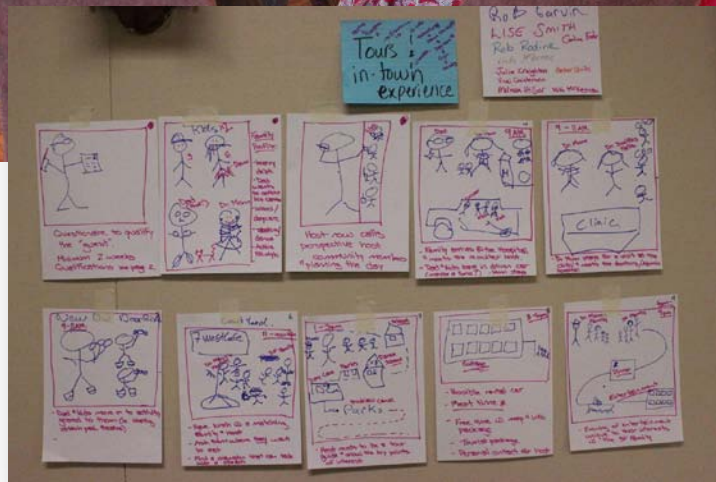


Steps Forward



An overview of learning about rural leadership and program design considerations going forward
July 2014

Testimonials

“There are no other programs like yours in Ontario. I have depended on the Leading Edge Summit in a big way to help me develop many new skills: building my confidence to take on leadership roles and work with groups, communities and networks in rural Ontario.”

“We are aware of the work that the Rural Ontario Institute is doing in developing this kind of new rural leader, and the innovative, interactive and highly participatory, community-based programs that you have initiated. One of our colleagues attended the ROI Steps to Leadership Summit last year, and came back inspired to get some projects going. We want to work with ROI in our region!”

“The Action Lab was a productive catalyst moving the community forward to create change. Collectively we stepped away thinking differently about our value to the community and our ability to provide leadership within the community.”

“ROI has put together an innovative program which engages and networks local leaders and helps drive rural economic development.”

“The Leading Edge Summit is just so where it’s at! I’m indebted to ROI for how far I have come along, for the courage and empowerment to speak up and take on leadership roles, for helping me discover that I have lots to share and that others actually want to hear what I have to say.”

Executive Summary

The Steps to Leadership program has been piloted and evolved significantly from 2009 through 2013. Funding for the collaborative project was provided by Agriculture and Agri-Food Canada through Ontario’s Agricultural Adaptation Council. The overarching project goal was to develop current and emerging leaders to serve Ontario’s rural communities and agricultural organizations effectively, with vision, integrity and commitment.

As of December 2013, a total of nearly 3000 people have directly participated in Steps to Leadership programming, including

- Step Up, First Steps and Next Steps to Leadership programs
- Leadership Summits
- Community Action Lab
- Leadership Track programming
- Travel and registration subsidies
- Speakers Network activities

At least 13 rural communities partnered with ROI to bring Steps programming to their locales across Ontario since 2009. Another 730 people and organizations followed Steps via Twitter and as subscribers to the e-newsletter.

In 2009 Mary Ferguson of Eko Nomos Program Development Consultants and Cathy Lang of C. Lang Consulting were contracted by the Rural Ontario Institute (ROI) to provide developmental evaluation services for the Steps to Leadership Project. Results of the evaluation to date have been summarized in the Steps to Leadership Interim Evaluation Report, April 2013, and this document, updated as of September 2014.

Steps programming transitioned from the project outset from a focus on organizations and individual leaders to the community level on strengthening networks and engaging people to work across sectors in a process of shared leadership to address difficult and complex community issues.

The most recent Steps programming was shaped by a renewed rationale or Theory of Change, identifying that:

- Rural communities are facing increasingly complex challenges.
- No one person or organization can be expected to take the lead on community issues and resolve them alone.
- The issues rural communities encounter necessitate interventions at many levels and require shared leadership and alliances which go well beyond traditional sector boundaries.
- Concepts of leadership are also evolving – from a focus on authority and position to distributed capacities and processes that are shared among key stakeholders.
- In order to facilitate new perspectives on, and collaborative solutions for critical issues, rural communities need support to leverage local knowledge by expanding local leadership networks, and building new leadership skills and capacities.

A new leadership philosophy was also integrated into the Steps program design. The innovative philosophy was influenced by “complexity theory” (the study of a complex system) as well as advances in collaborative leadership practice. It represents a significant change from rural leadership programming philosophy in the past, and fills a gap in the training currently available in Ontario’s rural communities.

Steps programming in 2013 was built on the successes and learning in the pilot phase. Design criteria were developed to reflect this learning. They included the following considerations; that programming should:

- ✓ Reflect and communicate current “leading edge” thinking on leadership
- ✓ Bring innovative tools and processes to rural that are not widely available
- ✓ Build on the most successful aspects of Steps offerings to date and transfer these to other offerings, including:
 - A focus on motivating people and building their confidence to participate, get involved, and take action in their communities

Steps Snapshots: Numbers

Communities and Total Participants in Step Up, First Steps, Next Steps

- Chatham-Kent – 39 total participants
- Northumberland – 38 total participants
- Simcoe – 26 total participants
- Wawa – 37 total participants
- Thunder Bay – 62 total participants
- Muskoka – 93 total participants
- Grey Highlands – 9 total participants
- RDEE hosted – 89 total participants
- Temiskaming Shores – 21 total participants
- Smiths Falls – 72 total participants
- Pembroke – 12 total participants

Total # of Community Action Lab participants – 40

Total # of Step Up youth participants – 192

Total # of Summit participants – 257

Total # of speakers in Speakers Network – 15

Total # of participants in Speakers Network events – 1294

Total # of Newsletter Subscribers – 316

Total # of Twitter Followers – 417

- Promoting networking and network building for participants through all programming
- Providing a mix of knowledge transfer, skills training, practical applications, and opportunities for reflection
- Building on credibility of local/regional hosts and champions
- Possibilities for intergenerational programming
- Supporting peer learning
- ✓ Create greater consistency and quality in brand and product
- ✓ Package the best of Steps materials and programming
- ✓ Consider the needs in the community as a basis for further design and delivery
- ✓ Deepen work in some communities and with some past participants
- ✓ Build a legacy and leverage the investment to date
- ✓ Have the potential to generate income for cost recovery
- ✓ Be strategically integrated within ROI and be in keeping with ROI's mission
- ✓ Utilize and build capacity (staff, resources) for delivery within ROI
- ✓ Be branded as distinct from other ROI offerings
- ✓ Introduce efficiencies in design and delivery that ensure accessibility and affordability for rural communities and individuals
- ✓ Create new opportunities for partnership and program offerings going forward

A final evaluation of the 2013 Leadership Summit was conducted in early 2014 based on participants' end of workshop evaluations and reflections of the designers, facilitators and ROI staff. From these, it appears that most of the objectives for the Summit were met. Participants came to the Summit seeking new ideas, expanded networks, practical tools, theory and techniques around Network Weaving in particular, new skills, and some strategizing and partnership opportunities. Many participants agreed that the Summit was relevant, re-energizing, a good learning experience, and that the tools were applicable to their practice. Ninety percent (90%) of those who filled in the evaluation strongly agreed that the Summit was worthwhile attending. A significant number of those who filled in evaluations said the Summit exceeded their expectations.

The areas where greater attention could have been focused included providing opportunities for participants to develop concrete strategies for using the tools and network approaches in their work, as well as linking the Summit to ROI mission and other leadership programming. The budget review also revealed that the financial model for the Leadership Summit was not sustainable without considerable external funding.

The latest Steps to Leadership program offering to be implemented was the Community Action Lab, piloted in November 2013. The Lab model was designed to address the articulated needs of Summit and Steps program participants for more in depth support to integrate leadership skills and approaches within their own communities. Action Labs are focused on specific, place based issues. They integrate training and coaching for local leaders in the use of innovative community tools and processes as well as facilitation of community dialogue and planning. ROI's first Community Action Lab, focused on addressing

physician recruitment, was successfully implemented with over 40 community residents of all ages in late November 2013 in Smiths Falls, Ontario.

An evaluation of the pilot Action Lab found that in general it was extremely successful in achieving broad based community participation, planning outcomes, and inclusivity. The only challenge not addressed proved to be the follow up from the Action Lab, and further engaging participants in following up on ideas and strategies generated during the Lab. The processes used are being used for other community issues, and participants are using them in their own lives and work.

ROI is currently considering which aspects of the Steps leadership programming and products they will continue to offer based on the fit with their mission focus on individual, organizational and community leadership development and their delivery capacity. As of early 2014, the Steps curriculum has been repackaged in modular format. Other Steps offerings in 2014 and beyond could include:

- Train the trainer workshops and an Associate facilitator program
- Partnerships with 4-H and other youth organizations to deliver Step Up youth programming
- Community Action Labs focused on rural issues
- A Community of Practice for rural leaders
- Webinars linked to all of the above

Applying the Learning

Background

The Steps to Leadership project began as a collaboration between 4-H Ontario, The Ontario Rural Council (TORC), The Centre for Rural Leadership (TCRL) and the Foundation for Rural Living (FRL). Representatives from OMAFRA served as Advisors from the outset. Funding was provided by Agriculture and Agri-Food Canada through Ontario's Agricultural Adaptation Council for a period of 5 years to plan and implement the project with the following Goals and Objectives.

Project Goal

The overarching goal of the Steps to Leadership project was: to develop current and emerging leaders to serve Ontario's communities and agricultural organizations effectively, with vision, integrity and commitment.

MISSION: Building a culture of continuous leadership development in rural Ontario.

Pilot Project Objectives

Objective 1: To design an effective leadership program and delivery strategy for rural Ontario

Objective 2: To deliver a sustainable continuum of rural leadership learning opportunities throughout rural Ontario

Objective 3: To bring greater collaboration and sustainability among the four partner organizations

Partners

The partners in this initiative and their mission at the project outset were as follows:

- The Centre for Rural Leadership: developing and supporting current and emerging leaders through a continuum of programs and resources to strengthen and diversify rural communities and the bio-resource sector
- 4-H Ontario: delivering quality, innovative and sustainable leadership and life skill programs for youth and volunteers which will benefit citizens and the communities in which they live
- Foundation for Rural Living: advancing the rural nonprofit and voluntary sector and building sustainable capacity to enhance the quality of life of rural citizens

"The community has gained tremendously from the leadership of the Rural Ontario Institute. Their innovative approaches for how to stimulate dialogue and build consensus among broad based stakeholder groups is refreshing and creates results."

Community Action Lab Participant

- The Ontario Rural Council (TORC): acting as a catalyst for rural dialogue, collaboration and advocacy

The collaborative partners experienced significant change during the course of the project. By the time the project entered its third year, TORC and TCRL had merged to become the Rural Ontario Institute, the Foundation for Rural Living had been disbanded, and 4-H Ontario, with changes in staffing, had interest but limited involvement in the project.

As of December 2013, a total of nearly 3000 people participated in the following Steps programming: Step Up to Leadership; First Steps; Next Steps; the Leadership Summits; Leadership Track Programming; Speakers Network activities; and the initial Community Action Lab.

Steps Evaluation

In 2009 Mary Ferguson of Eko Nomos Program Development Consultants and Cathy Lang of C. Lang Consulting were contracted by the Rural Ontario Institute (ROI) to provide evaluation services for the Steps to Leadership Project.

The consulting team took a developmental evaluation approach with the project manager, other consultant/contractors, and members of the collaborative.

“Developmental evaluation refers to long-term, partnering relationships between evaluators and those engaged in innovative initiatives and development. Developmental evaluation processes include asking evaluative questions and gathering information to provide feedback and support developmental decision-making and course corrections along the emergent path....

.....The evaluator is part of a team whose members collaborate to conceptualize, design and test new approaches in a long-term, ongoing process of continuous improvement, adaptation and intentional change. The evaluator’s primary function in the team is to elucidate team discussions with evaluative questions, data and logic, and to facilitate data-based assessments of where things are, how are things unfolding, what directions hold promise, what directions ought to be abandoned, what new experiments should be tried – in other words, data-based decision-making in the unfolding and developmental processes of innovation....”¹

¹ Learning and Evaluation for Trail Builder Initiatives in Vibrant Communities, *Caledon Institute, Spring 2005.*

The evaluators were involved throughout the life of the project and worked closely with the project manager to assess results, plan revisions and build out new programming as the project moved forward.

Interim results of the evaluation and learning to date were summarized in the Steps to Leadership Interim Evaluation Report, April 2013. The evaluators, staff and contractors working with ROI's Steps to Leadership programming continued to integrate the learning and evaluation results into further design and planning for 2013 and for the post-pilot phase. This report documents design considerations and program theory, as well as specific evaluation results for 2013 Leadership Summit and Community Action Lab programming.

Theory of Change/Rationale

"The Rural Ontario Institute stimulates public dialogue and positive outcomes which enable rural communities to address issues in new ways that are inclusive and transparent."

Community Action Lab Participant

The Theory of Change or rationale for Steps programming evolved considerably from the early stages of the collaborative project to the present. The Theory of Change articulated early in the project focused on the role of organizations and leaders in building sustainable communities and the gaps in leadership and engagement in rural communities and organizations. Following are some of the need statements articulated early in the project:

- There is a need to create sustainable rural communities in the face of changing demographics and economies
- There are leadership gaps in agricultural and rural organizations
- Rural communities are getting older contributing to a leadership gap
- Organizations and their volunteers are experiencing burnout
- There is a growing gap in the quality of leadership in organizations
- There is a gap between young people in rural communities who are beginning to develop their leadership desire, capacity and skills and what is available for them in terms of learning opportunities
- Individuals do not have the same sense/motivation for rural community development as in the past
- There is a lack of awareness of community engagement opportunities

The collaboration was initiated without a needs assessment or budget for research and development in the first year. For this reason the developmental evaluation approach provided an opportunity to document assumptions at the outset and test these assumptions and assess need through the implementation of the Steps programming over the pilot period.

More recent Steps programming was shaped by the following rationale:

- Rural communities are facing increasingly complex challenges.
- No one person or organization can be expected to take the lead on community issues and resolve them alone.
- The issues rural communities encounter necessitate interventions at many levels and require shared leadership and alliances which go well beyond traditional sector boundaries.
- Concepts of leadership are also evolving – from a focus on authority and position to distributed capacities and processes that are shared among key stakeholders.
- In order to facilitate new perspectives on, and collaborative solutions for critical issues, rural communities need support to leverage local knowledge by expanding local leadership networks, and building new leadership skills and capacities.

Steps programming changed its focus from organizations and individual leaders to a focus at the community level on strengthening networks and engaging people to work across sectors in a process of shared leadership to address difficult and complex community issues.

“Rural communities today are experiencing increasingly complex challenges. Leadership capacity is needed for rural community sustainability and revitalization. Paradigms of leadership are also evolving. We cannot expect, as we might have in the past, that individual organizations or people will grapple with these changes on their own. The complex character of current rural issues such as food systems, youth retention and employment, or access to health care, means we have to intervene on many levels, in different ways, and with groups of people who may not be our traditional partners. Collaboration is an imperative - collaboration that brings together businesses with nonprofits, agricultural leaders with government representatives, youth with elders. The disconnectedness that contributes to rural problems will need to be addressed with innovative solutions that cross sector and age boundaries, seeking broad buy-in and the potential for systemic or long lasting change.

“ROI has taken a fresh look at our philosophy of rural leadership to reflect these changing contexts and paradigms. The new tools and practices we have researched and tested will support rural community leaders to collectively find new solutions. We have discovered that the most effective and impactful leadership development experiences come through action learning rather than traditional classroom-based learning. Our Leading Edge programming provides rural leaders, organizations and communities with updated, new philosophies, tools, action learning opportunities, coaching, and peer support that will help grow leaders’ capacities to achieve impactful change over time, and build more sustainable rural Ontario communities.” Alicia Evans, Program Coordinator

New Steps to Leadership Model and Criteria for Communities

As a result of four years of piloting and evaluation, ROI began to develop a new model for Steps to Leadership programming. The model included:

- A new leadership philosophy
- Innovative tools and processes, such as:
 - Liberating structures
 - Art of hosting
 - Network weaving
- Training in the use of the innovative tools and processes for take up by leaders across rural and northern communities (through Summit and Action Labs)
- Facilitation and follow up coaching with community leaders and residents to enable them to continue to use innovative tools and processes to address difficult issues in their communities
- Intergenerational learning where possible
- Partnerships with communities in bringing programming to local residents
- Accessibility of tools and curricula via web and packaged services and products
- Ongoing program evaluation and communication of community stories to a broader audience
- Peer learning through a community of practice
- Sustainable business models

Elements of the Leadership Philosophy

Through the Steps pilot it became clear that the new leadership philosophy being researched and integrated specifically into the ROI Steps programming was unique and innovative.

The philosophy was influenced by “complexity theory” (the study of a complex system) as well as advances in collaborative leadership practice. It responds to the increasing complexity of issues faced

“I learned that we’re all connected. We’re not alone and can get our communities moving.”

First Steps Program Participant

by northern and rural communities in addressing their sustainability. The philosophy represents a significant change from leadership programming philosophy in the past, and does not appear to be reflected in leadership training currently available to rural communities in Ontario.

The evaluation determined that ROI could differentiate its programming by more explicitly articulating the new philosophy in their Steps curricula/modules, coaching and training, and in the marketing and promotion of all Steps programming.

The new leadership philosophy that was integrated into the Steps program design was premised on the following concepts:

- Leadership begins with human self-direction that includes awareness, understanding and motivation for action
- Leadership does not exist within a position; instead it can be expressed outside of a structure in an inclusive model of leadership
- The 'leader' invites others into leadership and creates opportunities and space for others to contribute
- A participatory model of leadership focuses on 'leadership' rather than 'leader'. Community members have the wisdom, knowledge and experience to create the communities they desire
- Hosting/convening a community through change processes is an effective way to build leadership
- Negotiation of different points of view in community creates space for conversation and debate across differences and leads to better solutions to complex problems
- Leadership learning and innovation comes from appreciating and understanding differences and seeking out synergies
- Developing collective capacity for collaboration can result in more effective solutions to complex and critical issues

"The innovative concepts we learned through our relationship with the Rural Ontario Institute have greatly enhanced our community's ability to engage greater community dialogue."

Community Action Lab Participant

Building on What Worked

Steps programming in 2013 was built on the successes and learning in the pilot phase. The Step Up Youth program and the fall Leadership Summit were particularly successful in inspiring and motivating rural leaders across age groups. In considering the design of Steps programming for 2013 and beyond, the following key success factors and questions were considered:

Step Up:

- Extremely well trained and motivated facilitators (trained by Me to We)

- Focus of program on youth social entrepreneurship and empowerment of youth as agents of community change was well received by youth in many different contexts
- Program was adaptable for youth of different ages but focus primarily on youth under 18
 - Diverse youth benefited from the program including those who would not normally have been identified as leaders
 - Me to We brand contributed to its success however an ongoing partnership is not sustainable due to cost

“These [Step Up] were the most exciting workshops to deliver.”

Me to We Facilitator

Summit:

- Encouraged “out of the box” thinking and moving participants beyond their comfort zones
- Engaged diverse participants representing various sectors
- Opportunity for community leaders to take a break from their own communities to meet and network with others, but then to translate learning immediately back in own communities
- Retreat-like location
- Hands on learning lab – skills development, exposure to new tools, and practical take-aways
- Inspirational and motivating
- Current philosophies of leadership and learning technologies and tools integrated into program
- Excellent co-ordination, facilitation and design
- Subsidies made available for participants to come from all over Ontario

“My expectations were to learn tools to be a better leader. My expectations were blown away! Way deeper than I could have imagined. I learned more than I even knew was possible in relation to networking and what it actually means.”

Summit Participant

A review of participant outcomes from all Steps programming also confirmed the following considerations for successful program and curriculum development:

- Core message: to “get involved” and “make a difference” in your community
- Focus on motivating people and building confidence to participate and take on leadership roles
- Keep program accessible and flexible so messages can be communicated in variety of ways
- Promote networking and network building for participants through all programming
- Introduce participants to new ways of thinking

“The courses elevated my thinking.”

Next Steps Program Participant

- Provide mix of knowledge transfer, skills training, practical applications, and reflection
- Build on credibility of local/regional hosts and champions

As the Steps pilot rolled out, the actual program challenged a few earlier assumptions articulated at the outset of the collaboration. In particular, the curriculum was premised on the assumption that a continuum of programming would be available for emerging and current leaders to participate in – from Step Up through Next Steps to the Summit (hence the brand “Steps”). It was assumed that participants would progress through these steps. While a few did, most did not. Rather than pursuing this linear continuum approach, the evaluation indicated that Steps would best provide a variety of offerings that are flexible to meet the needs of people and communities. This would include access to modular curriculum that communities can deliver themselves or contract ROI to deliver, as well as more in depth Community Action Labs co-facilitated by ROI. Program strategies for the next development and implementation phase are described in the next section.

“I was surrounded by people who do different work than I do, this made for a good learning experience.”

Summit Participant

ROI will need to address two other issues identified through the evaluation in future programming. One is the rural focus of the program. A distinct rural lens should be further woven into all Steps curriculum and practice. As well, promotional approaches for Steps programming must address issues related to the

language of leadership and programming to avoid alienating prospective community champions as well as to attract the interest of both emerging and current leaders, young and older persons, and men and women.

Rural Summit 2013 Evaluation

The 2013 Rural Leadership Summit was held in September at the Hockley Valley resort with 57 persons registered. Twenty eight percent (28%) of the registrants had attended previous Summits. Participants travelled from across Ontario, including some from the north, though the majority of registrants were from southern/central and southwestern Ontario. They represented diverse rural organizations, including municipalities, social service and public health organizations, farms and farm organizations, local food groups, Chambers of Commerce, and Universities and Colleges.

Evaluation of the Summit involved a number of approaches:

1. Review of promotional materials for objectives, language, coherence with leadership philosophy and learning to date from pilot.
2. Review of the participant profiles, action cards (last activity), and Summit evaluations to look for:
 - match of participants goals with stated objectives for Summit
 - indicators of learning and change intentions of participants by end of Summit
 - whether the Summit met participant expectations
 - any surprises in outcomes

3. Sharing reflections on the Leadership Summit as a participant/observer.
4. Debrief with facilitator/designers to reflect on the Summit together as well as to identify indicators for change outcomes to look out for in a post Summit Survey or key informant interviews
5. Review of the Summit budget to assess sustainability

“This Summit is an exciting opportunity for personal growth, skill development and connection to other wayfarers.”
2013 Summit Registrant

The results of this evaluative review are outlined below.

The stated objectives for the Summit were to:

1. Share, connect with and be inspired by others while learning new skills to deepen the impact of your network
2. Understand networks and how they contribute to strong and interconnected communities
3. Experience tools, techniques and practices for:
 - Understanding and visualizing a network (digital and non-digital)
 - Forming, engaging and weaving intentional networks
4. Develop strategies for using a network approach in your work

Considering these objectives and based on the workshop evaluations and reflections, it appears that most of the objectives for the 2013 Summit were met. The areas where greater attention could have been focused included providing opportunities for participants to develop concrete strategies for using the tools and network approaches in their work, as well as linking the Summit to ROI mission and other leadership programming. The budget review also revealed that the financial model for the Leadership Summit is not sustainable without considerable external funding.

Of those who responded to the Summit evaluation survey, most agreed or strongly agreed that the Summit was relevant, re-energizing, a good learning experience, and that the tools were applicable to their practice. Ninety percent (90%) strongly agreed that the Summit was worthwhile attending.

Participants came to the Summit seeking new ideas, expanded networks, practical tools, theory and techniques related to Network Weaving in particular, new skills, and some strategizing and partnership opportunities. A significant number of those who filled in evaluations said the Summit exceeded their expectations. Some of their comments are noted here:

- *“They were far surpassed at this meeting. I expected an average meeting and found an interactive session that sparked continuous ideas.”*
- *“The workshop exceeded my expectations. I learned so many new techniques, came away with a new perspective and networked with so many great people.”*
- *“My expectations were to meet new people in the rural sector. Not only did I expand my network but I understand why and how a network is essential and how it works.”*

In spite of this enthusiasm, it appears that the language used for marketing the Summit may have discouraged some prospective participants, confirming an issue from the interim Steps evaluation that still needs attention.

- *“I wouldn't have come (if not for a personal recommendation) based on the info online but it has been a great experience that far exceeded my expectations.”*

When asked, participants said they planned to integrate their learning into their day to day work in many ways, including:

- Engaging people in meaningful conversations
- Recognizing, assessing and nourishing existing networks
- Sharing the tools and techniques with colleagues
- Reading up on and doing more conscious networking
- Working more effectively with diverse voices within groups
- Using some of the specific techniques to enhance their networks

A member of the Steps developmental evaluation team was present at the Summit to observe how the program rolled out and its impact on those present. Observations from this experience include that:

- Good connections were made in networking activities responding to participants' need for connection and support in their work as rural leaders
- The program was fun and engaging for participants
- The workshop facilitation and models for engaging participants was excellent
- There was considerable cross sector participation in keeping with the new Steps model
- The leadership philosophy expressed, that is, “everyone can be a leader”, was inclusive of the diversity of leadership positions participants held in their rural settings; this was an articulation in part of the new leadership philosophy underpinning the Steps programming
- Some of the theory presented on networks was difficult to absorb; it would have been more engaging with stories and case examples
- The number of tools and techniques introduced may have been a bit overwhelming, though different participants responded to and were enthused about different tools; more time could have been spent in strategizing and discussing how the tools and theory could be integrated into practice
- The links between the Summit, other Steps programming, and ROI were not clearly articulated

A post event reflection held with the evaluator, facilitators and designers of the Summit to review and reflect on the overall program, resulted in the following observations:

- There was no one highlight of the Summit program for participants; highlights and learning varied for different participants indicating that the program provided multiple entry points for rural leaders from diverse backgrounds and contexts to become engaged in the topic

- This Summit included solid theoretical content with the experiential learning; network leadership, and complexity and networks, was a logical next step in framing the 2013 Summit
- Of all of the Summits, this one felt the most like “rural leadership” training; that is, it provided tools, techniques and theory on how rural advocates can lead without necessarily calling themselves leaders
- The number of returning participants meant the group was ready and receptive to experiential learning
- It appeared that participants made truly meaningful connections at the Summit, and were beginning to change behaviours and attitudes, by developing confidence in their skills and knowledge and becoming inspired through the Summit program

The Summit was evaluated primarily from the point of view of the individual change experienced by the participants; that is, how the Summit may have impacted their work as rural leaders. While a follow up with participants was not possible as part of this evaluation, there appears to be sufficient evidence that those attending the Summit came away with new connections, knowledge, tools, and motivation to continue their work and address challenges in their rural communities.

The reflection discussion following the Summit also considered its impact on ROI as an organization. Two ROI directors attended part of the Summit and brought their experience back to the Board. As a result of this presentation, as well as discussion about the Community Action Lab pilot, there was a clearer articulation of the new leadership philosophy within ROI as an organization. It was also observed that there was a receptivity and greater sense of ownership over the Steps programming as a result of Board members participation in the Summit.

Community Action Labs

The latest Steps leadership program offering was the Community Action Lab, piloted in November 2013. The Lab model was designed, based on the learning from the pilot phase, to address the articulated needs of Summit and Steps program participants for more in depth support to integrate leadership skills and approaches within their own communities.

Community Action Lab Pilot

For the Smiths Falls Action Lab 40 people from throughout the community participated over an evening and a day to tackle the question: How can we leverage the assets and network of our community to attract and retain new physicians to make Smiths Falls their home? The objective for the two days was to get as far down a plan as possible to more effectively recruit/ retain physicians and to get broader community involvement in the process.

The two days followed a divergence/ convergence model. Divergence: where we blew open the question, gained insight and understanding into what has been done, brainstormed different factors that we would need to consider and explored different ideas for how we could tackle it. Convergence: prototyped our ideas to see how they could work, achieved some clarity for who would spearhead and organize this (task force), and got commitment from the broader community to be involved in helping with/ carrying out the different ideas.

We introduced tools and processes from the Summit and the updated Steps curriculum and a few others. We also had the planning team involved in the facilitation – to help them build their confidence in leading groups through processes, but also to show the participants that these processes are not meant to be held and used only by ‘professional facilitators’.

The event was a success! There was renewed energy from the participants about community gatherings. The planning team was convinced that only “the usual 5” people would show up and 40 came.

This was a great opportunity for people from across the community to join together to talk with people that they may never have talked to before. They also built capacity for taking leadership on the issue.

Action Labs are focused on specific, place based issues such as: local food, youth employment, renewable energy, health/physician recruitment, social innovation, arts and cultural development, and land use.

Rural communities requesting or recruited for Action Labs are identified through local champions who are:

- Aware of ROI’s work and supportive of the Steps leadership philosophy and approach
- Recognize the need for external support to assist them with a difficult or complex issue
- Able to form an action and facilitation team willing to earn and build their own capacity for using the innovative tools and processes with their community
- Able to find/make a financial investment
- Inclusive in their approach to engaging their community members in the Lab
- Willing to learn and co-facilitate some of the community processes as part of the Lab
- Ready to build on the work initiated in the Action Lab

ROI’s first Community Action Lab, which was focused on addressing physician recruitment, was successfully implemented with over 40 community residents of all ages in Smiths Falls, Ontario in November, 2013.

2013 Action Lab Evaluation

A total of 5 people from the Smith Falls Action Lab were interviewed of which 3 were in leadership positions.

Lead up to the Action Lab

All comments on the evening and daytime session were positive. There is general agreement that the strategies and tactics for engagement, problem identification, and solution brainstorming were effective and engaging. There was

Comments from Action Lab Participants

“It achieved what we wanted – it was almost a large brainstorming session where we got perspectives from all walks of life – general public, retired staff, health professionals, business owners – allowed us to not have tunnel vision.”

“It was less mainstream than usual meetings.”

“The Action Lab was highly interactive and facilitated.”

“I expected it to be a normal consultation, but this was quite different in terms of the success and the enthusiasm generated by the process, getting people to offer opinions and get involved.”

“The Action Lab encouraged participation – some people who said they could only stay for the evening came back the next day. We had a very good response and attendance by individuals who came and gave opinions and input. It was tremendously successful.”

“Feedback we received [at the Action Lab] was positive and constructive. The facilitators did a remarkable job of engaging and drawing out ideas and concepts and suggestions. It was very well done.”

“It was very interactive. I liked that everyone was engaged, it just wasn’t a few people offering a few views.”

“I still hear comments from those that attended in terms of how impressive and valuable that session was.”

“My expectations were exceeded.”

“I have gone forward into other projects using the tools used in the Action Lab. It has made other boards more productive.”

“We have another opportunity that we’re looking at that relates to youth and we’ve already made a call to one of the facilitators of the Action Lab because it worked tremendously well.”

definitely a sense of momentum, and community building, as well as a general understanding that all ideas were valid and all viewpoints were important. Some interviewees were concerned about participation – one felt that it was inappropriate to have people able to join for only part of the session, and one was concerned that not all members of the Physician Recruitment committee were able to attend the whole event.

The following components were specifically mentioned as being beneficial:

- Story boarding
- Fishbowl
- “Mind mapping – it was a different and very effective way to identify who we are targeting.”

Unfortunately, almost all interviewees described a sense of disappointment or unease with the lack of follow up after the Action Lab. However, most were clear that this was not due to the Action Lab itself, but rather to inaction of local leaders following the lab:

- “During the [Action Lab] my expectations were met – but I’m still not sure how those results will be transferred into action.”
- “I’m still very concerned about physician recruitment – I don’t feel anything has been done since the workshop. We are doing a lot of talking. At the workshop we were all very excited and brainstorming, it was well run but nothing happened since.”

- “Before starting the process, the group should have assurance that there is someone there to lead it after. That’s where it fell apart. It went well – all the things were happening that you want, but with no one taking the lead, the momentum was lost. If people are asked back they are going to be skeptical - more talk and not doing.”

Criteria for Program Planning and Development

Design criteria were developed from the learning in the pilot phase of the project as ROI advanced further Steps program offerings. This checklist was intended to provide focus and encourage both integration and innovation over the life of the program in 2013 and beyond the pilot phase. The criteria will undoubtedly be further honed. Currently the list includes:

That the programming:

- ✓ Reflects and communicates current “leading edge” thinking on leadership
- ✓ Brings innovative tools and processes to rural that are not available elsewhere
- ✓ Is based on key learning from the pilot about curriculum design, program delivery, target audiences, marketing
- ✓ Builds on the most successful aspects of Steps offerings to date and transfers these to other offerings
- ✓ Packages and makes accessible the best of Steps materials and programming
- ✓ Considers needs in the community as a basis for further design and delivery
- ✓ Builds a legacy and leverages the investment to date in Steps to Leadership programming
- ✓ Has the potential to generate income for cost recovery
- ✓ Is strategically integrated within ROI and is in keeping with ROI’s mission
- ✓ Utilizes and builds capacity (staff, resources) for delivery within ROI
- ✓ Is branded as distinct from other ROI offerings
- ✓ Creates greater consistency and quality in brand and product
- ✓ Deepens work in some communities and with some past participants
- ✓ Introduces efficiencies in design and delivery that ensure accessibility and affordability for rural communities and individuals
- ✓ Creates new opportunities for partnership and program offerings going forward
- ✓ Addresses other key considerations arising from the evaluation research (e.g. enables rural community leaders to network and build community; see next section)

For the Steps programming that was implemented in 2013 criteria were also created for choosing and working in communities. These were based on success factors and program modeling derived from the pilot as follows:

- New or past Steps host communities eligibility
- Evidence of need in the community

- Existence of a champion within the community that has credibility and is a bridge builder, with past experience of individual leadership development
- Commitment of a group or team to support the roll out of programming
- Availability of an appropriate coordinator and/or a core team of local champions

Evolving Program Strategies

Steps program strategies were revised significantly based on recommendations arising from the interim evaluation. Some of these strategic recommendations have been adopted while others are under consideration. They include:

Curriculum Guide

- The best aspects of Steps program have been rewritten and packaged to address issues of coherence with leadership philosophy, integration of a rural lens, and potentially including distance delivery modalities e.g. webinar or video components; This includes facilitator notes
- The curriculum can now be published in a format that is easily accessible to communities; e.g. materials may be posted online at no cost with registration to download used to build a data base of interested persons and communities
- While not a direct revenue generator, the curriculum represents a legacy document and lead in/promotional tool for possible modular or customized workshop delivery by ROI on a fee-for-service basis
- This approach enables ROI to address original program goals of flexible, accessible programming (can be delivered locally by trained facilitators or by ROI)
- There is a role for ROI in training the facilitators
- ROI can use webinars to promote and disseminate curriculum as well as ROI fee-based workshops

Modular Programming and Associates Program

- Now that the curriculum product is available in modular format it could also be extended to include in person and webinar or video components based on Steps curriculum guide
- ROI could act as broker for leadership training
- An Associates program could be considered to deliver programs on demand throughout the province; Associates can act as a sales force for leadership training in province through ROI

“Would love to see it again in our community!”

Next Steps Program Participant

- Core component could include a train-the-trainers program for Steps curriculum facilitation aimed at leadership facilitators in communities and potential ROI Associate facilitators

Community of Practice for Rural Leaders

- ROI could provide opportunities for participants in various Steps programs to engage in a community of practice – to further reflect on and integrate their learning, share issues and problem solving with peers, and learn about new leadership approaches and community development strategies
- This can be convened in webinar or conference call format to address accessibility issues

Customized, Community based Workshops (in conjunction with ROI forum model)

- Issue based workshops could be hosted by ROI with community partners and focused on place based issues and community dialogue, challenging assumptions, gathering rural voice on issues
- Key words: exploring, learning together, creating, innovating, questioning, formulating
- Leadership skills development component can be focused on critical reflection

Annual Leading Edge Summit

- The Conference now has momentum and a growing brand – ROI could continue to build on this brand
- ROI will need to determine whether to continue with this offering
- ROI can document the “Best of Leading Edge Summits” for possible regional delivery or “drilling down” if feasible, offered on cost recovery basis; e.g. Art of Hosting 3 day Retreat

Community Action Labs

- ROI has developed a new offering, the Community Action Lab, focused on specific community issues in select communities in 2013 to test “drilling down”
- They have piloted the Action Lab programming and initial results have been evaluated
- Prospective communities should be selected based on key criteria (see next section)
- ROI should encourage inclusion and an intergenerational component to the Labs where possible

Step Up To Leadership Youth Programming

- ROI may consider how to build youth programming based on what worked with Me to We
- Exploratory discussions have taken place with 4 H regarding an ongoing partnership or spin off to 4-H Ontario – legacy of program

- ROI should consider connecting with and adding value for existing groups in Ontario communities committed to youth leadership
- ROI should build an intergenerational component into other Steps offerings (e.g. youth leadership lab held as precursor to community leadership programming)

Steps Forward

In 2014, ROI continues to seek funding and explore earned revenue strategies to offer successful aspects of Steps programming that are a good fit with mission and their delivery capacity. The following recommendations based on evaluation of Steps programming are being implemented at present:

Strategic Fit and Distinct Brand within ROI

- Confirm ROI's investment in Steps through strategic planning and discussion
- Articulate distinct Steps brand in relation to other ROI programming
- Address different leadership philosophies and approaches within ROI
- Identify new financial resources to continue Steps programming going forward

Feasibility Assessment and Business Modeling

- Assess the true costs of program offerings
- Assess feasibility (organizational, social, financial) of Steps fee for service programming
- Build sustainable business models (if applicable)

Final Word

The need for leadership programming in rural Ontario is critical and people in communities are keen to solve the complex problems that affect their future. The learning from the last six years of the Step programming, through the on-going commitment to evaluation throughout, provides some good suggestions for how to move forward. Leadership development can happen in a number of ways and ROI's role in rural Ontario will continue to evolve as it integrates the lessons learned through the Step program more deeply into the organization leadership development offerings.