities, action plan, and committee structure that now serve as the foundation for the Network. The initial draft documents were distributed to all Network Fellows. They were revised to incorporate comments and then presented to AECF’s management committee for consideration.

History of Network

AECF invests in the Network for two years

- In October 1997, AECF's Management Committee committed to invest in the Network for two years. This would give the Foundation and the Fellows time to evaluate the experience and the level of participation among Fellows.
- The management committee expressed concern, however, about whether Fellows would assume leadership and participate in the Network.
- Two strategies were undertaken to address these concerns:
 - 1) AECF contracted with 1st year Fellow, Kim McGaughey, to coordinate Network activities; and
 - 2) The Network conducted a survey of all Fellows to determine their desires for participating in Network activities for the coming year.
- Almost 80% of Fellows (23 of 29) responded to the survey. They were enthusiastic about participating in the proposed activities for the Network.



Overview of Network

The mission of the Casey Fellows Network is to strengthen leadership to improve outcomes for poor children, families, and communities.

Network commitment. The Casey Fellows are committed to strengthening families, to building communities, and to challenging and transforming systems. The Network supports relationships among Fellows, to maximize the Fellowship experiences, and to contribute significantly to sustained movements to improve outcomes for poor children, families, and communities. To accomplish our mission, Fellows serve as resources to the field, to each other, to each Fellowship class, and to the Foundation. The Network provides diverse opportunities to encourage the involvement of all Fellows. The goal is for Fellows to participate and contribute to making it a valuable network. It continually evolves as it grows and changes to maximize its capacity to carry out its mission.

Network strategies. The Network focused on seven major strategies to accomplish its mission.

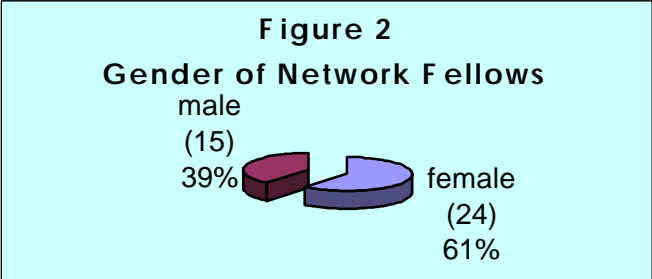
- Design an infrastructure to manage the Network;
- Enhance the leadership of Fellows in their communities;
- Use Fellows as resources for each other;
- Use Fellows as resources for the Foundation;
- Support and provide expertise to current Fellows and the Fellowship program;
- Support on-going communication among the Fellows, Foundation, and others; and
- Create an evaluation process for the Network.

Overview of Network

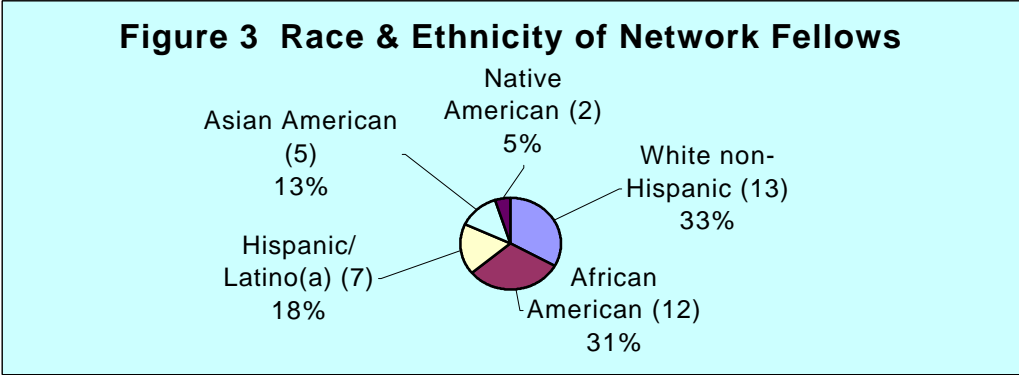
Membership

- Currently, there are 39 Casey Fellows from four Fellowship classes:
 - 10 Fellows from the 1994 class;
 - 9 Fellows from the 1995 class;
 - 10 Fellows from the 1997 class; and
 - 10 Fellows from the 2000 class.

- There are more female than male fellows in the Network.

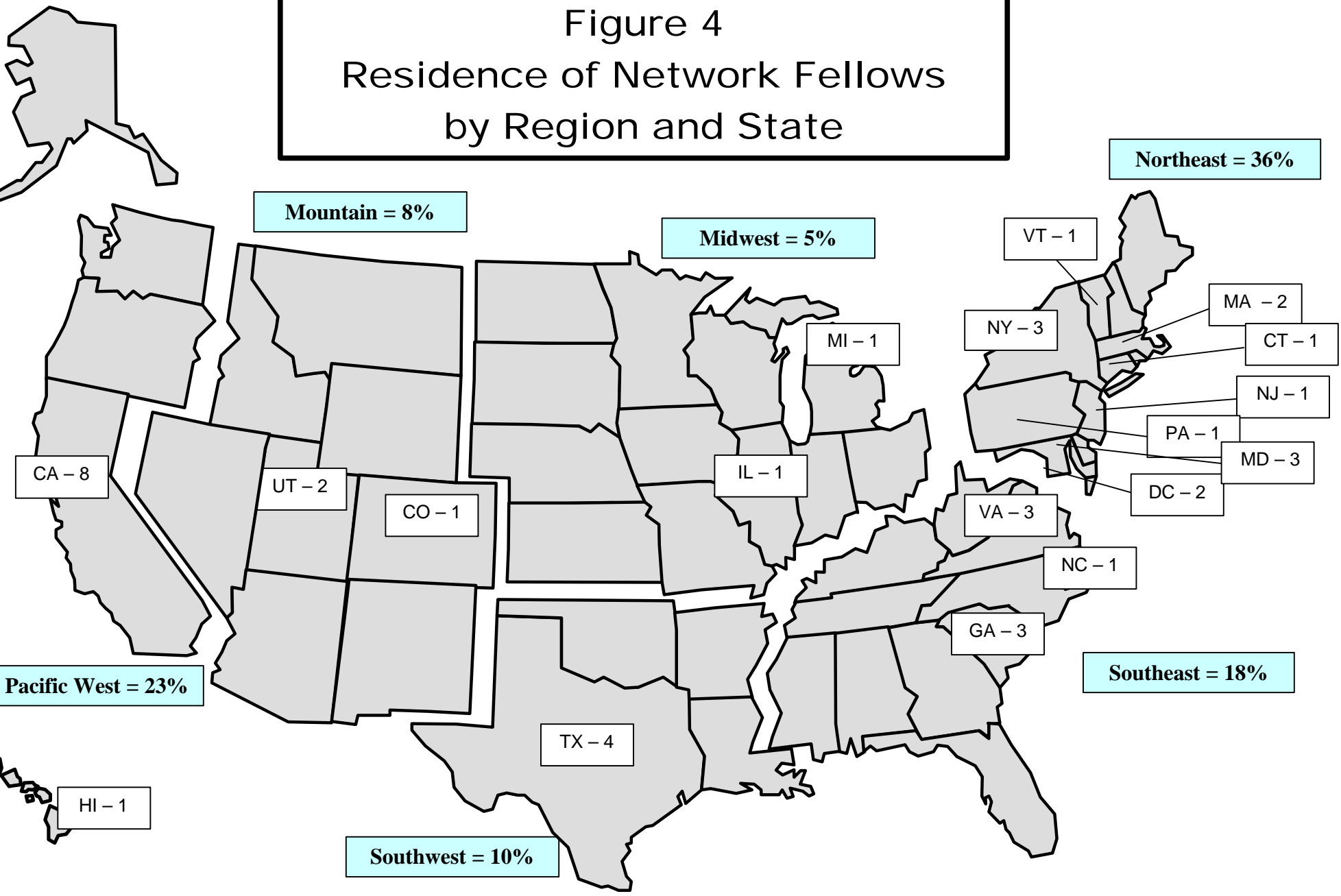


- The Fellows Network is racially and ethnically diverse.



- Over half of the Fellows are located on the East Coast. See Figure 4 on the next page.

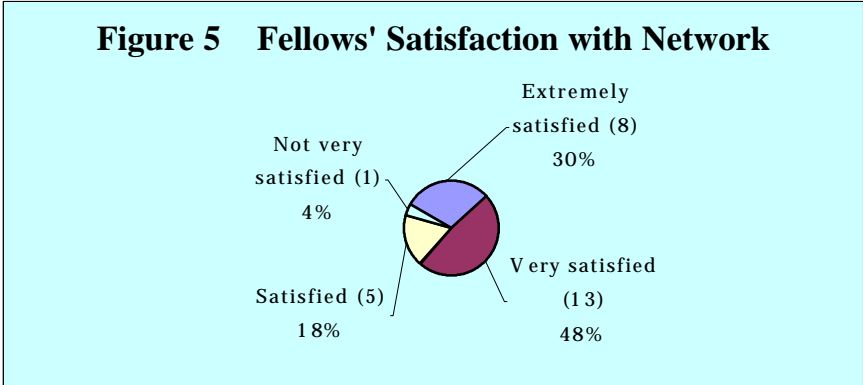
Figure 4
Residence of Network Fellows
by Region and State



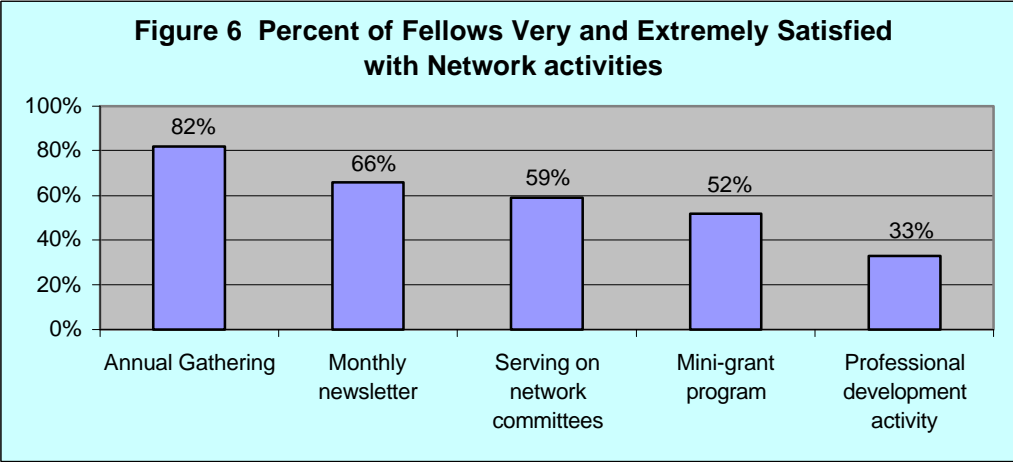
Overview of Network

Fellows are very satisfied with the Network

- 78% of Fellows said that they are very or extremely satisfied with the Network.



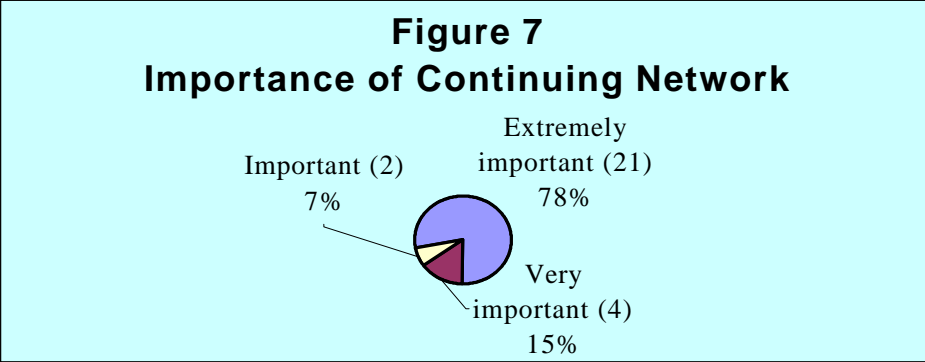
- Generally, Fellows are satisfied with individual Network activities. Fellows are most satisfied with the annual gathering and least satisfied with the professional development activities.



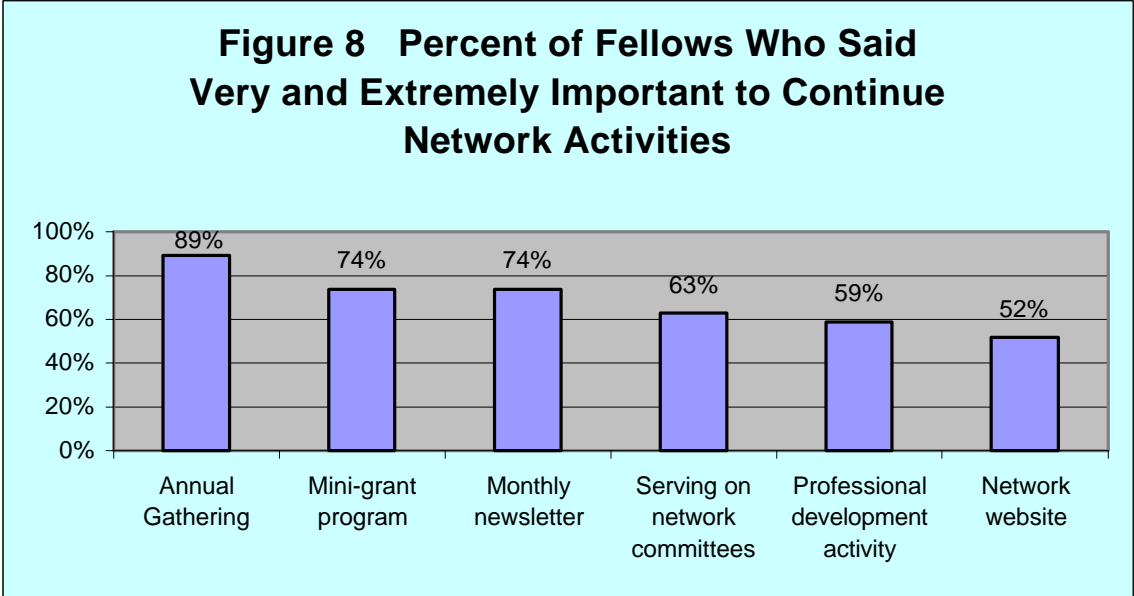
Overview of Network

Fellows say we should continue the Network.

- 93% of Fellows said that it is very or extremely important that we continue the Network.



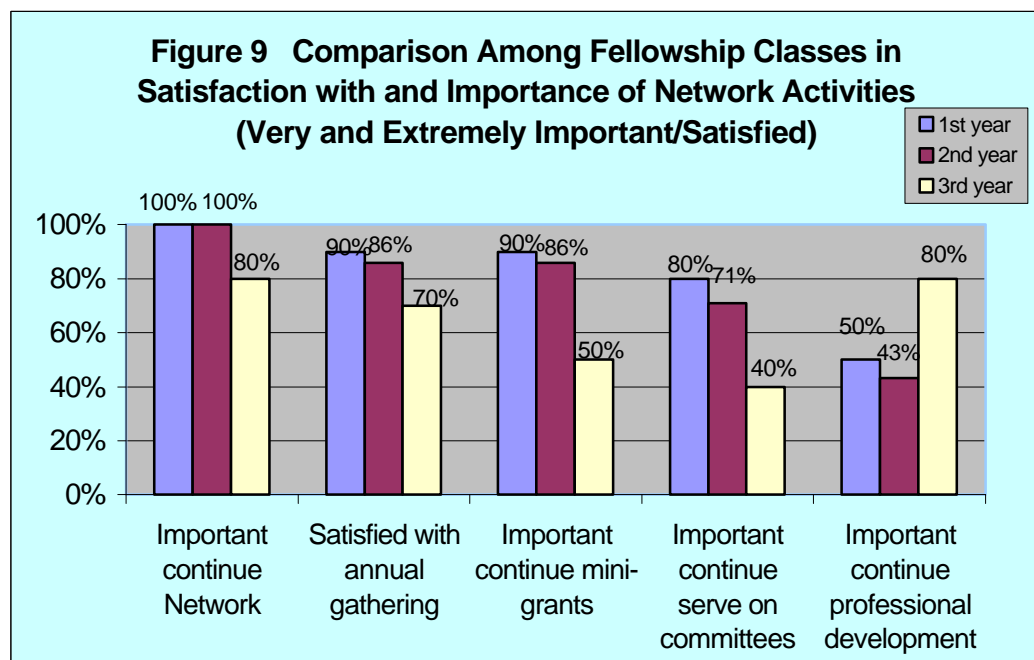
- Overall, Fellows feel it is important to continue Network activities. Around 75% of Fellows said it was very or extremely important to continue the annual gathering, mini-grants, and monthly newsletter.



Overview of Network

Differences Among Classes

- 3rd Year Fellows valued Network activities differently than 1st and 2nd year Fellows.
 - More 1st and 2nd year Fellows said it was important to continue the Network, mini-grants program, and serving on committees than 3rd year Fellows. More 1st and 2nd year Fellows were also satisfied with the annual gathering.
 - However, 3rd year Fellows felt it was more important to continue the professional development activities than 1st and 2nd year Fellows.



- It is not clear why the 3rd Fellowship class views Network activities differently. There are several possible reasons.
 - 1st and 2nd year Fellows may value the opportunity of being together more since the Network filled a void in their lives that 3rd year Fellows did not experience.
 - Classes that have recently completed the Fellowship program may experience the Network differently until they have been out of the Fellowship for a period of time.
 - There may be something unique about Fellows in the 3rd year class.

Overview of Network

Fellows value the power of the Network.

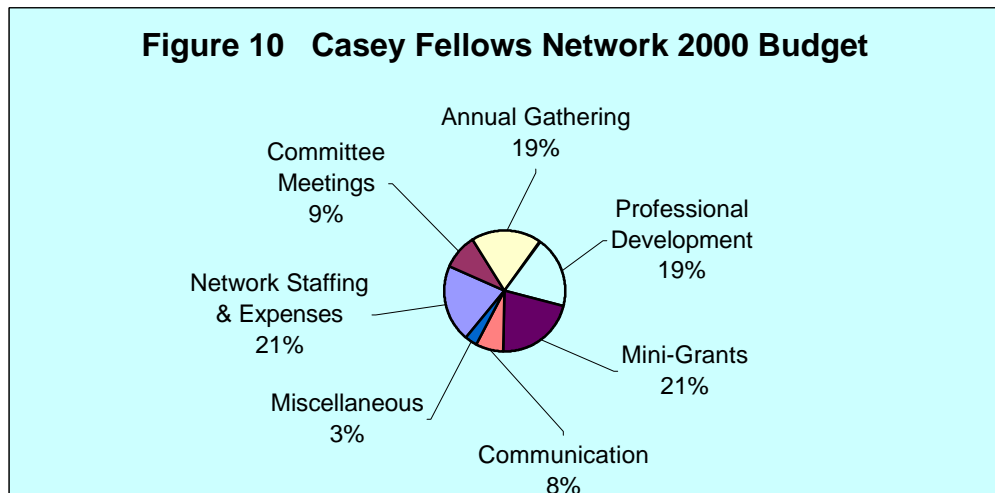
- Fellows described the power and capacity of the Network:
 - The Network is really beginning to coalesce. It is an incredibly accomplished and committed group. There is no doubt in my mind that we are powerful individuals who with appropriate strategic connections, can become a powerful force for progressive social change.
 - The Network is actually taking shape and I feel more a member of the Network than just a class.
 - The Fellows as a network have tremendous capacity and that provides me with capacity.
 - The Network is the network – it will take time to gell; some people will be more or less involved, but the more involved more people are, the more powerful it will be.
 - The Network has been an important part of my life since leaving the Fellowship. At a time when I have not been in a position to use the valuable training of the Fellowship, I have remained connected to the vision and spirit of the Foundation's work and the work of my colleagues in the field. This connection has been a vital link in my development and is starting to take root in some of the work I am currently doing. Much would have been lost for me if the Network had not existed to provide the interim connective tissue.

Network Infrastructure

A major emphasis for the Network during its first two years has been to design an effective infrastructure to lead and manage its activities.

The Network Committee serves as the governing body.

- The Network Committee provides vision, leadership and sets policy for the Network. It has been comprised of two representatives from each class, the chair, and the Fellowship Director.
- The committee delegates responsibilities and authority to three standing committees -- annual gathering, professional development, and mini-grants.
- It manages a budget totaling \$235,000 for fiscal year 2000. The Network has allocated its budget across the following activities:
 - Almost 60% on enhancing the leadership of Fellows (\$139,000);
 - 30% on infrastructure (\$70,700); and
 - 8% on communications (\$17,650).



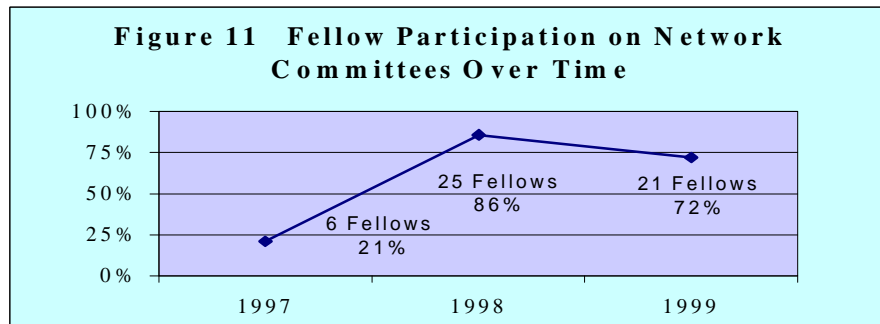
Fellows manage and lead the Network.

- Kim McGaughey served as Network Coordinator for two years beginning in January 1998.
- The Network Committee decided during 1999 to split the coordinator functions into two roles – a chair and program support. Now that the Network was established, the leadership functions were less time consuming, while the program support functions had increased dramatically.
- Brenda Donald currently serves as Chair, leading and managing the Network since January 2000. Linda Smith provides program and administrative support.

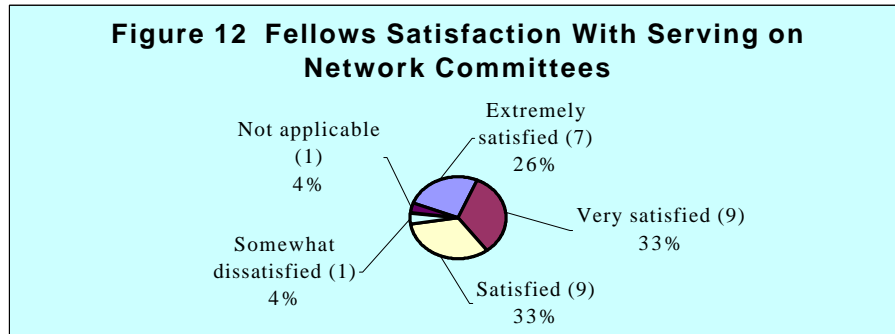
Network Infrastructure

Fellows are active in planning Network activities.

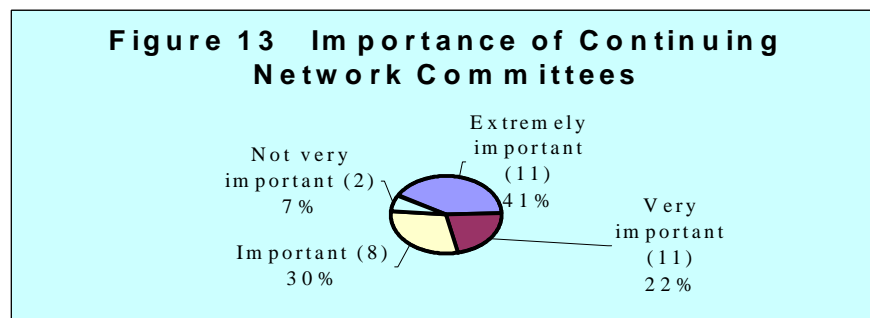
- Fellows are extremely active in leading and planning Network activities. Since the creation of the Network, almost all Fellows (93%) have served on committees.
- Approximately three-quarters of Fellows have served on committees for the past two years.



- 59% of Fellows said they were very or extremely satisfied in serving on committees. This response reflects the value Fellows find in opportunities to reconnect and work together and to contribute to the success of the Network.



- 63% of Fellows said it was very or extremely important to continue serving on committees.



Enhance Leadership of Fellows

A second major emphasis for the Network during its first two years has been to develop opportunities for Fellows to enhance their leadership in their communities.

The Network designed four strategies to enhance leadership.

- 1) Annual gatherings of all Fellows to provide a strong support network among leaders who are taking risks as they challenge and transform systems.
- 2) At least one professional development activity annually to strengthen the leadership capacity of Fellows.
- 3) Mini-grants to support Fellows as leaders in transforming systems and impacting the field; and
- 4) Collaboration with other alumni groups of leadership development programs to broaden and strengthen Fellows' networks and spark opportunities for working with other leaders.

I. Annual gatherings

The goal of the annual gatherings is to provide Fellows opportunities for developing strong relationships to support and sustain them in their work.

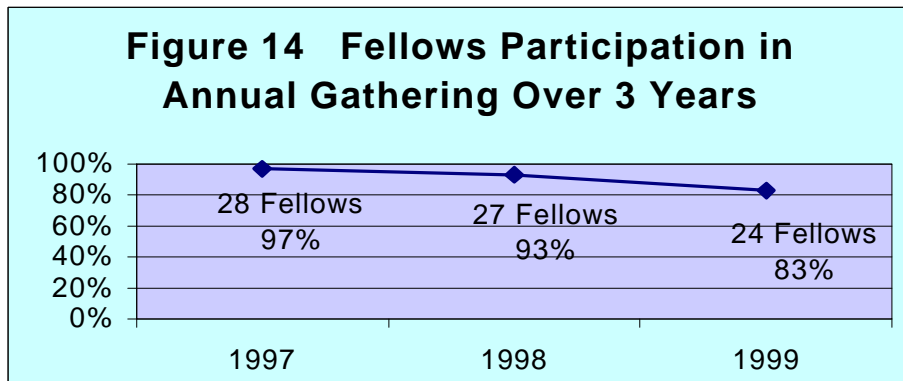
- The Network achieves this goal by:
 - Reconnecting among Fellowship classes and the Network as a whole;
 - Engaging new Fellows and energizing them about the Fellows Network;
 - Reflecting on learnings, including overcoming obstacles to change;
 - Sharing areas of expertise and needs;
 - Networking around issues;
 - Co-consulting and working on case studies;
 - Developing strategic ways to use each other;
 - Connecting with Foundation leadership on major initiatives and learnings from the field; and
 - Participating in renewal and social activities.

- The Network has successfully convened 4 annual gatherings.
 - 1st gathering in New York City in 1997;
 - 2nd gathering at Wye River, Maryland in May 1998;
 - 3rd gathering at Wye River, Maryland in May 1999;
 - 4th gathering in Santa Cruz, California in May 2000.

Enhance Leadership of Fellows

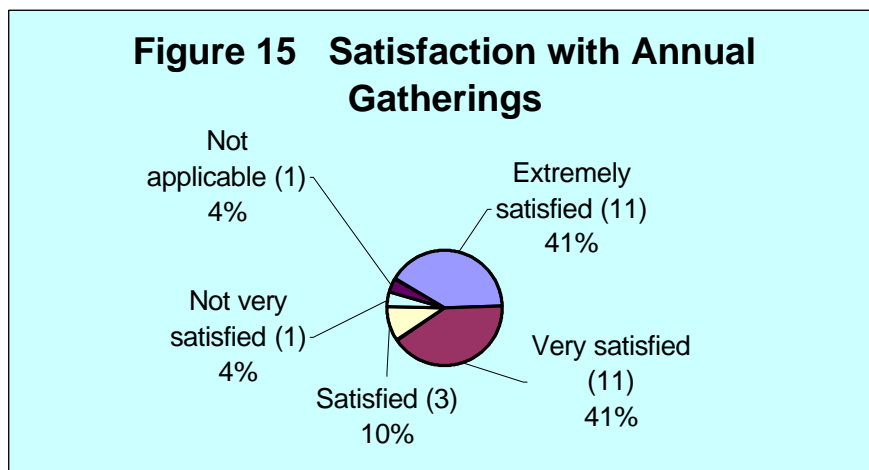
Most Fellows participate in the annual gatherings

- 85% of Fellows have participated in all 3 annual gatherings; while 93% of Fellows have participated in at least two of the gatherings.
- The Network would expect participation rates to slightly decline after the initial event and then stabilize over time.



Fellows are very satisfied with the gatherings

- 82% of all Fellows said that they were very or extremely satisfied with the gatherings.



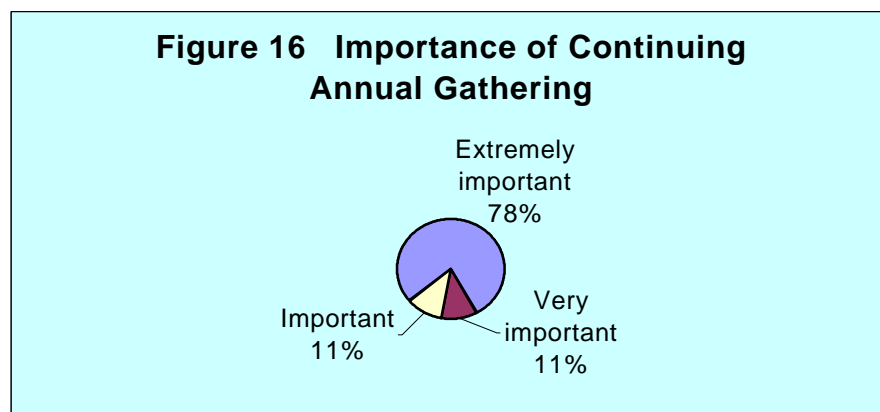
Enhance Leadership of Fellows

What Fellows liked about the annual gatherings.

- Fellows shared what they liked about the annual gathering on evaluations completed immediately after the event. These comments are representative of many responses.
 - I enjoyed reconnecting and strengthening my relationships with other Fellows.
 - The personal and professional networking are extremely valuable.
 - I like thinking together about the difficult issues.
 - There is an extraordinary amount of synergy among the Fellows. Rather than connecting as three separate groups, the Fellows are now connected as one group. The lines among classes no longer exist.

Fellows feel strongly that annual gatherings should continue.

- 89% of Fellows said that it was very or extremely important that we continue the annual gatherings.



Enhance Leadership of Fellows

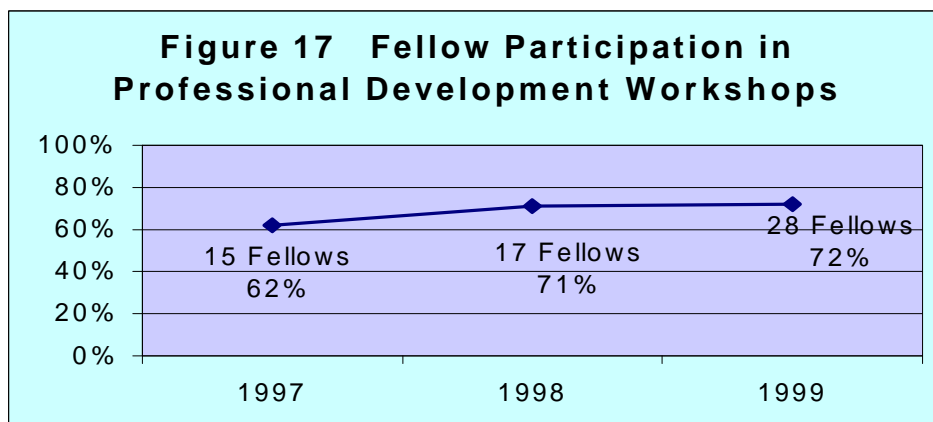
II. Professional Development

A second strategy the Network uses for enhancing the leadership of Fellows is conducting at least one professional development activity each year.

- The Network has conducted three activities.
 - 1997 *Group Facilitation Skills: Putting Participatory Values into Practice* by Sam Kaner;
 - 1998 *Building Public Will to Support Sustainable Movements* by the Advocacy Institute; and
 - 1999 *Leadership Challenges and Opportunities in Partnering with Faith-based Organizations* developed by the Network and held in January 2000.

Fellows actively participate in the seminars.

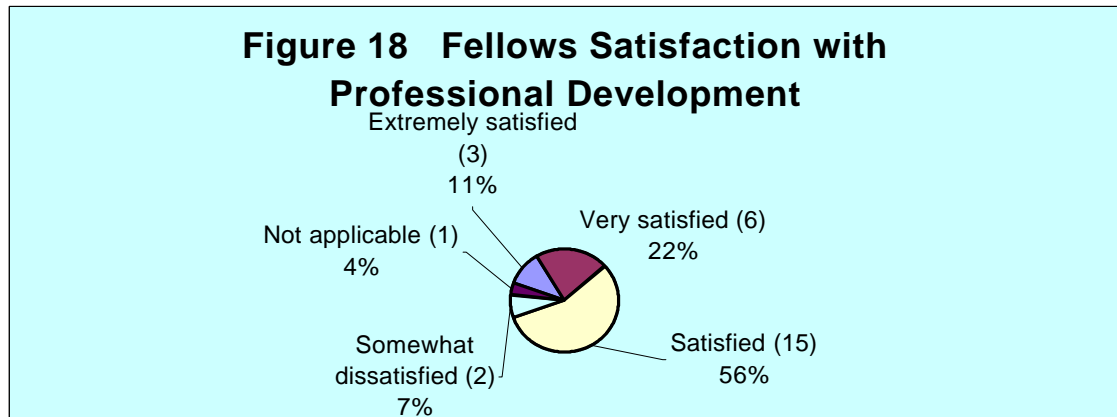
- Three quarters of the Fellows (78%) participated in at least two of the three professional development seminars offered.
- The percentage of Fellows participating in the seminars has been steady the past two years at around 72%.
- Fellows reported that they did not attend the seminars primarily because they had scheduling conflicts, family commitments, or had received the training previously.



Enhance Leadership of Fellows

Professional development needs to be improved.

- While Fellows expressed satisfaction with professional development, there is clearly room for improvement. 89% of Fellows said they were satisfied to some degree, but only 33% of Fellows said they were very or extremely satisfied.



Fellows offered suggestions for improving the workshops.

- The 1997 Sam Kaner facilitation training was a pre-packaged curriculum on a specific technical skill. The Fellows found this training extremely valuable, although there are no evaluation results from this training.
- The 1998 Advocacy Institute training was also primarily a pre-packaged curriculum on a broad, poorly-defined content area. Fellows suggested the following changes:
 - Allow more time and be more thorough in planning;
 - More clearly define the topic, issues and needs that Fellows want addressed;
 - Match the needs of Fellows with appropriate consultants;
 - Ensure facilitators represent or are sensitive to different cultural/race/ethnicity perspectives;
 - Give clearer expectations to the presenters and Fellows;
 - Co-design more with the consultants;
 - Frame the agenda more tightly;
 - Target the skills that Fellows want to improve more appropriately;
 - Make exercises more specific and relevant;
 - Provide more techniques, strategies, and concrete tools.

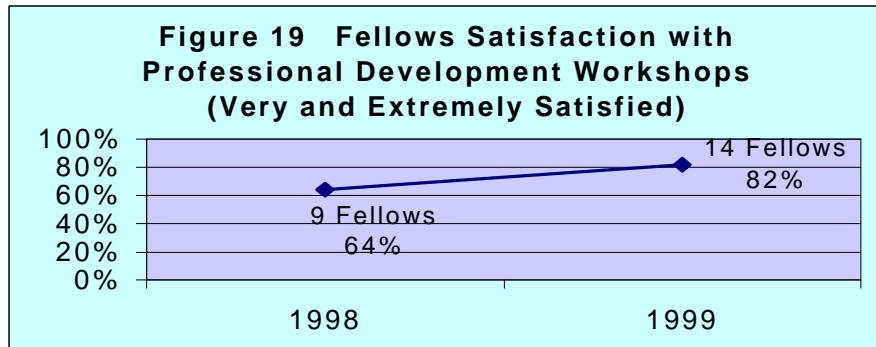
Enhance Leadership of Fellows

Despite these problems, Fellows found power in reconnecting.

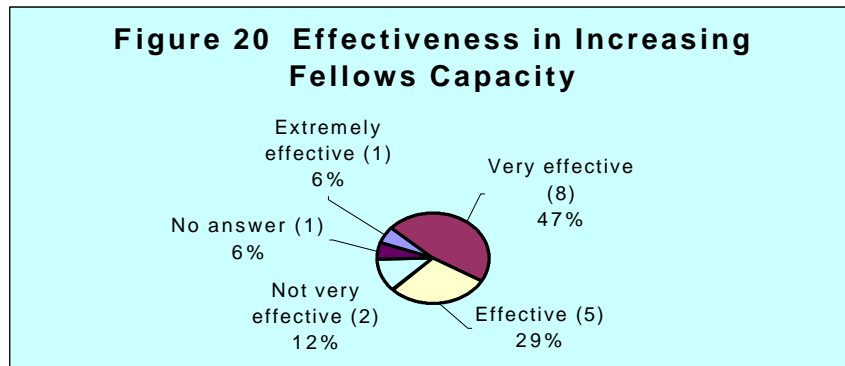
- I like reconnecting with all the Fellows and drawing energy from the collective spirit and brainpower.
- I like reconnecting with what’s happening! Staying in the loop is critical to the work because it is so challenging. It helps me be more strategic.
- There is incredible power in co-consulting with other Fellows.

Fellows were more satisfied with the 1999 workshop.

- 82% of Fellows were very or extremely satisfied with the 1999 workshop (held in January 2000), compared to 64% of Fellows in 1998.



- Over half of the Fellows (53%) said that the workshop was very or extremely effective in strengthening their capacity to partner with faith-based organizations. Of the three Fellows who found it not very effective or did not respond to the question, two Fellows had expertise in this area. The other Fellow said he was not positioned to work with faith-based groups, but was challenged to think creatively.



Enhance Leadership of Fellows

What Fellows liked about the last workshop.

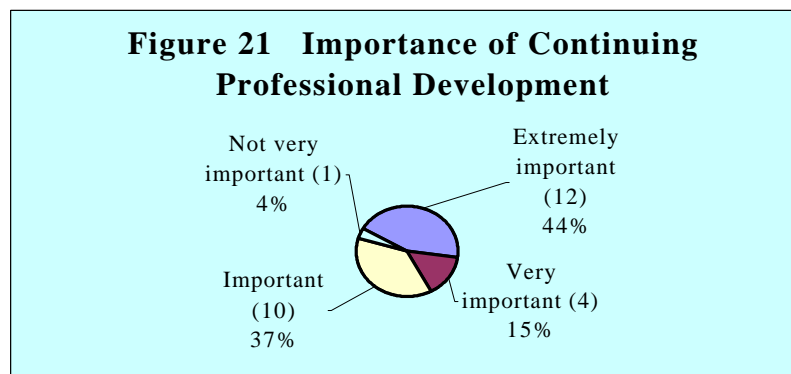
- The weekend was clearly well thought-out, thoroughly planned and organized.
- The multiplicity of perspectives was excellent.
- The speakers were excellent, well-prepared and focused.
- I loved the Fellows panel and utilizing Fellows as experts.
- It broadened my awareness of the myriad of opportunities (and challenges too).
- The workshop provided models, pitfalls, concrete strategies and approaches.
- It gave me resources – speakers and Fellows – that I can contact for more information and strategies.
- Carole Thompson from the Foundation was extremely helpful. The lines are blurring between classes, the network, and the Foundation.

What Fellows did not like.

- There was too much debriefing.
- The weekend was too long and the days were really packed.
- It could have been more practical – a “how to” session.
- I would like more problem-solving conversations and dynamic interactions with speakers.
- While tremendous effort was made for diversity, we still missed the Asian and immigrant communities.
- There was too much focus on the Black Church and experience.
- The decision not to include the Black Church on the panel was wrong.

Fellows want to continue professional development.

- 59% of Fellows said that it was very or extremely important that we continue the workshops. Since this data was gathered before the last workshop, it will be interesting to see if this percentage increases as the professional development improves.



Enhance Leadership of Fellows

III. Mini-grant program

The Network recently created the mini-grant program as a third strategy to support Fellows as leaders in transforming systems and impacting the field. The Network awards Fellows grants up to \$25,000.

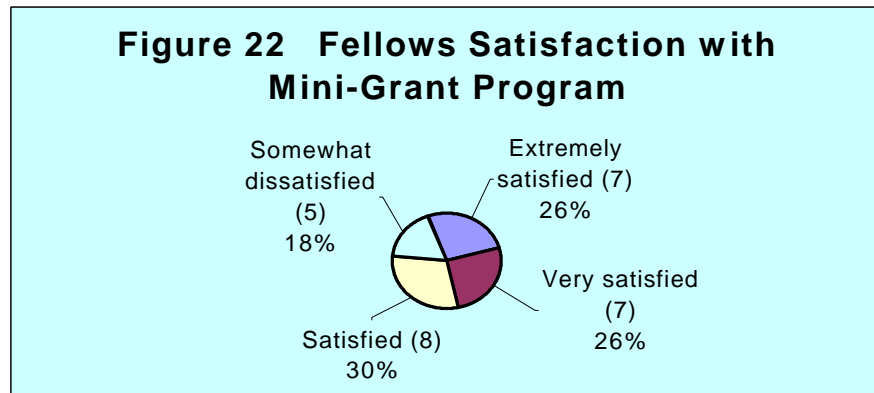
Purposes of mini-grants.

- The purposes of the mini-grants are to:
 - Support Fellows as leaders in transforming systems and impacting the field.
 - Add value and practical solutions to the major challenges in the Foundation's work of transforming severely troubled neighborhoods to ensure that children and their families flourish. The challenges include:
 - * Strengthening families;
 - * Creating economic opportunity;
 - * Building social networks and community;
 - * Reforming systems; and/or
 - * Building public will.
 - Create opportunities for Fellows to tackle challenges through innovative, creative and cutting edge approaches.
 - Allow Fellows to share their expertise and learnings with each other, thereby catalyzing new ways of tackling tough challenges and solving problems through co-consulting.
- The Network encourages Fellows to leverage other resources through the mini-grants to maximize the power of the investments. The Network also strongly encourages collaboration among Fellows through these grants to strengthen the power of the Network.

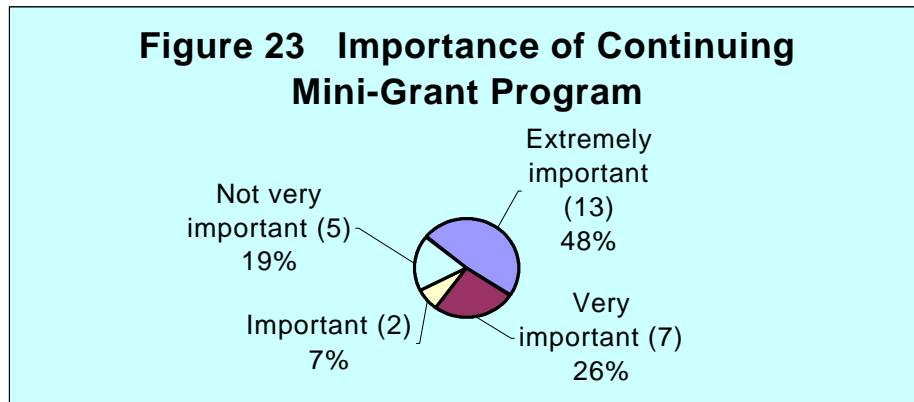
Enhance Leadership of Fellows

Fellows were mixed in their satisfaction with the initial program design.

- While 82% of Fellows said they were satisfied to some degree, only 46% of Fellows said they were very or extremely satisfied. Almost 20% said they were somewhat dissatisfied. Several Fellows said it was too early in the program to assess.



- 74% of Fellows said that it was very or extremely important that we continue the program. Almost 20% of the Fellows said it was not very important. It will be interesting to see if this latter percentage increases now the program has been developed and changes implemented, or whether it will continue to remain constant overtime.



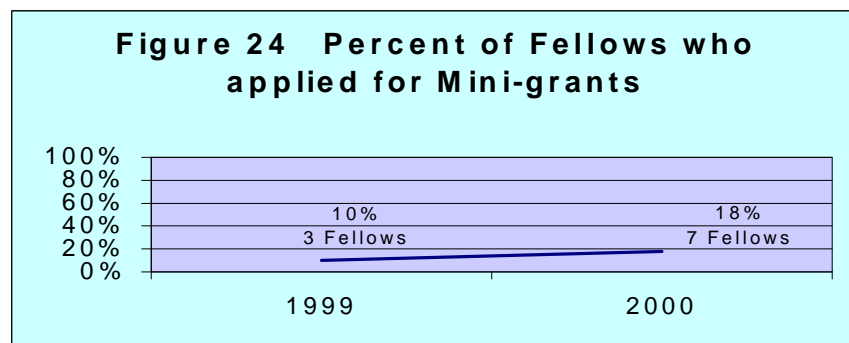
Enhance Leadership of Fellows

Fellows offered improvements in the initial design.

- In response to feedback from Fellows, the Network made several changes to the mini-grant program. The Network:
 - Requested and received \$50,000 for mini-grants from AECF in 2000, up from \$20,000 in 1999.
 - Increased the funding available per grant from a maximum of \$10,000 to \$25,000.
 - Clarified the purposes and added one: to allow Fellows to be more creative and to “commit heresy” in taking leadership risks to bring about change.
 - Simplified the program guidelines, reducing them from eleven to five pages.
 - Simplified the application.
 - Changed the rating of applications to be clearer, more objective, and to discriminate more clearly strengths and weaknesses.
 - Clarified that Fellows would be contacted about funding decisions within four weeks after grant submission.

More Fellows are now applying for mini-grants.

- During 1999, the Network received 3 applications (10% of Fellows) from 3 Fellows requesting a total of \$50,000 (need to check figure with Linda). The Network distributed \$20,000.
- During 2000, the Network received 9 applications (23% of Fellows) from 7 Fellows requesting a total of \$193,050. The Network distributed \$50,000.



Enhance Leadership of Fellows

The Network has awarded six grants.

- Edward Chisolm was awarded \$25,000 in 2000 for the Neighborhood Improvement Association (NIA) to design and implement a wealth building strategy to assist low-income residents in distressed neighborhoods. NIA will develop an Individual Development Account program in Savannah-Chatham County that will also be used to impact broader system change.
- Yolie Flores Aguilar was awarded \$15,000 in 2000 for the Los Angeles County Children's Planning Council to demonstrate how the county can better leverage resources and integrate four initiatives, totaling almost three-quarters of a billion dollars, that impact children and families other than in categorical funding terms. This will serve as a demonstration project to guide future collaborative efforts. Since the four initiatives are statewide, the process, recommendations, and strategies identified will be valuable and applicable to the 51 other counties in California.
- Leann Ayers was awarded \$10,000 to explore a neighborhood transformation and family development strategy in a conservative, majority white, predominately rural, southwestern community. The Amarillo's Neighborhoods Nurturing Children is developing Family Support Centers in four neighborhoods. The mini-grant will support the hiring of a parent leader in each neighborhood to host a series of community meetings. The goal is to hire the parent leaders, train them, distribute information about the forums, organize participation in them, and select neighborhood advisory committees. Leann will also explore a partnership among the collaborative work led by other Texas Fellows in Dallas, El Paso, and San Antonio.
- Trine Bech was awarded \$9,000 in 1999 to support a facilitated consultative session in Vermont to create a family-centered, strength-based, model of legal representation for parents in child protection cases.
- Dolores Briones was awarded \$6,000 to facilitate a retreat of the members of the El Paso County commissioner's court and their key advisors to develop a mission statement, goals and objectives for the county and for their respective precincts.
- Wendy Jacobson was awarded \$5,000 to conduct research and consultation with social work Fellows, other leaders in the field, and consumer representatives. The goal was to develop a feasibility study to identify and weigh the possibilities for engaging with and improving social work education in target communities in ways that are consistent with the goals of NTFD.

Enhance Leadership of Fellows

Initial results from grant awards.

- Fellows who received mini-grants reported the following benefits and outcomes.
 - **Trine Bech:** It was a welcome opportunity to do a piece of work which otherwise would not have happened, and to use other Fellows as part of my team. The process helped me focus my thinking, a sort of mini-strategic planning session for myself!
For the past two years, a group of multi-disciplinary stakeholders were involved in very contentious work and had gotten stuck on how to reform our current system that is a barrier to good outcomes for children. With the mini-grant we brought in ten experts from out-of-state, including three Fellows and my former Fellowship field placement adviser, and a skilled facilitator. We untied the knot and came to consensus on a new model of parent legal representation in child protection cases. The model we created is now part of a system reform package winding its way through the Vermont Legislature. The proposal includes a pilot in 6 counties costing half a million dollars and has the blessing of all major stakeholders. The American Bar Association's Center for Children and Law is interested in publishing the model. And as a final bonus, during the project, my fellowship field placement advisor gave me a lead on a new job. I have accepted the position of Deputy Director of the Division of Family Services in Delaware!
 - **Dolores Briones:** The mini-grant I received to hold a retreat with the Commissioners Court exceeded my expectations. There wasn't anything "mini" about it! We developed a vision, mission, goals, and objectives for the County of El Paso! This was no small feat. This had never been done before in the history of the County and most courthouse observers doubted we would succeed. I introduced a framework for a children and family agenda. And for the first time, we were able to articulate to one another our major interests and concerns. Previous to the retreat, we didn't know each Commissioner's priorities or thinking other than what we guessed according to partisan party affiliation. We all learned a lot and I learned how unsupported and alone the Commissioners feel a lot of the time. Therefore, I've instituted work sessions around topics of concern. And although they need to come in more often, we're able to fully discuss ideas and positions without second-guessing one another on important county business.
 - **Wendy Jacobson:** The mini-grant enabled me to continue down a path I began exploring as a Fellow: to understand the dilemmas in the intersection between social work education and innovative community-centered practice. It brought me into new working relationships with others studying the same issues, and has set the stage for me to draft another journal article.

Enhance Leadership of Fellows

I. Collaborating with other leadership development alumni groups.

A final strategy to enhance Fellows' leadership is to broaden and strengthen Fellows' networks of leaders and spark opportunities for collaborative work.

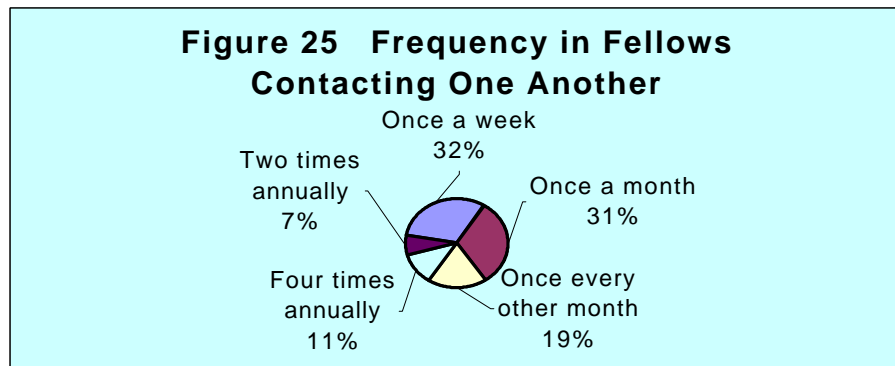
- Since the beginning, the Network has been in contact with several other organizations about their leadership development programs. These programs include the Kellogg Foundation's National Fellows Program, the Robert Wood Johnson Health Policy Fellowships, the Institute for Educational Leadership, the Congressional Hispanic Caucus Institute Leadership Development Program, and the President's Commission on White House Fellowships.
- However, the Network decided that it was important to first establish the Network and figure out its role and activities, before collaborating with other entities.
- Now that the Network has been established and institutionalized, a major activity for the coming year is to strengthen relationships and explore opportunities for collaboration with leadership development programs that would be beneficial due to similar or strategic interests.

Fellows as Resources

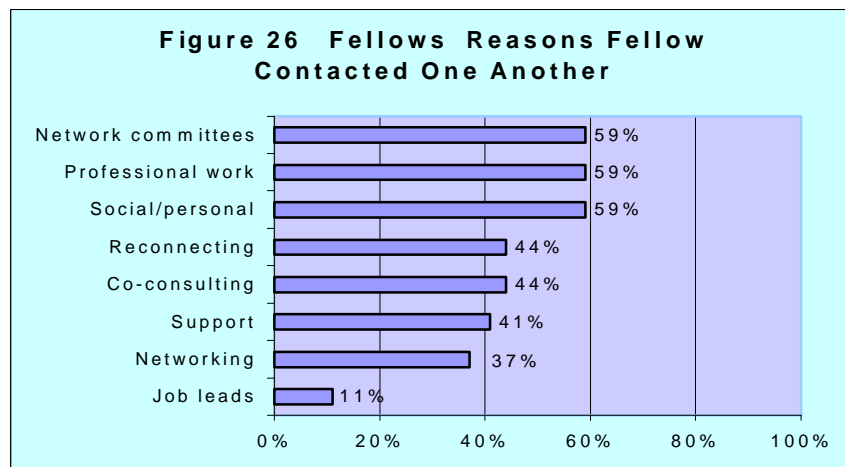
A third major emphasis for the Network during the past two years has been to strengthen relationships and strategically facilitate ways for Fellows to serve as resources to each other, to the current Fellowship classes, and to the Foundation.

Fellows frequently contact one another.

- An essential feature of a professional network and to Fellows working together is the amount of contact among its members. 60% of Fellows reported that they contacted other Fellows at least once a month between the 1998 and 1999 annual gatherings, not including the professional development workshop.



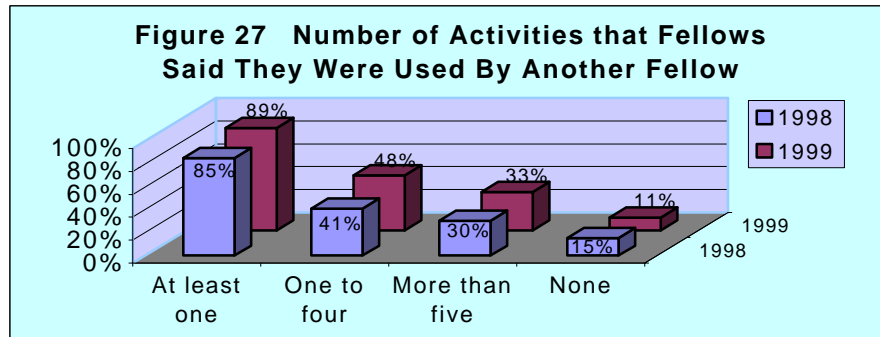
- The Network has used several vehicles for encouraging interaction among Fellows so they will discover the benefits of and opportunities for serving as resources to one another. These communication vehicles include the annual gathering, professional development, mini-grants, committee work, the newsletter, and the internet.
- Almost 60% of Fellows said they contacted another Fellow in 1998 for Network committee work, for their professional work, or for social or personal reasons.



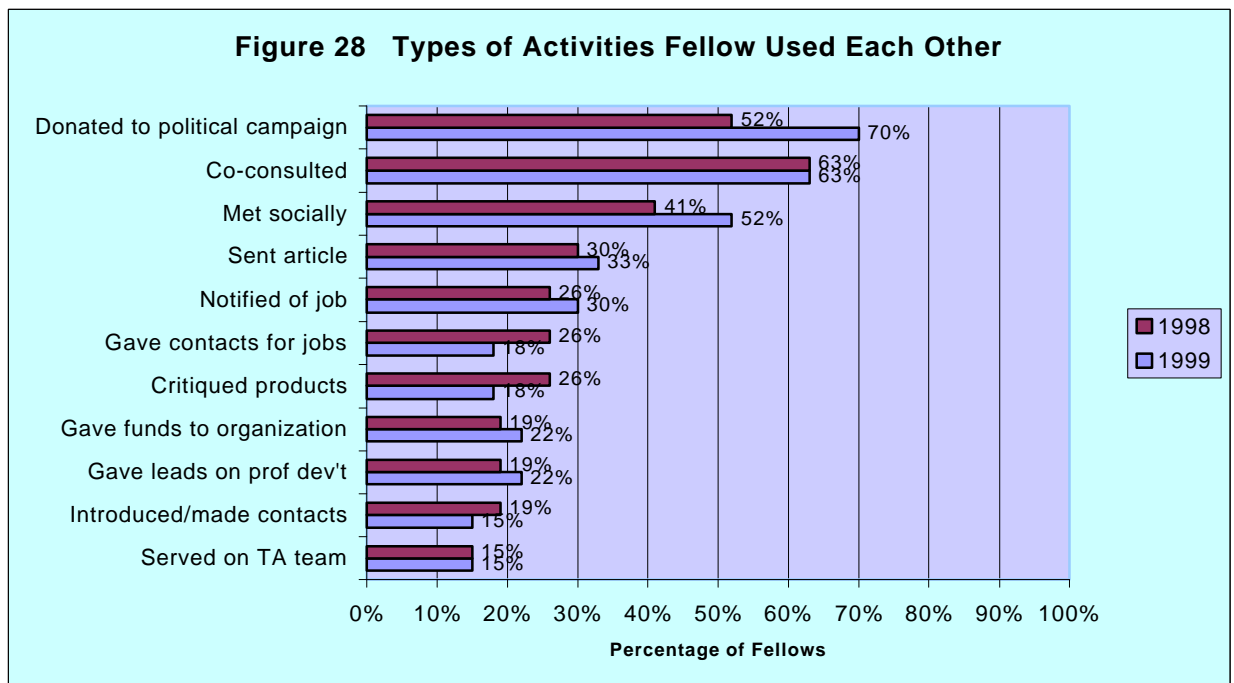
Fellows as Resources

Fellows are increasingly using one another as resources.

- Fellows slightly increased their use of each other from 1998 to 1999. In 1999, almost 90% of Fellows reported that another Fellow used them for at least one activity during the year. Almost half of all Fellows said they were used for one to four activities.



- Fellows used each other in a variety of activities. In 1999, over half of the Fellows donated to political campaigns, co-consulted, or met socially with Fellows.
- One to three Fellows organized political fundraisers, served on task forces, assisted in developing a program or securing program funds, were paid for consulting services, or facilitated meetings.

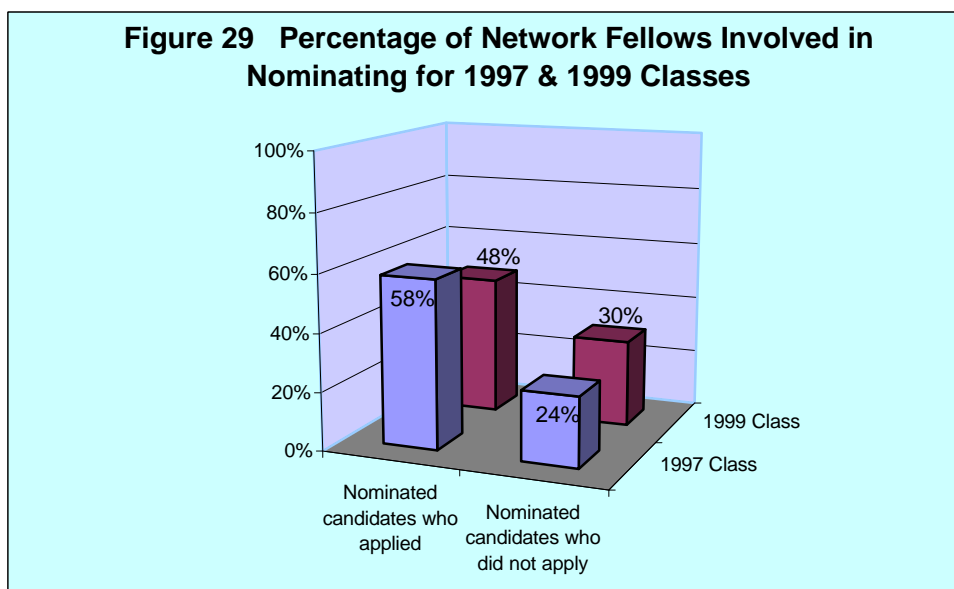


Fellows as Resources

Fellows were active in nominating candidates for the Fellowship.

For the 1999 Fellowship class, Network Fellows nominated 30% of the Fellows who were selected.

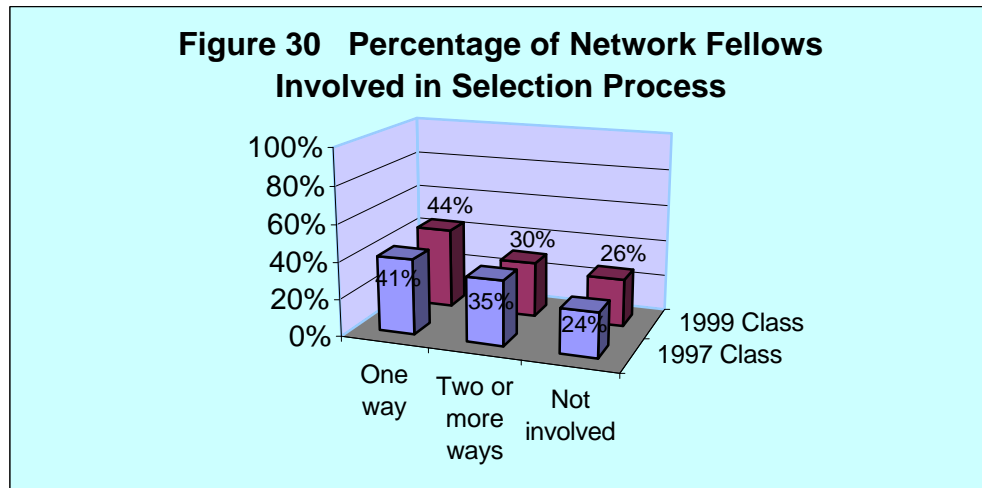
- Fellows have been very active and successful in nominating candidates for the Fellowship, demonstrating their commitment to the program. Fellows are unique in their ability to effectively communicate the benefits, realities, and nuances of the program, given their personal experiences during and after the Fellowship.
- Approximately 50% of Network Fellows nominated candidates who actually applied. And at least one-quarter of Fellows nominated candidates who decided not to apply.



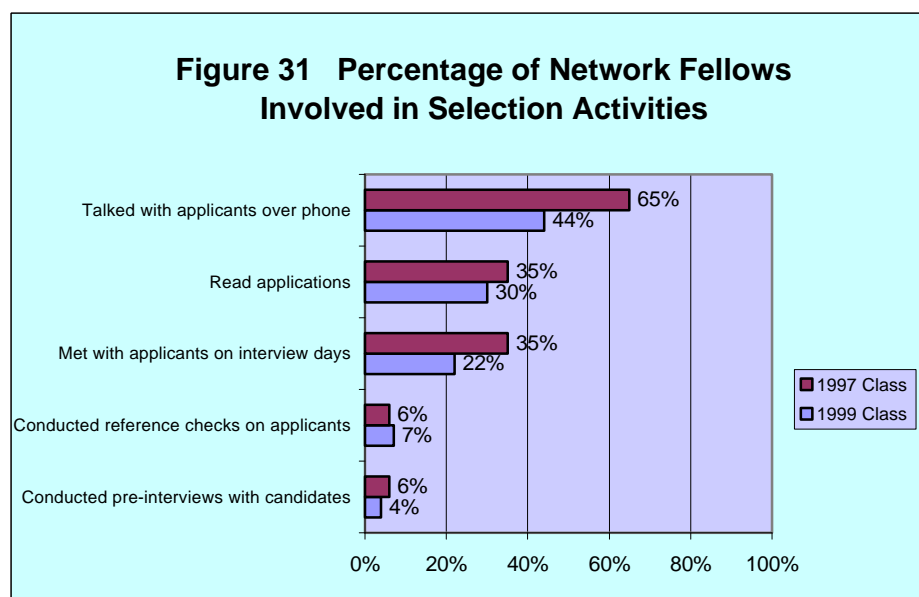
Fellows as Resources

Network Fellows are active in the selection of new classes.

- Approximately one third of all Fellows were involved in two or more activities during the selection process for the 1997 and 1998 Fellowship classes.



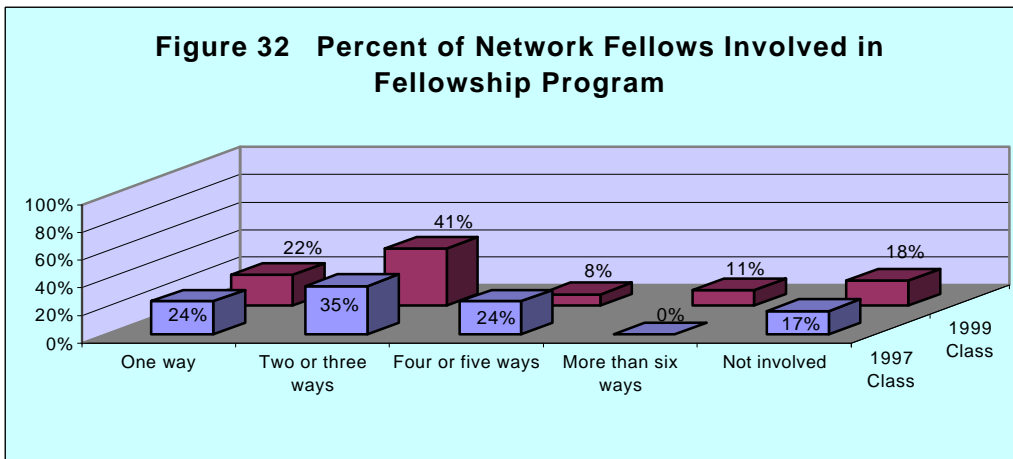
- Fellows were most frequently involved in talking with applicants over the phone and reading applications. While the overall percentage of Fellows involved declined, the actual number of Fellows stayed roughly the same since the total number of Fellows increased.



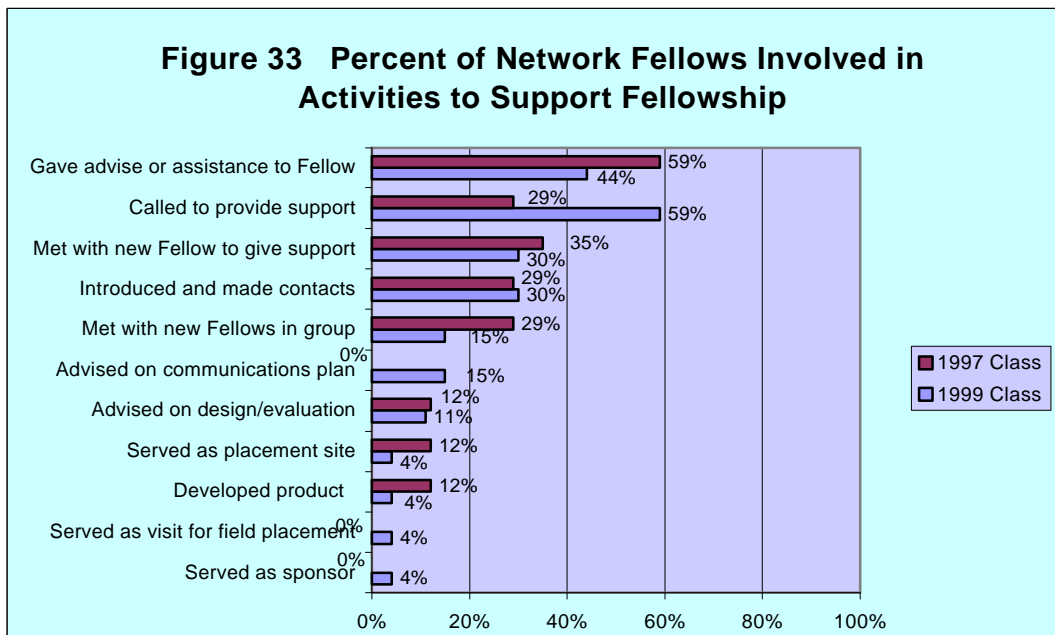
Fellows as Resources

Network Fellows actively support new Fellows during the Fellowship.

- Network Fellows were very active in supporting new Fellows from the last two classes during the 11-month Fellowship program. 82% of Fellows said they were involved in the program in at least one way during each year. It is impressive that this percentage stayed the same given that there were ten additional Fellows for the 1999 Class.
- More Fellows were involved in more ways during the 1999 class.



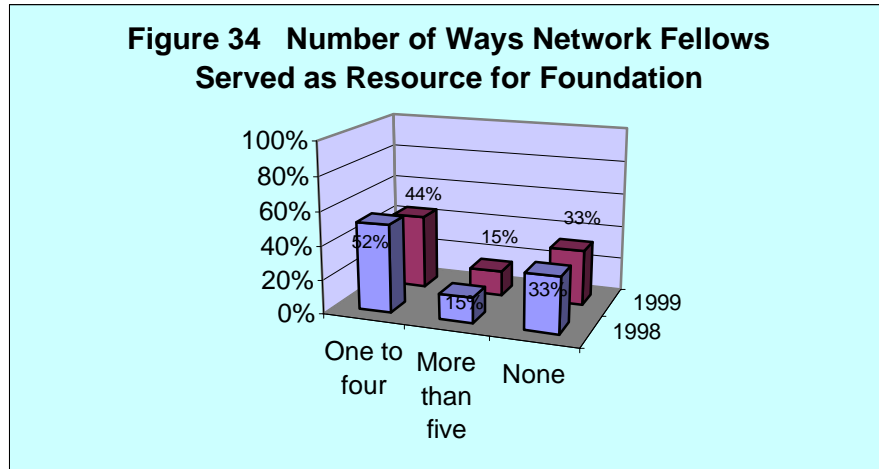
- Network Fellows supported the Fellowship in a variety of ways. Most frequently, Network Fellows gave advice, provided support, and introduced and made contacts for the new Fellows.



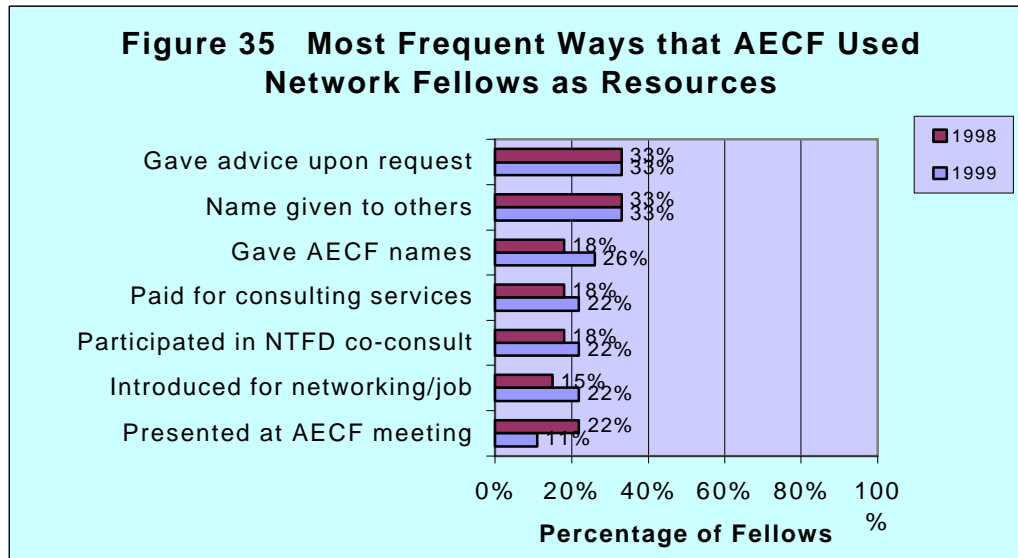
Fellows as Resources

Network Fellows serve as resources for the Foundation.

- Two-thirds (67%) of Fellows said the Foundation used them for at least one activity; while one-third (33%) said AECF did not use them as a resource.

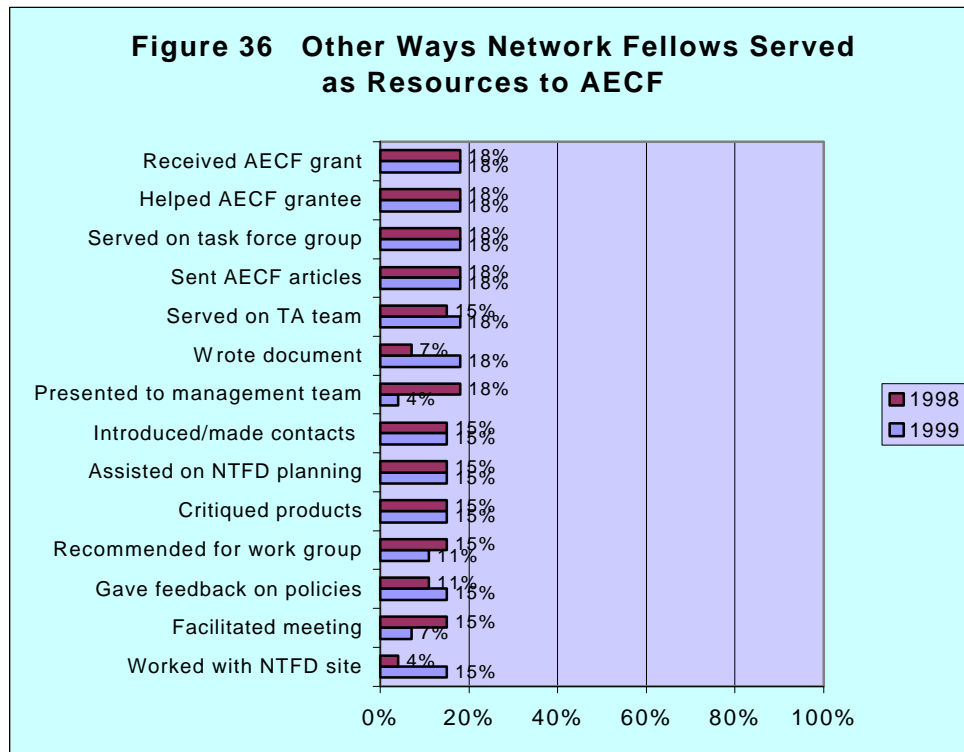


- AECF used Fellows most frequently for advice, networking, and consulting services. The Foundation used at least 20% of Network Fellows in the ways shown in Figure 35.



Fellows as Resources

- At least 15% of Network Fellows served as resources to AECF in other ways.



- One or two Network Fellows were involved in unique ways with AECF.
 - Assisted with its systems reform or building public will efforts.
 - Work directly for AECF.
 - Recommended by AECF to receive an award, honor, or fellowship.
 - Presented to the Casey management team.
 - Presented to Casey site teams.

- During the coming year, the Network will focus on developing more strategic ways for the Foundation to use a broad spectrum of Fellows.

Communication Strategies

A fourth emphasis for the Network during its first two years has been to develop strategies for supporting on-going communication among Fellows.

The Network has developed several communication vehicles for Fellows.

- Distributing a monthly newsletter, entitled Network News;
- Paying for conference calls to support Network committee activities;
- Reimbursing Fellows for email/internet service provider for those Fellows who cannot cover these costs through any other means;
- Posting on AECF's website general information on the Network and Fellows; and
- Developing a proposal to implement in 2000 a private Network website on AECF's website.

Fellows like Network News, the monthly mailing.

- 70% of Fellows say they read Network News every month. An additional 11% of Fellows say they read it almost every month. Fellows described why they read the newsletter:
 - It is nice to get news systematically on a monthly basis.
 - I always look forward to hearing from and about my fellow Fellows.
 - It keeps me connected; it allows me to follow where Fellows are and their work.
 - I enjoy catching up on Network activities.
 - Sometimes I pick up data necessary for my committee work.
 - It helps me stay abreast of what is happening among the Foundation.
 - It contains interesting and informative stories that I can use in my work.
 - I appreciate being notified of employment opportunities.
 - The articles are short and well-written pieces. The information is relevant and interesting.

Fellows suggested ways to improve Network News.

- Change frequency to bi-monthly or quarterly.
- Provide more updates on what Fellows are doing and develop a more effective strategy for Fellows to give updates
- Post job opportunities on email to ensure they are timely with quicker distribution.
- Do more extensive, planned and thoughtful search for job opportunities.
- Expand employment opportunity section to include postings beyond the East Coast.
- Include more AECF news, initiative updates, and the Transformation Information Newsletter, if appropriate.
- Scan newsletter onto Casey Fellows web site.

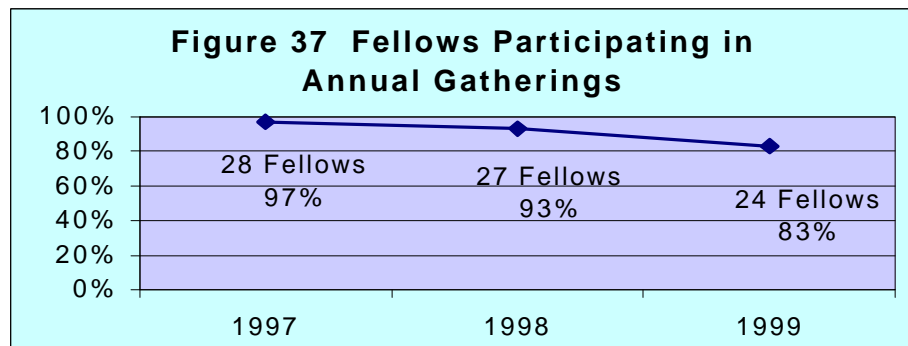
Performance Measures

A final emphasis for the Network during its first two years has been to establish an evaluation process that provides feedback: 1) to the Network so that it can continually improve; and 2) to the Foundation to demonstrate the value of its investment in the Network.

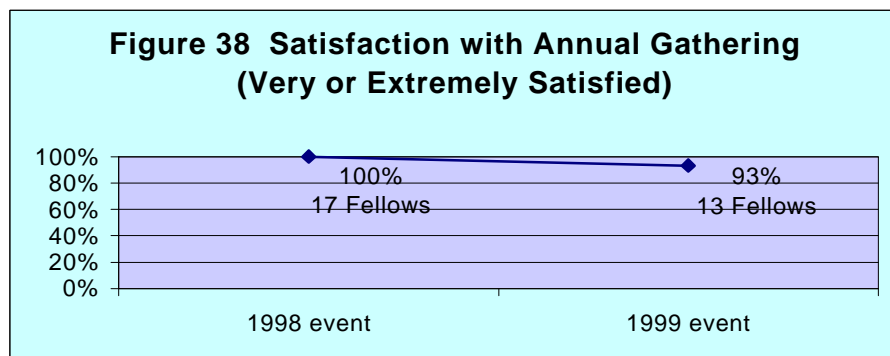
A major component of the evaluation is performance measures. The Network identified nine measures to be tracked over time. Due to the early developmental stage of the Network and in response to AECF's initial concerns with the Network, these measures focus primarily on the participation and satisfaction of Fellows with Network activities. In the future, measures will assess the impact of Network activities.

Participation and satisfaction with annual gatherings

- Measure: Percent of Fellows participating in annual gatherings.



- Measure: Percent of participating Fellows very or extremely satisfied with annual gatherings.



Performance Measures

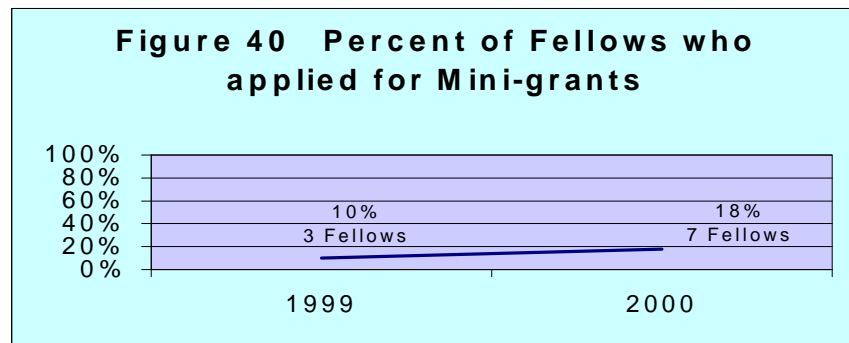
Satisfaction with professional development

- Measure: Percent of participating Fellows very or extremely satisfied with professional development.



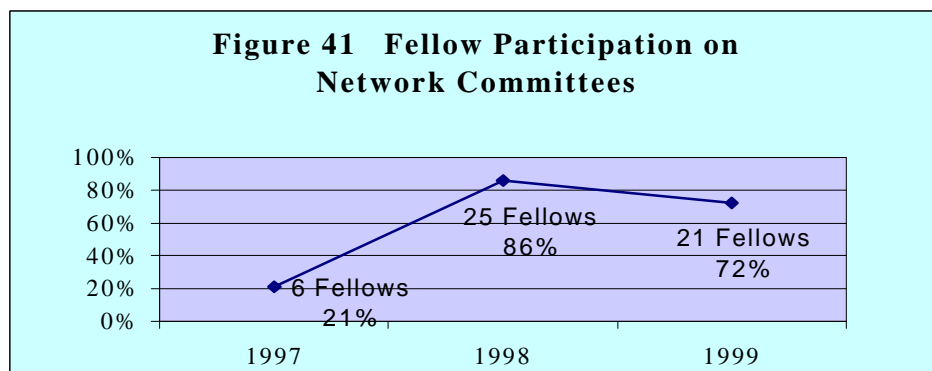
Applications for mini-grants

- Measure: Percent of Fellows who applied for mini-grants during year.



Participation on Network Committees

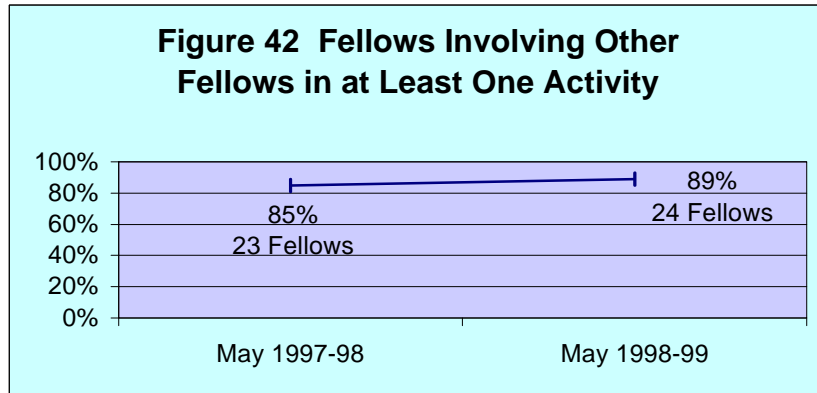
- Percent of Fellows who served on Network committees during year.



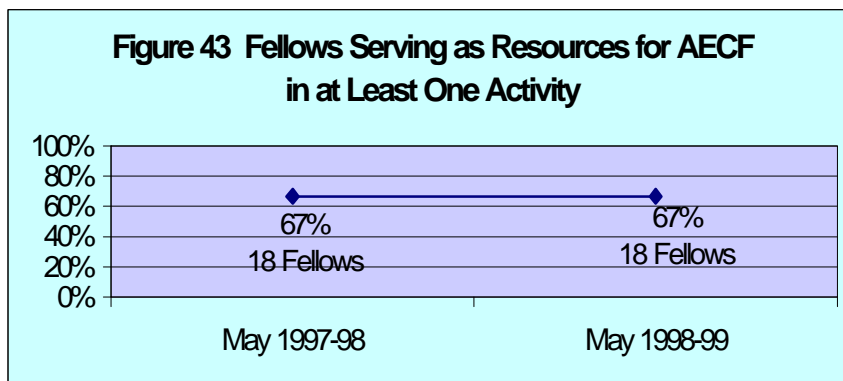
Performance Measures

Using Fellows as resources

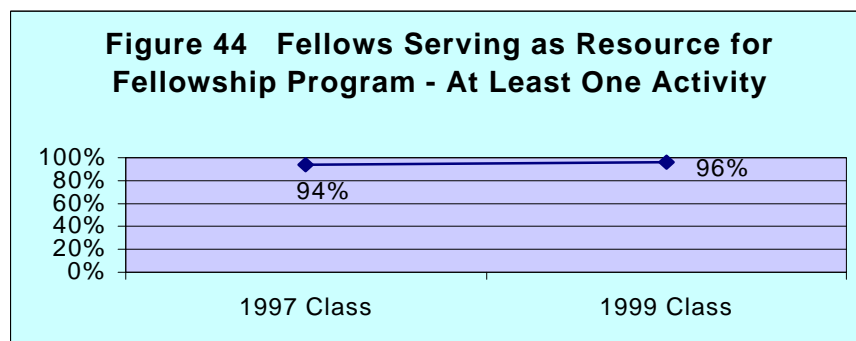
- Measure: Percent of Fellows who used other Fellows as resources during year.



- Measure: Percent of Fellows who served as resources for Foundation during year.



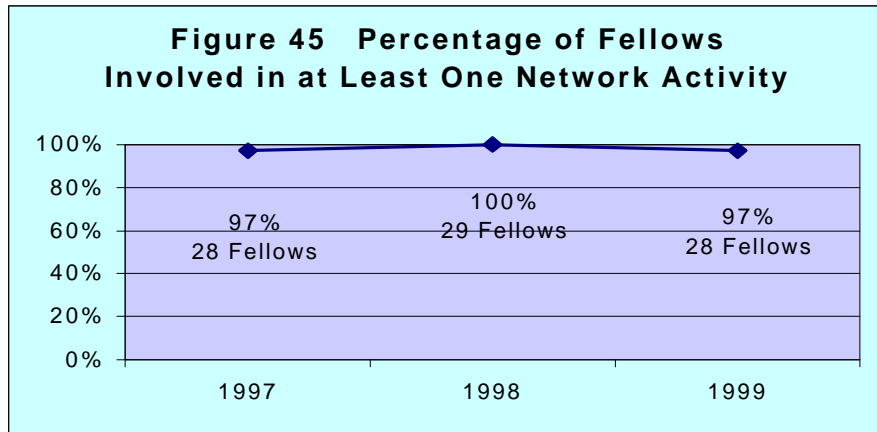
- Measure: Percent of Fellows involved in the Fellowship program.



Performance Measures

Fellows' Involvement in Network

- Measure: Percent of Fellows involved in at least one Network activity during year.



Improving the Network

The Network seeks to continually improve over time to maximize its capacity to fulfill its mission and to meet the needs of Fellows. In this spirit, Fellows were asked on the year-end survey what one additional focus or activity they would like for the Network in the future. They were also asked to share any suggestions for improving the Network. Fellows offered the following comments.

Revisit our vision and mission

- We need consensus on our mission so that we can use the Network more strategically. Being just a membership organization should not be enough for us and should not be worth it for the Foundation to support.
- The commitment of the Network includes a strategy to “contribute significantly to sustained movements to improve outcomes for poor children, families and communities.” Now that we have successfully established ourselves, I feel we should begin to position ourselves and work more strategically to directly impact national policy and the field. I realize there is tension within the Network about this, since other Fellows are satisfied with our current activities. But the Network offers diverse opportunities for Fellows to engage as they choose to focus their energies. This would be another opportunity. Not all Fellows would need to be involved.
- I would like to see a clear vision with a firm mission statement with specific activities with set goals that we want to accomplish. I am not saying that we don’t have these, but we can improve on them and reach for the stars.

Improve activities

- I think we need to focus our efforts in the Network on increasing our leadership. Add a dimension to the annual gathering to increase/enhance our leadership, the speaker was a good start in this direction. Focus professional development on improving leadership.
- The professional development component of the Network is the most valuable to me. It continues the Fellowship learning. I find it invaluable. If we were to continue and enhance any component, this goes farthest in helping me be more effective in the work.
- More tailored professional development, perhaps individual professional development opportunities.
- Combine annual gathering and professional development activity.
- Regional retreat. Those of us out in the West feel left out of the DC time zone aura; squeezed out of the Beltway.
- I think the Network has made a great start – exceeded expectations. The challenge will be how to maintain what we have created so far when the next class is added. This is not a commentary on the new Fellows – just a concern about how we will manage the expansion.
- More involvement with Foundation staff.
- Connect with other Foundation sponsored fellowships to extend Network possibilities.

Improving the Network

Develop a vehicle for working together

- Bring our Network together to promote one change initiative in the field.
- The possibility to work together on a specific project benefiting any community.
- Bringing Fellows together in small groups to work on an issue of benefit to the field. Finding way for Network to take on one issue – bring together expertise and resources to benefit field.

Develop forum for engaging on professional issues

- A forum for discussing current policy issues would contribute to our professional growth.
- Have a more conceptual conversation about trends in family and children work. Where it is going and where has it been. Professional development that is more like interesting issues we haven't heard or thought about.
- The Fellows Network is in its early stages – we are still in “the getting to know you phase.” The level of trust has increased and this is good. I think we now need to move on to a more mature phase where we focus more on indepth conversations or issues, even controversial issues, that can serve to enhance our work.
- Come together at site of Casey work to see and discuss; come together at one of our sites to see and discuss.
- Staying connected professionally; publications – management and other books (ie, Stewardship and Digital Age) – affects leadership strategically.

Create ways for more sharing among Fellows

- Find way to share expertise among each other.
- Need a better way to stay current with what everyone is doing – would facilitate more interaction/co-consulting.
- I think that Fellows are doing a lot of substantive work, but somehow this never gets highlighted to the Foundation or to the Network. It would be important to “carve out” space and time for Fellows to do more in-depth presentations to the Foundation and other Fellows. Aside from the co-consulting opportunities, there might be many other situations where Fellows can add to the Casey conversation by bringing in their most current thinking or highlight “state-of-the-art” aspects of their current work. Somehow, I think we are sitting on top of a gold mine and yet we remain passively satisfied with participating on the margins.

Improving the Network

Increase the visibility of the Network

- Find way to increase visibility/contributions of Casey Fellows as a group and of the Network.
- Submit an annual report to the Foundation management committee and/or Board of Trustees.

Improve administrative support

- The volunteer burden is substantial. The Network should have a fully dedicated staff person to work with Kim and the committees.
- We need sufficient staffing for Network -- additional administrative support.

Make suggestions to Casey

- Notification of Fellows when Casey is working in their city/state.
- I would like for someone, perhaps a contract person, to write the stories of the Fellows and the impact the Fellowship had on their lives. Moreover, how the work we now do has been enhanced or enriched by the Fellowship experience. Also, it could share how the Fellowship Network continues to strengthen the individual fellowship experience and deepen our work.
- Casey should continue to draw upon the strengths and contacts of the fellows to do work/consulting/etc for the foundation. It is a testament to the quality of the fellowship program and to Casey if their fellows emerge as leaders in their respective fields and if Casey respects their work enough to use them.

Network Committee Action Plan

The Network Committee discussed this report and used it as an opportunity to complete the Network action plan for the year.

Strategy I: Enhancing the Leadership of Fellows

1) Develop strategies and opportunities for the Network to contribute significantly to sustained movements to improve outcomes for poor children, families, and communities.

The Network Committee and interested Fellows will develop opportunities for the Network to be more strategic in directly promoting reform initiatives, impacting national policy, and/or impacting the field. Once operational, Fellows may choose whether they wish to participate in this Network activity. Brenda will organize a conversation to be facilitated by Jolie Bain Pillsbury during the Fall Network Committee meeting. Class representatives on the committee will query their respective classes for interested Fellows to join the conversation(s).

2) Enhance, promote, and engage in leadership development. The Network Committee will further focus professional development on enhancing the leadership of Fellows, including changing the title to “leadership development.”

- ◆ ***Connect the Network with the Fellowship program more systemically.*** The Network Committee will develop strategies for connecting the Network with leadership development in the Fellowship program more strategically and systemically. For example.
 - Institute a second leadership development activity for Network Fellows and current Fellows when a Fellowship class is in session. This activity will be designed and hosted by Fellows in the Fellowship class. (The Network will continue to invite current Fellows to participate in the Network’s annual leadership development activity when a Fellowship class is in session.)
 - Post an annotated bibliography of Fellowship readings on the Network website.
 - Distribute new and exemplary Fellowship readings to Network Fellows.
- ◆ ***Conduct the annual leadership development workshop.*** The professional development committee will plan and conduct the leadership development workshop on *The Changing Face of America* in the Fall 2000. The committee will:
 - Assess Fellows’ desires for learning and leadership challenges in the topic area on the registration form.
 - Use Fellows as experts when appropriate.
 - Collaborate with key Casey staff to plan the workshop and identify resources.
 - Engage presenters in more problem-solving conversations.
 - Offer more concrete and practical “how to” strategies.
 - Work with Jolie Bain Pillsbury, or other outside facilitator, to push Fellows’ learning to a higher level.

Network Committee Action Plan

- ◆ ***Increase opportunities for Fellows to exchange expertise and to engage on issues.*** The professional development committee will recommend to the Network Committee at its next meeting opportunities for Fellows to exchange expertise and engage on issues. For example:
 - Conduct mini-institutes at the annual gathering or leadership development workshop for Fellows to share experiences, lessons learned, and expertise on common topics.
 - Convene the annual gathering at one of Casey's NTFD sites or in a Fellows' community to continue learning and spark discussions.
 - Develop a session at the annual gathering to discuss policy issues, trends in family and children work, and controversial issues.
 - Offer breakfast roundtables for informal conversations led by Fellows at the annual gathering or leadership development workshop on areas of expertise and/or current issues.
 - Develop a column in the electronic newsletter and/or provide space on the website for Fellows to engage on issues and to share expertise and resources.

- 3) ***Convene the 5th annual gathering of Fellows and Fellowship staff in May 2001.*** The annual gathering committee will recommend a site for the gathering. It will design and organize the programmatic aspects.

- 4) ***Manage and enhance the Fellows mini-grant program.***
 - ◆ The Network will encourage Donna to request \$150,000 for the mini-grants program for 2001, given the interest and success of the program to date.
 - ◆ The Network will continue two rounds for 2001 with the same timeframe for submitting applications and making decisions as last year.
 - 1st cycle: Grants postmarked by November 15, 2000 will be decided by December 15, 2000. Funding will be available on or about January 31, 2001.
 - 2nd cycle: Grants postmarked by April 1, 2001 will be decided by May 1, 2001. Funding will be available on or about May 15, 2001.
 - ◆ The mini-grant committee will design a new grantmaking component that quickly awards small amounts of funds to Fellows on a first-come, first-serve basis through a fast decision-making process so that Fellows can take advantage of situations as they arise.

- 5) ***Strengthen relationships and collaborate with alumni networks from other leadership development programs.*** The Network will explore opportunities across alumni networks through the new effort among leadership programs, the Leadership Development Learning Community. Donna will take the lead in identifying opportunities for Network Fellows to be engaged in this initiative, including the strategies on creating opportunities for alumni and on developing a website. She will explore the possibility of exchanging Fellows' names and contact information by geographic region across leadership programs, perhaps through posting on the website.

Network Committee Action Plan

Strategy II: Fellows as Resources

6) *Develop more strategic opportunities for the Foundation to use a broad spectrum of Fellows.*

- ◆ Brenda will contact Frank Farrow to explore opportunities through the “virtual resource center” he is designing to provide technical assistance for Making Connections sites.
- ◆ John will distribute to Fellows a list of sites for Making Connections and other major initiatives, along with the names and phone numbers of site team leaders.
- ◆ John will distribute to Foundation staff a list of Fellows by regions, including their names, titles, addresses and phone numbers.

7) *Support and provide expertise to current Fellows and the Fellowship program.*

- ◆ The Network Committee will clarify the relationship and involvement of new Fellows with the Network during the Fellowship year.
- ◆ Fellows will nominate candidates.
- ◆ Fellows will participate in the selection process for the new 2001 class of Fellows.
- ◆ Fellows will be available for conversations with applicants during the selection process.
- ◆ The Network will plan the conversation among Fellows for the new Fellows in early 2001.
- ◆ Fellows will advise in the design and evaluation of the program as requested by Fellowship staff.

Strategy III: Enhancing Communication among Fellows, AECF and others.

8) *Complete phase 1 of the Network website by the end of 2000.*

- ◆ Kim will take the lead, along with Mark Gregor and John, to design and operationalize the private Casey Fellows Network website by July 2000.
- ◆ The Network will transition the newsletter, Network News, to the website by August 2000 and reduce the frequency of distribution from monthly to quarterly immediately.
- ◆ The Network will request funding from the Foundation to develop phase 2 in 2001, including a searchable data base on Fellows’ expertise, a “roladex” for Friends of the Network, and the capacity to capture information on the year-end survey and registration for the leadership development workshop in excel spreadsheets.

9) *Be more strategic in identifying resources for Network Fellows as they conduct job searches.*

- ◆ Fellowship staff will distribute to Network Fellows the resources shared with the Fellowship classes.
- ◆ Job opportunities will be posted via email and posted on the Network’s website to ensure timely distribution.

Network Committee Action Plan

10) Contract with an editor to design an annual alumni magazine. Due to interest among the Casey Board of Trustees, the Network Committee will request funding in its 2001 budget to design an alumni magazine. A group of Fellows will provide advice on this project.

11) Support other vehicles for communication among Network Fellows for committee work, networking, information exchange, and advice sharing.

- ◆ The Network will reimburse Fellows for email/internet service providers when necessary. It will pay for only those Fellows who cannot cover these costs through other means, up to \$240 per year, at the place where they communicate with the Network.
- ◆ The Foundation will pay for conference calls among Fellows (for committee work) that are pre-approved by Network staff.

Strategy IV: Managing the Network

12) Orient and train new program person to support Network. Foundation staff and Network leadership will train the new program person to provide all essential support activities.

13) Manage the evaluation process for the Network.

- ◆ Kim will complete the evaluation report for distribution in June 2000.
- ◆ Kim will complete the year-end survey for distribution in July 2000. A question will be added inquiring whether Fellows' participation in the Network strengthened their capacity to improve outcomes for poor children, families, and communities.
- ◆ The Network Committee will review the performance measures as needed.
- ◆ The Network will analyze trends over time, including trends among racial and ethnic groups, Fellowship classes, and geographic regions to inform decisions on activities.